How do sales and marketing produce business to business value propositions?

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Abstract

In my thesis I set out to provide an explanation of how sales and marketing works together to produce business-to-business (B2B) value propositions. My thesis is grounded in the discipline of marketing and draws substantively on Sales and Marketing Interface (SMI) and Value Proposition literature.

I deployed a novel research methodology in which an Engaged Scholarship approach was combined with a Critical Realist philosophy and an individual actor focus. Twenty-One B2B sales and marketing practitioners were interviewed and a thematic analysis of interview transcripts was undertaken. Analysis was informed by extant SMI and value proposition literature and outwith literature from fields such as theology and anthropology.

I found that value proposition production at the SMI is a much more dynamic process than depicted in extant literature. I found a much more fragmented and tribal view of sales and marketing identity in contrast to the holistic, monolithic entities portrayed in extant literature. Enablers and barriers to SMI value proposition production were found to be 'below the surface' issues related to identity, contextualisation, and actor thought worlds.

My thesis provides a unique view of value proposition production at the SMI. I have moved the conversation forward from a functional level dyadic view of SMI interactions to a much more dynamic depiction of how fragmented marketing and sales actors work to produce value propositions.

I provide models for depicting non-normative causal mechanisms for SMI value proposition production moving the discussion forward from the normative factors that dominate extant literature.

Acknowledgments

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This thesis is dedicated to the memory of my father, James Kelly. Had he been born at a different time and in different circumstances completion of a doctoral thesis would have been easily within his intellectual grasp. I am thankful to both my parents, Mary and James Kelly, for supporting me in becoming the first person in my family to attend University.

Mostly I would like to thank my wife, Marsha Kelly, who has had the patience to put up with me during completion of my thesis.

List of abbreviations

B2B	Business to business
B2C	Business to consumer
CIM	Chartered Institute of Marketing
GDL	Goods dominant logic
IMP	Industrial Marketing and Purchasing Group
NPD	New product development
RBV	Resource-based view
SDL	Service Dominant Logic
SMA	Sales Marketing Arena
SMI	Sales Marketing Interface
TMT	Telecoms Mobile Technology
VIE	Value-in-exchange
VP	Value proposition
VIU	Value-in-use

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Chapter 1 - Introduction

1.1 Chapter Introduction

The purpose of this chapter is to give an overview of my thesis. The aspiration, aims and objectives will be outlined to provide the focus and scope. A picture of my motivation for exploring the phenomenon of how the sales and marketing interface (SMI) works to produce value propositions is painted to give a perspective on why I feel the chosen topic is important. Both a business and academic viewpoint is considered in outlining the background to the nature of SMI working setting the phenomenon in an overall business context and within an academic framework. This is intended to provide a clear view of the organisational and academic context in which my thesis is situated and to explain the potential relevance of the research for organisation and management practice. To conclude the introductory chapter a summary of the structure of my thesis is outlined.

1.2 The Aspiration and aim of my thesis

In this section, I provide an overview of the key concepts that represent the focus of my thesis.

Aspiration of my thesis

An aspiration I have, which goes beyond the subject focus of my thesis, is to provide a recommendation for an educational approach to Doctor of Business Administration (DBA) study and thesis production that takes account of, and optimises, previous practitioner experience and which is therefore both rigorous *and* relevant. In my biography (section 1.4) I explain some of the travails and tensions I have faced as a recent ex-senior marketing practitioner whilst on the DBA journey. At times, I was made to feel like experience was seen as a barrier to research objectivity. I resolved to find a pathway for practitioners that follow the DBA that helps them feel that interpretive ability is enhanced by their previous experience. Selecting a DBA instead of a PhD was based on the wish to produce something of worth for practice, whilst achieving the academic rigour required at a doctoral level of study (Hodgkinson & Rousseau 2009).

Aim of my thesis

I aim to provide Business-to-business (B2B) marketing and sales practitioners with critical insight and recommendations that reframe their understanding and can facilitate improved SMI interworking in relation to producing value propositions. I intend to provide an explanation of how the SMI works together with the customer to produce value propositions in a B2B context. Value proposition is a specific area of value study that has its roots in how value is framed, articulated, and presented to the customer prior to purchase (Johnston 2014). While some authors see value propositions as the 'single most important organising principle' for organisations (Webster 2002), research suggests that less than ten per cent of companies formally develop value propositions (Payne & Frow 2014). Value propositions are seen by some authors as the opening move in an exchange process with the customer (Bagozzi 1975; Ballatyne et al. 2011; Vargo & Lusch 2008). For the purpose of my thesis value proposition is defined as:

> 'Value propositions are suggestions and projections of what impact on their practices customers can expect. When such a projection is proposed actively to customers, it is a promise about potential future value creation.' (Gronroos & Ravald 2011, p.14).

A functional group perspective

The SMI is seen to be the interface between the two named departments carrying the titles of sales and marketing within B2B organisations. In my thesis, I take a functional group perspective which is about the tasks performed by the named units focused on the named departments, as opposed to an activity perspective where marketing is viewed as a process encompassing activities such as research, communications, and pricing (Workman et al. 1998).

Sales and marketing actors are responsible for developing, producing, and articulating value propositions with and to customers. The traditional mainstream marketing literature tends to ignore the social aspects associated with value proposition production. Extant SMI literature has primarily focused on 'The extent to which activities carried out by the two are supportive of each other' (Rouzies, et al. 2005). Although absent of clear definition in the SMI literature the word interface is used in line with a dictionary definition as: 'A point where two systems, subjects, organisations etc.…meet and interact' (Oxford English Dictionary 2015). In the context of the SMI this is the interface between marketing and sales. The extant literature treats sales and marketing as monolithic holistic entities (Guenzi & Troilo 2007; Hughes, Le Bon & Malshe 2012; Snyder, McKelvey & Sutton 2016) without due consideration of value propositions as the key output of the two functions. The existence of an interface known as the SMI appears to be taken for granted. In my thesis, a focus is placed on how individual actors in the SMI interact specifically in relation to value proposition production, the key output of the 'interface'.

The importance of value propositions as an output of the SMI

In the context of my thesis a value proposition (VP) is regarded as something that is created and produced by actors in the SMI and is concerned with the extent interaction and dialogue between sales actors, marketing actors and customers shapes value proposition production. I view VP production as a social phenomenon concerned with the sales and marketing actors playing on the SMI stage involved in the production of value propositions, analogous with Goffman (1959). Viewing VP production at the SMI from a social standpoint is distinct from the mainstream marketing management problem solving approach which seems to view a value proposition as a self-creating artefact. In my thesis, I will concern myself with actors playing on the SMI stage, and the tribes they may be part of (Mafesolli 2016), not just the monolithic entities known as sales and marketing. To this end I will propose to promote a debate that is critical of logical positivist mainstream marketing management approaches (Gilligan & Wilson 2009; Kotler

& Keller 2015) which portrays marketing as a mechanistic process that ignores attitudes, behaviours, and interactions of actors. To date there appears to have been little or no empirical research into how actors in the SMI work to produce VPs; this is a gap that I intend to address in my thesis. I will concern myself with actor relations, interactions and networks in line with the Industrial Management and Purchasing (IMP) School (Hakansson & Snehota 1990). I will align myself with IMP scholars such as: Easton, Ehret, Harrison, Nicholson, and Peters (Easton 2010; Ehret 2013; Harrison & Easton 2002; Peters et al. 2013) in advancing a Critical Realist (CR) philosophy throughout my thesis.

1.3 My thesis objectives

Having already explained my aspiration and aim I will now present and elaborate on the objectives of my thesis:

Objective 1

To provide an understanding and explanation of the relationship between sales and marketing actors at the SMI in a B2B context.

Much of the extant SMI literature acknowledges considerable difficulties and dysfunction at the SMI (Dewsnap & Jobber 2000; Kotler, Rackham & Kirshnaswamy 2006; Malshe, Johnson & Viio 2016). The main focus of extant SMI literature has been at a functional unit, not actor-level, where sales and marketing have been characterised as monolithic, holistic organisations that interact at the SMI. In my own experience in B2B organisations I have witnessed what seem to be good relations at an empirical level, and more dysfunctional sales and marketing relationships, which varied actor by actor. I want to get an up to date understanding and provide an explanation of the relationships between sales and marketing actors in a B2B context. To this extent the focus will be at the actor and tribe level (Hakansson & Snehota 1990, Maffesoli 2016), in contrast to extant SMI literature.

Objective 2

To understand more deeply, unpack, and explain the phenomena of SMI interworking for value proposition production informed by market data.

This objective demonstrates that one of the primary focuses of my thesis is to look at SMI relationships and interactions specifically in relation to value proposition production. Throughout my thesis I have used the term value proposition production to encompass the creation, maintenance, and development of value propositions. Highly effective value propositions are seen to include a reflected understanding of customer benefits and the impact a proposed solution may have on an organisation (Barnes, Blake & Pinder 2009; Gronroos & Ravald 2011; Vargo & Lusch 2008). In my thesis, I set out to explore to what extent SMI interworking encompasses market data, where market data can be taken to mean information coming back into the organisation from sales actor interactions with customers. Understanding the enabling factors and barriers to effective SMI interworking in value proposition development is at the heart of this objective.

Objective 3

To understand and explain the underlying *generative mechanisms* that have the tendency for causal power on SMI interworking in the production of value propositions.

In line with the adoption of a Critical Realist (CR) philosophy this objective is about understanding what the *generative mechanisms* (Danermark et al. 2002; Easton 2010; Sayer 2000) are that may have tendency for causal power in SMI interworking in value proposition production. A generative mechanism is a term used in critical realism which can be defined as: ‘An account of the make-up, behaviour, and interrelationships of those processes which are responsible for the regularity’ (Pawson & Tilley 1997, p. 68). Generative mechanisms seek to provide causal explanations where behaviours, interrelationships and processes combine to cause events to occur (Keat & Urry 1975; Layder 1990; Tsoukas

1989). Seeking to meet this objective will help work towards the overall thesis aim of providing practitioners with insight to facilitate improvement in SMI interworking, while acknowledging that practitioners will have to recognise and mobilise the generative mechanisms.

1.4 Motivation for the study

Motivation is an abstract word like many used in the pantheon of organisation and management that seems to have contestable meaning. In this section, I will view motivation in line with the Oxford English Dictionary definition: 'A reason or reasons for acting or behaving in a particular way'. Here I will try and address two questions which fall under my umbrella interpretation of motivation: what caused me to be interested in how sales and marketing work to produce value propositions? Where do I hope that a thesis on sales and marketing interworking to produce value propositions will take me in the future?

To get to the answer to the first question I will provide a summary autobiography. I will expand upon this autobiography in Chapter 3 to help explain why I chose Engaged scholarship as the lens through which to view my thesis (Boyer 1996; Cunliffe & Scaratti 2017; Hoffman 2016; Struminska-Kutra 2016). For now, I want to make it clear how and why I became interested in the problem at hand, how the SMI works to produce value propositions in a B2B context.

1.4.1 A personal autobiography

In presenting a personal autobiography I hope to explicitly declare my values in my thesis. In doing so I am demonstrating epistemic reflexivity which refers to efforts by researchers to 'Make research accountable to the reader through a detailed presentation of the ways in which results were obtained' (Gomm & Davies 2000, p.8). I will further demonstrate epistemic reflexivity by being transparent about my research methodology in Chapter 3 and in the reflection of my thesis journey in Chapter 7. Now, I will turn to, what I humbly refer to as the 'I am Simon' section, and my personal autobiography.

Between 1999 and 2002 I was Marketing Director for BT Major Business, an £8bn turnover division of BT responsible for BT's largest 2500 business customers. During my time as Marketing Director record revenue and sales growth was achieved in challenging economic times. Much of this was attributed to the way the marketing and sales teams worked together to create value propositions based on customer understanding, we called this a value-based approach to marketing and selling, a process that begins with customer wants and needs and works backwards from there (Hammer 1996; Levitt 1960). Here a value proposition can be seen as a promise of value, in commercial exchange, sometime in the future (Vargo & Lusch 2008), developed and articulated in a way that provides a view of the impact on their practices customers can expect (Gronroos & Ravald 2011).

Before we embarked on this customer value based approach the BT Major Business Management board (BTMB) on which I served recognised that there was a business problem that had to be fixed. The problem was that in an increasingly competitive market, in tough economic times growth was stagnating. The BTMB felt that marketing and sales were finding it difficult to articulate value that differentiated BT in the eyes of customers in the context of having a product portfolio of over 1,000 products and services. Sales people had to contend with product literature coming at them from legions of product managers who were only interested in product features, not customer benefits (Rackham 1988). Communicating to customers one product at a time, often referred to as an inside-out or product push approach in an incoherent way, confused the customers and got in the way of understanding the customer issues and providing solutions to their business problem.

This led to the decision by the BTMB that from a strategic standpoint we had to move the organisation from a product to a customer oriented 'value-based' approach. There was recognition from my marketing team that we could only be successful if we worked closely with sales teams. Sales were the people having the front-line conversations (Day 2002) and the people tasked with creating value propositions to resonate with customers. The job of the marketing team was to harness the primary customer intelligence we were getting back from sales teams and supplement it with secondary and industry research in order to develop value themes to take to market. The marketing team recognised that only sales could generate value propositions relevant for individual customers based on their unique proximity to the customer and a deeper understanding of individual customers.

The work we did at BT at that time was regarded by the Chartered Institute of Marketing (CIM) to be at the leading edge of practice. It helped spurn the growth of value proposition frenzy with hundreds of jobs posted to perform proposition manager roles, especially in Technology, Mobile and Telecoms (TMT) companies. There was a similar growth in the focus of academic work in value propositions (Cheverton 2010; Doyle 2000; Knox & Maklan 1998). The approach I led at BT has been recognised for its enduring nature featuring as a case study set in 2012 in the journal article 'Developing superior value propositions: a strategic imperative' (Payne & Frow 2014). A schematic representation of the value proposition approach I originally devised and implemented can be found on page 218 of the article. I was surprised to find that the approach was alive and well in BT, ten years after I left.

I left BT in 2002; from this time to 2010 I had a dual focus which led me to describe myself as a 'pracademic', or practical academic. I was a marketing lecturer at Sheffield Business School and a business owner of a marketing consultancy practice that helped large B2B organisations develop compelling value propositions. I wanted to keep practicing as a marketer to help 'sharpen the saw' (Covey 2013) and keep me up to date with current industry practices. I have always held the belief that marketing, taught in universities, should be a practical subject that produces students for business not students of business.

Whilst bidding for a piece of commercial work I was offered a job at Level 3 communications in Denver, Colorado. At the time Level 3 was the fifth largest telecommunications company in the USA, focused purely on serving business customers. At Level 3 communications (2010-2012) I was responsible for North American Marketing with a mandate for helping them move to a more customer value based approach. Here I observed something that I had also witnessed when working with other large organisations through my consultancy that the inside-out product push approach was back masquerading in the clothes of value propositions. Often 'value-propositions' were generated by marketers sitting in rooms trying to articulate how their products added value to customers. They were not creating authentic value propositions as they were constructed without any customer or sales team input. At best, they were communicating product advantages (or assumed benefits) not customer benefits (Rackham 1988). At the same time researchers like Anderson et al. (2006) observed that many value propositions were being created as generic all benefits statements that lacked resonance and relevance to customer needs. I left Level 3 communications in August 2012 to return to my old combination of Sheffield Business School marketing lecturer and owner of a business aimed at helping organisations develop compelling value propositions.

The motivation for wanting to understand more about how sales and marketing interact to develop value propositions was based on a history of working in or with large organisations who attempted to move towards this more customer-centric value-based approach, with varying degrees of success. Having the opportunity to try and understand more deeply, unpack and explain the phenomena of SMI interworking for value proposition production to try and help move practitioner understanding forward was an exciting prospect for me.

The academic part of my pracademic identity was frustrated for a number of reasons. When I think of the core undergraduate and postgraduate curriculum at Sheffield Business School, marketing as a subject is largely positivistic and dominated by normative models that have been around for a long time, and, in my experience, are barely used in commercial practice. In the mainstream marketing texts used to support undergraduate study the sales function is buried deep in the tactical marketing communications mix, as just one small ingredient for communicating the already baked offer to customers (Jobber & Ellis-Chadwick 2013; Kotler & Keller 2015). Portraying the sales function as playing a limited role in the marketing communications mix may reflect the dominance of a consumer marketing focus in mainstream university modules and supporting literature (Gilligan & Wilson 2009; Jobber & Ellis-Chadwick 2013; Kotler & Keller 2015). The mainstream marketing literature also seems to be absent of people, the part that actor interactions play in developing marketing artefacts, and the skills and competencies required to operationalise these normative models and processes. In contrast practitioner focused sales literature does focus on techniques, skills and competencies required to move a sale forward from the opening approach to a customer to post-sale (Adamson & Dixon 2013; Miller, Heimann & Tuleja 2011; Rackham 1988). The specialist SMI literature seems only to offer normative solutions for better SMI process, offering norms for surface level factors such as goal setting, and views sales and marketing as monolithic organisations, largely absent of actors (Kotler et al. 2006; Snyder et al. 2016; Strahle, Spiro & Acito1996).

The motivation to understand and help provide an explanation of SMI interworking for value proposition production from an academic perspective was to help enrich B2B marketing knowledge by providing explanations as to how a market orientation can be mobilised. In providing recommendations for operationalising a more market and customer centric approach my motivation is to help humanise academic marketing by providing an explanation of how sales and marketing actors help operationalise marketing, not just monolithic holistic organisations known as sales and marketing, as per extant SMI literature (Dewsnap & Jobber 2000; Homburg & Jensen 2007; Snyder et al. 2016). I also want to give both the sales and marketing functions appropriate consideration from both a strategic and tactical perspective, in contrast to extant mainstream marketing literature which portrays sales as a small tactical piece of marketing communications (Fill 2013; Jobber & Ellis-Chadwick 2013; Kotler & Keller 2015). I am motivated to provide a bridge between the mechanistic marketing literature where people and skills are absent and commercial sales literature which has a much greater focus on actor skills and capabilities (Adamson & Dixon 2013; Miller et al. 2013; Rackham 1988). Finally, I would like to contribute to extant SMI literature by offering explanations and solutions for practice and academia that go beyond the normative and that pay attention to individual actors and tribes.

After completion of my thesis I am motivated to contribute to practitioner debate and intend to write books focused on helping them better understand SMI interworking for successful value proposition development. As an Academic I am motivated towards contributing to the Industrial and Marketing and Purchasing Group (IMP) School. I am pleased that I attended an IMP conference in 2016 thanks to an introduction from my Sheffield Business School colleague, Doctor John Nicholson. I now view IMP as a group of academics that have a strong tie to practice that I view as wholesome pracademia, which I feel I can make a positive contribution to.

The decision to pursue a thesis focused on how the SMI works to develop B2B value propositions was certainly timely as the Marketing Science Institute (2010, 2014) identified customer value as a research priority for the marketing community (Payne, Frow & Eggert 2017). Around the same time B2B managers voted value quantification and communication as the number one trend in a 2011 Institute for Study of Business Markets (Lindgreen et al. 2012). After a thorough review of literature related to value in business markets Lindgreen et al. (2012) recommended a number of areas for future research which included value proposition creation, congruent with my research. In short my thesis topic is seen as highly relevant and timely by both business practitioners and academics.

1.5 Defining moments on my thesis journey

The approach to this thesis has been shaped by four defining moments: the decision to focus on a B2B context, the decision to examine the SMI as a vehicle for mobilising market orientation, to specifically concentrate on how the SMI works to produce value propositions, and crucially to adopt Engaged scholarship as the research lens (Boyer 1996; Cunliffe & Scaratti 2017; Hoffman 2016; Struminska-Kutra 2016).

Selecting a B2B context was not difficult and largely influenced by my long-standing career as a senior level B2B marketing practitioner. The still overt consumer focus of academic marketing management literature, the fixation on normative models and relegation of sales to one small element of the marketing communications mix (Fill 2013; Jobber & Ellis-Chadwick 2013; Kotler & Keller 2015) was an influencing factor in choosing the SMI as an area of focus. The absence of SMI research focusing on the key output of the interface was instrumental in the decision to home in on value proposition production at the SMI. My experience in working in and with large B2B organisations was also a key influencing factor, having observed a variety of SMI relationships and different approaches to value proposition production.

1.5.1 Achieving rigour *and* relevance

The most liberating decision was to take an Engaged Scholarship approach to my thesis. During the write up of the DBA essays which were prerequisites for the DB2 stage I had taken a more neo-empiricist approach (Barsalou 2003; Prinz 2002) to literature review and felt I was leaving myself, and my vast commercial experience, out of the analysis. Adopting an Engaged Scholarship approach allows me to put myself back into the interpretation of respondent data (Boyer 1996; Cunliffe & Scaratti 2017; Hoffman 2016; Struminska-Kutra 2016). During the data gathering phase of my thesis to set aside and suspend personal bias I adopted a stance akin to bracketing out, which is a technique for preventing researcher knowledge from prematurely defining the direction of respondent input (Rennie 2000). The combination of bracketing-out and engaged scholarship helped me to deal with the schism in my values to be both a relevant practitioner *and* a rigorous academic (Hodgkinson & Rousseau 2009) and allowed me to be both observational and clinical, in the sense that I draw on both academic knowledge and my own lived experience (Schein 2010). For academic knowledge to be useful, it must illuminate experience and provide explanations for what we observe that puzzles or excites us. If experience cannot be explained by what research and theorizing have shown so far, then the scholar or practitioner must develop his or her own concepts and, thereby, enhance existing theory. Putting myself and my pracademic experience back into interpretation has hopefully led to better theory building and contributions that are of utility to both practice and academia.

1.6 Thesis background

In this section of the introduction I will be trying to answer the question why is consideration of how the SMI works in value proposition production important? Given the starting point for my motivation towards SMI interworking one of the main factors was that my thesis and any subsequent outputs should have practical utility. To be practically useful means directly applicable to problems facing practising managers (Corley & Gioia 2011) concerned with something they would regard as a real-life phenomenon, not from the standpoint of a scholar: 'Struggling to find holes in the literature' (Hambrick 2005, p.124). I will now consider issues of SMI alignment and VP production along with customer relevance and resonance from practitioner and academic perspectives in turn.

Practitioner view of SMI alignment and VP production

The question of whether how marketing and sales works together to develop value propositions was an issue that concerned organisations and practitioners became the starting point for deciding whether to develop my thesis topic. For that reason, my first port of call was research and practitioner literature to see if the commercial world saw the problem. With the proliferation of the internet and mobile phone customers are in a position to get company and product information on line, to help them make buying decisions (Saarinen, Tinnila & Tseng 2005). Recent research suggests that 67% of B2B buyers say they have a clear picture of what they want when they first contact a sales rep (Pisello 2015). Corporate Executive Board (CEB) research showed that 94% of potential customers have disengaged with selling organisations because customers have received content that they deemed irrelevant (Pisello 2015). At the same time

B2B buyers now tend to be over 60% of the way through the buying process before they contact a sales person (Pisello 2015). All this is taking place in an environment where since the recession in 2009 organisations have become more cautious in their buying behaviour. The Corporate Executive Board (CEB) now estimates that 5.4 executives are involved in decision making for a significant purchase (Pisello 2015). According to Qvidian (Sales Execution trends 2014), 58% of B2B sales deals end up as no decision because sales has not presented value effectively.

The overall picture painted by commercial research in B2B marketing and selling highlights that it is now imperative for marketing and sales to be aligned because customers rely on information coming from marketing sources, for example web sites, before they speak to a sales person. Customers are looking for organisations to demonstrate a clear understanding of customer value in order to engage with them. Results seem to suggest that at a time when buyers are making more decisions based on their interactions with both marketing and sales channels it appears that there is a value-gap (Pisello 2015) between the versions of value marketing and sales teams have related to what they believe, or imagine, the customer requires.

Practitioner view of VP customer relevance and resonance

Producing value propositions that resonate with customers does seem to be recognised as an issue by B2B sales and marketing organisations. Practitioners are also concerned with sales and marketing alignment. Commercial research points to a strong link between alignment and market performance, for example, an Aberdeen Group study (2011) concluded that highly aligned organisations achieve on average a 32% year-on-year revenue growth as opposed to a 7% reduction for non-aligned organisations (cited in Pisello 2015). Yet, according to Forrester research (2011) only 8% of organisations say that their marketing and sales team are aligned. Research carried out by Randstad, a UK based recruitment specialist in 2015 'The divide between marketing and sales' found that despite 80% of UK businesses recognising the benefits of alignment 40% admitted to not having systems in place to facilitate alignment.

At a more tactical level 32% of sales people say they lack useful or relevant content from marketing, in terms of how helpful the marketing content is in taking customer sales conversations forward (Sirius Decisions 2014). Other studies have found that only 40% of companies believe sales and marketing are aligned with what customers want, the very reason for alignment (Cespedes 2014). From a commercial research standpoint, there appears to be overwhelming evidence that practitioners see that alignment between marketing and sales is problematic. Add this to the issues organisations appear to be have articulating value to customers it would seem that how he SMI works to develop value propositions is a problem the practitioners would recognise as worthy of study (Corley & Gioia 2011).

Academic view of SMI and VP production

From an academic standpoint, there are problems related to SMI interworking that are explored in depth in the Literature Review in Chapter 2. Almost all the extant SMI literature recognises that there is conflict between marketing and sales, most authors portray the two organisations at worst as being 'at war' (Kotler et al. 2006), or at best dysfunctional or problematic (Dewsnap & Jobber 2000; Malshe et al. 2016). Overall the volume and level of debate seems to be in its infancy in relation to academic studies into how the SMI works. Most of the recommendations coming out of the literature are normative (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). There are a number of one off pieces of research into issues like thought world differences (Homburg & Jensen 2007) that could be accused of academic eclecticism, borrowing theory from other disciplines without fully developing it (Burton 2005; Corley & Goya 2011). There is not, as yet, any apparent level of insight into effective SMI working. In and of itself SMI interworking is recognised by scholars interested in the topic as a problem which would indicate that some scientific utility can be gained from further study into the phenomenon.

The value proposition literature does not pay much regard to the interaction of sales and marketing people at the SMI as actors involved in creating value propositions and how this manifests itself in relationships with customers. Even the IMP literature seems to regard marketing and sales actors as part of a holistic entity known as 'The organisation' without consideration of the interactions that take place within the SMI at the initialisation, development and launch phases products and services (Kowalkowski, Kindstrom & Carlborg 2016). Given the centrality of value in the academic marketing domain (Kowalkowski 2011), while the definition of value propositions remains contestable (Ballatyne et al. 2011; Payne & Frow 2014; Vargo & Lusch 2008) studies that seek to move the discussion about value and value propositions are seen by scholars as potentially having scientific utility. In relation to value propositions this is especially pertinent as there have been paradigm shifts in recent years that moved the academic value proposition debate on from transactional value to the Service Dominant Logic view advanced by Vargo and Lusch (2004, 2008) which concerns itself with value-in-use.

1.7 SMI interworking for value proposition production in relation to the marketing concept and marketing orientation

In this section, I will outline where the phenomena of SMI interworking to produce value propositions sits in relation to macro-marketing concepts such as the marketing concept and marketing orientation. In this regard, I will seek to explain the macro-micro link (Weber 1968) between a sociological study taking place at the micro-context level of the SMI value proposition production in a B2B context and macro-marketing theory.

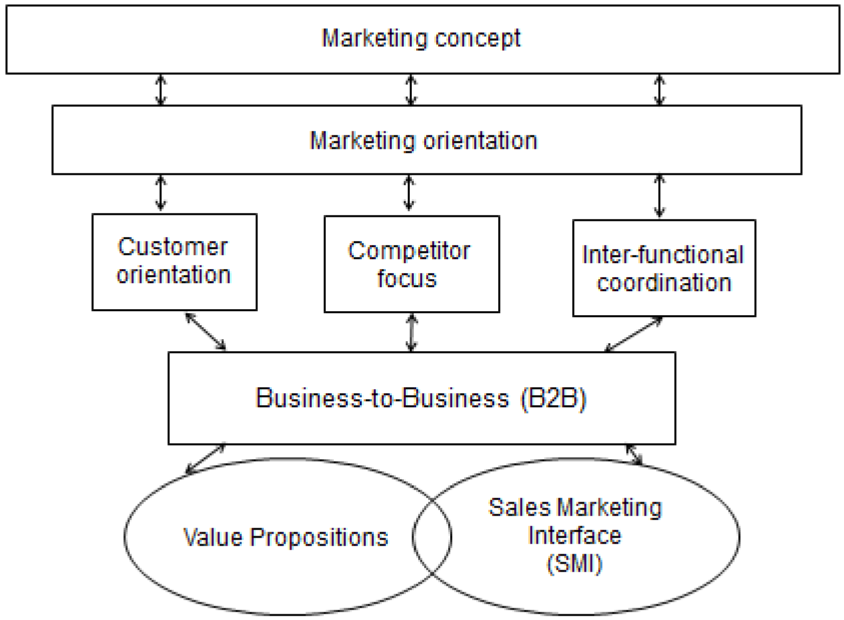

Fig. 1.1 Sales Marketing Interface (SMI) and value proposition in relation to marketing concept and market orientation (Source: Author).

Three management propositions that appear in the marketing management literature have a central bearing on my thesis. These are:

1. Organisations flourish when they adopt the marketing concept and are marketing orientated.
2. An effective SMI is crucial for operationalizing marketing orientation. This relies on on-going dialogue between sales and marketing whereby market data from sales is readily disseminated and used in the creation of value propositions.
3. Successful value propositions are superior to alternative competitor offers in the eyes of the customer.

The marketing concept

Central to the philosophy and practice of marketing is the notion of the marketing concept, often attributed to Levitt (1960). Levitt posited that an industry is not a goods-producing process but a customer satisfying process. An Industry begins with a customer need, and develops backwards, first concerning itself with the physical delivery of customer satisfactions. Organisations flourish by finding out what customers want, and giving it to them (Levitt 1960), the customer centered approach outlined by Levitt was what became known as the marketing concept (Hackley 2009). Any definition of marketing should attribute the marketing concept, defined as:

> 'The notion that the firm is best off by designing and directing its activities according to the needs and desires of customers in chosen markets' (Grönroos 1994, p. 349).

Marketing orientation

Marketing academics first began recognizing and operationalising the marketing concept as market-orientation in the early 1990s (Kohli & Jaworski 1990; Narver & Slater 1990; Slater & Narver 1995). Others argue that the marketing concept has an outdated focus on transactions, products and tangibility (Vargo & Lusch 2004, 2008) and that value is created in use. This Service-Dominant Logic concept of marketing moves the focus away from transaction cost economics towards a customer solution orientated concept.

Hackley (2009) posits that marketing is located in rationality and bureaucracy. where the idea that a bureaucratic planning process, as is prevalent in mainstream marketing texts pays insufficient regard to the complexity of organisations and markets (Gilligan & Wilson 2009; Jobber & Ellis-Chadwick 2013; Kotler & Keller 2015). Organisations are profoundly complex and managerial texts often completely ignore the organisational dynamics that have to be negotiated in order for the marketing concept to be enacted. Central to my thesis is a concern for how the SMI works to produce value propositions. I believe this is central to the notion of operationalising a marketing-orientation, in a B2B context. A market-orientation objective is to deliver sustainable competitive advantage based on knowledge of customers, competitors and through inter-organizational processes, reflecting the three major components of market orientation as: customer orientation, competitor focus, and cross-functional coordination (Slater & Narver 1994).

Customer orientation is 'The sufficient understanding of one's target buyers to be able to create superior value for them continuously' (Narver & Slater 1990, p.21). In my thesis, I concern myself with the generative mechanisms for operationalising a marketing orientation in a B2B context by explaining how the SMI works to develop value propositions (Danermark et al. 2002; Easton 2010; Fletcher 2016).

Customer orientation and Inter-functional co-ordination are inherent in my thesis objectives and can be seen to have primacy of focus. Competitor focus is of secondary concern as developing value propositions that are seen to be superior to competitors may form part of the dialogue at the SMI. How my thesis aligns to the three components of marketing-orientation is outlined in table 1.1 below:

Component of market orientation	**Alignment to thesis**
Customer orientation	Primary focus of thesis: Are value propositions informed by market data?
Competitor focus	Secondary focus: how are value propositions informed by market data to help develop point of competitive difference (Levitt 1980).
Interfunctional- Co-ordination	Primary focus of thesis: What's going on at the SMI? How does the SMI work to produce value propositions

Table 1.1 - Alignment of my thesis to the three components of marketing orientation (Source: Author).

Fundamental to a marketing orientation is the generation and dissemination of organisation-wide information and the appropriate responses related to customer needs and preferences and the competition (Kohli & Jaworski 1990). This transforms into sustainable competitive advantage when an organisation uses market information effectively as part of a customer satisfying process. The issue of generation and dissemination of market data, coming back into an organisation from sales is a key concern of my thesis. Overall a marketing-orientation in a B2B context could be said to manifest itself in the production of value propositions through effective inter-functional-coordination. Developing an understanding, and explanations for how the SMI works to develop value propositions in a B2B context may inform macro-marketing theory related to marketing orientation.

1.8 SMI and the importance of value propositions

The manifestation of how an organisation sees value and articulates the value it provides to customers is often seen in the value propositions it develops. In marketing management literature the phenomenon of value proposition is concerned with proposing value at the pre-purchase stage of a B2B commercial transaction (Parasuraman 1997). From this perspective, a value proposition can be seen as a promise of value sometime in the future (Gronroos & Ravald 2011; Kowalkowski 2011; Vargo & Lusch 2008). The concept of value proposition occurs increasingly in management literature and developing a value proposition is seen by some authors as a critical strategic issue for marketing managers (Kowalkowski 2011; Payne & Frow 2014).

At the nano-level of a single business-to-business transaction value propositions are about articulating the potential benefits a customer can expect to gain from a solution that is being proposed to a customer business problem (Anderson et al. 2006; Ballatyne et al. 2011; Kowalkowski 2011). The act of proposing value at this nano-level is widely recognised within the commercial sales literature as part of effective sales practice (Adamson & Dixon 2013; Miller et al. 2011; Rackham 1988).

In marketing management literature, a value proposition is often portrayed as a self-creating artefact absent of human involvement. Value propositions are often reified as objective statements of the future value a customer can expect from a purchase, often in the form an equation when benefits minus costs is equal to expected value. A value proposition should embody a level of customer and competitor understanding that facilitates competitive advantage:

> 'The ability to communicate a firm's value propositions strategically and effectively is a new era for the development of competence of the heart of competitive advantage' (Kowalkowski 2011, p.277).

The concern of my thesis is a B2B context where value propositions are generally considered in both commercial sales and marketing management literature as artefacts that seek to portray the positive future impacts or value a proposed solution will bring to the purchasing organisation. Positive business benefits could take the form of improved productivity, reduced costs, increased efficiency, improved growth and profits (Gronroos & Ravald 2011; Miller et al. 2011; Thull 2005). How marketers develop value propositions at the macro-level has therefore become a greater imperative with the proliferation of the internet and given that a typical customer is 60% through the buying cycle before a sales person is contacted (Pisello 2015). How these macro-level value propositions are produced is not considered in mainstream B2B marketing management literature (Blythe & Zimmerman 2013; Ellis 2011).

1.9 The SMI and a sociological explanation of value proposition production

My thesis looks to move forward the discussion from value propositions as reified objective artefacts created absent of actor involvement to consider how the SMI works to produce value propositions from a sociological perspective. Value propositions will be considered from the nano-sales deal level, where a deal is a single piece of business being pursued by sales, to the meta-level where all companies and individuals interact.

While mainstream marketing management literature can help understanding of what a value propositions is and provides mechanistic processes for producing them it pays little attention to how actors at the SMI work to produce them. Contrary to the mainstream mechanistic approach found in the extant literature my thesis intends to provide a sociological actor-centric explanation of how value propositions are produced at the SMI. The perspective adopted in my thesis also pays cognisance to a critical realist approach that has a concern for 'marketing work', or the way in which marketing outputs, in this case value propositions, are developed and produced by sales and marketing actors (Svensson 2007). This is also consistent with the IMP school who consider actor roles, relations, interactions, and networks (Easton 2010; Hakansson & Snehota 1990; Peters et al. 2013).

The stance taken in my thesis is that value propositions that have been produced through SMI dialogue will be better understood if jointly created, and have the buy-in of sales and marketing actors (Malshe 2010). In essence, how value-propositions are produced is seen to be at least as important as what they end up looking like. The sociological stance being taken here elevates the need to understand what the generative mechanisms are in the SMI for constructive interaction facilitating effective value proposition production (Danermark et al. 2002; Easton 2010; Fletcher 2016). Up to date consideration of these generative mechanisms has been largely absent from the SMI literature (Kotler et al. 2006; Malshe et al. 2016; Snyder et al. 2016). To get beneath the under socialised views of logical positivism and surface level interpretivism I will deploy a critical realist approach. The stratified ontology of critical realism will help bring out both surface level empirical issues and below the surface generative mechanisms through analysis and inference at the actual and real levels (Danermark et al 2002; Easton 2010; Fletcher 2016). Looking through a lens of engaged scholarship (Boyer 1996; Hoffman 2016; Struminska-Kutra 2016) will help me draw on both empirical research and my own experience with the aim of producing work that is relevant to practice and academically rigorous (Hodgkinson & Rousseau 2009).

1.10 Theoretical and practical contributions of my thesis

Corley and Gioia (2011) developed a useful four box model for considering theoretical contribution of academic work. They consider contribution from two perspectives: utility and originality as can be seen in figure 1.2. The originality dimension bifurcates into incremental and revelatory insight. The distinction is drawn between extending current understanding and offering new points of view (Conlon 2002), contributing to a current conversation and starting a new one (Huff 1999). An explanation of what constitutes each of the four boxes is provided below. In Chapter 7, where summary of findings is drawn together, a populated version of the Corley and Gioia (2011) model will be provided to demonstrate contribution.

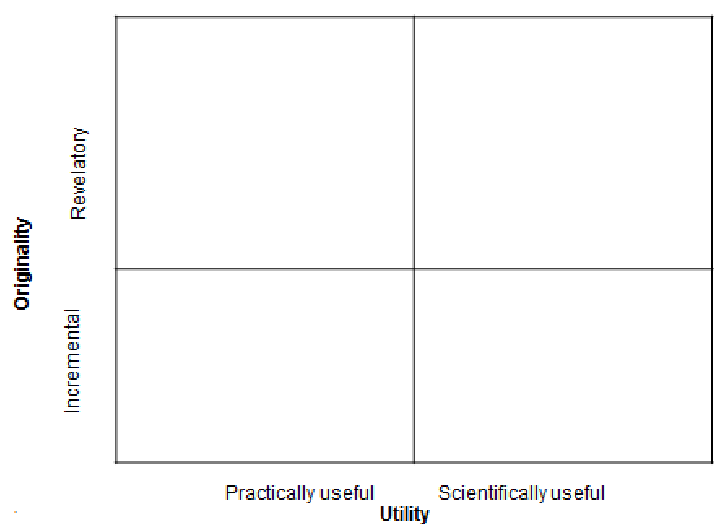

Fig. 1.2 Contribution to knowledge - adapted from Corley and Gioia (2011, p.15).

Incremental insight is the notion that theoretical contributions should progressively advance understanding is a long-venerated one (Kaplan 1964).

Although incremental improvement is arguably a necessary aspect of organisational research, especially as it relates to the contextualisation of theory (Johns 2001; Rousseau & Fried 2001; Tsui 2006).

Revelatory Insight occurs when theory reveals what we otherwise had not seen, known or conceived.

> 'Allows us to see profoundly, imaginatively, unconventionally into phenomenon we thought we understood…theory is of no use unless it initially surprises us - that is changes perceptions' (Mintzberg 2005, p.361).

Or it is novel or questions assumptions underlying the prevailing theory (Davis 1971). From a CR perspective challenging existing assumptions can be facilitated by below the surface analysis at the actual and real levels.

The utility dimension bifurcates into practically useful and scientifically useful. This utility dimension is particularly apt as the maxim: 'Just because you are unique does not mean you are useful' (Anon), a maxim that is often applied by practitioners to value propositions. *Scientific utility* is an advance that improves conceptual rigour or enhances its potential to be operationalised and tested. *Practical utility* is when theory can be directly applied to problems practising managers face.

Deploying the Corley and Gioia (2011) framework focuses contribution that is both rigorous *and* relevant (Hodgkinson & Rousseau 2009). Academic rigour can lead to scientific utility through improved concept development. The start of my journey towards practical relevance was in selecting a real-life problem that is currently acknowledged by practitioners, how the SMI works to produce value propositions, in the anticipation that investigating the problem can provide opportunities for enlightened practice. I concur here with Kilduff (2006) that 'The route to good theory leads not through gaps in the literature but through an engagement with problems in the world' (Kilduff 2006, p. 252).

I hope that I have mitigated against the first potential source of practitioners and scholars talking past each other by focusing on a problem I know practitioners face and avoiding the lost before translation problem where scholars have difficulty in explaining the relevance of their work to practitioners (Hodgkinson & Rousseau 2009; Shapiro, Kirkman & Courtney 2007). Being diligent at the outset and mindful of practitioner language will help me avoid the second potential source disconnect of talking past each other. By viewing my thesis from the eye of an engaged scholar I hope that the populated Corley and Gioia (2011) model in Chapter 7 will reflect that I have made contributions that are both scientifically rigorous and practically relevant. I would hope the engaged scholar lens will lead to production of conceptual models for scholarship that provide utility for practice.

1.11 Structure of my thesis

To conclude this introductory chapter, I will provide an overview of the structure of my thesis. Chapter 2 presents a critical review of the extant literature and is divided in to three sections: Section A, Marketing Management literature, takes into consideration the broader Marketing Management literature to provide context for where and how the main concern of my thesis (how the SMI works to develop value propositions) sits in relation to broader marketing ideas such as marketing concept and market orientation. The main purpose of this section is to set the context for my thesis and to draw out concepts that will be taken forward into the analysis phase. Section B, SMI and Value Proposition, is a thorough review of what I call the core literature germane to my thesis, SMI and value proposition literature. In Section C, The outwith literature, I will introduce relevant literature from outwith the discipline of marketing management. The main aim of this section is to review relevant outwith literature that helps makes sense of how the SMI works to produce value propositions.

Chapter 3 provides justification for the engaged scholarship lens I will be viewing my thesis through and the critical realist philosophy that I deploy. The primary research question, aims and objectives of the research, methodological assumptions, methods and decisions relating to sample selection, data collection, and thematic analysis demonstrating how major themes were arrived at through critical realist analysis and evaluation.

In Chapter 4 I present and discuss the theme of identity for actors in the SMI. In Chapter 5 the theme of contextualisation for value proposition production at the SMI is considered. In Chapter 6 I discuss the cognitive thought worlds of actors in the SMI. Finally, Chapter 7 represents a synthesis of the research, a discussion of the contribution to practice and knowledge, limitations and avenues for future research, and concludes with a personal reflection of my thesis journey.

2. Literature review

2.1 Introduction

The purpose of this chapter is to provide a review of the extant literature relating to the Sales and Marketing Interface (SMI) and Value Propositions in a business to business context. The literature review is divided into three sections reflecting different types of literature, depicted in Figure 2.1 below:

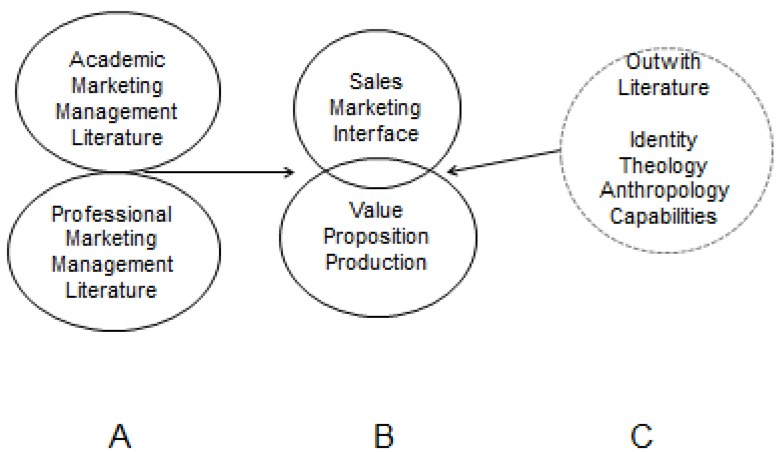

Fig. 2.1 Schematic of Literature Review (Source: Author).

Section A - Marketing Management literature

Takes into consideration the broader Marketing Management literature to provide context for where and how the main concern of my thesis (how the SMI works to develop value propositions) sits in relation to broader marketing ideas such as marketing concept and market orientation. The main purpose of this section is to set the context for my thesis and to draw out concepts that will be taken forward into the analysis phase.

Section B - SMI and Value Proposition - core literature

This section is a thorough review of what I call the core literature germane to my thesis, Sales Marketing Interface (SMI) and value proposition (VP) literature. The SMI literature looks at: 'The extent to which activities carried out by the two are supportive of each other' (Rouzies et al. 2005, p.115). Attention has also been given to recent innovation literature where the role of the SMI has been examined in relation to new product development (NPD) (Keszey & Biemans 2015, 2016). The VP literature is concerned with how value is framed by the supplier and presented to the customer prior to purchase (Johnston 2014). The VP literature review will pay particular attention to how the two organizational functions described as sales and marketing are seen to work together in the development of VPs. The main purpose of this section is therefore to provide a critique of the extant core literature and to take relevant core concepts forward into the data analysis phase of my thesis.

Section C - The outwith literature

In Section C, I will introduce relevant literature from outwith the discipline of marketing management. During the empirical phase of my thesis it became apparent to me that the Marketing Management and core literature could not adequately explain the phenomena under investigation. In this section, I will provide a review of literature congruent with the major themes that emerged from respondent data: Identity, contextualisation, and thought worlds. The main aim of this section is to review the outwith literature that helps makes sense of how the SMI works to produce value propositions. Relevant concepts will be discussed and taken forward to enrich data analysis, consistent with the theory-laden approach that my methodology follows (Danermark et al. 2002; Easton 2010; Sayer 2000).

2.1.1 Literature review process and strategy

Phase one Pre-empirical	Phase two: Collection and primary coding	Phase three Pattern coding and thematic analysis	Phase 4 Write up
Marketing Management Literature (Section A) SMI literature (Section B) Value Proposition literature (Section B)	Identity literature (Section C) Contextualisation literature (Section C)	Thought world literature (Section C)	Updates of all relevant literature through to write up

Table 2.1 - Main literature review stages in relation to research phases and thesis preparation (Source: Author).

Table 2.1 demonstrates that the literature review was not a one and done activity. The bulk of the relevant marketing management and core literature was reviewed in the pre-empirical stage. This literature helped shape the research questions and approach. During the data collection and primary coding phase identity and contextualisation began to emerge as potential themes which led me to begin to access relevant outwith literature. In the pattern coding phase thought worlds began to emerge as a below the surface issue in respondent data, which led me to begin to access outwith thought world literature. I endeavoured to keep up to date with all relevant literature through to write up. In this sense, the structure of the finished thesis does not reflect the sequential flow of activity through the period of study, rather it is presented in the best way to expose the final arguments derived from the process and make them most accessible to the reader.

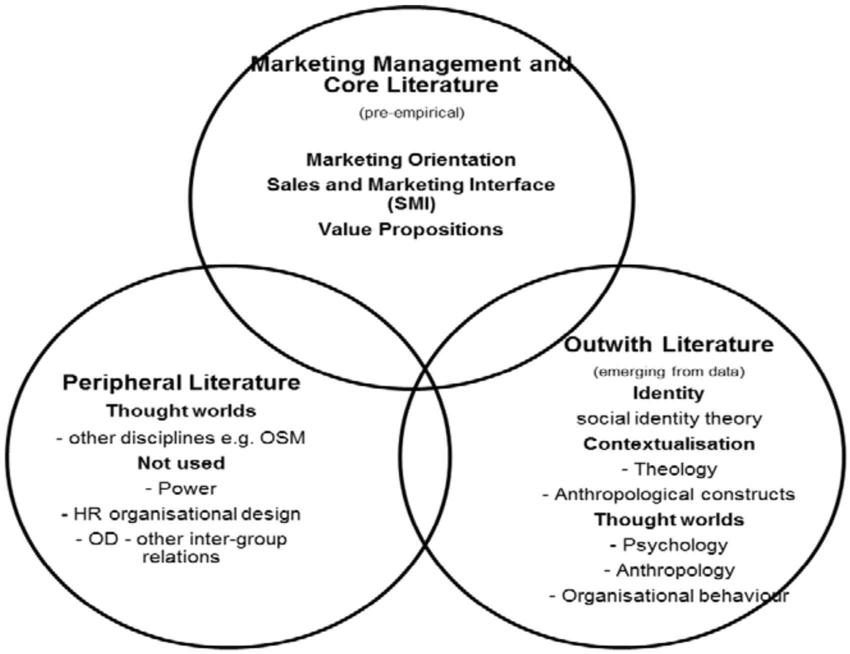

Fig. 2.2 Summary of literature review philosophy and strategy (Source: Author)

Figure 2.2 provides an overall summary of the literature philosophy and strategy. Having set the context within marketing management literature I immersed myself in the core literature relating to SMI and Value Propositions in the pre-empirical stage. The search for outwith literature was shaped by what was emerging from the research data as themes based on relevance. The search for relevance led me towards some seemingly distant fields such as North American Indian anthropology to help make sense of thought worlds (Carpenter 2004; Graymont & Martin 1979), and to theology to make sense of contextualisation (Harrower 2001). Literature which, on the surface, may seem more adjacent to area of study, for example, Power, Organisational design was not covered in the literature review because the issues did not emerge as themes, or help make sense of the themes that emerged from the data.

2.2 Sales Marketing Interface and value proposition literature in context

In this section, I will outline where the core SMI and value proposition literature relevant to my thesis sits in the broader context of macro-marketing concerns such as marketing concept and marketing orientation. In this regard, I will seek to provide a macro-micro link between the core literature and macro-marketing theoretical concerns (Weber 1968).

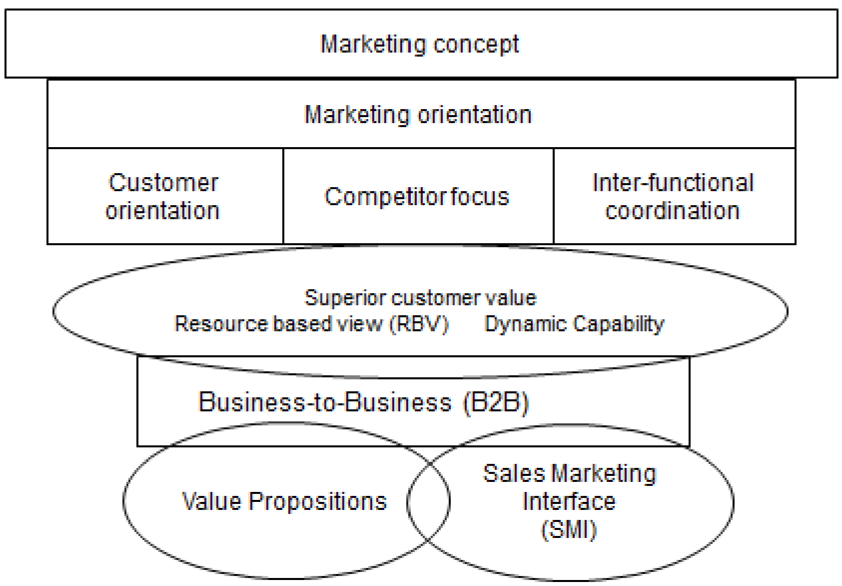

Fig. 2.3 Core literature in the marketing management academic schema (Source: Author).

Figure 2.3 provides a schematic overview of where the core literature sits in the academic marketing schema. The SMI literature is set primarily in a Business-to-business (B2B) marketing context, and the value proposition literature review concerns itself primarily with how value propositions are developed in a B2B context.

Here the context of B2B is businesses selling to other business, referred to in mainstream marketing literature as *Business Markets* defined as including:

> 'Organisations that buy goods and services for use in the production of other products and services that are sold rented or supplied to others' (Blythe & Zimmerman 2013, p.4).

Business markets also include wholesaling and retailing firms who acquire goods to re-sell or rent to others. The factors that distinguish business from consumer markets (B2C) are the nature of the customer. In business markets (B2B) customers are organizations (business or government), in consumer markets customers are typically householders (Hutt & Speh 2004).

LITERATURE REVIEW SECTION A - MARKETING MANAGEMENT LITERATURE

2.2.1 Marketing concept, market orientation and customer orientation

Marketing concept, market orientation, and customer orientation are three organising ideas for marketing theory that I will now discuss to provide a context for where the main concern of my thesis, SMI interworking for value proposition production, sits.

Marketing concept

Central to the philosophy and practice of marketing is the notion of the marketing concept, often attributed to Levitt (1960). Levitt posited that an industry is not a goods-producing process but a customer satisfying process. An industry begins with a customer need, and develops backwards, first concerning itself with the physical delivery of customer satisfactions. Organisations flourish by finding out what customers want, and giving it to them (Levitt 1960). The customer centered approach outlined by Levitt was what became known as the marketing concept (Hackley 2009), and can be defined as:

> 'The notion that the firm is best off by designing and directing its activities according to the needs and desires of customers in chosen markets' (Grönroos 1994, p.349).

Market orientation

Marketing academics first began recognizing and operationalising the marketing concept as market-orientation in the 1990s. Here marketing orientation can be defined as:

> ‘The organization-wide generation of market intelligence, dissemination of the intelligence across departments and organization-wide responsiveness to it’ (Kohli & Jaworski 1990, p.5).

And

> ‘The organization culture that most effectively and efficiently creates the necessary behaviours for the creation of superior value for buyers and, thus, continuous superior performance for the business’ (Narver & Slater 1990, p.23).

Operationalisation of market orientation

Some authors believe that the overall aim of market-orientation is to deliver sustainable competitive advantage based on knowledge of customers, competitors, and through inter-organisational processes (Kohli & Jaworski 1990; Narver & Slater 1990). Operationalisation of a marketing orientation has therefore been characterised as consisting of three major components: customer orientation, competitor focus, and cross-functional coordination (Slater & Narver 1994). In my view, no parts of an organisation are more integrally involved with customer orientation and competitor focus than marketing and sales. Fundamental to a marketing orientation is the generation and dissemination of organisation-wide information and the appropriate responses related to customer needs and preferences and the competition (Kohli & Jaworski 1990). This transforms into sustainable competitive advantage when an organisation uses market information effectively as part of a process. At the heart of the market orientation is inter-functional coordination (Homburg & Pflesser 2000; Narver & Slater 1990). Organisations must disseminate marketing intelligence and get consistent departmental response to align with market needs, in order to operationalise market orientation (Kohli & Jaworski 1990; Slater & Narver 2000).

In large organisations sales and marketing are often separate and discrete departmental functions (LeMeunier-Fitzhugh & Piercy 2007; Workman et al 1998) where inter-functional co-ordination is required to operationalise market orientation as depicted in figure 2.4 below:

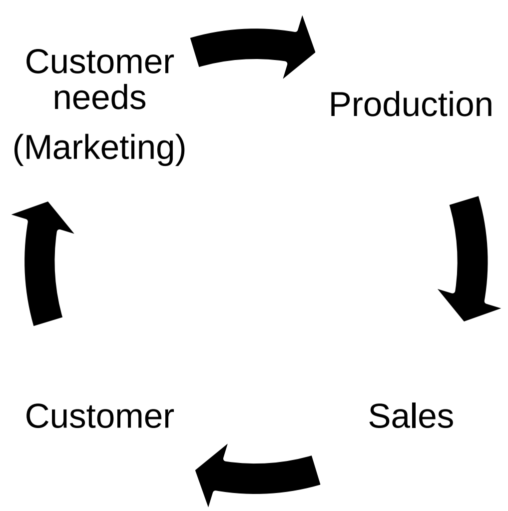

Fig. 2.4: Depiction of market orientation (adapted from Jobber & Lancaster, 2015)

To operationalise a market orientation the role of the sales department has to be defined more broadly than 'The department of a company that is responsible for selling its products' (Collins English Dictionary 2017) to 'The department that sells products on behalf of the company and provides intelligence from customer interactions to help inform value proposition development' (source: Author) .
The role of the marketing department needs to transcend the narrow definition of 'a job that encourages people to buy the product' (Collins English Dictionary 2017) to one that I would define as 'The department that has specific responsibility for gathering and disseminating market-related information in order to develop value propositions that satisfy customer requirements profitably' (adapted from Kohli & Jaworski 1990; Slater & Narver 2000; CIM 2015). To perform their role effectively the marketing department has to be aligned with sales to effectively collect market data in order to develop value propositions in line with market needs. The generation and dissemination of market data, coming back into an organisation from sales is a key concern of my thesis.

Customer orientation can be defined as 'The sufficient understanding of one's target buyers to be able to create superior value for them continuously' (Narver & Slater 1990, p.21). My thesis concerns itself with seeking to understand and explain generative mechanisms for operationalising a marketing orientation in a B2B context by explaining how the SMI works to develop value propositions. Customer orientation and Inter-functional co-ordination are inherent in my thesis objectives and can be seen to have primacy of focus. Competitor focus is of secondary concern as developing value propositions that are seen to be superior to competitors may form part of the dialogue at the SMI. My thesis therefore aligns to three components of market orientation in the following way:

Component of market orientation	Alignment to thesis
Customer orientation	Primary focus of thesis: Are value propositions informed by market data?
Competitor focus	Secondary focus: how are value propositions informed by market data to help develop a point of competitive difference? (Levitt 1980).
Interfunctional- Co-ordination	Primary focus of thesis: What's going on at the SMI? How does the SMI work to produce value propositions?

Table 2.2 - Alignment of my thesis to the three components of market orientation (Source: Author).

Overall a marketing-orientation in a B2B context could be said to be embodied in the production of value propositions through effective interfunctional-coordination. Developing an understanding, and explanations for how the SMI works to produce value propositions in a B2B context may inform macro-marketing theory related to marketing orientation.

2.2.2 Superior customer value creation

A manifestation of market orientation is seen to be the creation of superior customer value, which some authors see as the raison d'etre of organisations (Woodruff 1997). The generation of superior customer value is regarded by some authors to be the basis of competitive advantage for any organisation (Narver & Slater 1990). Superior customer value creates a competitive advantage if the company is able to financially benefit from the exchange in the long-term, creating such value more effectively than competitors (Slater & Narver 2000).

Creation of superior customer value is seen to be achieved through a strong market orientated culture (Deshpande & Zaltman 1987; Homburg & Pflesser 2000). A limitation in the claim that market orientation leads to superior customer value is that the named marketing department is not normally responsible for all the processes that are recognised as inherent in a market orientated culture;

such as collecting, disseminating, and developing an organisational response to market intelligence (Kohli & Jaworski 1990). Some of these responsibilities are under the control of the sales department (Krohmer, Homburg & Workman 2002; Rouzies et al. 2005). The bifurcation of responsibilities highlights the importance of the SMI as the pinch-point of the process for gathering and dissemination of information to drive superior customer value creation, and developing organisational responses to market intelligence in the form of value propositions. If sales and marketing relationships at the SMI are seen as problematic and lacking alignment (Anderson 1996; Rouzies et al. 2005; Strahle et al. 1996) the ability to create customer value is seriously inhibited. How sales and marketing function as a combination is seen by some authors as key to overall organisational alignment and performance (Hughes et al. 2012).

2.2.2.1 Resource-based view

In contrast to the Market-orientation approach scholars who espouse the *Resource-based view* (RBV) argue that strategy starts with an assessment of organisational resources, capabilities and core competencies (Barney 1991; Meyer 1991; Peteraf 1993; Reed & De Fillippi 1990). RBV theory notes that differences in firm resources will lead to differences in sustainable competitive advantage. In the context of my thesis RBV is a concept worth taking into data analysis as it provides a different lens through which to look at the SMI, regarding the SMI as a potential organizational resource that can be assessed as a competitive advantage creating asset. The significance of RBV theory for this doctoral study is that marketing and sales can be seen as enhancing relational assets that can be leveraged to create competitive advantage. The SMI should be seen as a key part of an organisational system (Black & Boal 1994) that enacts market-orientation, thereby creating sustainable customer value.

Market-orientation theory pays little regard to how to develop the capability to operationalise the marketing concept. RBV has its primary focus as developing assets to create competitive advantage. Driving improvement in the SMI could potentially lead to enhanced market orientation through improved relational asset performance. This could be described as the Dynamic Capability (Teece 2009) required to deliver market orientation.

2.2.2.2 Dynamic capability

In RBV the SMI can be seen as a resource that can be developed to help create competitive advantage. In fast moving market places where the environment is in constant flux (Kumar, Jones, Ventkatesan & Leone 2011) the SMI can provide a dynamic view of what is happening in the market, congruent with Dynamic Capability literature (Bruni & Verona 2009; Teece 2009). Dynamic capabilities enable business enterprises to create, deploy, and protect intangible assets that support long-term performance (Teece 2009). The micro-foundations of dynamic capabilities are skills, processes, and disciplines that are difficult to develop and deploy.

In fast moving markets there is a need for difficult to replace knowledge assets, for example, sales and marketing: to sense and shape opportunities and threats, to seize opportunities, and to maintain competitiveness through re-configuring intangible and tangible assets. Teece (2009) hypothesises that excellence in the orchestration capabilities undergirds organisational capacity for innovation and superior long-term financial performance. The development of these dynamic capabilities lies at the heart of success, especially in high technology sectors. Success in not about scale, or other structural advantages, but on the discovery of opportunities and the effective combination of internally and externally generated inventions.

Opportunity sensing requires access to information and an ability to recognize, sense, and shape developments (Teece 2009). *Seizing capabilities* concern the ability to seize relevant opportunities identified through sensing. In itself sensing capabilities are of little value unless an organisation can develop seizing capabilities (Teece 2009). The access sales people have to customers could be important here if the SMI can develop and create difficult to replicate relationships with customers that lead to opportunity seizing.

In contrasting the RBV with the Dynamic Capability tradition Zott (2003, p.210) states that:

> 'Dynamic capabilities are more than a simple addition of the RBV since they manipulate the resources and capabilities that directly engender rents.'

For dynamic capability, there has to be both a sensing and seizing capability (Teece 1999). There is little point in the SMI developing effective sensing if it cannot mobilize itself, and other functions, to seize opportunities. Simply put, the object of my thesis could be taken to be about whether the SMI works as a dynamic capability to produce value propositions. I think that sensing and seizing capabilities are useful lenses through which to understand how the SMI works.

2.2.3 Service Dominant Logic and the move to value in use

The concept of value has proved difficult to define, despite the considerable attention focused on value in marketing literature and by practitioners (Johnston 2014; Payne et al. 2017). Leszinski and Marn (1997, p. 99) state that: ‘Value may be one of the most overused and misused terms in marketing and pricing’. Authors have attempted to provide definitions and typologies. Some examples of value typologies begin with the perspective of *Economic value,* related to the price worth paying (Porter 1980), before consideration was given to *Perceived value*, a benefits minus cost reckoning (Zeithaml 1988). The body of literature on relationship marketing drew attention to *Relational value*, where the customer-supplier relationship forms part of the value reckoning (Gronroos 1996). *Experiential value* builds on relational value by adding subjective feelings, such as valuing professionalism (Pine & Gilmore 1999). Considerations of value tended to be focused on the economic notion of value-in-exchange until the notion of value-in-use (Vargo & Lusch 2004), which I will now examine, came to the fore.

The value-in-use world view, known as *Service-Dominant Logic*, moves the focus away from transactions economics and value-in-exchange. The origins of marketing as an academic subject were rooted in economics (Lusch & Vargo 2006). Starting early in this millennium scholars began to argue that the marketing concept had an outdated focus on transactions, products and tangibility (Vargo & Lusch 2004) and that value is created in use. Service-Dominant logic (SDL) is seen as a reformist agenda challenging the inherent Goods-Dominant logic (GDL) of marketing (Lusch & Vargo 2006; Vargo & Lusch 2004, 2006, 2008). SDL states that customers participate in the co-creation of value, which they access through sharing and integrating of resources with suppliers, especially their skills and knowledge.

Rather than firms marketing to customers emphasis is placed on suppliers and other parties marketing with customers (i.e. both sellers and buyers participating) as part of an interactive relational process. The customer is nevertheless the final arbiter of value co-created through direct interaction with suppliers, and most importantly, the arbiter of value-in-use derived from interaction with goods and other physical resources. The controversial aspect of this agenda is that service becomes the basis of all marketing activity, involving reciprocal giving and receiving. From this perspective, a market is not only a meeting place or space but involves communicative interaction (Varey 2008). Vargo and Lusch (2004) make it explicit that value is co-created through interactions in the relational process, as distinct from embedded in the product. This is rooted in subjective performance standards and measured by value-in-use (Kowalkowski 2011). This contrasts with the objective standards capable of value-in-exchange.

In relation to my thesis the SDL world-view places an even bigger responsibility on the need for continuous dialogue between sales, marketing, and customers. If value is experienced in use the SMI is a place for co-creating value propositions and responding to customer experiences of value in use to enhance them. A concern of my thesis is to look under the surface to understand how the SMI produce value propositions and in particular how feedback from sales, a proxy for market data, about actual value experienced in use by customer shapes future value proposition production.

2.2.4 Summary of the marketing management literature

The marketing management literature provides a backdrop and the broader context for the matter at hand in my thesis, how the SMI works to develop value propositions in a B2B context. Part of my thesis motivation was to provide an explanation of how a market orientation can be mobilised. The three constructs of market orientation: customer orientation, competitor focus, and inter-functional co-ordination (Slater & Narver 1995) help shape the approach towards a better understanding and explanation of the matter at hand. Viewing actors in the SMI as valuable resources for mobilising a market orientation, or a dynamic capability, necessitated an introduction to concepts in marketing management literature relating to RBV and dynamic capability, which is useful in helping me develop and articulate an explanation of how the SMI works to produce value propositions.

LITERATURE REVIEW SECTION B - CORE LITERATURE - SMI AND VALUE PROPOSITIONS

2.3 Sales Marketing Interface (SMI) literature review

The preceding section described the general theoretical context of marketing and value creation in which the SMI and value proposition literature sits. In this section I provide a review of the extant literature focused on the Sales and Marketing Interface (SMI). The SMI body of literature generally concerns itself with how sales and marketing work together, often as an end in itself, characterised as: 'The extent to which activities carried out by the two are supportive of each other' (Rouzies et al. 2005, p.115). I begin by providing an overview of the SMI literature that draws out the key areas of concern and scope of SMI research to date, a summary of academic literature to date is provided in the table below. After the literature overview I examined some of the relevant themes in the literature in more depth. At times this will involve building on individual pieces of research as some issues appear to have come to the surface once, and have not been developed by subsequent research, for example, credibility of marketers (Malshe & Sohi 2009).

Given the importance authors have placed on the broader organisational role of the SMI for activating market orientation, especially in a B2B context (Guenzi & Troilo 2007; Hughes et al. 2012) the SMI is surprisingly under researched, and study of the SMI as a phenomena is underdeveloped, through discourse to the present (Dewsnap & Jobber 2002; Le-Meunier-Fitzhugh 2009). I have observed that almost all SMI studies to date view marketing and sales as monolithic holistic entities that interact at, or through an interface, akin to 'A point where two systems meet and interact' (Oxford English Dictionary 2016). Therefore, I claim, that most of the studies have an organisational perspective where little regard is paid to individual marketing and sales actors. My thesis by contrast, pays attention to the actor-level. The table below provides an overview of the extant SMI literature:

Focus of study	Literature to date
SMI broader organizational role	Joint contribution of marketing and sales – Guenzi and Troilo (2007). SMI at the interface – Hughes, Le Bon and Malshe (2012).
SMI effectiveness	Considerable difficulties at the interface (Dewsnap & Jobber 2000, Kotler et al. 2006). SMI is operating effectively (Dawes & Massey 2005; Massey & Dawes 2007). Exploring sales and marketing integration (Snyder et al. 2016). *Quantitative* Marketing-sales Interface and organisational competitiveness (Avliontis & Lionakis 2015). *Quantitative* Understanding the sales-marketing interface dysfunction experience (Malshe et al. 2016).
Economic differences, goals and roles	Budget, resource allocation etc... Kotler et al. (2006). Goal differences (Strahle et al.1996). Role encroachment (Keszey & Biemans 2015, 2016). C- Level roles (Lee & Scott 2015). - *Qualitative*
Cultural differences	Cultural Frames: Beverland, Steel and Dapiran (2006). Thought worlds; Windows on the world Homburg and Jensen (2007), Cespedes (1996).
Single issue studies	Credibility of Marketers (Malshe 2010). – Qualitative Sales 'buy-in' to marketing strategy: Malshe and Sohi (2009).
Classification and Taxonomy	By organisation life-span (Kotler et al. 2006). Characteristics, performance linked (Homburg et al. 2008). Marketing and sales configurations (Biemans et al. 2010). *Qualitative*

Table 2.3 – Summary of the SMI literature to date (Source: Author)

Given the largely organisational level, management science perspective of the SMI research to date, a number of studies have focused on interface effectiveness as an end in itself (Dewsnap & jobber 2000; Kotler et al. 2006; Snyder et al. 2016). Some recent studies have attempted to develop causal links between SMI effectiveness and organisational competitiveness (Avliontis et al. 2015). I would observe that the link to competitiveness is nascent and underdeveloped. Conflicts between functions at the SMI can typically be categorised as economic and cultural. Economic differences cover normative concerns such as, goals, roles, incentives and rewards (Keszey & Biemans 2015, 2016; Strahle et al. 1996). Cultural differences are less prevalent and under developed in the SMI literature than economic differences. Sales and marketing functions are viewed as having different cultural frames or windows on the world (Beverland et al. 2006; Homburg & Jensen 2007). Little has been done to research or develop notions of cultural or cognitive differences in the last decade. Some attempts have been made to recognise that not all marketing and sales configurations are the same through providing taxonomies from life span and performance perspectives (Biemans, Brencic & Malshe 2010; Homburg, Jensen & Krohmer 2008; Kotler et al. 2006). Little has been done to challenge or build on attempts to classify SMI configurations in almost a decade. Concerns such as credibility of marketers (Malshe 2010), and sales buy-in (Malshe & Sohi 2009) surface only once, as what I Iabel 'single issue studies'. Overall trends, explanatory theory, and causality are underdeveloped in the SMI literature. Of particular interest to my thesis is that not one single SMI study has shed any light on how the SMI works to produce what is its key output, or 'central organising principle' (Webster 2002), value propositions. I will now turn to some of the more detailed findings from the SMI literature in order to draw some conclusions to help inform and develop my thesis.

Fig. 2.5 Schematic of SMI literature review contents (Source: Author).

2.3.1 SMI effectiveness and Inter-functional Conflict

Most SMI studies say that there may be considerable difficulties at the interface (Dewsnap & Jobber 2000; Kotler et al. 2006; Malshe et al. 2016) characterised by lack of cohesion, poor co-ordination, conflict, distrust and mutual negative stereotyping (Dewsnap & Jobber 2000). Far fewer studies point to positive inter-working between marketing and sales (Dawes & Massey 2005; Massey & Dawes 2007; Snyder et al. 2016). Almost a decade ago authors observed that SMI studies mainly focus on single-issues, like sales buy-in, from which generalisations have been made (Homburg et al. 2008), and point to a growing realisation that the SMI relationship is not operating as effectively as it should (Le-Meunier-Fitzhugh & Piercy 2009). I would suggest that these observations are still relevant today, evidenced by the lack of development of concepts such as cultural frames (Beverland et al. 2006) and thought worlds at the SMI (Homburg & Jensen 2007).

Perhaps the most well-known SMI related article is by Kotler, Rackham, and Kirshnaswamy (2006). Some of the most eminent marketing and sales scholars combine to try and address what they see to be the scale of the problem in ‘Ending the war between sales and marketing’. The discussion centres on conflict in sales and marketing practice.

> ‘Sales departments tend to believe that marketers are out of touch with what’s really going on in the marketplace. Marketing people, in turn, believe the sales force is myopic, too focused on individual customer experiences, insufficiently aware of the larger market and blind to the future. In short, each group undervalues the other’s contributions. Both stumble (and organisational performance suffers) when they are out of sync. Yet few firms seem to make serious overtures toward analyzing the relationship between these two critical functions’ (Kotler et al. 2006, p.70).

Kotler et al. (2006) classify strains between sales and marketing into two categories: economic and cultural. From an economic standpoint budget has to be divided. Sales may often feel more people are preferable to marketing budget, as do some Chief Executive Officers. This means there is constant tension around promotional spend. While marketing feel that sales should sell the price or value the sales function can deal direct with the Chief Finance Officer for transactional pricing. From a cultural standpoint they have different ‘world-views’ where sales are oriented around a single or few customers and marketing around a sector or market. Often marketers have a more formal education while Sales are relationship builders who live for closing a sale. Kotler et al. (2006) feel there is a need to integrate incentives to help create better alignment. Here I would make an observation that is symptomatic of much of the SMI literature. Even when scholars identify issues that appear to be under the surface, such as cultural or world view issues the solutions put forward are often normative, in this case incentive integration. From the perspective of my thesis, with a critical realist eye, I seek to identify generative mechanisms (Collier 1994; Easton 2010; Sayer 2000), and recommend solutions that befit the non-normative nature of some SMI conflicts such that attention is given to generative tendencies rather than a statement of definite operational prescriptions.

Snyder et al. (2016) built on the Kotler et al. study (2006) by using a similar classification system to examine SMI interworking in National Hockey League teams in the United States concerning: Location of power, goal orientation, structural linkages, and information sharing (Kotler et al. 2006). In contrast to most other SMI studies Snyder et al. (2016) found high levels of alignment between sales and marketing. Marketing departments tended to view cooperation more positively than sales. In their positivist study which sought to identify antecedents and outcomes for SMI effectiveness three major themes emerged: Structure and frequency of communication, financial incentives, and integration of work. In earlier studies communication was often found to be a key factor in departmental cooperation (Le-Meunier-Fitzhugh & Piercy 2006; Matthysens & Johnston 2006). Physical proximity was cited as the main enabler for good communication. The Snyder et al. (2016) study is set in single arena sporting context and in this sense the proximity findings lack transferability to the multi-site global B2B organisational context of my thesis.

Where financial incentives were aligned so were the sales and marketing teams, for example if they were on similar revenue targets. Cespedes (2014) highlights the importance of seeing financial incentives in the context of a broader sales compensation plan. He points out the impact this can have on orders into operations, cash-flow profile, and interactions between sales and other functions, including marketing. The integration of work through shared digital platforms which both units have access to and use, for example, social media, was found to be enhancing cooperation. The social media observation (Snyder 2016) seems to be the only addition to normative recommendations prevalent in previous studies (Guenzi & Troili 2006; Malshe & Sohi 2009; Rouzies et al. 2005).

2.3.2 Credibility of marketers

It seems apparent through early academic discourse to the present that an SMI divide is still evident (Malshe 2010). Sales people have been found to harbour prejudice, disrespect and do not look up to the marketing function to provide strategic direction (Yandle & Blythe 2000) which leads them to disregard marketing initiatives (Strahle et al. 1996) as they do not see marketing as credible partners. This apparent disregard seems to have been a concern of Malshe (2010) when investigating the credibility of marketers in the eyes of sales. Here *credibility* refers to whether recipients (in this case sales) view the source of information as believable (Bettinghaus 1989).

The credibility construct consists of cognitive and affective dimensions where cognitive refers to perceived expertise, and affective is about perceived trustworthiness in the eyes of the recipient (Dholakia & Strenthal 1987; Newell & Goldsmith 2001; Sharma 1990). Hence, the distinction between cognitive and affective dimensions in the consideration of matters of reciprocal credibility between the marketing and sales function, a theme I will return to when presenting a conceptual framework at the end of this chapter. Further embedding the point about reciprocal credibility in a subsequent qualitative study, involving depth interviews with sales people, three categories relating to credibility emerged: Expertise, trustworthiness, and proximity.

The *expertise* category consisted of themes that related to being seen as business savvy, having trench experience, and providing sales with value creation in the form of solutions to know customer problems. The *trustworthiness* category concerned keeping promises, providing leadership and resource where it was required, advocating for sales causes inside the organization, and sharing a common fate, with aligned goals. The *proximity* category related to social distinction, reverence and understanding. From this review we can extract not only cognitive and affective forms of consideration, but also more micro-level categories credibility, expertise, trustworthiness and proximity.

Forming part of the proximity category the social distinction sub-theme, in line with previous studies, points to perceived social status differences between sales and marketing (Beverland et al. 2006; DeLong & Fahey, 2000). Marketers make a social distinction between themselves and salespeople that gives rise to a greater psychological distance between sales and marketing that hurts their credibility (Dawes & Massey 2005; Dewsnap & Jobber 2002). Proximity is often narrowed down to normative physical proximity as a 'surface' issue (Snyder et al. 2016) that is disconnected from the 'below the surface' or real issues of social distinction emerging from Malshe's work (2010).

The findings gave Malshe (2010) reason to believe that sales unfavourable credibility assessment of marketers is a root cause of problems at the SMI. The claim is that functional credibility enhancement is an enabler to bringing sales and marketing closer together. To enhance credibility marketers need to possess superior business knowledge and ensure they come across as authoritative knowledge sources. I would say that this normative solution could be seen as a fix to the normative cause of expertise without addressing the generative mechanism of social distance. In my thesis, I hope to gain an understanding of generative mechanisms and provide non-normative solutions where appropriate.

2.3.3 Cognitive and cultural differences at the sales marketing interface

The following section considers two related aspects of the SMI: Cultural frames and thought worlds:

2.3.3.1 Cultural frames

Studies by Beverland, Steel and Dapiran (2006) and Homburg and Jensen (2007) sought to understand cognitive and cultural differences between marketing and sales. Beverland et al. (2006) examined the question of cultural frames to test if these resulted in tension at the SMI. They were also interested in the variables that encourage or discourage cross-cultural understanding between the two functions.

In seeking to understand cultural differences Beverland et al. (2006) used a definition of culture that consisted of mental frames by which we approach behaviour. They examined for differences in key cultural assumptions defining the nature of activity in each sub unit (Martin 1992; Schein 1992). Previous research shows that cultures apply different criteria in defining valid knowledge, action, rules for interaction, times focus, and task value (De Long & Fahey 2000; Schein 1992). Using in-depth qualitative interviews Beverland et al. (2006) found numerous cases where the SMI relationship was sub-optimal. For example, sales not providing market information to marketing for fear of not being taken seriously. Negative stereotyping of sales people led marketing to believe they would have little interest in contributing to strategy formation. They identified four cultural frames that defined each functions as illustrated in the table 2.4.

Cultural Frame	Key facets
Valid scope of focus and activity (customer vs. market)	Sales have narrow role, selling. Play a secondary role in carrying out strategies from above.
Time horizon (short term vs. long term)	Sales focused on customer's immediate needs. Marketing focused on LT with little regard for day-to-day customer problems.
Valid sources of Knowledge (experience v training, applied vs. theoretical)	Marketing viewed sales a valid source of short-term individual customer information
Relationship to environment (reactive vs. proactive)	Sales perceptions and practice identify importance of reacting to customer requirements Marketing was concerned with driving the marketplace to increase margin and sources of growth.

Table 2.4 - Cultural frames - adapted from Beverland, Steel and Dapiran (2006).

Not all marketers saw sales as only a source of short-term customer needs. Some marketers identified sales as an important source of market insights which led them to cultivate informal relationships with sales to find out more about individual customers. Marketers saw sales ongoing contact with customers as a potential source of new innovation and insight. Sales were seen by some marketers as playing an active *boundary spanning* role, as the people who have the job of linking the organisations internal networks with external customers (Tushman 1977). Where marketers perceived sales as carrying out this boundary spanning function supporting sales people was seen to be critical part of achieving marketing goals. For sales-people the lack of customer contact by marketing was seen to be a serious problem and affected their view of the credibility of marketing. While they thought marketing was more strategically minded they saw them as too distant from the customer. Beverland et al. (2006) observed that the need for qualitative information identified a common concern that marketing needs to supplement its information with direct sources of information. Consistent with extant literature on sub-culture conflict, perceived and real status differences hampered integration (De Long & Fahey 2000). Negative stereotyping led to perceived differences in status. A common complaint from sales was that they had little direct input to strategy formation, important as strategy execution is dependent on them (Malshe & Sohi 2009). Sales felt isolated from the marketing department, lacked social interaction with marketers, and were not given the information they needed.

I would speculate that whilst the act of asking sales for input to strategy, or about customer trends, can be viewed as evidence at the empirical strata of SMI interactions, underlying this is what marketing thinks of sales as a valid source of knowledge, below the empirical surface. With this in mind I will now turn to the notion of thought worlds at the SMI (Homburg & Jensen 2007).

2.3.3.2 Different thought worlds at the sales marketing interface

Homburg and Jensen (2007) sought to understand whether differences between thought worlds of marketing and sales are deleterious or beneficial to SMI relations. Their investigation revealed that in general differences hamper co-operation between Marketing and Sales that leads to lower Strategic Business Unit (SBU) performance. Some facets of thought-world differences enhance performance through a direct effect that outweighs the negative effect of quality of co-operation.

Friction at the SMI can be because of differing goals (Strahle et al. 1996) and windows on the world (Cespedes 1996, p.27). Marketing has been characterised as more long-term and product oriented with sales more short-term and customer relationship oriented (Cespedes 1994; Kotler et al. 2006; Malshe et al. 2016). This in itself may not be helpful to organisations as it is important for the SMI to develop a *dynamic capability* to collect, collate and disseminate customer and competitor information (Teece 2009). Dynamic capability can be defined as:

> 'The firm's ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments' (Teece, Pisano & Sheun 1997, p. 509).

Strength should come from the combined SMI resource activating a market-orientation.

The thought world concept has several applications in the literature on strategy making and New Product Development (NPD) (Dougherty 1992; Franckwick et al. 1994). The Homburg and Jensen (2007) inquiry considers how differences in world-view would help or hinder the enactment of marketing decisions, with relation to marketing and sales. In particular, which kind of thought world differences helped and which hindered. There are contradictory views on the nature of thought-world differences found in management literature. Some have called for similar thought worlds (Donath 1999). Others have supported differences, for example: 'The solution is not to eliminate differences among these groups' (Cespedes 1996, p.30).

Dougherty (1992) groups thought world dimensions into two categories: funds of knowledge and systems of meaning (SOM). SOM is what is seen when looking into the future: what is critical, how the task is understood. Lawrence and Lorsch (1969) define differences in cognitive and emotional orientation among managers in different functional departments. Homburg and Jensen (2007) found that different thought worlds can have a positive effect. If marketing are long-term and product focused with sales being short-term and customer focused. They use the supporting argument of sales focusing on pricing under pressure from customers. They also provide the counter argument of marketing putting too many features into a product that are not ‘valued’ by the customer and priced too high. Kotler (1977, p. 68) observed that:

> 'Sales people are not counter-balanced often enough with ‘brand management’ personnel, who think in terms of long-range product strategy and its financial implications.'

From this standpoint, orientation differences are good. Competency differences are bad as they adversely affect performance. Differences among interpersonal skills and between the knowledge funds of marketing and sales pose an interpretive barrier that precludes the exchange, understanding and synthesis of ideas and ultimately, optimal decisions (Franckwick et al. 1994; Workman 1993). In my view the utility of orientation differences posited by Kotler (1977) does not seem to take account of the need for the SMI to work effectively as a *dynamic capability* (Teece 2009) to activate a market-orientation. If marketing is too busy being product focused it is unlikely to be performing the essential role of aggregating emerging customer requirements and driving organisation alignment to produce new value propositions. In the decade that has elapsed since the cultural frames work (Beverland et al. 2006) and the thought world research (Homburg & Jensen 2007) no further research has been done to elaborate on the cultural and cognitive issues. The overt organisational level focus of SMI research where sales and marketing are generally viewed as holistic monolithic functions tends to produce output that often focuses on the empirical and normative, for instance, goal differences (Kotler et al. 2006; Malshe et al. 2016; Strahle et al. 1996).

2.3.4 Sales ‘buy-in’ of marketing strategies

The boundary spanning role played by sales people means they have a crucial role in ensuring firms implement their strategies appropriately (Malshe & Sohi 2009). At times distrust and prejudices at the SMI make it difficult for each function to appreciate the others role in the strategic process (Beverland et al.

2006; Homburg et al. 2008; Matthysens & Johnston 2006). Where marketing does not involve sales in strategy development they may view the initiatives as ineffective or irrelevant (Dewsnap & Jobber 2000; Rouzies et al. 2005). This can mean the sales function does not buy into or support the initiatives proposed (Lorge 1999; Strahle, Shapiro & Acito 1996; Yandle & Blythe 2000).

Malshe and Sohi (2009) sought to understand what constitutes the notion of sales buy-in of marketing strategies and factors that either determine buy-in or influence whether marketers succeed in getting sales buy-in. Malshe and Sohi (2009) observe that the extant SMI literature does not look at the notion of buy-in, which may serve as one of the crucial pre-conditions for achieving an integrated, well-functioning interface. The data indicated that getting sales buy-in consists of four key components; these are summarized in the table below:

Components of buy-in	Key facets
1. Objectivity and rational persuasion	Helping sales see the rationale behind a strategy was seen to be important so they can see the "why" - not treating them as pure executors
2. Sensitivity and responsiveness to reality	When marketers appreciate their different world-view from salespeople (Homburg & Jensen 2007). appreciate sales people's field experience, and responded appropriately, they were more open to what the marketers were telling them
3. Involvement in strategy creation	Marketing should involve sales in the Strategy process and be prepared to negotiate from different points of orientation (Cespedes 1996; Strahle, Spiro & Acito 1996).
4. Positioning for success	Sales are looking for marketing to position them for success that gives them a competitive advantage in the field. Even though sales want marketers to take on board their feedback and give input to the strategy, achieving sales objectives is an important focus (Carpenter 1992; Lorge 1999).

Table 2.5 - Components of 'buy-in' – adapted from Malshe and Sohi (2009).

All of these factors link strongly to VP creation and development. It would suggest that VPs need to be constructed with some basis in objectivity, involving sales people in their development and ultimately positioning them for success. From my experience, in practice, I know that getting buy-in from sales people is of concern to practicing marketers. Given the boundary spanning role of sales (Malshe & Sohi 2009) I find it surprising that the notion of sales buy-in has not been explored in more depth in the SMI literature. I would observe that buy-in lacks tangibility when compared with empirical and normative factors such as goals and roles (Kezsey & Biemans 2016; Strahle et al. 1996), and could be regarded as a below the surface issue at the real strata of analysis in the critical realist sense (Danermark et al. 2002; Easton 2010; Sayer 2000).

2.3.5 Taxonomy of marketing and sales

There are only really three studies that have been performed that look at the taxonomy and configuration of the SMI (Biemans et al. 2010; Homburg et al. 2008; Kotler et al. 2006). Recognising that earlier work had focused on the generalisation of individual issues Homburg, Jensen, and Krohmer (2008) set out to provide taxonomy for Marketing and Sales. They based their conceptual model of the SMI on a multidimensional taxonomy. The five chosen domains were: Information sharing, structural linkages, power, orientation and knowledge. Their research led them to identify five clusters set out in the table below:

Cluster	Characteristics
1. Ivory Tower	Sales market knowledge lowest of all clusters as is short term focused. Marketing is isolated caller for more customer orientation. Not much information sharing or joint planning (locked in an Ivory Tower – Lorge 1999).
2. Brand Focus Professionals	Highest level of formalization, joint planning, and information sharing. M+S have highest level of market knowledge and most L-T orientation of clusters. Marketing is powerful and product driven here. Sales have become a congenial counterpart. FMCG is typical sector.
3- Sales Rules	Sales most powerful and among most knowledgeable, with respect to both products and markets. Marketing has low product knowledge and operative unit in support of sales. Often project-based businesses e.g. wind turbines which may explain why role of marketing is small
4- Market Driven Devil's Advocacy	Sales most S-T focus of all clusters, marketing has a L-T strategic focus. Marketing has strong product focus and knowledge where sales has lowest product knowledge of all clusters. Relationship is formal and contrasting voices of marketing and sales are confronted for optimally balanced decisions. Devil's advocacy in the literature (Dooley & Fryxell 1999; Mason & Mitroff 1981).
5-Sales-Driven Symbiosis	Marketing has low product knowledge and sales is high. Marketing have high market knowledge where sales is medium. Both are customer focused and here is the highest range of teamwork. Formalisation is high with joint planning that suggests structured cooperation.

Table 2.6 - Taxonomy of SMI adapted from Homburg et al. (2008).

Homburg et al. (2008) then assessed performance for each of these categories. The measures they used were based on cooperation quality, market performance, and objective financial performance. They found that 'Ivory tower' was the lowest performer against all measures. Brand-focused professionals was highest in all three while Sales-driven symbiosis was the second highest performance in all categories. In Market driven devil's advocacy they found lowest co-operation of all, though devil's advocacy led to good decisions as market performance mid- range.

A limited amount of work has considered the classification of SMIs. Kotler et al. (2006) talked generically about how the SMI could be classified over the lifespan of an organisation, from start-up to large corporation. The work by Homburg et al. (2008) appears to be an isolated example of an attempt to make a causal link to performance based on an examination of SMI characteristics. The Homburg et al. work (2008) tries to move the discussion on from generalisation of single issues to performance linked typologies. How the causal conditions can lead to specific improvements in aspects of the SMI work that drives customer value, like value proposition development, is absent from their findings.

Biemans et al. (2010) found that SMI configurations related to a life-cycle view of SMI evolution, akin to Kotler et al. (2006). Biemans et al. (2010) put forward four types of SMI configuration: hidden marketing, sales-driven marketing, living apart together, and marketing-sales integration. The configurations can develop from a 'Hidden marketing' state where an organisation is too small to have a named marketing department and the marketing role is typically performed by the CEO or sales manager towards a state of sales-marketing integration. Biemans et al. (2010) regard sales and marketing integration as a state where there is a distinct marketing function and an integrated SMI. Here both sales and marketing exist separately and have complimentary roles. There is joint responsibility for creating marketing plans and at times it is difficult to see where marketing and sales roles begin and end, which is linked to 'role encroachment' as we will examine next (Keszey & Biemans 2015, 2016). An integrated SMI is characterized by an optimal mix of formal and informal communication with a free-flow of information and mutual respect. Attempts to provide SMI taxonomy start from a position where not all interfaces are viewed to be the alike (Biemans et al. 2010; Homburg et al. 2008; Kotler et al. 2006). However, taxonomy studies do view sales and marketing as holistic monolithic entities where no attention is paid to individual actors or tribes which is the focus of my thesis.

2.3.6. Role encroachment between sales and marketing

In recent innovation literature Keszey and Biemans (2015, 2016) look at the effects of sales-marketing *role encroachment* on innovation. They observe that the role of sales had become more strategic over the past decade encroaching into the role of marketing. In a large scale quantitative enquiry, they sought to understand the antecedents and consequences of encroachment. While encroachment is not clearly defined Keszey and Biemans (2015, 2016) point to the difference between their view and the extant SMI literature (Guenzi & Troilo 2006; Rouzies et al. 2005). The SMI literature looks at 'The extent to which activities carried out by the two are supportive of each other' (Rouzies et al. 2005, p.115) with the assumption that there are separate and well-developed sales and marketing functions. In encroachment sales start to perform roles that are in marketing's domain. With this blurring Keszey and Biemans (2015, 2016) focus on encroachment of 'strategic activities' where the SMI literature typically concerns itself with tactical tasks

Innovation literature tends to focus a lot of attention on the role of marketing and ignores sales (Griffin et al. 2013; Malshe & Biemans 2014). Sales are in a unique position in a B2B context as they serve as a primary source of information regarding marketplace problems and customer requirements. The strategic shift in the role of sales requires new skills to become customer value agents with a change in the job description away from value communication and towards creating value over-time (Ingram et al. 2009). Sales contribute to front end voice of the customer part of the new product development process (NPD) (Ernst, Hoyer & Rubsaamen 2010) and to the success of new products by promoting them to customers (Athuahene-Gima 2003). To this end sales can be seen as dual gate keepers to the NPD process. Greater customer involvement is a bi-product of encroachment. Again, from the innovation and NPD literature:

> ‘Renewing the offering and developing new ways to create customer value is a crucial issue for management in fast changing contemporary markets’ (La Rocca et al. 2016, p.55).

Keszey and Biemans (2015, 2016) found that Inter-functional trust, interface formalization, and actionability of information lead to a higher level of sales-marketing encroachment. Overall encroachment was seen to lead to more customer focused NPD resulting in better financial performance and a higher degree of success levels for new products.

Many of the recommendations put forward by Keszey and Biemans (2015, 2016) are similar to those made in much of the extant SMI literature. For example, formalisation at the SMI in terms of roles, information flow, processes and the like. Job formalisation reduces uncertainty and assists flows that contribute to linkages between sales and marketing (Arnett & Wittman 2014). Incorporation of voice of the customer is seen as critical to successful NPD (Mahr, Lievens & Blazevic 2014). The innovation literature is ambiguous about the effect of interaction formalisation. For example, studies of marketing managers' use of outside information say it was negatively affected by formalisation (Deshpande & Zaltman 1987). Others confirm a positive relationship between cross-functional formalisation and collaboration (Ruekert & Walker 1987). The recommendations to enhance trust are, like the SMI literature it seeks to contrast, appear to be normative fixes for more substantive issues. More social events, rewarding collaboration, IT system alignment, and top management support are very much in-line with previous SMI research recommendations (Malshe & Biemans 2015).

Studies that look at the SMI in the context of innovation typically study the interaction between the distinct departments. Sales is seen as performing an operational function with marketing taking a more strategic role (Ernst et al. 2010). The dominant orientation in SMI literature to date has been to view sales and marketing as separate functions. Keszey and Biemans (2015, 2016) advocate an approach that investigates the complex dynamics between marketing and sales focusing on marketing as a process (Kohli & Jaworski 1990; Narver & Slater 1990; Vorhies & Morgan 2005). A perspective that is provided in the innovation literature that appears absent in SMI work is consideration of marketing as an overall process that encapsulates marketing and sales activities. My thesis is interested in how the SMI works to develop value propositions to enact the marketing process of aligning the organisation to customer value, where sales are viewed as value agents (Ingram et al. 2009) who can actively inform value proposition production. I recognise that in the B2B context there is a propensity for role encroachment where sales can adopt a more strategic value agent role (Ingram et al. 2009).

2.3.7 Sales and marketing dysfunction experience

The SMI literature focuses on the dyadic relationships and interactions between organizational functions know as sales and marketing, at a functional level (Rouzies et al. 2005). Recommendations for improving dysfunctional relations have tended to focus on normative factors such as job-rotation, training, structured meetings and information quality systems as impactors (Malshe et al. 2016).

In the light of paucity of research at the individual unit level Malshe et al. (2016) set out to understand how dysfunction experiences impacted on individuals. Three interface dysfunctions were observed; communication paucity, lack of collaboration, and interface conflict. The individual unit focus led them to expose that sales and marketing people may respond differently to each dysfunction experience. Often this can be in a way that is counterproductive and may prolong or worsen dysfunction. Dysfunction was found to be bi-directional or circular, not linear like in previous studies. Communication paucity was made up of three facets: seeking each other’s input, engaging in dialogue to discuss strategies, and keeping each other appraised on marketplace activities. Where sales people felt they were being ignored they would employ active ignorance towards marketing by ‘tuning out’ any operational directives. On the other hand marketing people felt that sales attract people who appreciate job autonomy (Wang & Netmeyer 2002) and they engage in autonomy overkill. The perception that marketers have about sales need for autonomy leads marketing actors to gather intelligence themselves and cultivate other channels or seek out loyal customers to get input into strategy development.

While the SMI literature shows that sales and marketing share a dysfunctional relationship (Malshe & Biemans 2015; Rouzies et al. 2005) the same dysfunction encounter may trigger vastly different sense-making (Weick 1999), where sales and marketing people interpret an event differently and engage in counter-productive behaviours as a consequence. Malshe et al. (2016) observe that this may be why organisations continue to struggle with dysfunction at the SMI. They are critical of the extant literature in this regard for generating institutional level recommendations such as job rotation, structured meetings, joint marketing and sales interaction (Guenzi & Troilo 2006; Malshe & Sohi 2009; Rouzies et al. 2005). Their findings point to why these institutional fixes will not work in and of themselves. Organisations need to understand these individual nuances that arise from the different sense-making experiences of sales and marketing personnel (Weick 1999).

The SMI dysfunction study performed by Malshe et al. (2016) is in contrast to much of the extant SMI literature as it has an individual actor-level focus. I concur with their analysis of the normative nature of recommendations in the SMI literature emanating from the organisational level focus of much of the research to date. In taking an actor-level focus in my thesis and looking to identify surface empirical and 'below the surface' generative mechanisms (Danermark et al. 2002; Easton 2010; Sayer 2010). I am seeking to develop non-normative solutions that take account of different individual actor sense-making (Weick 1999).

2.4 Summary of the SMI literature

The development of SMI literature is fairly recent and nascent. Much of the research to date has focused on single issues from which generalisations have been made (Homburg et al. 2008). In the decade that has elapsed since Homburg et al. (2008) made the single-issue observation stands up to the evidence provided in my literature review and illustrated in the summary of SMI literature to date in Table 2.2. Some authors have observed there is *a* growing realisation that the SMI relationship is not operating as effectively as it should (Le-Meunier-Fitzhugh & Piercy 2009). Again, whilst the observation made by Le-Meunier-Fitzhugh & Piercy (2009) is several years old the evidence provided in my literature review would suggest that this observation stands the test of time. Of the few studies that have been performed the large majority show that there may be considerable difficulties at the interface (Dewsnap & Jobber 2000; Kotler et al. 2006; Malshe et al. 2016). Far fewer studies observe that the SMI is operating effectively (Dawes & Massey 2005; Massey & Dawes 2007; Snyder et al. 2016).

There is an acknowledgement in the literature that coverage of the SMI is sparse (Dewsnap & Jobber 2002; Guenzi & Troilo 2007; Hughes et al. 2012; Le-Meunier-Fitzhugh & Piercy 2009). Or that little attention has been devoted to the interface between marketing and sales units (Homburg & Jensen 2007). There were only eight empirical studies identified into the effectiveness of the SMI, two of which drew from the same data (Homburg et al. 2008). A review of the literature to date appears to show that about 15 studies have been conducted, some examples of which are illustrated in Table 2.2. The single-issue focus of much of the extant literature, combined with its sparse nature, makes trend development problematic. The balance of research into the SMI has shifted in recent years to a slightly more qualitative inductive approach over recent years which recognizes the lack of any clear insights developing in the SMI literature. Given the importance of the SMI in the B2B context for operationalising market-orientation the under-researched, under-developed nature if the SMI work remains a puzzle.

In relation to the issue at hand in my thesis, how the SMI works to produce value propositions, no attention has been paid in the extant SMI literature to value propositions as the key output of SMI and its 'central organizing principle' (Webster 2002). The absence of concern for value proposition production at the SMI leaves a number of questions unanswered, for example: how are value propositions created? What are the respective roles of marketing and sales in developing these? How is the customer engaged in value proposition production? The absence of consideration of customer value in SMI literature led me to turn to the innovation literature where the SMI role is considered from a start point of customer innovation (Kezsey & Biemans 2015, 2016).

Most of the SMI research views sales and marketing as monolithic holistic entities, where the relationship is considered to be dyadic. The study of the SMI as a phenomenon has been at the functional level, with only isolated examples of actor-level research (Malshe et al. 2016). SMI research has tended to focus on sales and marketing relations as an end in itself (Kotler et al. 2006; Rouzies et al. 2005; Snyder et al. 2016). Emanating from this functional focus are largely normative recommendations, even in response to non-normative differences such as thought worlds (Homburg & Jensen 2007). Differences between marketing and sales have been classified as economic and cultural in nature, here cultural encapsulates cognitive differences (Beverland et al. 2006; Kotler et al. 2006; Snyder et al. 2016). Responses to economic differences are better developed than cultural differences reflecting surface level analysis resulting in normative recommendations such as goal and role alignment (Kezsey & Biemans 2016; Strahle et al. 1996). Little work has taken place to develop cultural and cognitive differences identified a decade ago (Beverland et al. 2006; Homburg & Jensen 2007). There has been little conceptual model development to integrate the economic, cultural and cognitive aspects or to speculate how they may inter-relate as potential generative mechanisms. The differences between what has emerged from the extant SMI literature and the approach I am taking in my thesis is summarised in Table 2.7:

	SMI Literature	My thesis
Research focus	Organisational level - how sales and marketing interact as holistic entities	Actor-level - how individual marketing and sales actors interact
SMI relationship	Dyadic - viewing sales and marketing as monolithic holistic entities	Open-system - sales and marketing actors operate within an open system
Research purpose	'End in itself' - interested in extent to which SMI activities are supportive of each other (Rouzies et al. 2005).	Operationalisation - interested in how SMI works to produce value propositions as central organising principle (Webster 2002).
Nature of research recommendations	Normative - empirical level factors such as roles, goals (Strahle et al. 1996).	Multi-layered - interested in 'empirical' and 'real' level concerns (Sayer 2010).

Table 2 7: Summary differences between extant SMI literature and my thesis (Source: Author).

I have summarised the extant SMI literature into a framework that depicts the spaces between marketing and sales in Figure 2.4 below. My intention is to build on this framework through the research phase of my thesis from a position of better understanding of what is going on at the SMI in relation to value proposition production. It can be seen therefore that the SMI literature that has a direct bearing on my thesis as a priori theoretical ideas have shaped and influenced the approach I have taken. In taking ideas and concepts from the SMI literature into the research phase of my thesis I acknowledge the theory laden stance I have taken (Danermark et al. 2002; Easton 2010; Sayer 2010).

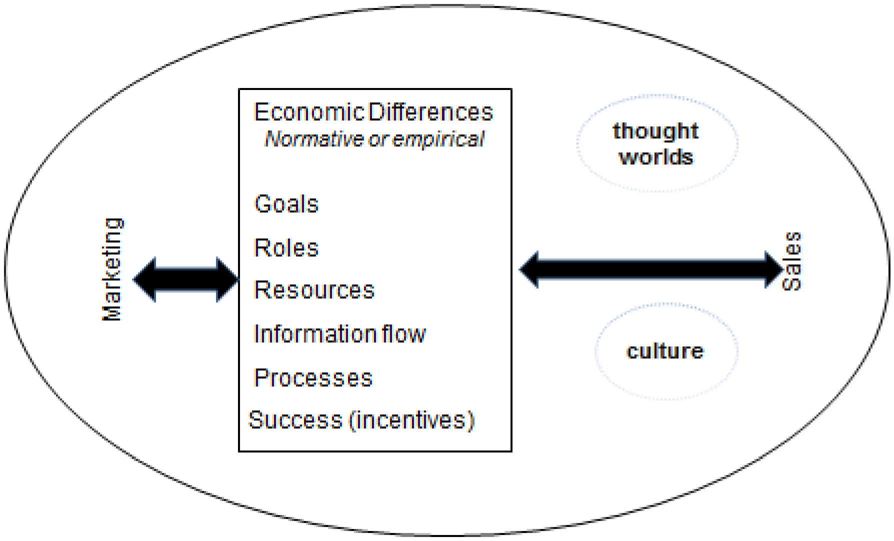

Fig. 2.6- Depicting spaces in between marketing and sales (Source: Author).

Figure 2.6 depicts the extant literature as having a fascination with economic differences at the SMI which manifest themselves as normative recommendations (Malshe et al. 2016). Cultural and cognitive issues have surfaced in the SMI literature on isolated occasions and non-normative recommendations are absent in the SMI literature. I will now turn to a review of value proposition literature and intend to end the next section by building on the framework in figure 2.6 and integrating an understanding of the value propositions into the spaces in-between marketing and sales framework.

2.5 Literature Review value propositions

2.5.1 Introduction to value proposition literature

In this section I will provide a review of the extant Value Proposition (VP) literature which is generally concerned with how value is framed by a supplier and presented to the customer prior to purchase (Anderson et al. 2006; Ballatyne et al. 2011; Payne et al. 2017). After outlining the origins and classification of value propositions, through development in VP literature I will build on the earlier discussion of SDL as it relates specifically to value proposition production (Vargo & Lusch 2004). *Buying centres*, which can be defined as the group of people responsible for making purchasing decisions for an organisation (Miller et al. 2011), are discussed as they expose the need for value propositions tailored to individual customers, and provide a contrast between sales and marketing literature relating to value propositions. After discussing internal capabilities required for developing value propositions (Kowalkowski 2011) some consideration will be given to triadic value propositions. The role the SMI plays in value proposition production is discussed before providing a summary of the VP literature. I will conclude the literature review chapter by integrating the findings from SMI and VP literature with due consideration of the place this 'core' literature occupies in the broader academic marketing literature. I will end the literature review with a conceptual framework that ties together the literature findings facilitating a 'theory-laden' view (Sayer 2010) to take into field research.

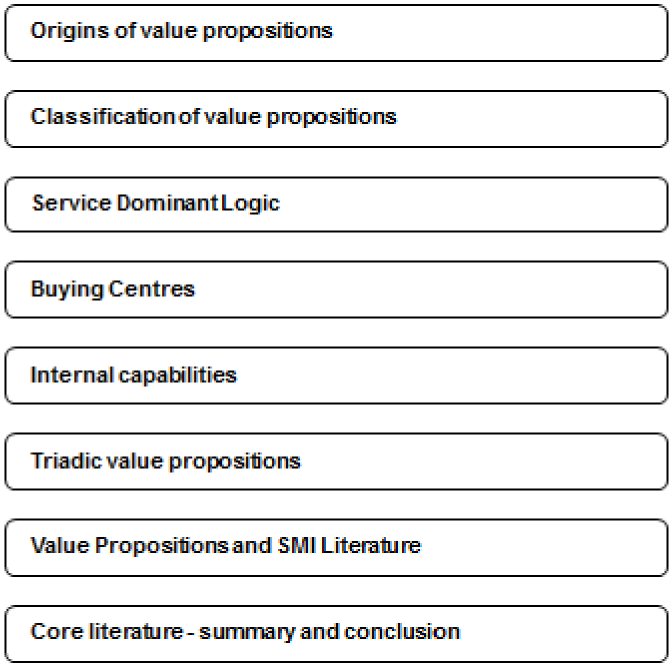

Fig. 2.7 Schematic of the value proposition literature review (Source: Author).

2.5.2 Origins of value propositions

The manifestation of how an organisation sees value and articulates the value it provides to customers is often seen in the value propositions it develops. Like value, the term value proposition is not uncontested and is worth exploring here. A value proposition can be seen as a promise of value sometime in the future (Johnston 2014; Payne et al. 2017; Vargo & Lusch 2008). The value proposition concept occurs increasingly in management literature and developing a value proposition is seen by some authors as a critical strategic issue for marketing managers (Payne & Frow 2014). After a rigorous review of the extant value proposition literature Kowalkowski (2011) observes:

> ‘The general conclusion is that the ability to communicate a firm’s value propositions strategically and effectively is a new area for the

development of competence at the heart of competitive advantage' (Kowalkowski 2011, p.277).

Barnes et al. (2009) describe the evolution of the term value proposition as rooted in the 1950s with the notion of the Unique Selling Proposition (USP). This led to the movement in benefit-led selling (Rackham 1988) where sales and marketing teams were coached to move from product features through to describing customer benefits. Only then did it dawn on organisations that a benefit can only be so if it solves a customer problem, a solution to a need. This is when the term value proposition was conceived. The origination of the term value proposition is credited to McKinsey consultants Bower and Garda (1985) where they discuss the making of promises of satisfaction as part of the logic of enacting a marketing oriented value strategy for business (Ballatyne et al. 2011). Lanning and Michaels (1988) built on this developing consultancy tools that focused on the creation of value propositions and the design of a value delivery system management model, consisting of three steps: choose the value, deliver the value, and communicate the value. The communications step is the point where the value proposition is presented to the customer (Frow & Payne 2011). Here a value proposition is defined as a statement of benefits being offered to a customer group at a price the customer will pay (Ballatyne et al. 2011). A value proposition is traditionally taken to mean the value promise formulated and communicated by the seller, with the intent that it can be accepted by a buyer (Anderson et al. 2006).

In line with Levitt (1960), Barnes et al. (2009) state that customers do not buy things they buy the experiences the things are able to deliver. Kaplan and Norton (2004) believe that strategy is based on a differentiated customer value proposition where satisfying customer needs is the source of sustainable value creation. Clarity of the value proposition is seen by some authors as the 'Single most important organising principle for customers' (Webster 2002). A value proposition is seen to be a clear and compelling expression of the experience that a customer will receive from a supplier; it is a projection of future value. The Kaplan and Norton definition declares that value differs by customer segment. Value, like beauty, is in the eye of the beholder so it is best when it relates to a specific customer or targeted customer segment. Anderson et al. (2006) say that customers in B2B markets focus on functionality and performance, whereas customers in consumer markets focus on aesthetics and taste. Ascribing predominantly rational factors to B2B customer preferences presents an over-simplistic view that takes insufficient account of the emotional buying dimension in business markets, and the role of the sales person within this (Lynch & De Chernatony 2007). In my view, a heavy burden is placed on marketing and sales teams who must develop a deep understanding of the value drivers affecting the customer in order to begin to create value proposition. It also suggests that the customer value does not become real until they have experienced it 'in-use' (Vargo & Lusch 2004, 2008).

Barnes et al. (2009) put forward a pyramid of value starting with components at the base moving up through offers and solutions to co-created value. The top level is unique and tailored to a customer. The lower parts of the pyramid are about communicating value, moving up towards the pyramid apex is about creating value. This could be seen as over simplistic as all parts of the pyramid require a good level of customer understanding. Rackham and De Vicentis (1999) believe that extrinsic value customers often reject possible suppliers, even those who have good offerings that are attractively priced if the suppliers push their products or solutions too quickly without first becoming educated in the customer business. In other words, value can only be communicated in a two-way dialogue where first you seek to understand what the customer values.

2.5.3 Classification of value propositions

A number of authors have attempted to classify value propositions (Anderson et al. 2006; Ballatyne et al. 2011; Payne et al. 2017), Ballatyne et al. (2011) take a temporal view of value propositions from the inception of the value proposition concept with Bower and Garda (1985): Given that the focus of my thesis is on B2B customers I will draw out the relevant classifications pertaining to business customers as other stakeholders are not part of the scope of my research.

Ballatyne et al. (2011) classify early value propositions attributed to Mc Kinsey consultants Bower and Garda (1985) and built on by Lanning (1988) as *supplier-crafted value propositions* where value is communicated to a customer in the form of a marketing offer that should aim to be superior to competitors. This challenges the prevailing strategic management approach inherent in Porter's value chain (1985), suggesting that instead of adopting a supplier-oriented approach, a value proposition should depict value from a customer perspective. Here value was seen to be embedded in the product supported by persuasive communications. This depicts a Goods-Dominant Logic (GDL) standpoint where value is seen to be transferred in exchange (Vargo & Lusch 2008). Although absent from discussion in the literature, the challenge for the SMI here is to produce value propositions that resonate with customers as depicting something the customer will value. The implication of superiority to competitors suggests that the SMI must possess knowledge of competitor offers.

Marketing relationships can bring to the fore complex demand and supply tensions which might be resolved through *co-produced value propositions*. Flint and Mentzer (2006) studied account managers working in integrated value chains. They argue that value propositions are more often *co-produced by suppliers and customers* rather than packaged in advance by suppliers. Knowledge collaboration across multiple organisations means that the supplier's initial value propositions will seldom constitute the final offer to the customer. Suppliers and customers engage in dialogue and work with emergent ‘components of value propositions, which are then considered and modified by both parties’ (Ballatyne et al. 2011, p.142).

Although not considered in the literature, there are implications for the SMI placing demands on the communications process from the initial crafting of a value proposition through its dialogical development in the customer arena. A more recent development attributed to SDL is the view that organisations work with customer to co-create *reciprocal value propositions*. Participants recognise objectives are complimentary, not antagonistic, and carry this idea into negotiation. In this case value is an all-inclusive reckoning where negotiation is the path by which participants share in the creation of value. Ballatyne and Varey (2006) say that a communications process begins with a reciprocal value proposition crafted by any party that makes explicit benefits gained and given up. This means that in any marketing exchange there will be at least two evaluators and their perspectives become linked in reciprocal promises (Ballatyne & Varey 2006). Again, although not considered in the literature the burden on enacting these reciprocal value propositions sits with the SMI and has implications for the competencies required by actors in the SMI to co-create value propositions.

Anderson et al. (2006) classify value propositions based on their research into how organisations were deploying them, linked to their view of what an *effective* value proposition looks like. They felt that many companies produced 'all benefits' value propositions that provide a laundry list of potential benefits. These benefits can only really be described as advantages as they are not really rooted in a clear view of customer needs (Rackham 1988). The second classification was points-of-difference value propositions. The plus side of these types of propositions is they allow organisations to recognize points-of-parity with competitors and highlight points-of-difference (POD). Anderson et al. (2006) see this as flawed if the POD are not truly valued by the customer but invented by the supplier. The optimum level value proposition is *Resonating Focus* concentrating on the two or three known benefits that the customer is looking to derive. These will have been established by prior research as the facilitator of resonating focus. Resonating focus and a deeper understanding of customer benefits could also be achieved through dialogue during the sales process. Although absent from consideration in the literature, to achieve resonating focus would probably require good co-ordination at the SMI to move from a general view of customer requirements to a resonating focus position.

Johnston (2014) looks at value propositions from a situational standpoint characterising them as either tactical or strategic. A tactical value proposition addresses an immediate customer problem. For example, a company providing fire safety solutions may be able to address immediate fire hazard concerns. A more strategic value proposition may seek to address a broader customer concern for health and safety compliance. Here Johnston is seeking to draw out short-term tactical concerns, which may need a technical response from the salesperson, and more strategic concern that may require more business acumen from the salesperson. What is of interest to my thesis is how the SMI works together to construct and produce these different types of value propositions, and the role marketing may have in framing these in an overarching value proposition depicting the totality of what an organisation can offer to a customer.

2.5.4 Service dominant logic and value propositions

Earlier I portrayed SDL as a reformist agenda challenging the inherent GDL of marketing (Lusch & Vargo 2006; Vargo & Lusch 2004, 2006, 2008). In an SDL world value propositions are co-created with customers and value is experienced in-use in direct contrast to the value-in-exchange perspective of GDL. In SDL service is a super-ordinate to both goods and services (Vargo and Lusch 2008, p. 256). Through interaction the experience of service becomes the basis for assessments of value-in-use by beneficiaries. Within SDL the rather unidirectional communication implied in value propositions created using GDL is replaced by reciprocal communications (Lusch & Vargo 2006), or dialogical communication in cases where the companies involved purposefully engage in working and learning together (Ballatyne 2004).

From a SDL standpoint Value Propositions are reciprocal in nature framed by 'if you' 'if we' (Ballatyne et al. 2011). These are emergent in nature and not conducive to tightly framed VPs. SDL value propositions present a number of organisational challenges at the SMI, particularly where the marketing team feels it has the responsibility to craft value propositions, taking a supplier perspective. In this SDL world there is a move from communication as transfer to communications as a process. Generally, marketers see their role as message makers rather than as participants in an interactive communications process, this again has a significant effect on the SMI.

In their original agenda for SDL (Vargo & Lusch 2004, 2006) covered value propositions in their Founding principle FP7. In their initial conception, it can be inferred that an enterprise can initiate a Value Proposition *but only* a beneficiary can determine the *in-use* value. Ballatyne et al. (2011) feel that that this has a GDL feel to it with one party simply proposing value, there is no sense of reciprocity. Vargo and Lusch (2008) offered a reformulation which reads 'The enterprise cannot deliver value, but only offer value propositions'. Ballatyne et al. (2011) felt ‘only’ was misleading and felt the need to place greater emphasis on reciprocity and offered a refinement to FP7:

> 'An enterprise can initiate or participate in developing value propositions as reciprocal promises of value but beneficiaries will always determine what is value in their own terms' (Ballatyne et al. 2011, p.142).

Vargo and Lusch (2004) make it explicit that value is co-created through interactions in the relational process, as distinct from embedded in the product. This is rooted in subjective performance standards and measured by value-in-use (Kowalkowski 2011). This contrasts with the objective standards capable of value-in-exchange. Kowalkowski (2011) acknowledges that in SDL value-in-use has a super-ordinate position to value-in-exchange. What is questioned is whether you always strive to emphasise value-in-use in favour of value-in-exchange (Day 2006). If the customer was focused on short term price concessions why focus on value-in-use? Individuals and organisations that have this short team view may not be interested in value-in-use propositions. So, it could be demanding pursuing a value-in-use service strategy as it may conflict with customer strategies and buying behavior. This has implications for the SMI in terms of developing customer understanding and segmenting based on propensity for value-in-use.

Part of this customer evaluation could be informed by their desire for a deep relationship. Not all customers will want one, and any supplier will only be able to invest in a few. Understanding which customers desire a relationship and which have a transactional perspective can help companies develop the value-in-use towards willing customers who desire strategic relationships (Kowalkowski 2011). Here the challenge for the SMI, in my view, is developing an approach which facilitates production of value-in-exchange and value-in-use value propositions, for the appropriate customers, at the right time.

2.5.5 Buying centres

Enhanced value-in-use value propositions may also fail due to the GDL focused nature of the customer buying-centre, lack of authority, or poor understanding of corporate operations and strategy (Kindstrom & Kowalkowski 2009). To interact successfully sellers need to work closely with gatekeepers and understand buyer’s internal linkages (Bonoma & Johnston 1979; Miller et al. 2011; Webster & Wind 1972). Here a gatekeeper can be defined as the person inside the customer organisation who can allow or prevent access to the people in an organisation that a sales person may need to talk with in order to advance a sale. In spite of growing evidence that tangibility is not what buyers actually purchase (Lovelock & Gummesson 2004; Vargo & Lusch 2004) decision makers maybe driven by short term goals which limits the opportunity for value-in-use (Ballatyne & Varey 2006; Vargo & Lusch 2004).

A number of authors have provided explanations for the make-up of buying centres (Michel, Brown & Gallan 2008; Miller et al. 2011). A buying centre is made up of the people in a customer organization who make purchasing decisions (Miller et al. 2011). Michel et al. (2008) discuss three key roles inside a buying centre: Payer, Buyer and User. While the payer maybe interested only in VIE and user only in VIU the buyer bridges the two. In response to the bridging role of a buyer firms interested in developing VIU propositions need not only to interact with users but also to understand lifecycle costs and new value creation opportunities (Kowalkowski 2008). In the first instance, a value proposition must meet the criteria of the initiator, the person in the customer organisation who initially activates a potential purchase (Miller et al. 2011). Value propositions will change during the sales process as the sales-person becomes exposed to other people involved in the purchasing process, for example; end-users, procurement managers. Even though some users may only be interested in VIU if they work at an operational level their comprehension of longer-term value creation could be impeded (Kindstrom 2009). For example, the central procurement function may have taken up a complex offer on the basis of strategic value in use considerations while the operational users still prefer to go to local providers as they cannot see the 'value' in the strategic contract struck by procurement (Nordin 2006).

Executives who devise Value Propositions in SDL need to understand the subjective perceptions of all parties involved in co-creation: initiators, deciders, users, buyers, and others or the value perceptions many not be congruent (Vargo & Lusch 2008). This contrasts with a GDL world where VIE propositions are linked to specific functions where an economic value can be monetized and is independent of the number of evaluators. VIU can be subjective, idiosyncratic and cross functional. In the sales literature there is debate among authors about whether different value propositions should be crafted to meet the needs of individual actors involved in the buying centre or an over-arching value proposition should be developed that traverses the needs of the 5.4 people that typically constitute a buying centre (Adamson & Dixon 2013; Miller et al. 2011; Rackham 1988). Although generally absent of discussion in the value proposition literature navigating the needs of the actors involved in the buying centre, crafting and re-crafting value propositions in response to buying centre members is a responsibly of actors in the SMI.

2.5.6 Internal Capabilities

Organisations must have internal capabilities to move to value-in-use value propositions as this is complex and offers challenges to traditional firms (Kowalkowski 2008). Providers have difficulty getting customers to buy offerings that exceed minimum exchange-value specifications; they must be able to provide some incentive for change (Anderson et al. 2006). If the customer pursues GDL and low price the seller needs to understand why; was value poorly articulated, or was customer finance the major driver of budget? Companies pursuing SDL must also have the capability of crafting compelling VIU Value Propositions and show commitment to them. A second challenge is the ability to deliver VIU. Building trust and keeping promises is important as there is a higher risk of failure of VIU propositions (Thull 2005).

Strategic management of value focus of each firm's VP should be understood as dynamic, competently developed operating resource at the heart of competitive advantage and performance. Here Kowalkowski (2008) has helped provide a link back to the SMI as sales and marketing actors need to have the capability to help frame, develop and execute VIU proposition. Kowalkowski (2011) establishes four principles for VIU propositions and provides a useful contrast with VIE value propositions:

> Principle 1 – Value Propositions with an emphasis on VIU are more likely to address the needs of multiple evaluators than those with emphasis on VIE.

> Principle 2: Relative emphasis of VIE and VIU will normally change over time during the sales process.

> Principle 3: The discrepancy between VIE and VIU is lower for offerings in which VIE manifests itself as continuous financial feedback linked to value creation for customers than for other types of offerings.

> Principle 4: The closer the relationship between customer and provider the more the emphasis of the value proposition can be placed on VIU.

The process of crafting a Value Proposition can be time consuming, especially in the case of complex sales. The provider needs to match the emphasis to different values that emerge during the negotiation and commitment process (Kindstrom & Kowalkowski 2009). This implies that the provider knows about each customer's purchasing processes and the mindsets of evaluators in the buying centre and informs them of potential benefits of each offering during dialogue (Ballatyne & Varey 2006). Factors can vary in importance throughout the sales cycle and value perspectives may change through dialogue and sense making (Ring & Van de Ven 1994). From this a shared interpretation of reciprocal value will emerge. The importance of VIE and VIU can vary over time. At times VIE propositions may be what is needed to get beyond gatekeepers (Lindberg & Nordin 2008). What is absent of discussion here is what specific roles actors in the SMI play in crafting VIE and VIU value propositions. Capabilities seem to be discussed at an organisational level, not at the actor-level, which is the concern of my thesis.

2.5.7 Triadic value propositions

Kowalkowski et al. (2016) observed that much of the research focus of value propositions to date has been on the buyer-supplier dyad, where each organisation appears to be regarded as a holistic entity. More recent conceptualisations have moved away from a static supplier-centred view of value proposition creation towards interdependence and reciprocity (Ballatyne & Varey 2006; Kowalkowski 2011; Payne & Frow 2014). Kowalkowski et al. (2016) noted that even these studies concentrated on dyads which prompted their interest in understanding triadic value propositions in a manufacturer – dealer – customer triad.

The study followed the Industrial Marketing and Purchase Group (IMP) view that triads represent complex market configurations of independent firms that connect through network ties, either directly, or indirectly, to do business. These ties can be structural, economic, or social in character (Hakansson & Snehota 1990). The research looked to extend the concept of value propositions to multiple stakeholders (Kowalkowski 2011). It was found that value propositions emerged over time with each of the three dyads within the triad changing. They identified three phases: initialising, developing and launching the value proposition where:

> 'The traditional value proposition between the dealer and users focused on product performance and technical features, rather than on process – related issues, such as optimising the customer fleet' (Kowalkowski et al. 2016, p.289).

Dealers become more involved with users as network ties strengthened and their value proposition focus moved from VIE to VIU.

The IMP approach concerns itself with actors in networks. Actors must play active roles in the value creation process in order to develop value propositions. To be successful triadic value propositions need a high intensity level in terms of engagement (Chandler & Lusch 2015). This could involve the manufacturer working with the dealers in multiple workshops for value proposition development. The implications for the SMI are in understanding that a value proposition that has been written in-house cannot be viewed as being crafted, but merely drafted. Account needs to be taken of the transitory nature of value propositions triadic relationship, accepting that value propositions are dialogical, or in this case, ‘trialogical’ not static communication vehicles. This is paramount in B2B contexts where often the benefits of any value proposition are experienced downstream in-use (Vargo & Lusch 2004, 2008). Once again, even the IMP perspective does not appear to consider the dynamics of the SMI, or the sales and marketing actors involved in this more complex triadic, multi-dyadic context. Of direct concern for my thesis is the notion that customer-supplier relationships are seen as dyadic in the extant literature, this in itself maybe a naïve view if sales and marketing do not consider the SMI a holistic entity responsible for customer-supplier relationships.

2.5.8 Value proposing actors

The value proposition literature does not pay much regard to the interaction of sales and marketing people at the SMI as actors involved in creating value propositions and how this manifests itself in relationship with customers. Even the IMP literature seems to regard them as part of a holistic entity that is 'the organisation’ without consideration of the interactions that take place within the SMI at the initialization, development and launch phases (Kowalkowski et al. 2016).

At the interface between the customer and the organisation, typically manifested in the sales person, consideration is given to the value proposing actor which does bring a human dimension to value. Performance and social dimensions of the actor at the customer interface are considered. A more subjective view of value theory is provided (Ballantyne & Varey 2006) where supply-side organisations and actors determine their own sense of value in order to construct their value proposals and promises to customers. Studies in the social actor, even at the customer interface, are in paucity (Johnston 2014). Bagozzi (2006, p.453) observed that at the B2B customer interface:

> ‘Business relationships do not endure and flourish on their own…buyers and sellers do more than follow well defined scripts in accordance with codified rules …if this were all there was firms could computerise much of business to business transactions…and do away with most of the human element’.

Johnston (2014) draws the implication from this that:

> 'The supplier-actor themselves have a value in the business to business interaction that is concurrent with any value proposition that refers to an independent specific product or service.'

Here value propositions are seen to be dialogical between the actor and the customer, not unidirectional communication from the supplier (Salamonson, Aberg & Allwood 2012). The role of the supplier actors is to make offers to actors inside the customer organisation in the form of a value propositions that promise potential value (Vargo & Lusch 2011). Here value propositions are part of a negotiation process between actors. Through discussion and dialogue during the development stage actors can agree on a value proposition (Hilton et al. 2012; Kowalkowski et al. 2016).

What appears absent from the literature is any consideration that sales and marketing personnel can be regarded as actors in the creation of supply-side value propositions before they are taken out to the customer interface, or the role of customers as actors in that initalisation. The value proposition literature often talks about value propositions as is they are static things that manifest themselves, without any human element in their creation (Johnston 2014). Also of significance for the SMI is the notion that value propositions are seen to be negotiable at the customer interface (Hilton et al. 2011; Kowalkowski et al. 2016). Quite how marketing and sales people work together at the SMI in this more transitory environment also appears to be absent from the value proposition literature.

2.5.9 Summary and conclusion of value proposition literature in relation to SMI

In large part, the value proposition literature itself pays scant attention to the respective roles of marketing and sales in their initiation, development and creation (Kowalkowski et al. 2016). This is a gap in the literature that I will attempt to address in my thesis. How sales and marketing work together to understand customer value drivers and how these translate into value propositions is a potential test of SMI effectiveness.

There is a level of complexity concerned with value proposition development that heightens when moving from a GDL world to an SDL world (Kowalkowski 2011). This involves a change in organisational mindset, from both supplier and customer, from an exchange-based view of value (Anderson et al. 2006) to an 'in-use' perspective (Vargo & Lusch 2004). The more straight-forward world of GDL centric VIE has implications for the SMI in relation to the crafting of strategic and immediate value propositions (Johnston 2014) and the relationship between the two. Moving into the dialogical value-in-use world of SDL creates new tensions at the SMI. Now a far more dynamic, less static view of value proposition development comes to the fore (Ballatyne & Varey 2006). Here consideration needs to be given to how value propositions have to change over time taking into account different players in the customer buying centre. Adding to this the more subjective nature of value in an SDL world adds to the complication. Furthermore, not all customers will be ready for VIU with some preferring concrete VIE approaches. The complexity is added to when considering the triadic nature of many B2B relationships with a shift from dialogue to 'trialogue' (Kowalkowski et al. 2016; Wynstra et al. 2015). How SMI actors interact in the shifting GDL to SDL environment appears to be largely absent from value proposition literature, as does the SMI dynamic in the ‘trialogue’ context. This is significant as often competitive advantage is seen to exist at the organizational constellation level, in partnerships and relationships with other companies, not the individual company (Gomes-Casseres 2015).

What is most telling is that in all the contexts covered in the value proposition literature review sales and marketing personnel do not appear to be considered to be individual actors. The exception to this is in the value literature that considers boundary spanners, primarily sales people, as actors who can make value proposals to other actors (Hilton et al. 2011; Vargo & Lusch 2011). How sales and marketing people interact at the SMI to draft initial value propositions, deal with and respond to negotiated changes at the customer interface does not appear to be considered. Neither is any coverage given to sales and marketers as individual actors further upstream in the initially creation of value proposition before they are taken out to the customer.

The value proposition literature does not pay much regard to the interaction of sales and marketing people at the SMI as actors involved in creating value propositions and how this manifests itself in relationships with customers. Even the IMP literature seems to regard marketing and sales actors as part of a holistic entity known as 'the organisation’ without consideration of the interactions that take place within the SMI at the initalisation, development and launch phases of products and services (Kowalkowski et al. 2016). Given that Value propositions are seen as the ‘Single, most important organising principle’ (Webster 2002) the absence of consideration of individual actors in value proposition production, and the role of SMI actors is a puzzle, which is a direct and relevant concern of my thesis. Table 2.8 summarises the differences between what is considered the extant value proposition literature and the focus of my thesis:

	Value Proposition literature	My thesis
Research focus	Organisational level - from the perspective that organisations produce value propositions.	Actor-level - how individual marketing and sales actors work to develop value propositions.
SMI role in value proposition production	Dyadic - customer-supplier value propositions are constructed in a dyadic relationship.	Open-system - sales and marketing actors operate within an open system at the SMI and in customer-supplier relations.
Research purpose	'End in itself' - focused on classification of value propositions i.e. what they are (Anderson et al. 2006; Ballatyne et al. 2011).	Operationalisation - interested in how SMI works to produce value propositions as central organising principle (Webster 2002).

Table 2.8 - Differences between extant value proposition literature and my thesis (Source: Author).

2.6 Summary of SMI and value proposition literature

In this section, I will draw together the findings from the 'core' SMI and value propositions and where it sits in the broader marketing schema.

In relation to the broader marketing literature how the SMI works to develop value propositions is concerned with operationalisation of a marketing orientation. The actor-level focus I take in my thesis is in line with the critique of marketing orientation literature as located in rationality and bureaucracy, epitomised by a bureaucratic planning process (Hackley 2009). Insufficient regard is paid to the complexity of organisations and markets, and managerial texts often completely ignore the organisational dynamics that have to be negotiated in order for the marketing concept to be enacted, and marketing orientation operationalised (Hackley 2013). Central to my thesis is concern for how the SMI works to produce value propositions, to operationalise marketing-orientation, in a B2B context. At the 'real' level people are what activate a market orientation, how actors in the SMI work to develop value propositions is fundamental to the potential activation of marketing orientation. The actor-level focus is often absent from the rational bureaucratic view of marketing portrayed in mainstream marketing literature (Hackley 2009). The actor or 'real' level of analysis is the focus of my thesis.

In considering differences between the SMI and value proposition literature with the approach I intend to take I would make the following observations:

Organisational level vs. actor-level focus:

The SMI literature regards sales and marketing as monolithic holistic entities (SMI literature). The value proposition literature generally takes the perspective that organisations produce value propositions (Anderson et al. 2006; Ballatyne et al. 2011). In both bodies of literature there is a lack of consideration of individual sales and marketing actors. My thesis pursues an actor-level focus.

Figure 2.8 depicts converging gaps in the two elements of the 'core' literature; SMI and value proposition literature. While the SMI literature fails to consider how the SMI works to develop value propositions I would observe that the value proposition literature fails to consider how SMI actors work to develop value propositions. My thesis will seek to provide explanations and generative mechanisms (Collier 1994; Danermark et al. 2002; Easton 2010) on how the SMI works to produce value propositions which seek to fill the coincidental gap in the two bodies of literature.

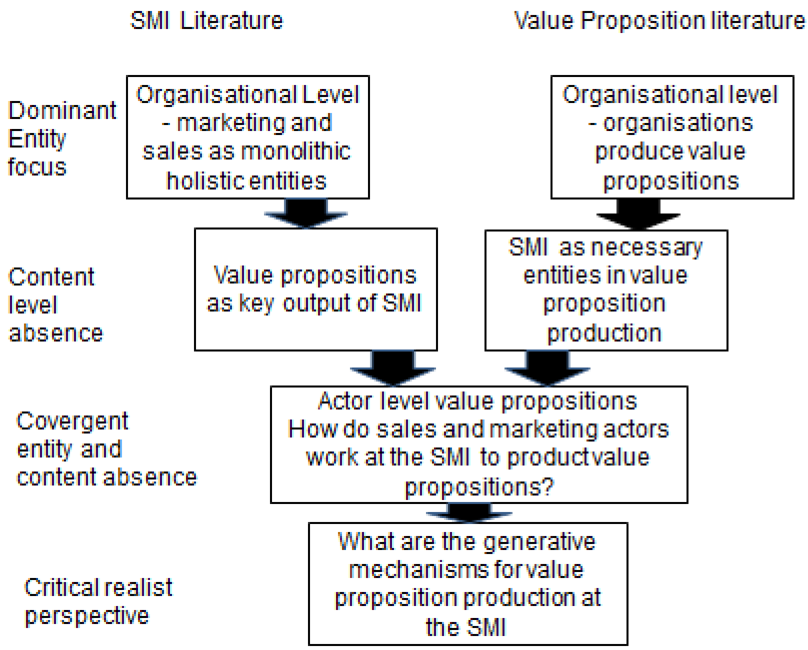

Fig. 2.8 - Converging gaps in the SMI and value proposition literature (Source: Author).

End-in- itself

Both bodies of literature look to examine the phenomena which concerns them, SMI or value propositions, through what I term an 'end-in-itself' *standpoint*. While the SMI literature generally focuses on: 'The extent to which SMI activities are supportive of each other' (Rouzies et al. 2005) the value proposition literature seems to concern itself with what value propositions are. This is manifested in work that looks to classify value propositions temporally, situationally, and in terms of effectiveness (Anderson et al. 2006; Ballatyne et al. 2011), or in relation to marketing theory development and the move from GDL to SDL (Kowalkowski 2011). Little consideration is given to how value propositions are produced and no attention is paid to how the individuals in the SMI work to produce value propositions, a major concern of my thesis.

Normative recommendations

SMI literature tends to provide normative recommendations relating to factors such as goals, roles, and process (Strahle et al. 1996). Value proposition literature does not pay attention to non-normative actor-level recommendations. In my thesis I intend to adopt a multi-layered approach with a focus on both 'empirical' and 'real' level concerns (Danermark et al. 2002; Easton 2010; Sayer 2010).

Building on the framework I depicted in the summary of the SMI literature in 2.4 to incorporate the value proposition literature review I am proposing a conceptual framework to take into my thesis research methodology outlined in figure 2.9 below:

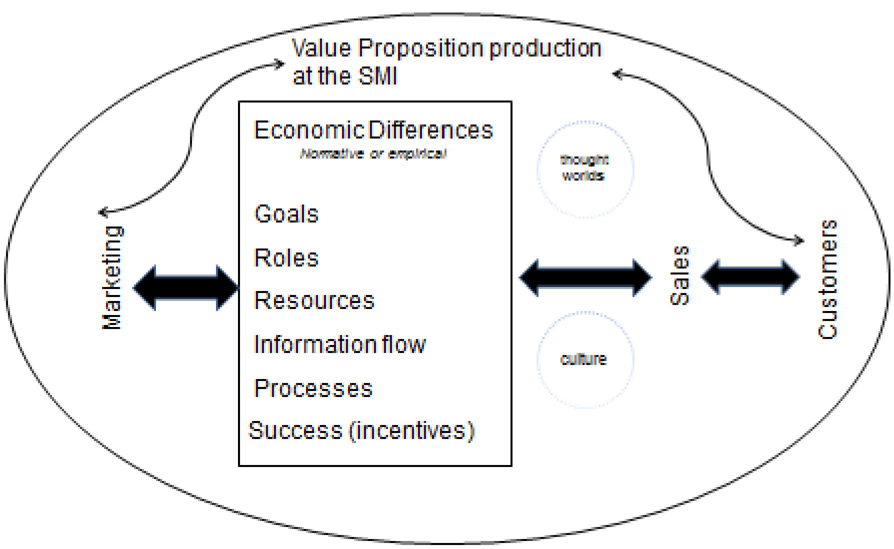

Fig. 2.9 - Spaces in between marketing and sales in relation to value proposition production (Source: Author).

Figure 2.10 depicts the extant SMI literature as having a fascination with economic differences at the SMI which manifest themselves as normative recommendations (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996).

Cultural and cognitive issues have surfaced in the SMI literature on isolated occasions and non-normative recommendations are absent in the SMI literature. There is a lack of consideration for SMI actor involvement in value proposition development in both elements of the 'core' literature. Figure 2.7 depicts value proposition production as a key output of the SMI. Explanations for the 'spaces in-between marketing and sales' as they relate to value proposition production and is a framework that will be carried forward into the research phase of my thesis.

LITERATURE REVIEW SECTION C - THE OUTWITH LITERATURE

2.7 Introduction to outwith literature

This section contains what I am calling the *outwith* literature. Outwith is a term I am using to describe literature that falls outside the realm of marketing management literature, and outside the scope of review in the work of most marketing scholars. During the data collection and analysis phases I started to access literature in three areas that began to emerge from analysis to help make sense of the emerging issues and sensitise myself to extant literature. In this section, I will review relevant literature aligned to the key themes of: Identity (sub-section 2.7.1), Contextualisation (sub-section 2.7.2), and Thought Worlds (sub-section Section 2.7.3).

2.7.1 Identity

Mid-way through the data collection phase of my thesis and during the first cut coding process I became aware that respondents, particularly from marketing, did not believe themselves to be part of a monolithic, holistic organisation called sales or marketing, in direct contrast to the extant SMI literature (Homburg & Jensen 2008; Kotler et al. 2006; Snyder et al. 2016). Respondents were also talking about processes and structures of the SMI and had a concern for who they are professionally, and how they see themselves in relation to others**.** At this point I began to access the relevant identity literature to sensitise my analysis.

The definition of identity, like value, can be 'difficult and slippery', it is very context dependent, and so it is not possible to answer the question 'what is identity?' in advance of theorizing about it (Lawler 2014). Writers such as Brubaker and Cooper (2000) argue that identity has come to mean too much and too little. Lawler (2014) argues that identity is a social and collective process and not, as western traditions would have it, a unique and individual possession. Identity is socially produced, through social relations. Authors such as Mead and Goffman attempt to understand identity as process, something to be achieved, as opposed to something innate. For Mead (2007) identity is both processual and social. It comes out of language, communications and interaction.

Identity has become a theoretical concern over recent years stemming from wider social concerns. Identity is now seen as far less fixed and certain as are nation states, gender, and social fluidity (Baumann 2011). Identity has been a philosophical concern for much longer, for example, Nietzsche believed we are all engaged in creating an identity and that the exemplary human being should craft his own identity through self-realisation (Mafessoli 2016). Some authors, in contrast to Lawler (2014), have sought to provide a definition of identity:

> 'Identity is about belonging, about what you have in common with some people and what differentiates you from others' (Weeks 1990, p.88).

Here identity is separated into sameness (*Idem*), and difference *(Ipse)* (Riceour 1991). In my thesis, in line with Lawler (2014), identity will be treated as a social phenomenon, building on Social Identity theory.

2.7.1.1. Social Identity Theory

Social identity theory (SIT) posits that individuals classify themselves and others in social categories, for example: religious affiliations, communities and professional fields or communities (Ashforth & Mael 1989). In developing a social identity individuals locate themselves relative to others and the social environment (Barraquier 2013). Social identification relates to the extent that an individual feels they belong to a particular social group (Ashforth & Mael 1989).

Social identities are self-derived from the social categories that an actor belongs to (Tajfel & Turner 1986). By choosing to be members of certain groups (in-groups) and opting for non-membership of others (outgroups) actors define their social identity. SIT consists of two underlying socio-cognitive processes: categorisation and self-enhancement. Categorisation helps distinguish between group boundaries and membership. Self-enhancement is where comparisons between salient groups serve to enhance the self by favouring an actor's in-group to out-groups (Hogg & Terry 2000) Brewer (2001) defined SIT as:

> 'The extent to which the in-group has been incorporated into the sense of self, and at the same time, that the self is experienced as an integral part of the in-group' (Brewer 2001, p.121).

SIT can help actors answer the central 'Who am I?' question, often associated with identity, with 'I am part of this group'. This is seen as motivated by the need for the actor to define himself and create meaning (Gundlach et al. 2006). From an organisational stand-point this relates to which team or team's actors feel they are members of, where team is defined as 'Small groups of interdependent individuals who share responsibility for outcomes of their organisation' (Sundstrom, De Meuse & Futrell 1990, p.120). From an SMI standpoint Sundstrom's definition of team throws up a number of questions about how SMI actors identify themselves in relation to teams, which I will now discuss.

Teams and tribal identity

Do sales and marketing actors regard themselves to be part of a holistic monolithic 'team' called marketing or sales? Do they think of SMI as a unified entity that works together as a 'team' effectively to produce value propositions? Or do sales and marketing actors develop a sense of self by associating themselves as part of a smaller 'tribe'? Here tribe is taken to mean a group which is shaped by the importance of the territory the 'tribe' finds itself in, and the sharing of common tastes among tribe members (Mafessoli 2016).

Conferred identity

Authors writing in the identity literature draw attention to the importance of *conferred identity.* What is at play here is the notion that it is not just self-identity that is worthy of consideration but how actors see other actors, the identity that actor A would *confer* on actor B. Identity may not just be felt or experienced it could be something imposed on us (Gagnier 2000).

Consumer Identity theory

It is acknowledged that there is a large body of work in the realm of consumer research that focuses on Consumer Identity. The focus of Consumer Identity Theory is concerned with how a sense of self is constructed in relation to people, possessions and brands (Ahuvia 2005; Belk 1988, 2014; Connell & Schau 2010). While much Consumer Identity Theory work is only of tangential relevance there are a few ideas that are worthy of borrowing to bring into SMI and value proposition world to aid theory development:

Expanded-self

The notion of *expanded self* is espoused by a number of authors (Aron et al. 1991; Connell & Schau 2010). Here authors pay consideration to how identity is built by 'including other in the self'. The original conception paid attention to mother and close friends as part of self. Later iterations of expanded self took account of other business actors and the degree to which an actor felt they had expanded themselves by being in a relationship with another person. Exponents of Expanded self invite actors to consider if they believe other actors to be 'me' or 'not me'. SMI actor responses can be usefully analysed for the extent that identity is developed through association with other actors at the SMI.

Multiple and narrative or dialogic selves

Authors who espouse a *multiple and narrative or dialogic* view of self believe that an individual should be conceived of as having multiple or plural identities (Ahuvia 2005; Bahl & Milne 2010). 'Self' is comprised of simultaneous or sequentially different persons (Ahuvia 2005). The pluralistic view of identity can expand the notion of tribal identities (Mafessoli 2016). Relevant questions for SMI interactions for value proposition development are: Do SMI actors see themselves as having a singular or pluralistic identity? Does this manifest itself in an association with one or more teams or tribes? Do SMI actors play more than one role with interacting with other actors?

Extended self

In his seminal work on *extended-self* Belk (1988, 2014) places a focus on how possessions and brands affect the development of the *extended self*, through a level of emotional attachment to them. Whilst Belk is concerned with consumers his focus on possessions is nevertheless thought provoking for B2B in terms of value proposition production being seen to be owned or possessed by particular people or functions or tribes, in the SMI. The notion of *extended self* facilitates questions such as: do sales and marketing actors regard themselves as having ownership of value propositions or value proposition production? Do actors at the SMI have an emotional attachment to value propositions they have been involved in or not involved in developing?

2.7.1.2 Developing identity through credibility

Respondent references to gaining credibility led me towards literature concerned with developing identity through credibility mid-way through the data collection phase. The credibility literature relevant to my thesis is drawn from Communications and Advertising theory, and Leadership literature. In the findings chapters (4-7) these bodies of literature will be used to sensitise and inform the discussion of empirical data emerging from fieldwork.

Respondents seemed to recognise that to play on the SMI 'stage' in the 'performance' of producing value propositions they had to be seen as credible actors worthy of taking their place on the stage (Goffman 1959).

> ‘Every putative actor of role X can be held responsible for abiding by standards which can be taught as part of the institutional tradition and used to verify the credentials of all performers…’ (Berger & Luckmann 1991, p.92).

In line with Berger and Luckmann's observation gaining and establishing credibility as an actor is seen as fundamental to creating an identity that could be 'taken seriously' (Johnston 2014).

Credibility as a construct consists of cognitive and affective dimensions where cognitive refers to perceived expertise, and affective is about perceived trustworthiness in the eyes of the recipient (Dholaki & Strenthal 1987: Newell & Goldsmith 2001; Sharma 1990). Credit and credibility share the same root origin *'credo'* meaning I trust or believe (Kouzes & Posner 2003, p.23). For example, the job of a Loan Officer is to run checks on a potential customer's store of believability to help answer the question 'Will he pay the loan back?' Kouzes and Posner (2003) referring specifically to how leaders are perceived observed that a credibility check is rooted in the past, credibility is earned over time. Kouzes and

Posner (2003) surveyed 1500 managers who provided 225 values crucial to leadership credibility. The top value was seen to be honesty, which was selected by 87% of participants. When asked to define credibility in behavioural terms participants were asked how they judged whether a leader was believable. Consistency between words and deeds was the overwhelming response. Leaders with credibility were seen to ‘practice what they preach’ or ‘walk the talk’.

Communications and Advertising literature refers to credibility as 'The degree to which a communication source is perceived as trustworthy and competent by the receiver' (Rogers & Shoemaker 1971). Source credibility is a term often used to refer to attributes of the communicator including expertise, trustworthiness, attractiveness and power (Belk 1988). If an individual perceives that an information source has higher credibility they will be more receptive to messages from that source. Source credibility is seen as favourably enhancing the believability of a spokesperson's message as perceived by the receiver of that message (Ohanian 1990). Some authors believe that here credibility is perceived by the receiver and has no objective criteria (Webster 1968). Other authors point out that the set of perceptions that the message receiver holds could contain impressions of the prestige, power, trustworthiness, expertise, among other things of the information source (Shimp & Delozier 1985). Overall, credibility can be seen as the entire set of perceptions held towards an information source by a receiver (Bettinghaus & Baseheart 1969). Although this body of work comes from consumer studies into the source credibility of celebrity endorsers there are implications for the SMI about the persuasiveness of any value proposition. Any value proposition that is produced may be affected by the perceived credibility of the salesperson, in the eyes of the customer (Johnston 2014). Further upstream the production of the value proposition may be affected by how sales and marketing perceive the credibility of actors in the SMI.

2.7.1.3 Identity literature summary

The constructs of credibility taken from leadership and marketing and communications literature can help provide a frame for analysing respondent views as related to identity. Adding to ideas from Social Identity Theory and borrowed from Consumer Identity theory my analysis will be enriched and sensitised to the outwith Identity literature. Next, I will consider literature germane to contextualisation in order to draw out key concepts that can help make sense of issues arising from personal respondent data and to sensitise analysis to extant contextualisation literature.

2.7.2 Contextualisation: A theological perspective

From the first interview onwards informants spoke of developing and producing value propositions in different contexts. Some way through the data collection process, I began to look for outwith literature to help make sense of respondent remarks. The surprising turn taken here was towards theological literature which I will review in this section.

Context is a noun that comes from the Latin contextus, where con is 'together' and texere is 'to weave'. The notion of context is directly relevant to the SMI as a place where sales and marketing 'come together' to 'weave' value propositions ideally based on customer understanding between actors from the two functions.
Context is defined in the Oxford English Dictionary as meaning 'The circumstances that form the setting for an event, statement, or idea, in terms of which it can be fully understood'. The relevance of Oxford English definition is that a value proposition can be seen to be promise of value to a customer based on a summary understanding of the customer context in the eyes of the SMI as value proposition producing actors (Chandler & Vargo 2011; Johnston 2014; Kowalkowski et al. 2016).

Theology as an area of literature provides an alternative lens to make sense of contextualisation that, as far as I can tell, is not found in the management or marketing literature. Strong parallels can be drawn to the theological concerns of setting the gospel in context, or contextualising it to the prevailing context and culture of recipients of the gospel. In concerning himself about how context and culture influence his Christian mission in Australia, Harrower (2001) put forward a definition of contextualisation:

> 'Contextualisation is various processes by which a local church integrates the Gospel message (the 'text') with its local culture (the 'context'). The text and context must be blended into that one, God-intended reality called Christian Living'. (Luzbetak 1988, p.69).

Harrower (2001) also concerns himself with culture as relevant in the context of context:

> 'Culture is a dynamic system of socially acquired and socially shared ideas, according to which an intersecting group of human beings is to adapt itself to its physical, societal and ideational environment'. (Luzbetak 1988, p.74).

Overall the theological concern is about how Christian mission deals with changing contexts such as different historical times, prevailing circumstances, and cultures.

2.7.2.1 The theological significance of context

Harrower (2001) cites two examples to draw out the significance of context in relation to missionary work. The first instance is from the perspective of a Nigerian who experienced missionary work coming into his country:

Reflecting on his experience of the missionary work 'The Nigerian' observed (Kraft 1979):

> ‘When missionaries first came to my country, they spoke of the God who created the world as if he were a different God from the one we already knew about. We listened and compared what we heard and read in the Bible about this God and discovered that he is the very same God we had always known about. We received many new *insights* from the missionaries and especially we heard that we could come to know God personally through Jesus Christ. But everyone except the missionaries realised that your God is the same as our God. In other words, our God had brought the missionaries to add to our understanding and commitment. The missionaries had not brought a new God with them. And this is what I would like these young missionaries to realise before they go so that they don’t waste so much effort trying to change our ways but devote them to building something worthwhile on the foundations that are already there.’ (Harrower 2001, p.9).

The Nigerian seems to be reflecting on missionaries trying to impose a ‘different god’ on them. His interpretation of the value proposition offered by missionaries to the incumbent Nigerian population seems to be about ‘adding to our understanding and commitment’ and ‘bringing new insights’. This is very much akin to sales practitioner literature which suggests that providing insights to customers, not imposing products on them, through an improved understanding of the customer is more likely to lead to commitment to buy (Adamson & Dixon 2013; Schulz & Doerr 2014).

The second example is a supply-side view of the approach to missionary work in Africa. This is seen to be:

> ‘About explicating the meaning of the gospel relevantly to touch them not simply in their cultural or social context but in his existential need, perplexity and moral guilt. To proclaim *relevantly* therefore is not about aping those you are trying to reach through missionary work, far from it. Paul actually contradicted the Greeks and Jews and showed them God was completely different to what they had expected. But he did this in terms of *their* suppositions and notions that he searched them out. He met their questions on their level. That makes all the difference. He did not ape what they were saying just to make the Gospel palatable’ (Harrower 2001, p.9).

Here parallels can be drawn, once again, with developing sales literature. The ‘challenger sale’ research suggests that more successful sales people challenge the status quo of the customer by providing insights from similar situations experienced with other customers (Adamson & Dixon 2013). In order to be able to do that the missionary role of the sales person is to understand the prevailing culture or context of the customer and translate the value proposition of his own organisation in the light of ‘suppositions and notions’ coming from the customer context.

2.7.2.2 Theoretical models and metaphors of context

Contextual analysis has long since been practiced by sociologists such as Weber and Durkheim (Boudon 2014). They illustrate how to solve the micro-macro link, between an individual context and a meta sociological concern. The solution to this question is dependent on the nature of the macroscopic facts to be explained. The question of the micro-macro-level is present in sociology, and is highly relevant in my thesis; Weber (1968) posits a view that while questions can be contextual, answers should aim to be a-contextual. The ‘macroscopic puzzles’ (Boudon 2014) my thesis seeks to provide an explanation for is how sales and marketing work together to produce value propositions, while trying to make a link between various stages the value proposition is being played out on, the micro-macro link.

In defining context as they do it is possible to see how hundreds of actors could be a specific context, two actors and their links might be another (Chandler & Vargo 2011). With this in mind Chandler and Vargo propose a multi-level concept of context based on a service-dominant logic (SDL) perspective of markets where resources are applied to benefit other actors, beyond merely economic and social exchanges. In the *micro-context* the process for exchange of value is service for service between two actors, seen as dyads. In the *meso-context* exchange is framed among dyads as triads where an indirect service-for-service exchange between actors’ A and C who are only served directly by actor B, so they are not all directly connected. The *macro-context* is characterised as exchange among triads as ecosystem where the synergies of multiple direct and indirect service-for-service exchanges are seen as important. The *meta-layer* of context is concerned with exchange among complex networks. Based on this, the important process of exchange at this level is *institutionalization*, (my italics), that is, the process by which various networks of actors become legitimised (or delegitimised) with respect to larger societal systems (DiMaggio & Powell 1983).

There seems to be a level of congruence with the sociological challenge of addressing the micro-macro link (Boudon 2014). What Chandler and Vargo appear to be saying is that value proposition production, and co-creation, can exist at any level of context. The meta-layer is of particular significance here as it seems to suggest there has to be a level of consistency of processes and value proposition production so that a consistent view of the organisation is presented at the other levels. The Chandler and Vargo context levels will be considered, and woven in, to evaluation of the empirical data that emerged from fieldwork.

2.7.2.3 Potential responses to contextualisation

Coming from the theological standpoint Hiebert (1985) cites three potential approaches to contextualisation and culture for Christian mission: There can be a *rejection* of any culture that is seen to be different to Christianity where all other cultures are regarded as evil. Alternatively an *uncritical* approach leads to an-acceptance of every aspect of contextual and cultural difference. A criticism of the uncritical approach is that not all types of religion or behaviour could be seen to be acceptable, for example, human sacrifice or cannibalism. Finally, *critical contextualisation* is an approach where what to accept and not accept and how far a context or culture should impact on theology is an open question.

Relating these three responses back to my thesis it seems organisations have a decision to make about whether they reject, or accept the need to contextualise. Do they act like high priests and force their gospel on customers or do they take a completely laissez-faire flexible approach to take account of customer context? Or do they take a more critical approach to contextualisation that allows them to balance a flexible stance with customers to a desire for brand consistency?
(Anderson et al. 2006; Hackley 2009; Vargo & Lusch 2011). Hiebert (1985, p.188) puts forward a four-stage process for critical contextualisation: The *gather* stage consists of gathering information on context and culture, the study stage involves becoming familiar with biblical teachings, the first two stages underpin the third stage in which missionaries *evaluate* different cultures and context in the light of biblical teachings. The first three stage allow theological practitioners to *create* new Christian practice align to the recipient cultures.

The four-stage theological contextualisation process is congruent to sales literature where the prevalent sales process put forward begins with contextual understanding of the customer and their immediate industry environment

(Adamson & Dixon 2013; Miller et al. 2011; Rackham 1988). The context and culture first principle is generally absent in mainstream marketing literature (Gilligan & Wilson 2009; Kotler & Keller 2013). The four-stage process postulated by Hiebert (1985, p.188) will provide a framework for analysing participant responses relating to producing value propositions in various customer contexts.

2.7.2.4 Different approaches to contextualisation

The theological literature also provides different models for contextualisation that seek to bring context, culture and theology together, which I will now turn to.

2.7.2.4.1 Translation models - formal and dynamic equivalence translation models

Formal and dynamic equivalence are two contrasting techniques used in bible translation. The two techniques achieve differing levels of literalness between the original and target languages (contexts) of bible translation.

Formal equivalence can be understood to be about word-for-word translation in a literal sense. Dynamic equivalence aims at sense-for-sense translation which aims to translate the same meaning, in the eyes of the receptor, such that response of the receptor is like that of the original recipients (Nida & Tabor 1969).

In translation models, the essential message of Christianity is supra-cultural. The context and culture of receptors plays a secondary role in the translation process (Kraft 1979). Formal Equivalence is based upon a limited understanding of translation where language is seen as merely alternative codes for the same reality. At issue in the Formal Equivalence model is that when forms are retained from culture to culture and language to language, meanings are inevitably changed (Kraft 1979). This model mistakenly equates form and meaning.

The dynamic equivalence translation model considers meaning as having priority over form. Dynamic equivalence aims to achieve the same impact with new receptors that the message was originally intended to have. Dynamic equivalence endeavours to be faithful both to the original author and message (or meaning) (Kraft 1979). Formal and dynamic equivalence are concepts that can help analysis of how the SMI works to develop value propositions in a B2B context. Are there structures at play in organisations that influence actor behaviour towards literal translation of the company offer, or is actor behaviour more akin to the sense-for-sense aspiration of dynamic equivalence?

2.7.2.4.2 The anthropological model of contextualisation

The anthropological model of contextualisation views cultures (contexts) as different and unique, arising from a more catholic view of culture (Bevans 1992). Individuals are seen to be their own best contextualiser. Here the role of the theologian is to help enable the process to allow people to contextualise theology. In the context of my thesis the anthropological model of contextualisation is a frame for analysing the depth of customer understanding sought by SMI at the micro- (customer) and meso- (industry). levels.

2.7.2.4.3 Praxis models of contextualisation

Praxis models put forward different views of how theology can be practiced (Schreiter 1985). This is about the practice of theology in the here and now. Two models provide different starting points for ‘doing theology’ in a hermeneutic cycle.

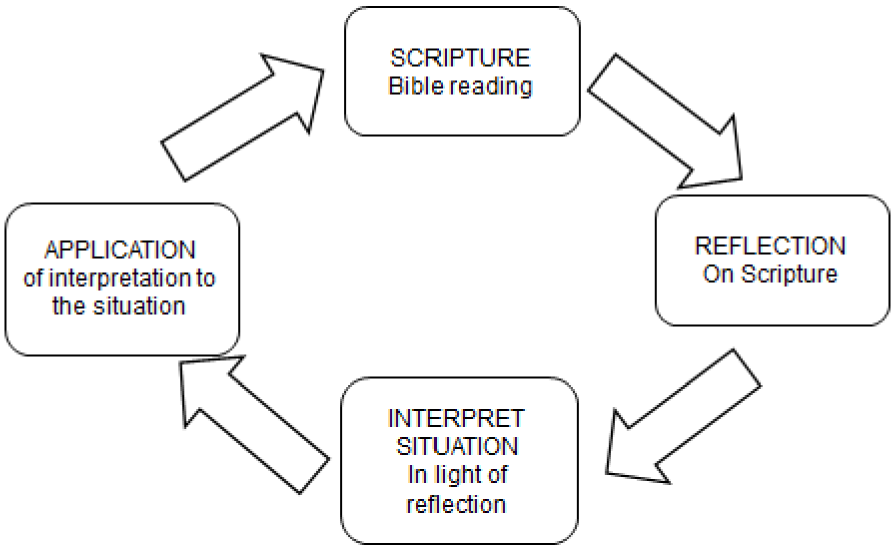

Fig. 2.10 - Evangelical model - starts with scripture = adapted from Harrower (2001, p.13).

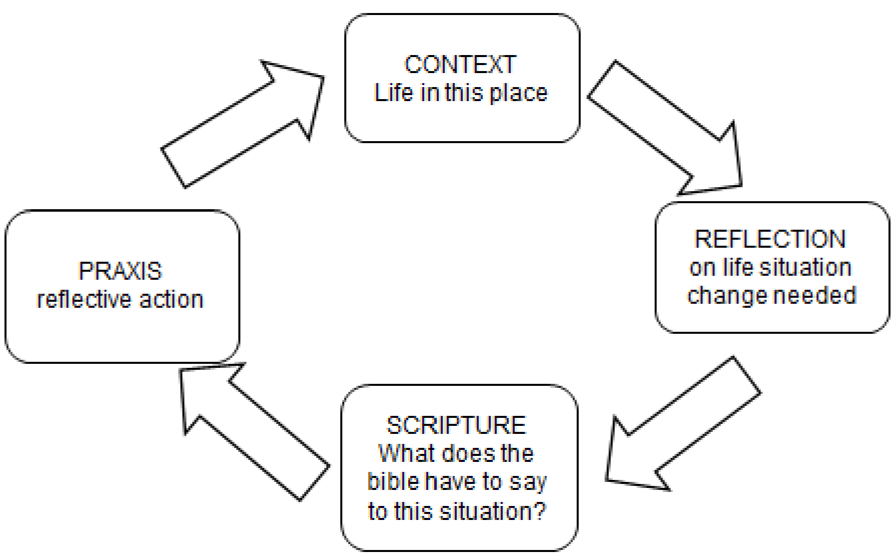

Fig. 2.11 - Liberation Praxis model- starts with context 'life in this place - adapted from Harrower (2001, p. 13).

Theological praxis models of contextualisation are highly relevant for making-sense of the macroscopic puzzle of how sales and marketing work together at the SMI to produce value propositions. The liberation theology model begins with ‘life in this place’ as the starting concern, before turning to scripture. The evangelical model begins with the bible using scripture to reflect and interpret the contextual situation. Empirical data can be made sense of in the light of these models. Does it seem that marketing respondents act akin to the evangelical model by passing down biblical ‘value propositions’, like high priests, without much involvement from sales, or the customer? Do actors see praxis as more akin to liberation theology and how does this play out in developing value propositions at the SMI? Contextualisation is a key issue to both understand and implement for *relevant* and effective practice.

2.7.2.5 Summary of contextualisation literature

The constructs of contextualisation taken from theological literature including philosophies, approaches, and praxis models will be taken forward into the analysis phase of my thesis to enrich and sensitise analysis of respondent data to theological notions of contextualisation. Next I will consider literature germane to thought worlds in order to draw out key concepts that can help make sense of issues arising from personal respondent data and to sensitise to the analysis to extant thought world literature

2.7.3 Thought worlds

At the coding phase of analysis, a below the surface pattern that seemed to be emerging from respondent data related to cognitive, or thought world differences. At this point I began to access the outwith literature to help me make sense of the thought world phenomena. Up until this point I had only been exposed to two studies in the SMI literature related to thought worlds (Frankwick et al. 1994; Homburg & Jensen 2008).

In this section, I will provide a discussion of the literature relating to thought worlds which draws from organisational behaviour and culture, psychology, and anthropology. Studies into other departmental relations in organisations are also taken into account. Ideas and concepts coming from extant thought world literature will then be used in the findings chapter 6 to sensitise and inform the discussion of empirical data emerging from fieldwork. In chapter 6 the thought world literature will be used in an abductive sense in order to provide a recontextualisation of mainstream marketing management descriptions of thought worlds consistent with a CR approach (Danermark et al. 2002; Easton 2010; Fletcher 2016; Sayer 2010).

2.7.3.1 Thought world differences in the context of organisational culture and behaviour

Cognitive thought world differences are an issue of concern in broader organisational behaviour and culture literature (Martin 1992; Schein 2010). Schein (2010) provides a useful categorisation of how culture can be viewed. Sitting underneath the organisational macro-culture level are 'subcultures' that relate to various occupational groups. Schein (2010) pointed to the growing interest in 'coherent units' within organisations that could be seen as 'micro-cultures'. Schein defines the culture of a group as:

> 'A pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration, which has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems' (Schein 2010, p.18).

Schein (2010) points out that the above definition of culture tends toward patterning and integration. A given group may not have the shared learning experiences to evolve in the way implicit in the definition. A group may split into subgroups that develop their own subcultures leading to differentiated or fragmented cultures (Martin 1992). Where Schein (2010) sees the importance of culture is as a concept that strives towards integration. Even though, evidence in many groups identified by Schein, shows that their actual history of experiences, perceptions and beliefs is getting in the way of integration. Schein (2010) differentiates between three different levels of culture:

> Level 1. Artefacts - are visible and feelable structures and processes and observed behaviour.
>
> Level 2. Espoused beliefs and values: these are ideals, goals, values, aspirations, and ideologies. Level 2 also includes rationalizations, which may or may not be congruent with behaviour and other artefacts.
>
> Level 3. Basic underlying assumptions: these are unconscious, taken - for - granted beliefs and values that determine behaviour, perception, thought, and feeling.

Previous studies have sought to understand habits of thinking, mental models, and linguistic paradigms, looking at shared cognitive frames that guide the perceptions, thought, and language used by the members of a group and is taught to new members when they join (Douglas 1986; Hofstede 2001; Senge et al. 1994; Van Maanen 1979). There is a level of congruence between the three levels outlined by Schein (2010) and the three strata of analysis inherent in critical realism (Danermark et al. 2002; Easton 2010; Fletcher 2016). Critical realists (Danermark et al. 2002; Easton 2010; Fletcher 2016) would rationalise that looking below the surface for generative or causal mechanisms to retroduce empirical differences in culture would lead to a better understanding of causation of how sales and marketing actors work at the SMI to develop value propositions.

Lawrence and Lorsch (1969) see organisations as open systems where behaviours of members are interrelated. They observe that as systems become large they differentiate into parts (Lawrence & Lorsch 1969; Martin 1992). They believe that the functioning of these separate parts has to be integrated if the entire system is to be viable. One of the primary motivations for this thesis was the need for marketing and sales to be integrated in order to drive a market orientation (Kohli & Jaworski 1990; Slater & Narver 1995). Lawrence and Lorsch (1969) provide the analogy of a human body as a number of vital organs that are integrated through the nervous system and brain. An important function is adaptation to what goes on in the outside world. In my thesis, I set out with the intent to understand how the SMI collects, analyses and makes sense of market and customer information. Based on customer and market information how are value propositions adapted to allow the organisation to thrive? The SMI can be seen to be analogous with the brain where market intelligence needs to be stored, interpreted and transmitted to the rest of the organisation to help it become an agile 'body' reacting to the outside stimulus of the market place. If the SMI is not aligned then the organisational brain will not function effectively to get the body that represents the whole organisation to move in line with customer and market needs.

As organisations deal with the outside world they become organisational units that have more specialist tasks that deal with narrower aspects of the outside world. Individual units do not have the cognitive capacity to take on all aspects of the outside-world. With this fragmentation members of different units become expert in particular tasks. Both because of prior education and experience and the nature of their tasks they develop specialised working styles and mental processes.

Lawrence and Lorsch (1969) identify five specific dimensions of differences in ways of thinking and working: Goal orientation, time orientation, interpersonal, formality of structure, and finally, differences in cognitive and emotional orientation among managers in different functional departments. These five dimensions can be a useful framework to understand holistically how the SMI works to produce value propositions. It is noteworthy that organisational behaviour and culture theory of the vintage and standing associated with Schein and Lawrence's work recognises that cognitive aspects has an inherent part to play in considering organisational effectiveness. In contrast, the mainstream positivistic marketing management literature pays little attention to cognitive and thought world differences (Gilligan & Wilson 2009; Kotler & Keller 2015). In extant SMI literature the thought world discussion is not well developed with only two studies that reference cognitive thought world differences (Frankwick 1992; Homburg & Jensen 2007).

2.7.3.2 Bounded rationality and thought worlds

Simon (1986) contrasts the fact that rationality in economics is seen as being substantive rationality, based on choices made, while in psychology rationality is seen as procedural, and based on the best information available at the time. Economic rationality is independent of context and seen to universal in its application. Marketing as a discipline is grounded in the rationality of economics with subsequent imported influence from disciplines like psychology. Some authors accuse marketing as a discipline of 'academic eclecticism' or of being a subject where ideas have been imported whilst in-context theory is poorly developed (Burton 2005). The view of rationality held by psychologists accepts that both knowledge and the computational power of the decision maker are limited, referred to as *bounded rationality*. The limitations create a 'frame' for decision making to take place in.

> ‘If we accept the proposition that both the knowledge and computational power of the decision maker are severely limited, then we must distinguish between the real world and the actor’s perception of it and the reasoning about it’ (Simon 1986, p.211).

In economics a rational decision is deemed to be the optimum or best decision based on utility. Cognitive psychology takes the view that it is what is procedurally reasonable in the light of knowledge and computational power that puts a frame around decision making. In the economic substantive theory of rationality there is no place for focus of attention. In procedural theory it may be important to know what aspects of reality will be heeded and which ignored, based on the decision making frame. This *'bounded rationality'* in psychology provides a body of theory about processes people use to make 'boundedly' rational decisions. This theory suggests that processes are sensitive to the complexity of decision making contexts and to learning processes. Bounded rationality provides a useful lens to view thought worlds through which consideration can be given to how quality of decision making at the SMI is bounded by the thought worlds of the actors involved in value proposition production.

2.7.3.3 Thought worlds and the anthropology of North American Indians

My search for clarity of definition and discussion of the thought world notion took me on an unexpected turn to literature concerning the anthropology of North American Indians, which I will now provide an overview of.

Niranjan et al. (2014) say that departmental thought worlds (DTW) are a ‘well-established problem’ facing organisations (Dearborn & Simon 1958; Shapiro 1977). I would acknowledge that cognitive differences are an integral part of long standing concern in organisational behaviour and culture literature (Lawrence & Lorsch 1969; Schein 2010). However, direct references to 'thought worlds' are sparse in marketing management literature. I had to turn to American history and the anthropology of the North American Indian to find a definition of thought worlds.

Richter (2006) credits Calvin Martin (Graymont & Martin 1979) as the originator of the term 'thought worlds' whilst Carpenter (2004) is credited with providing a definition:

> 'Thought world …encompasses a culture's logic, ontology, epistemology, and values….it can be defined as a culturally adapted mode of thought' (Carpenter 2004, p.47).

Carpenter (2004), in his book 'The renewed, the destroyed, and the remade: The three thought worlds of the Huron and the Iroquois, 1609–1650' compared the fate of the Five Nations Iroquois tribe with that of the Hurons. He concluded that their comparative ability to thrive or survive could be traced to ways their culturally determined modes of thinking adapted to their environment, which was dramatically changed with the influx of European settlers. The Five Nations Iroquois and Hurons began with similar thought worlds based around *'renewal'.* Both tribes had rituals, like moving camps, based around the thought world principle of renewing their world. This world view had technological weaknesses as it prevented them from envisioning anything completely new rather than renewing what they already knew. They could sit in a cold drizzle and imagine being warm and dry but could not imagine making waterproof garments. Carpenter (2004) contended that the Huron thought world was destroyed by their inability to adapt to everything that came with European settlers. Demand for trade goods saw a change in hunters' relationships with beaver, who ceased to be viewed as beings that demanded respect and renewal.

Martin (1978) concerned himself with the man-animal relationship of North East American Algonkians and Chipewyan. In aboriginal times, there was a respect between man-animal, an unwritten 'contract' where animals provided food in return for respect in form of rituals, beliefs, taboos. The thought worlds of the Algonkians and Chipewyan were destroyed by fur trade, depopulation, and Christianity, all of which came with European settlers. When animals brought in smallpox this led to the breaking of the man-animal thought world contract and led to the overkill of animals (Martin 1978). By contrast the Five nations Iroquois survived as they allowed themselves to be 'remade' to craft a novel form of renewal by introducing other peoples into their confederacy, which they metaphorically described as 'The white roots of peace' (Carpenter 2004, p.118).

I find the 'The renewed, the destroyed, and the remade' notion a useful metaphor to analyse the SMI thought worlds that emerged from the data. Over the last few years the rapid pace of change has meant that customers are now 60% of the way through the sales process before they approach a sales person, much of the information search is now done online (Pisello 2015). This means that the 'value propositions' customers are exposed to for the front 60% of the sales process are accessed via 'marketing channels' such as the company website or 'content' sent to them. Commercial research suggests that as 94% of companies have stopped communicating with selling organisations because they are being sent 'irrelevant content' (Pisello 2015). In the light of this changing environment, of the magnitude of that experienced by the North American Indians with the advent of European settlement, are the existing SMI thought worlds reflecting a pattern of renewal? Could a continuation of the extant thought worlds lead to the destruction of a sales or marketing tribe? Do the sales or marketing tribes need to consider how they remake themselves, or does their extant thought world depict a propensity to remake?

2.7.3.4 Thought worlds - learning from other disciplinary studies

Given the paucity of thought world coverage in SMI literature I decided to look towards other disciplines for instances of thought world research. Studies that specifically cite thought worlds proved to be thin on the ground. The field of Operations and Supply Chain Management (OSM) provided an isolated example of thought world research in a discipline outwith the SMI.

Niranjan et al. (2014) felt that mainstream OSM literature provided lots of normative solutions to improve performance based on an assumption that everyone had the same understanding of some of the basic tenets of the OSM discipline, with a similar appreciation of cost elements in the supply chain and their outcomes (Cachon & Lariviere 2005). The perceived propensity for normative solutions in OSM literature has strong parallels with mainstream marketing texts which are full of normative solutions deemed to be fit for any context (Gilligan & Wilson 2009; Kotler & Keller 2015).

Niranjan et al. (2014) found that research participants with different functional backgrounds interpreted costs in different ways. For example, quality was perceived by production as defect-free manufacturing while marketing defined quality as fulfilling individual customers' specifications. Those who were closer to the customer perceived inventory holding costs to be less relevant to total costs, those closer to the suppliers perceived costs to be much higher. In part, because they had a more accurate understanding of inventory holding costs. All managers rated different cost drivers the most important. Ceteris-Paribus, this led to the conclusion that organisational roles influence actor perception of reality systematically (Niranjan et al. 2014).

Traditional OSM literature pays scant attention to how managers perceive problems in their supply chain or cost parameters. Like mainstream marketing literature the prevailing OSM literature assumes that all managers view the major tenets of the OSM practice discipline in the same way, this does not seem to be a tenable position. What emerged from the OSM research is congruent with the notion of bounded rationality (Simon 1986). Managers have a limited view about their world and the real world is simply too complex for managers to assimilate in its entirety (Simon 1986; Sterman 2000).

Niranjan et al. (2014) recommends that OSM scholars should factor in managerial perceptions of problem parameters instead of relying on assumed values. Value propositions can be seen to be one of the main 'problem parameters' of the SMI, or the 'central organising principle' (Kowalkowski et al. 2016; Vargo & Lusch 2008; Webster 2002). Different SMI actors having variant perceptions of what value is and what propositions are is a problem my colleagues and I have experienced multiple times in working in and with large organisations.

2.7.3.5 Summary of thought world and outwith literature

The review of thought world literature concludes a review of literature outwith marketing management that is deemed relevant to enhance understanding of the core issue at hand; how the SMI works to produce value propositions.

Concepts will be taken forward into the analysis phase of my thesis from the thought world literature to enrich and sensitise analysis of respondent data to thought world differences. During the analysis phase I will use the thought world literature in an abductive sense in order to provide a recontextualisation of conventional marketing management descriptions of cognitive thought worlds, consistent with CR (Danermark et al. 2002; Easton 2010; Fletcher 2016; Sayer 2010). Dimensions of differences in ways of thinking (Lawrence & Lorsch 1969); bounded rationality Simon (1986), and ideas about thought worlds emanating from the anthropology of North American Indians (Carpenter 2004; Graymont & Martin 1979) can provide useful lenses for abduction through which to analyse respondent data relative to thought worlds.

2.8 Literature review chapter summary

Section A provided a backdrop and the broader context through a review of marketing management literature. Part of my motivation for understanding how the SMI works to develop value propositions in a B2B context was to provide an explanation of how a market orientation can be mobilised. Viewing actors in the SMI as valuable resources for mobilising a market orientation, or a dynamic capability, necessitated an introduction to concepts in marketing management literature relating to RBV and dynamic capability.

Section B was intended to provide an in-depth review of the core literature related to the matter at hand in my thesis, how the SMI works to produce value propositions in a B2B context. Figure 2.6 pointed to converging gaps in the SMI and VP literature that necessitates an actor-level focus to understand and explain the phenomena of value proposition production as the SMI. The conceptual framework in figure 2.7 was developed from the core literature review and will be taken forward into the analysis phase to be built on after evaluation of respondent data.

Finally concepts from the outwith literature are taken forward into the analysis phase of my thesis to enrich data evaluation and sensitise analysis to relevant extant outwith literature in identity, contextualisation, and thought worlds. It can be seen therefore that the literature that has a direct and indirect bearing on my thesis ranging from the conventional marketing management literature relating to marketing orientation to the unconventional literature of North American Indian anthropology. As such these literatures represent a priori theoretical ideas shaping and influencing the approach I have taken. The extensive literature reviewed constitutes an acknowledgement of the theory laden approach I am aware of in my methodological approach that I will turn to next. In Chapter 3 I will outline the philosophical underpinnings of, and methodology for, the fieldwork through which the findings of my thesis are drawn.

Chapter 3 - Methodology

3.1 Introduction

The purpose of this chapter is to outline the choices that I made in relation to research philosophy, methodology and research methods in seeking to address the primary research questions. Ontological and epistemological assumptions are discussed after paying due attention to my research aims and objectives. I provide a personal biography to give context to, and in the light of, philosophical and methodological choices. Attention will be paid to my choice of critical realism as the research philosophy deployed in my thesis along with an engaged scholarship approach. The influence of social theory on the overall research approach will be considered before outlining research sample decisions, the research techniques that I deployed, and data collection and analysis. The chapter concludes with an explanation of how the key themes, that inform the findings chapters, were arrived at.

3.2 Research objectives and questions

The value proposition literature review provided an indication that scant attention is being paid to the respective roles of marketing and sales people in the initiation, development and creation of value propositions. The influence of Service-Dominant logic (SDL) (Vargo & Lusch 2004) has introduced a level of complexity to value proposition production that heightens when moving from a Goods-Dominant Logic (GDL) perspective to an SDL world. The move from a GDL to an SDL world involves a change in organisational mindset, from both supplier and customer, from an exchange-based view of value (Anderson et al. 2006) to an 'in-use' perspective (Vargo & Lusch 2004).

In both GDL and SDL contexts the role of sales and marketing people as individual actors appears to be absent of consideration in the extant value proposition literature. Given that SDL has moved the conceptualisation of value propositions from artefacts that are objectively given to a more idiosyncratic actor specific footing the absence of consideration of SMI actors in value proposition production is notable (Edvardsson, Tronvoli & Gruber 2011; Lobler 2011). Value proposition literature concerned with the boundary spanning nature of sales people does consider their role as actors who can make value proposals to other actors (Hilton et al. 2011; Vargo & Lusch 2011). However, how sales and marketing people interact at the SMI to draft initial value propositions, deal with, and respond to negotiated changes is absent of consideration. There is also a lack of attention given to how sales and marketing actors interact in the initial creation of value propositions before they are taken out to the customer.

With regard to the SMI literature there is an acknowledgement that coverage of the SMI is sparse (Dewsnap & Jobber 2002; Guenzi & Troilo 2007; Hughes et al. 2012; Le-Meunier-Fitzhugh & Piercy 2009). Or that little attention has been devoted to the interface between marketing and sales units (Homburg & Jensen 2007; Snyder et al. 2016). Much of the SMI literature portrays a world of conflict and tension at the SMI (Kotler et al. 2006; Malshe et al. 2016). Recommendations and responses to these tensions have tended to offer normative solutions, such as goal and role alignment, in what appears to be a response to the 'on the surface' normative issues. Discussion of non-normative (affective) issues is emergent and appears in single research studies, for example, thought worlds (Homburg & Jensen 2007). In all cases marketing and sales organisations are viewed as holistic, monolithic entities which, by definition, can interact as holistic entities at the interface known as the SMI (Homburg & Jensen 2007; Snyder et al. 2016). The extant SMI literature tends to consider SMI interactions and relations as an end in itself, or as loosely connected to an organisational quest for competitive advantage (Avliontis & Lionakis 2015; Rouzies et al. 2005). The creation and production of the primary output of the SMI, value propositions, is absent of consideration.

The absence of consideration of sales and marketing actors in value proposition production in the value proposition literature, coupled with scant coverage of value propositions as a key output in the SMI literature presents an opportunity to provide an improved understanding of how sales and marketing actors interact to produce value propositions. In the light of the literature review findings I have set the aim and objectives of my thesis are out below:

Aim

To provide B2B marketing and sales practitioners with critical insight and recommendations that reframes their understanding and can facilitate improved SMI interworking in relation to producing value propositions informed by market data.

Objective 1

To provide an understanding and explanation of the relationship between sales and marketing actors at the SMI in a B2B context.

Much of the extant SMI literature acknowledges considerable difficulties and dysfunction at the SMI (Dewsnap & Jobber 2000; Kotler et al. 2006; Malshe et al. 2016). The main focus of extant SMI literature has been at an organisational, not actor-level, where sales and marketing have been characterised as monolithic, holistic organisations that interact at the SMI. In my own experience in B2B organisations I have witnessed what seem to be good relations at an empirical level, and more dysfunctional sales and marketing relationships, which varied actor by actor. I want to get an up to date understanding and provide an explanation of the relationships between sales and marketing actors in a B2B context. To this extent the focus will be at the actor and tribe level (Hakansson & Snehota 1990; Maffesoli 2016), in contrast to extant SMI literature.

Objective 2

To understand more deeply, unpack, and explain the phenomena of SMI interworking for value proposition production informed by market data.

This objective demonstrates that one of the primary focuses of my thesis is to look at SMI relationships and interactions specifically in relation to value proposition production. Throughout my thesis I have used the term value proposition production to encompass the creation, maintenance, and development of value propositions. Highly effective value propositions are seen to include a reflected understanding of customer benefits and the impact a proposed solution may have on an organisation (Barnes et al. 2009; Gronroos & Ravald 2011; Vargo & Lusch 2008). In my thesis, I set out to explore to what extent SMI interworking encompasses ‘market data’, where market data can be taken to mean information coming back into the organisation from sales actor interactions with customers. Understanding the enabling factors and barriers to effective SMI interworking in value proposition development is at the heart of this objective.

Objective 3

To understand and explain the underlying *generative mechanisms* that have the tendency for causal power on SMI interworking in the production of value propositions.

In line with the adoption of a CR philosophy this objective is about understanding what the generative mechanisms (Danermark et al. 2002; Easton 2010; Sayer 2000) are that may have tendency for causal power in SMI interworking in value proposition production. A generative mechanism is a term used in critical realism which can be defined as ‘An account of the make-up, behaviour, and interrelationships of those processes which are responsible for the regularity’ (Pawson & Tilley 1997, p.68). Generative mechanisms seek to provide causal explanations where behaviours, interrelationships and processes combine to cause events to occur (Keat & Urry 1975; Layder 1990; Tsoukas 1989).

Seeking to meet this objective will help work towards the overall thesis aim of providing practitioners with insight to facilitate improvement in SMI interworking, while acknowledging that practitioners will have to recognise and mobilise the generative mechanisms.

Commercial research shows B2B organisations to be performing poorly in terms of articulating customer value (Forrester 2011; Pisello 2015). In the light of commercial research findings, I saw providing pragmatic suggestions for marketing and sales practitioners for optimising SMI interworking for effective enhancement of value propositions as imperative. Especially given that most of the SMI studies to date have tended to make surface level normative recommendations for improving SMI interworking (Kotler et al. 2006; Snyder et al. 2016; Strahle et al.1996).

Table 3.1 depicts the alignment of my thesis aspiration and aim with the key objectives which are drawn from my Primary Research Question (PRQ): How does the SMI work to produce value propositions? The three objectives can be seen as akin to critical realist three strata of analysis which I will discuss in section 3.3 (Danermark et al. 2002; Easton 2010; Sayer 2010). Research questions that underpin Objective 1 seek an empirical understanding of the relationship between marketing and sales actors at the SMI. Research questions aligned to Objective 2 seek to facilitate a deep understanding of how the SMI works to produce value propositions. In line with a CR philosophy research questions in support of Objective 3 seek to identify generative or causal mechanisms that have tendencies to influence empirical outcomes in value proposition production at the SMI (Delbridge & Edwards 2013; Easton 2010; Fletcher 2016).

<table>
<tr><th colspan="3">Primary Research Question: How does the SMI work to produce value propositions?</th></tr>
<tr><th>Aspiration and Aim</th><th>Objectives</th><th>Research Questions</th></tr>
<tr><td rowspan="3">Aspiration

To provide a recommendation for an educational approach to DBA study and thesis production that takes account of, and optimises, previous practitioner experience and which is both rigorous and relevant to practice

Aim

To provide B2B marketing and sales practitioners with critical insight and recommendations that reframes their understanding and can facilitate improved SMI interworking in relation to producing value propositions informed by market data</td>
<td>Objective 1

To provide an understanding and explanation of the relationship between sales and marketing actors at the SMI

Empirical strata</td>
<td>1.1 What is the nature of communications and interactions between marketing and sales?

1.2 What is the main source of dialogue between marketing and sales?

1.3 How well aligned are the roles and goals of sales and marketing?</td></tr>
<tr><td>Objective 2

To understand more deeply, unpack, and explain the phenomena of SMI interworking for value proposition production informed by market data

Real strata</td>
<td>2.1 How does the SMI work together to produce value propositions?

2.2 How well aligned is the SMI to what the customer wants?

2.3 To what extent is the customer involved with the SMI in the development and production of value propositions?</td></tr>
<tr><td>Objective 3

To understand and explain the underlying generative mechanisms that have the tendency for causal power on SMI interworking in the production of value propositions

Real strata</td>
<td>3.1 What are the barriers and enablers to effective SMI working for effective value proposition production?

3.2 What expectations and preconceptions do sales and marketing actors have of each other?

3.3 How do sales and marketing professionals make sense of value proposition creation processes, markets, customers and each other?</td></tr>
</table>

Table 3.1: Alignment of research aspiration, aim, objectives and research questions (Source: Author).

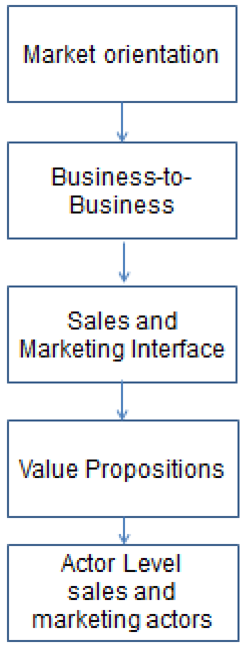

Fig. 3.1 Summary of steps taken to research focus (Source: Author).

The series of decisions taken to arrive at the eventual focus of my research is depicted in Figure 3.1. Value propositions are seen as a key organisational focus and central to operationalisation of a marketing orientation (Kowalkowski et al. 2016; Vargo & Lusch 2008; Webster 2002). The SMI can be seen as the interface between customers and the rest of the organisation (Guenzi & Troilo 2007; Hughes et al. 2012). Research into the phenomena of value proposition production at the SMI necessarily places my thesis in a Business-to-Business (B2B) context. The study takes place at an actor and tribe level (Hakansonn & Snehota 1990: Mafessoli 2016), in contrast to the extant SMI literature which views sales and marketing as holistic, monolithic entities (Guenzi & Troilo 2007; Hughes et al. 2012; Snyder et al. 2016).

3.3 Philosophical Stance - ontological and epistemological considerations

3.3.1 Research philosophy – critical realism

Before outlining the proposed research methodology the researcher needs to develop a clear understanding of their own philosophical position. Trigg (1985) postulated that empirical social science must start from a properly articulated philosophical base for it to be successful. Bryman (2016) stated that research strategies are linked with the ways in which social scientists envision the connection between different viewpoints about the nature of social reality and how it should be examined. Typically, this means declaring a philosophical position which takes into account ontology, which is the study of being existence or the way the world is, and epistemology, which is the study of how knowledge is possible (Fleetwood 2014).

The philosophical stance I have taken in my thesis is based on a critical realist (CR) perspective (Bhaskar 1978, 2008; Easton 2010; Fletcher 2016). Sayer (2010) offers three basic assumptions of CR ontology: The world exists independently of our knowledge of it and our knowledge of the world is fallible and theory laden, there is necessity in the world where we have particular powers or ways of acting and particular susceptibilities, and the world is differentiated and stratified consisting of events, objects, structures, which have powers and liabilities capable of generating events. These may or may not be present even where, as in the social world, they do not generate regular patterns of events. From a meta-theoretical standpoint CR takes on a realist ontology that recognises that there is a world that exists independent of the researcher. From an epistemological perspective CR sits between positivism and relativism as a bridging mechanism that draws on objectivist and subjectivist views of the world.

By approaching my thesis from a critical realist perspective I am able to steer a line between positivism and constructivism (Denzin & Lincoln 2003). In particular I concur with the critical realist claim that ontology is not reducible to epistemology and that human knowledge is only a small part of a bigger reality. Positivism is criticised by Bhaskar (2008), for promoting the epistemic fallacy that reality is only what can be empirically known, through scientific research. Critical realists describe positivism as naïve empiricism (Danermark et al. 2002; Easton 2010; Fletcher 2016) and reject the empiricist claim that all scientists can do is observe the relationship between cause and effect at the level of an event. The subject matter of social sciences involves thinking, sensing human beings who cannot be observed in the same way as the physical sciences that study animals and objects (Gill & Johnson 2010). With this in mind CR takes the view that causality cannot be reduced to a constant conjunctive relationship between subject and object. CR applies a similar critique to constructivism which views reality as entirely constructed through human knowledge or discourse. CR sees knowledge as theory laden (Sayer 2010), social research is seen as researcher interpretation of actor interpretations of the world. Critical realists can develop theories that can be 'more or less truth like' (Danermark et al. 2002, p.10), from this perspective some interpretations are seen to be better than others (Delbridge & Edwards 2013; Easton 2010; Sayer 2010). Theory is improved by providing better explanations of the 'causal mechanisms' that drive social events and activities, selected and formed using rational judgment of these events (Archer 2003). The ability of a CR approach to help develop causal analysis and engage in explanation was a prime reason for choosing CR as a philosophical perspective. Positivism was rejected for its postulation of the identification of a coincidence of an independent and dependent variable as no attention is paid to the thinking, sensing nature of the actor in the SMI (Gill & Johnson 2010).

Another compelling reason for choosing CR is that, from an ontological standpoint CR sees reality as stratified, analogous to an iceberg (Danermark et al. 2002; Easton 2010; Fletcher 2016). On the surface or empirical level are objects, structures or events that can be measured empirically and are mediated through human experience and interpretation. At the empirical level social ideas, decisions and actions happen that can be seen as causal. At the empirical level observations are made and experienced by observers, which is the primary focus of positivistic studies (Delbridge & Edwards 2013; Easton 2010; Sayer 2010). The middle layer, known as the actual level concerns ‘detectable and undetectable events’ (Miller 2015, p.177) as they are experienced by an agent. In the actual layer things may not be observed or may be understood quite differently by observers (Easton 2010). Here CR sees causal mechanisms as transfactual, as causal forces that can occur independent of their detection. The role of the investigator is to reconstruct or retroduce these causal mechanisms. At the first level, or real domain, are the 'entities whose generative mechanisms underlie actual and potential phenomena' (Miller 2015, p.177). These mechanisms are seen to be independent of observers and inherent properties in a structure or object that act as causal forces to produce events that appear at the empirical level (Fletcher 2016). The CR research process involves retroduction which is:

> 'A mode of inference in which events are explained by postulating (and identifying) mechanisms which are capable of producing them' (Sayer 1992, p.107).

This stratified perspective of reality supports a view that there is more going on under the surface than is empirically visible. The nature of generative mechanisms supports my research objective to identify factors that have a tendency to shape the production of value propositions in the SMI rather than a claim to absolutely 'law-like' causality between objects and outcomes. At the empirical level CR recognises that there can be common, frequently reproduced behaviours and patterns that are seen in human activity, and can emerge in the setting of a realist review as theme-type things that are seen across different studies. They are the ‘broad lessons’ and ‘usually happens like this’ findings. Unlike positivism CR does not see these events as constantly conjunctive cause and effect. CR describes these results in terms of an association between as empirical events, known as *demi-regularities*. Over time and space some certain factors may come to dominate over other. These factors are 'rough and ready generalities or partial generalities, holding to such a degree that prima facie an explanation is called for' (Lawson 1997, p. 204). For example, poverty does not appear at random and is related to class. The research task from a critical realist perspective is to understand the generative mechanisms that underlie the demi-regularities. From my perspective, the development of SMI literature is fairly recent and nascent studies to date do not appear to have identified any demi-regularities beyond normative observations such as goal and role differences (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). Deploying a CR philosophy in my thesis will help identify demi-regularities at the empirical level while seeking to understand and explain the underlying generative mechanisms that have the tendency for causal power on SMI interworking in the production of value propositions.

CR sees organisations as open systems which deem it impossible to make predictions like in natural science. Seeking the discovery of causal mechanisms helps develop a well-informed discussion of potential consequences that can be generalisable to different settings (Danermark et al. 2002; Easton 2010; Sayer 2010). Interpretivists argue that all perceptions arise within the context of a prior set of beliefs or theoretical commitments (Finlayson et al. 2004). Knowledge is generated as we interpret new experiences or new theories in the context of what we believe and what we have learned (Hay 2011). In my thesis I have taken a critical realist stance which involves the use of my own creativity and imagination to re-contextualise research data provided by SMI actors. CR can be seen as a vehicle to provide causal-explanatory accounts of events consistent with the objectives of my thesis (Fleetwood 2014).

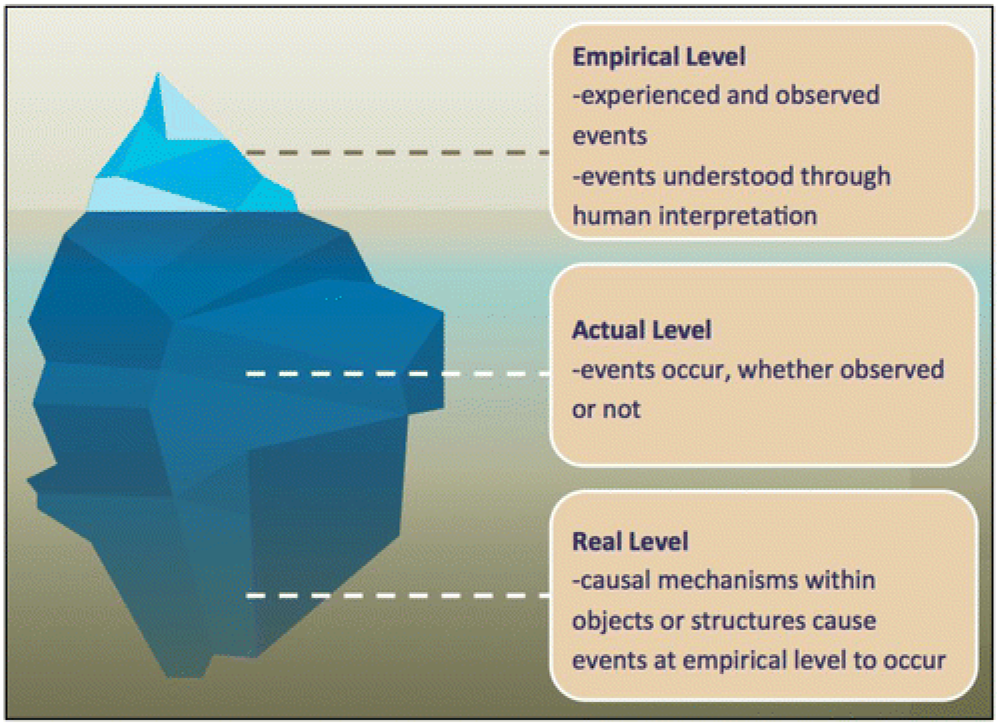

Fig. 3.2 Stratified Level of reality – adapted from Fletcher 2016.

How CR deals with *structure* and *agency* makes it compelling for explaining how sales and marketing work to develop value propositions. Structure is: '…a set of internally related objects or practices' (Sayer 1992, p.52) and can be seen as the recurrent patterned arrangements which influence or limit the choices and opportunities available (Barker 2005), social structures consist of rules and resources. Agency is the capacity of individuals to act independently and to make their own free choices (Barker 2005). In the development of social scientific theory the way the relationship between structure and agency is treated is seen as crucial, and has been covered at great length elsewhere (Archer 1995; Bhaskar 1989; Collier 1994; Lawson 1997). Of relevance to my thesis is in deploying a CR philosophy I have taken the view that the two cannot be treated separately, and cannot operate independently of each other (Archer 1995). Consistent with a CR standpoint that social structures both enable and constrain actions leads to a transformation model of human activity developed by Bhaskar (1998):

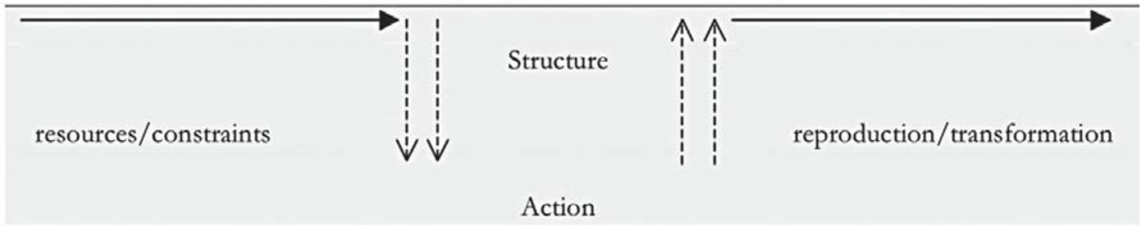

Fig.3.3 - The transformational model of the connection between social structure and agency. Source: Based on Bhaskar (1998, p. 217).

In line with Bhaskar (1998) I concern myself on the interplay between structure and agency in my thesis. In trying to understand how sales and marketing actors work to produce value propositions I have a concern for whether actor actions are enabled or constrained by SMI relationships, value proposition production processes, social structures and resources. Therefore, in the context of my thesis I consider whether the interplay between actors and the emergence, reproduction, or transformation of structure enhances value propositions over time (Archer 1995). In this respect, deployment of a CR Philosophy and the transformative view of social structure and agency are supportive of the aim and objectives of my thesis. Consideration is given to whether VP production can change its form and adapt in response to structure-agency interplay and in the light of dialogue between marketing, sales, and customers. In CR terms, the ability to adapt over time is *morphogenesis*. Conversely, can VP production maintain consistency in the face of challenges and structure-agency interplay, which is the tendency towards *morphostasis* (Chubb 1990; Simon, Stierlin & Wynne 1985).

3.3.2 Engaged scholarship and the quest for rigour and relevance

In conjunction, and consistent with a critical realist philosophy, I have adopted an engaged scholarship perspective in my thesis. It is argued that using engaged scholarship in combination with CR enables rigorous research while at the same time engaging meaningfully in generating contextually rich findings. This combination needs a level of engagement with actors in the field necessary to capture rich insight consistent with performing research that is both rigorous and relevant (Hodgkinson & Rousseau 2009; Van de Ven & Johnson 2006). Some authors recognise that practitioner engagement is not just a knowledge transfer problem, nor is it that practitioner and academic enquiry represent distinct and irreconcilable worlds (Kieser & Leiner 2009).

Engaged scholarship can be seen as a reaction to an ongoing discussion relating to academia utility for the 'real world' (Boyer 1996). Boyer (1996) observes that one hundred years ago the Presidents of US Ivy league universities cited the mission of higher learning as practicality, serviceability and reality. Boyer (1996) contrasts this mission with Jacoby who observed that the influence of US academics had declined because it had come to mean holding a faculty appointment and writing in a certain style understood only by one's peers. The quest for rigour and relevance has recently taken sharper focus due to the 'impact' debate driven by research funding bodies (Cunliffe & Scaratti 2017). Traditionally 'impact' has been taken to mean translating academic theory into practice. In line with Cunliffe and Scaratti (2017) I prefer the notion of impact as social usefulness (Wilmott 2012).

Some scholars feel that the rigour-relevance gap has arisen due to the predominance of positivist epistemologies (Hodgkinson & Rousseau 2009). Critical realism has become more pervasive in management research (Bhaskar 2008; Van de Ven 2007) and makes the need for research choices unnecessary. The multi-level nature of organisations seeks causal mechanisms that are immediate with those that are more distant (Hackman 2003). The true-false dichotomy of positivism is absent from CR and seen to be preferable from a rigour-relevance perspective (Hodgkinson & Rousseau 2009).

The quest of my thesis, as outlined in the introduction, is to provide outputs that have 'social utility' (Wilmott 2012) for both practice and science. The aspiration is to provide insight that is revelatory in nature for both disciplines, in line with the framework provided by Corley and Gioia (2011) in Figure 3.4.

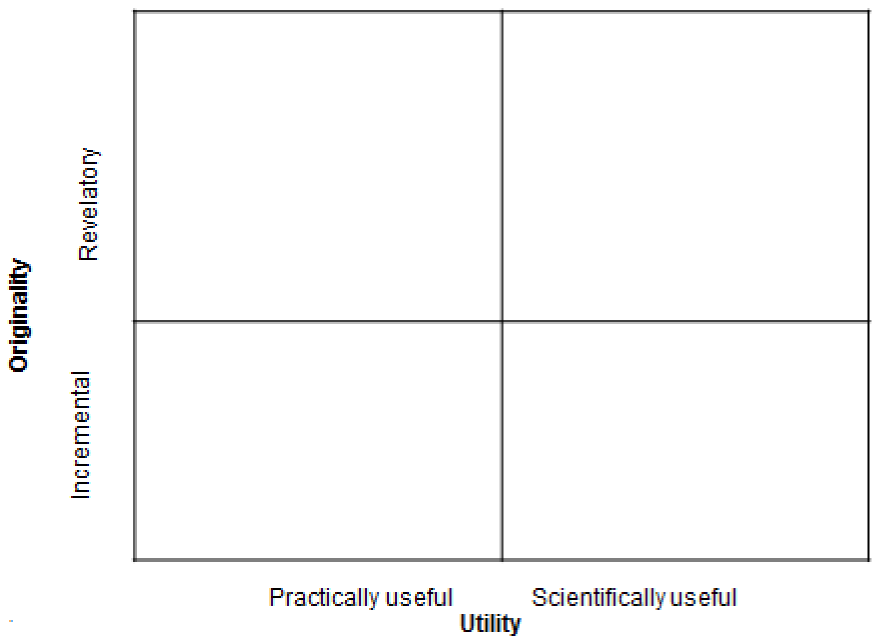

Fig. 3.4 Contributions to knowledge adapted from Corley and Gioia (2011).

In setting out to achieve this social usefulness I adopted some principles of engaged research in an attempt to embed impact and relevance in the process of generating knowledge (Cunliffe & Scaratti 2017). This type of engaged scholarhip is based on the premise that both practitioners and academics possess expertise, tacit and explicit knowledge about lived experience in context that needs to be surfaced and understood (Polanyi 1966).

Engagement with practice began with problem recognition which had its origins in observations I made from my time as a full-time marketing practitioner. Accessing research performed for, or on behalf of commercial organisations, further indicated firms were having difficulty articulating value propositions to customers (Forrester 2011; Pisello 2015). Immersing myself in this commercial research and embracing literature written for practitioners is, as outlined in my thesis introduction, further evidence of a desire to engage with practice. Publication of a commercial and academic literature review on the Sales and Marketing Interface in the Journal of Sales Transformation (JST), a practitioners journal for the Association of Professional Sales (APS), is further evidence of engaged scholarship (Kelly 2015). It also keyed into the zeitgeist of promoting science informed management practice, which is a mission of the APS (Hodgkinson & Rousseau 2009). The desire to write the JST article was an engagement test I set myself to ensure I could breach the research-practice gap which is seen by some authors to be more about language and style (Hodgkinson & Rousseau 2009; Kieser & Lerner 200). My ongoing engagement with practice and academia resulted in the publication of a book entitled 'Value-ology: Aligning sales and marketing to shape and deliver profitable customer value propositions designed to help individuals develop value propositions in organisations (Kelly, Johnston & Danheiser 2017).

During the research process I foregrounded some principles of engaged scholarship taken from dialogical sensemaking (Weick 1988) by being open to the unfolding of meanings between research participants as they raised issues and problems in shared interview conversations (Cunliffe & Scaratti 2017). Using 'conversational resources' in line with Cunliffe and Scaratti (2017, p.34) in respondent interviews involved: Recognising that meanings can be created in the moment, and required being attuned and responsive to actor interview dialogue,questioning taken for granted assumptions related to meaning, drawing more from past events that appear to be striking or arresting moments, surfacing tensions, contradictions, binaries and boundaries within dialogue by exploring subtle variations in meanings (Haraway 1988).

How these conversational resources were operationalised during respondent interviews will be discussed in more detail in Section 3.5 and while elaborating the research findings in Chapters 4 to 6. The desire to take an enaged scholarship perspective presented me with a personal dichotomy. How should I engage myself in the research and analysis process given my background as a ‘pracademic’?, a question I turn to next.

3.4 The dichotomy – how to engage myself in the research and analyis

In the introduction Section 1.4 I provided a personal biography outlining my background as a senior B2B marketing practitioner. This practice experience, continued with consultancy assignments and through exposure to practitioners on academic MBA modules. Combining practitioner experience with my more recent academic role as a University Lecturer leads me to classify myself as a ‘pracademic’. I will now draw on the relevant elements from my biography to explain how I engaged myself and dealt with the academic-practitioner dichotomy inherent in my experience and make up.

The most relevant parts of my full-time commercial marketing career in relation to what I am trying to explore in my thesis started with my time as Marketing Director for BT Major Business Division (1999-2002), an £8bn turnover division of BT responsible for BT's largest 2500 business customers. During my time as Marketing Director record revenue and sales growth was achieved in challenging economic times. Much of this was attributed to the way the marketing and sales teams worked together to create value propositions based on customer understanding, we called this a value-based approach to marketing and selling, typically defined as a process that begins with customer wants and needs and works backwards from there (Hammer 1996). Here a value proposition can be seen as a promise of value, in commercial exchange, sometime in the future (Vargo & Lusch 2008), developed and articulated in a way that provides customers with ‘Suggestions and projections of what impact on their practices customers can expect’ (Gronroos & Ravald 2011, p.14).

In short BT Major Business (BTMB) started 1999 in a position of having 1,000 products that were presented individually to customers which made it difficult for marketing and sales people to articulate value that differentiated BT in the eyes of the customers. This was a product-oriented approach where features were presented to customer's one product at a time, not customer benefits (Rackham 1988). By 2002 having adopted a more customer oriented 'value-based' approach BTMB had a few core customer value themes, informed by ‘market data’ which included sales as the people having the 'front-line' conversations (Day 2002). The success we had at BT at that time was regarded by the Chartered Institute of Marketing (CIM) to be at the leading edge of practice. It helped spurn the growth of value proposition frenzy with hundreds of jobs posted to perform 'Proposition Manager' functions, especially in Technology, Mobile and Telecoms (TMT) companies. There was a similar growth in the focus of academic work in this area (Cheverton 2010; Doyle 2002; Knox 2000). The approach I led at BT has been recognised for its enduring nature featuring as a case study set in 2012 in the journal article 'Developing superior value propositions: a strategic imperative' (Payne & Frow 2014). A schematic representation of the value proposition approach I originally devised and implemented can be found on page 218 of the article. I was surprised to find that the approach was alive and well in BT, ten years after I left.

In 2010, I returned to a full time commercial marketing role for Level 3 communications, in Denver, Colorado. At the time Level 3 was the fifth largest telecommunications company in the USA, focused purely on serving business customers. From 2010 through 2012 I was responsible for North American Marketing with a mandate for helping Level 3 move to a more customer value based approach. Here I observed something that I had also witnessed when working with other large organisations through my time as a consultant to other commercial organisations (2002-2010), that the product oriented approach was back masquerading in the clothes of value propositions. Often 'value-propositions' were generated by marketers sitting in rooms trying to articulate how their products added value to customers. They were not creating authentic value propositions as they were constructed without any customer or sales team input. At best, they were communicating product advantages (or assumed benefits) not customer benefits (Rackham 1998). At the same time researchers like Anderson, Narus and Van Rossum (2006) observed that many 'value propositions' were being created as generic 'all benefits' statements that lacked resonance and relevance to customer needs. I left Level 3 communications in August 2012 to return to my old combination of Sheffield Business School marketing lecturer and owner of a business aimed at helping organisations develop compelling value propositions.

The motivation for wanting to understand more about how sales and marketing interact to develop value propositions was based on a history of working in or with large organisations who attempted to move towards this more customer-centric value-based approach, with varying degrees of success. To arrive at the problem-statement inherent in the core thesis question, how does the SMI work to produce value propositions? I engaged my personal experience as a practitioner.

During the essay writing process required for progressing through the DBA I found myself taking a naïve position in reviewing literature that reified objectivity. I was almost unconsciously adopting a naïve, neo-empiricist position (Barsalou 2003; Machery 2007; Prinz 2002) in a deliberate attempt to take myself, and my personal experience, out of the narrative. Taking me out of literature evaluation seemed to be producing anodyne output, more descriptive than evaluative, almost by default. With some encouragement from my Director of Studies, John Nicholson, I was determined not to let this happen during the research and analysis required for my thesis. At the same time, I wanted to ensure that the way I operationalised the research methodology and methods kept personal bias out of the data gathering phase to focus on actor interpretations, before engaging my experience in the data analysis phase of my thesis (Denzin & Lincoln 2003). To set aside personal bias I adopted a stance akin to 'bracketing out', which is a technique for preventing researcher knowledge from prematurely defining the direction of respondent input (Rennie 2000). I put the practical side of my experience into analysis in the literature review and in moving from primary data coding to developing pattern codes. How the bracketing and practitioner experience were operationalised will now be considered in the methodology and methods sections.

3.5 Methodology

My research aims to discover, understand and interpret how the SMI works to develop value propositions in a business to business context, from an actor perspective (Silverman 2009). Given my philosophical rejection of positivist cause-effect using quantitative methods to try to understand direct causal relations between a dependent and independent variable was deemed inappropriate. Case study research allows the exploration and understanding of complex issues beyond quantitative cause-effect (Zainal 2007). A case study is a systematic enquiry into an event or set of related events which is an attempt to describe a phenomenon of interest, in this case how the SMI works do develop value propositions (Bromley 1990). Yin (2009, p.23) defines a case study as:

> 'An empirical enquiry: that investigates a contemporary phenomenon within its real-life context; when the boundaries between the phenomenon and context are not clearly evident; and in which multiple sources of evidence are used'.

A case study is considered by some authors to be a robust research method, especially when a holistic, in-depth investigation is needed, where an explanation of behaviours is being sought (Zainal 2007). A case study approach was deemed to be appropriate for my thesis as in-depth investigation is facilitated for the case in point, the SMI and value propositions, set in a specific B2B context. The methodology deployed can be characterized as an explanatory case study as I seek to examine data at both a surface ‘empirical’, 'actual' and deep ‘real’ strata consistent with a critical realist ontology (Bhaskar 1998; Easton 2010; Sayer 2010). I have adopted an intensive research method which focuses on individual agents in the context of value proposition at the SMI by using interviews placed in that context (Easton 2010).

Compared to quantitative research, some authors argue that qualitative interviews carry greater validity, allowing the provision of rich, insightful accounts and to make sense of complex organisational problems (Eby, Hurst & Butts 2009). In depth semi-structured qualitative interviews were used to gather data. The purpose of interviews is to 'Gather descriptions of the life-world of the interviewee with respect to the meaning of the described phenomena' (Kvale 1983, p.176). It is a professional conversation where ‘inter-views’ are exchanged and knowledge is constructed in the inter-action between the interviewer and interviewee (Kvale & Brinkmann 2009). Although interviews merely elicit memories that may not reflect the ‘true state’ of what the interviewee is trying to recall, they are ‘Representative of the underlying (memory) structure with respect to both content and organisation’ (Lynch & Srull 1982, p.24) and may influence future behavior because decisions are often made based on how people remember an experience (Flint, Woodruff & Gardial 2002).

Semi-structured interviews were chosen as a research method for a number of reasons. Consistent with an engaged scholarship approach semi-structured interviews are seen to be of utility when the researcher knows something about a topic, but gives participants the opportunity to raise new issues. This allowed me to activate conversational resources (Cunliffe & Scaratti 2017) by using structured flexibility to: clarify meaning, test taken for granted assumptions, invite respondents to build on striking moments, and surface apparent contradictions in responses to the set questions (Haraway 1988). At the same time the semi-structured nature of the interviews allowed me to ‘bracket out’ (Rennie 2000) my own views at this discovery stage by simply asking questions, not offering opinions, I acknowledge this was difficult to do at times. Semi-structured interviews are useful when working with a complex issue, such as SMI interworking for value proposition development, because probes and spontaneous questions can be used to explore, deepen understanding, and clarify answers to questions. From an expediency standpoint, and as a novice researcher, the semi-structured interviews allowed me to construct a theory-laden (Sayer 2010) question set informed by, for example, how the extant literature saw value propositions. This gave me, as a novice researcher, the feeling that the basic questions that required answers had been developed ahead of respondent interviews. The semi-structured nature of the interview was also chosen with the respondents in mind, all of whom held senior positions in large organisations, to give them the comfort that the 'inter-view' conversation could be concluded within a sensible time-frame. I acknowledge that critical realist ontology is agonistic in attitude towards different types of research methods, and encourages data gathering from a number of sources (Danermark et al. 2002). However, I chose semi-structured interviews alone as I felt that I had used numerous data sources in developing the problem-statement in my research proposal. Data sources included; commercial research, practitioner focused literature, consultancy assignments, and conversations with practitioners. Besides, as a novice social science researcher I felt that there would be enough rich data emerging from the interviews which would, in itself, present a challenge for analysis, interpretation and evaluation.

I conducted 21 interviews between September 2015 and May 2016 by telephone, skype or face-to-face. Deciding on the appropriate sample size was not completely straight-forward. Despite the fact that qualitative interviews are a widely used tool in social scientific research there has been little discussion about how many participants are deemed to be sufficient (Curtis et al. 2000; Robinson 2014). Studies reveal a large variation in the number of interviews performed in different research contexts. Acknowledging exceptions, and dependent on study purpose a norm of around 15-60 participants was observed in a recent study (Saunders & Townsend 2016). Marshall (2013) drew on studies reporting participants in five information systems journals, it was inferred, that 'collective wisdom' suggested 15-20 participants for single case study research. I used the 'collective wisdom' provided by Marshall (2013) and the expediency of wanting not too large a sample to make depth analysis difficult whilst making data saturation attainable (Onwuegbuzie & Leech 2005). I acknowledge that declaring the number of interviews conducted as robust is problematic. Especially as in the extant literature on interview sample sizes ‘expert voices’ rarely offer a precise number of participants (Baker & Edwards 2012, p.6).

The technique chosen was governed mainly by logistical considerations such as location and availability. A number of the respondents were based in the USA traversing a 7-hour time difference. In fact, none of the chosen respondents were based in the same city as me which also presented logistical challenges to meeting face-to-face that often necessitated conducting the interview by phone or skype. The respondents who chose skype as their preferred channel were given the option of a video or audio conversation.

Using these different techniques for conducting the interviews has to take into consideration the telephone remains largely unacknowledged as a research tool. Face-to-face interviewing still has primacy even though computer and telephone mediated communication is wide-spread (Seymour 2001). The limited discussion on telephone interviews presents mixed opinions as to its utility compared with face-to-face (Caicha & Millward 2011; Creswell 2007). An empirical study comparing face-to-face with telephone interviews was conducted by Sturges and Hanrahan (2004) which found no discernible differences between the two methods. The findings suggest that the choice of medium was based on logistics with no a-priori preference for face-to-face. This would suggest that using both telephone and face-to-face interviews is a legitimate approach for my thesis. In line with previous empirical studies comparing face-to-face with telephone interviews (Sturges & Hanrahan 2004) I did not observe any discernible differences between telephone, skype and face-to-face interviews. The interviews typically lasted around an hour; the shortest interview was around 40 minutes with the longest taking 75 minutes. In all cases the amount of time given by respondents was determined by other diary commitments.

3.6 Research sample

The research sample was senior marketing and sales professionals with current or recent experience in large organisations selected using purposive sampling of individuals within the segment of the population with knowledge and experience on the matter at hand (Cresswell 2007; Guarte & Barrios 2006). In seeking out 'senior' practitioners I was looking for participants typically at manager level and above who had experience in developing value propositions from different levels and perspectives at the SMI to help provide rich perspectives of the phenomenon. The size of the sample was determined in relation to the purpose of the research and with a view to project timescales (Miles & Huberman 1994), and in line with the broad benchmark for participants identified in previous studies as outlined in 3.5 (Marshall 2013; Saunders & Townsend 2016). The expediency of not too large a sample to make depth analysis difficult whilst making data saturation attainable was also a consideration (Onwuegbuzie & Leech 2005). Whilst currently the individuals mainly work in Telecoms, IT and Consultancy their combined experience spanned 71 companies and 14 Industry sectors, as depicted in Table 3.2 below:

Name	Current role	No. of companies worked for	No. of industry sectors worked in
Althea	Marketing, Vice President, US Cable company	3	2
Thomas	Sales, Senior Vice President, Global Telecommunications	3	1
Caila	Sales, Vice President, Global Telecoms	2	1
Anna	Marketing, Director Account Based Marketing Global IT Company	3	1
Coleen	Marketing, Senior Director Global Campaigns, Global Telecommunications	4	2
Davina	Marketing, Vice President Marketing Global FinTech	5	5
Greg	(Sales). Owner, Sales Consultancy Former Sales Vice President Global Telco	4	2
Jeff	Managing Director, Global Telco	1	1
Kent	(Sales). President, Global Data Centre Company	4	2
Kyle	(Marketing).Managing Director, US Software Former Senior Vice President, Marketing	4	2
Kenny	Marketing, Director, Global IT company	2	2
Laura	Sales, Senior Vice President, Global Telco	2	1
Maurice	(Marketing). Vice President. Sales Enablement' Global Telco	1	1
Norma	Marketing, Senior Marketer, Global IT	7	3
Dave	Sales, President, Global Mobile	5	2
Sheila	Sales, Account Director, Global IT	1	1
Saskia	(Marketing). Owner, Consultancy Former Marketing Director, Global Fintech	7	4
Terry	Sales Vice President, Global Mobile	7	4
Vanessa	Sales Account Director, Global IT	2	2
Katie	Marketing, Senior Vice President, Global Telco	4	4
Eli	Sales, Vice President, Global Equipment Provider	5	3

Table 3.2 Summary of research participants (Source: Author).

Data saturation can be deemed to have been reached when no further significant insights are emerging (Glaser & Strauss 1967). This was tracked by contact summary sheets that were completed after each interview (Appendix 1). Essentially data collection and analysis continued until a 'fruitful analytical argument' could be developed (Hammersley 2014). In reality it is difficult to determine when data saturation has occurred and acknowledged that if it is not reached it only means that the research phenomenon has yet to be fully explored

(O’Reilly & Parker, 2013). The reality was that I felt certain topics had begun to recur frequently after the 21st interview. At any rate expediency determined that performing more interviews would have made data analysis cumbersome and stretched fieldwork timescales.

3.7 Data collection and interview protocols

The core Interview questions sought to understand the level of interaction and 'spaces between' marketing and sales in relation to value proposition production. Questions were devised to get 'mirror' responses depending on whether the respondent was in sales or marketing. My first consideration was to get alignment between my research questions and interview questions as the first phase of interview *protocol*, where protocol is defined as the interview questions and the procedure associated with qualitative interviewing (Castillo-Montoya 2016; Jacob & Furgerson 2012). The questions developed were theory laden (Sayer 2010), and to some degree shaped by the literature review, and my personal experience. For example, how the extant literature views what a value proposition consists of, helped shape the question set to cover customers, competitors, and differentiation (Anderson et al. 2006; Ballatyne et al. 2011; Payne et al. 2017). A sample of the questions asked, related to the literature sources which helped shape the questions, can be seen in Table 3.3.

Literature influence	Sales Questions	Marketing Questions
SMI interworking (Geunzi & Troilo 2007; Snyder et al. 2016)	To what extent are you involved with marketing in value proposition creation, maintenance and development?	How are front-line sales people engaged in value proposition creation, maintenance and development?
Customer orientation (Kohli & Jaworksi 1990; Slater & Narver 2000)	To what extent are you asked to provide customer feedback to value propositions?	Do Sales people regularly provide customer feedback to value propositions?
Value proposition development (Anderson et al.2006; Ballatyne et al 2011; Payne et al. 2017)	How useful do is content that marketing provide you in supporting customer value proposition discussions?	To what extent is sales engaged in content creation for customer value propositions?

Table 3.3 Sample and sources of interview questions (Source: Author).

The second phase of my interview protocol was to ensure I constructed an enquiry based conversation. I was aware that the interview was about drawing out as much of the respondent's experience as I could, not just getting bland answers to a fixed set of questions:

> 'The purpose of in-depth interviewing is not to get answers to questions… At the root of in-depth interviewing is an interest in understanding the lived experiences of other people and the meaning they make of that experience. At the heart of interviewing research is an interest in other individuals’ stories because they are of worth' (Seidman 2013, p.9).

After outlining the purpose of the research and asking for participant consent to participate and for the interview to be recorded, the opening move was to make respondents feel 'of worth' by establishing rapport with them (Moustakas 1994, p.114). Many of the interviewees were known to me so for these people the opening conversation was about re-connecting at a personal level, asking what they had been doing since we last met. All interviewees were then asked to provide a career history which also helps build the feeling of worth by showing an interest in their story. The semi-structured nature of the interviews was also designed to help facilitate drawing out participant experience, allowing flexibility to grow their stories, and consistent with the emergent design capability of qualitative research (Creswell 2007). Whilst bracketing-out my own experiences in the subject area (Rennie 2000), I did use my consultative interview experience to adopt an empathetic approach by reflecting back answers and asking for clarification of points. At the end of each interview I thanked respondents for their participation, reminded them the interview would be transcribed, and how confidentiality would be preserved, the final phase of interview protocol (Castillo-Montoya 2016; Jacob & Furgerson 2012).

Interviews typically lasted around an hour which was thought to be of sufficient length and openness to elicit many complex facets and related concepts (Flint et al. 2002). The process began with two trial interviews after which the participants were asked to provide feedback on the interview experience. Some questions were adjusted following feedback from the trial interviews. Interviews were recorded with the permission of interviewees, then transcribed and stored in Nvivo 10 software (Miles & Huberman 1994).

Etherington (2010) recommends that transcription should be performed by the researcher as this helps you listen and hear more of what we might have been missed in the moment. After the first three interviews, a professional transcription service was used for expediency. A contact sheet summarising thoughts and feelings directly after each interview was produced by the researcher (see example in Appendix 1). In addition to this a transcript memo was written after two read-throughs of each transcript (Miles & Huberman 1994). It is felt that writing the contact sheets and transcript memos, and other processes used during data analysis, mitigated not transcribing all the interviews personally.

3.8 Ethical considerations

Ethical considerations were paramount throughout the design and implementation of this research; Ethical concerns were considered alongside the ethical guidelines of Sheffield Business School.

The purpose of the research was clearly stated at all stages of contact with potential respondents. It was made clear that the research was towards a DBA and may also be used in producing published books and academic papers. Potential respondents were made aware that participation was voluntary and that they could withdraw at any time without giving a reason.

The overriding ethical concern of this thesis lies in confidentiality. To gain access to senior executive's guarantees were offered in respect of the following areas:

1. Descriptions of respondents would not be by name of the individual or the organisation.

2. Quotes used in my thesis or in publications would be non-attributable.

3. Transcripts would be seen only by the researcher and the transcriber. All hard copies and recordings would be securely kept.

Informants were provided with a written explanation of the purpose and nature of the research and signed a research consent form to say that they agreed to take part (Appendix 3). The information that was provided prior to the participant signing the consent form made it clear that anonymity would be preserved and no organisationally sensitive information would be disclosed. There will be no reference in the research at any time to company names or any other commercially sensitive information.

Respondents were advised that their interview transcripts and any other data provided would be kept anonymous. All recordings and transcriptions would be stored at Sheffield Business School in a locked cabinet and be strictly private. Finally, following completion of the project (circa 10 months) this material will be destroyed.

3.9 Data analysis

Thematic analysis was used for identifying, analysing and reporting patterns (themes) within data (Braun & Clarke 2006). My thesis was trying to establish, through analysis of data from the interviews, how sales and marketing people made sense of what they believe is happening at the SMI in relation to value proposition development.

Thematic analysis involves searching for repetitive themes that occur across the gathered data and is useful for spotting patterns in seemingly random information (Boyatis 1998). At the empirical strata themes can be seen as akin to demi-regularities (Fletcher 2016; Lawson 1997). The technique involved using Nvivo 10 software to code data followed by analysis of the data to ‘chunk up’ to themes. Here I used chunking as a process to bind together individual codes into a meaningful theme (Neath, Farley & Surprenant 2003). The 'chunks', or themes, act as a coherent integrated grouping of related and inter-associated codes, which help retrieval and processing of information for analysis (Tulving & Craik 2000).

Some authors believe that the paucity of literature relating to applied CR presents challenges in relation to data coding (Fletcher 2016). In line with other critical realist studies I employed an approach which sought to draw out themes that were grounded in the data (Maxwell, 2012). The initial coding process necessarily involved coding text almost on a line by line basis. I would argue that how coding was informed was theory-laden, even sub-consciously (Sayer 2010). Language for coding, for example, 'market orientation' was informed by previous reading and experience. I did not systematically take-out from the reading a list of pre-prescribed codes as has been recommended in more recent critical realist studies (Fletcher 2016), which would seem to me to be ultra-theory laden. In relation to the extant SMI literature specifically it would have been difficult to pre-prescribe codes, even if I had wanted to, as any themes that could be said to be emerging from SMI studies are nascent, with no obvious demi-regularities emerging from previous studies (Dewsnap & Jobber 2002; Hughes et al. 2012; Le-Meunier-Fitzhugh & Piercy 2009). The themes largely came out of, and were grounded in the data. Coding began as an inductive approach to thematic analysis (Braun & Clarke 2006). At the outset of coding I bracketed out (Rennie 2000) my own practitioner experience and in large part the literature review to focus on the data provided by respondents.

A theme captures something important about the data in relation to the research question, and represents some level of patterned response within the data set. More instances do not mean it represents a theme, the ‘keyness’ of a theme is not about volume but whether it captures something important in relation to the research questions. There is no right or wrong way to determine prevalence (Braun & Clarke 2006). Themes can be at a Semantic (latent) or Explicit level (interpretive) (Boyatis 1998). Explicit is taken from surface meaning of data and not looking for anything beyond what is being said or written. Latent goes beyond this and looks for underlying ideas, assumptions and conceptualisations – and ideologies – that are theorised as shaping or informing the content of the data.

Interview transcripts were read through twice after which a transcript memo was produced capturing the main issues and themes from the interview (Miles & Huberman 1994). An example of a transcript memo can be found at Appendix 2. After this first-stage primary coding began. Analysis was largely grounded in data, though not considered to be a process of producing grounded theory (Glaser & Strauss 1967). In the first stage of coding 853 primary codes were produced collected and collated in Nvivo 10 (Appendix 4). These 853 codes reflected a mixture of factors that existed at the surface or empirical level, defined as explicit codes and latent codes that reflected below the surface issues (Fletcher 2016). A large percentage of the codes were, at this stage, explicit in nature. From a critical realist standpoint, primary coding at the empirical level can be seen as the start of the process to draw out demi-regularities (Fletcher 2016). A master code list was then printed out and an initial attempt was made to place the codes into groups, or pattern codes. This was done in a two-person workshop style session with Dr. Paul Johnston of Sheffield Business School.

During this workshop 83 pattern codes were developed which were then condensed or 'chunked up' (Ham 1993) into 23 core thematic streams which originated from the original 853 codes. In a subsequent three-person workshop involving Dr. Paul Johnston, Dr. John Nicholson, also of Sheffield Business School, and me the 23 core thematic stream, were distilled into four overarching themes: Identity, contextualisation, thought worlds, and credibility. These were rationalized down to three themes by merging credibility with identity. Worksheets from the coding and thematic analysis workshops are shown at Appendices 5 to 8.

In summary the overall approach to data analysis was:

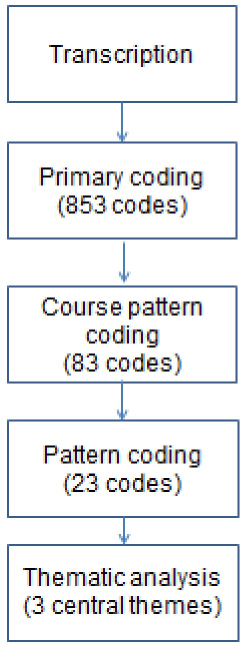

Fig. 3.5 Summary of data analysis approach - adapted from Johnston (2014).

From initial coding onwards it has to be accepted that data coding is analysis (Miles & Huberman 1994). Bracketing in my own experience into the 'chunking up' process from primary codes to pattern codes could be seen to be akin to moving from induction to a more abductive approach in line with CR (Danermark et al. 2002; Easton 2010; Sayer 2010). What seemed to happen here is that in performing the thematic analysis to 'chunk up' from primary to pattern codes, and especially in moving to the three central themes, the latent, below the surface issues, came much more to the fore. This is reflected in the choice of the 3 central themes.

The three themes that emerged from the process of analysis were: Identity, contextualisation, and thought worlds and are presented along with the twenty-three core thematic streams are at Appendix 9.

During the course of analysis it became apparent that identity was important for individual actors. In particular marketing respondents drew attention to the number of job functions underneath the broad marketing umbrella. For example, Coleen, in describing who was involved in value proposition production said:

> "Product marketing, brand marketing, product management, segment strategy, digital marketing, it's about five. I think those would have, not to say that other people don't influence it or have a perspective, but they're the ones that technically are paid to have some input."

Here five different marketing stakeholders are named, and were perceived by Coleen, and others, as having different identities. This was at odds with the holistic, monolithic view of sales and marketing presented in the SMI literature (Kotler et al. 2006; Snyder et al. 2016), and with other factors that chunked up identity was prevalent in respondent data. The naming and choice of this theme reflects the more abductive, theory-laden nature of the final stages of thematic analysis.

Contextualisation as a theme chunked together a rich amount of respondent data that paid attention to the importance of producing value propositions that facilitated communicating in context. For example, Norma, a Senior Marketer in a Global IT Organisation, in discussing the importance of developing relevant value propositions for individual customers said:

> “So Global IT Co. has what I call a bunch of offerings which are bits of technology. So let’s go and sell them a bit of Widget X; let’s sell them a bit of Widget Y. That means nothing to the customer if you don’t put it in their context.”

Sales people were particularly interested in whether value propositions provided to them by marketing were fit to take into the context of the particular customer served by the individual sales actors. Whilst it is acknowledged that recent academic value literature has moved the value discussion to value-in-context (Vargo & Lusch 2011) the prevalence of issues surrounding context came largely inductively from respondent data.

The third theme, thought worlds, though less prevalent in the data was deemed to be an important consideration for how the SMI works to develop value propositions. Thought worlds can be viewed as a below the surface 'latent' factor in contrast to the normative recommendations that generally come from SMI literature (Homburg & Jensen 2007). Actors observed that engaging each other in value proposition production work was dependent on what was occupying other actors thought worlds. For example, Kyle, MD of a US based Software Company and former SVP of marketing at a Global Telco brings out the issue of how sales engagement in taking new value propositions to market is constrained by the sales focus on individual deals:

> "Sometimes the marketing team comes up with training on a new value proposition and benefits and what-not and in the sales team, the sales guy, you know, Joey’s working on this deal right now, the one that's hot for him that he's got a commission cheque coming in. The value proposition doesn't necessarily line up for that one deal."

The non-normative nature of thought worlds, the importance placed on thought world factors by respondents, and the presence of thought worlds as an underdeveloped theme in SMI literature made thought worlds a relevant theme to develop. Overall the three themes together can be regarded as the 'spaces between' marketing and sales in relation to value proposition development as depicted in Figure 3.6.

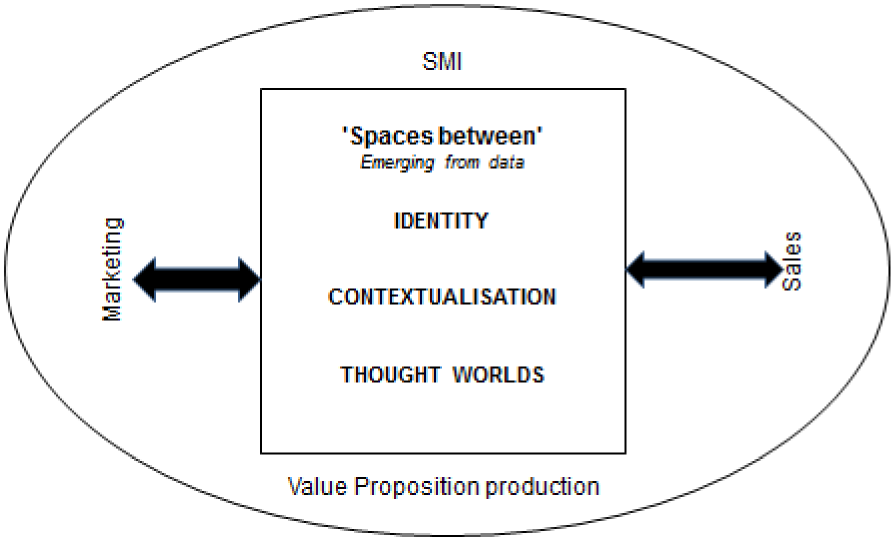

Fig.3.6 spaces between marketing and sales in relation to value proposition production (Source: Author).

3.10 Issues of generalisability and validity

Unlike a positivist enquiry and in line with a critical realist philosophy I am not looking to develop any grand law or law-like generalisations that provide for both explanation and prediction (Easton 2010; Giddens 1984). The constant conjunction prediction deemed possible by positivists is not attainable because the social world involves open systems with overlapping occurrences, events and interactions, during which people can learn and change. Seeking the discovery of causal mechanisms helps develop a well-informed discussion of potential consequences that can be generalisable to different settings (Danermark et al. 2002; Easton 2010; Sayer 2010).

Consistent with a critical realist ontology I used thematic analysis to search for tendencies, in the patterns and codes, these codes can be seen as akin to demi-regularities and tendencies. In this sense, thematic analysis is a process which facilitates drawing out the generative mechanisms which provide an explanation of potential causality. The aim is to develop 'better theory' from this analysis that is of utility for marketing and sales practitioners and scholars alike.

3.11 Summary of research and theorising process

In this section I will utilise a five step process entitled 'Explanatory research based on critical realism' (Danermark et al. 2002, p.109) which will also facilitate explanation of how theorising took place throughout my thesis. Dictionary definitions of *theorising* converge around a verb that means forming or proposing a new theory. *Theorising* can be seen as having three parts: beginning with description, it proceeds with the creation of concepts, and concludes with explanation (Swedberg 2010). Using Danermark's five step process helps articulate how theorizing can take place with a critical realist study, directly applied to my thesis theorising looks like:

1. *Description of conventional understandings and explanations of the phenomenon of SMI and VP production:* occurred during the literature review of the 'core' SMI and VP literature, set inside the broader 'contextual' marketing literature.

2. *Analysis of aspects of SMI and VP production using informant data*. In the first instance during data gathering I used a process akin to bracketing-out (Rennie 2000) to keep my personal bias and values out, in order to focus on respondent interpretations of their world. The first cut data coding was at the empirical level using explicit coding (Braun & Clarke 2006) grounded in the data (Glaser & Strauss 1967), akin to demi-regularities (Fletcher 2016; Lawson 1997). In chunking-up to pattern codes and themes I put my own experience and creativity into the process using latent coding (Braun & Clarke 2006) consistent with CR actual and real 'below the surface strata'.

3. *Abduction to interpret and re-describe SMI and VP*: here abduction can be taken to mean making inferences from somewhere else, in this case the outwith literature, to understand the phenomena of how the SMI works to produce value propositions from a different perspective (Danermark et al. 2002; Easton 2010; Sayer 2010). The process of abduction through the outwith literature can help make sense of and re-describe how the SMI works to develop value propositions. To make sense of themes that emerged from the data I accessed relevant theory from outwith literature and my own experience. The process of abduction led to the development of original ideas and the reframing of the SMI and VP as of objects of study.

4. *Retroduction to produce explanations of underlying causal mechanisms* having made sense of the outwith literature and synthesised it with extant SMI, VP, and contextual marketing literature retroduction in relation to how VP production takes place at the SMI is now possible. Here retroduction can be taken to mean making inferences about what cannot be seen below the surface of an empirical event and how these underlying causal (generative) mechanisms can have an effect on empirical outcomes.

5. *Concretisation and contextualisation* takes place when inferences have been made as to causal mechanisms and through a process of retroduction. It is then possible to model how underlying structures and mechanisms manifest themselves at the empirical strata. Models are developed at the end of each findings chapter to depict causality at the empirical level. The final chapter brings together an integrative model of VP production at the SMI that encompasses findings from literature and findings from research.

3.12 Chapter structure and relationship between data and theory

The rest of my thesis concentrates on developing the three core themes. Each of the subsequent chapters draws on additional social theory relevant to the theme, whilst being sensitised to the SMI and value proposition literature from Chapter 2.

My quest from hereon in is to develop a better understanding of the generative mechanisms at play in the SMI that have a tendency to influence value proposition production. Developing better theory than currently exists and providing an explanation of factors that have the potential for causation is consistent with a critical realist philosophy (Danermark et al. 2002; Easton 2010; Fletcher 2016).

Chapter 4 - Identity

This chapter considers the phenomenon of identity. The following themes are discussed: The actor's presentation of self in the SMI, and using identity to achieve credibility when producing value propositions.

In my Literature Review in Chapter 2 I observed that the extant SMI literature views marketing and sales as monolithic holistic entities (Dewsnap & jobber 2000; Kotler et al. 2006; Snyder et al. 2016). The prevailing SMI literature has characterised the SMI as a 'dyadic' relationship where one holistic entity interfaces at the SMI with the other (Avliontis et al. 2015; Homburg & Jensen 2007; Snyder et al. 2016). What emerged from the data was a much different picture where marketers, especially, saw themselves as belonging to much narrower functional and professional groups. In this respect the SMI, such as it exists, needs to be viewed as a network of actors more in line with IMP philosophy (Hakansson & Snehota 1990).

What also emerged from the data was that marketing and sales practitioners were concerned with their self-image and how others saw them. Responses that drew out these issues were categorised under the pattern code 'Identity' which is the concern of this chapter. The chapter will build on ideas and concepts from identity literature which were introduced in Chapter 2 which will be used to sensitise and inform the discussion of empirical data emerging from fieldwork. I have used the identity literature in an abductive sense in order to provide a recontextualisation of conventional marketing management descriptions of sales and marketing roles and titles from a sociological perspective, consistent with CR (Danermark et al. 2002; Easton 2010; Fletcher 2016; Sayer 2010). The discussion moves between theory and data to help develop an explanation of how identity affects actors in the Sales and Marketing Interface (SMI), especially in relation to the production and development of value propositions. The chapter concludes by proposing a model of actor identity (Figure 4.1) which is constructed at the SMI by considering the data by reflecting on new themes (Miles & Huberman 1994), arrived at through a process of retroduction

(Danermark et al. 2002; Easton 2010; Sayer 2010). This chapter is therefore fundamentally concerned with identity heterogeneity and self-image in value proposition production at the SMI.

4.1 How informants made sense of their identity

Pattern coding drew out five clear aspects of identity that stood out for informants. I will provide an overview of the five aspects of identity that emerged from the data before going on to cover each aspect in more depth, incorporating respondent observations:

- Aspect 1. *Not a single entity*:

Practitioners did not regard themselves as being in monolithic organisations known as marketing or sales. This was particularly true for marketing practitioners.

- Aspect 2. *Distant versus adjacent*

From a sales standpoint utility or lack of utility conferred on marketing was seen a function of adjacency (Gagnier 2000). The contrast between distance and adjacency has been characterised in management literature as *distance* versus *proximity* (Nicholson, Tsagdis & Brennan 2013). Actor judgments of distance and proximity are made up of a number of facets which I have categorised under the 'Distant versus adjacent' heading:

- Generic versus specific marketing (practice proximity).
- Central versus local (organisational proximity).
- Outside-in versus inside-out (philosophical proximity).

- Aspect 2.1 *Generic versus. specific marketing*: (practice proximity).

Marketing practitioners were keen to emphasise the difference between generic and specific marketing. The generic-specific contrast was also recognised and conferred on marketers by sales practitioners (Gagnier 2000).

The notion of distance also includes differences between central and local marketing resource:

- Aspect 2.2 *Central versus local*: (organisational proximity).

Marketing practitioners recognised the identity difference between being in a central marketing function at one extreme or integrated with sales at the other extreme (Riceour 1991).

- Aspect 2.3 *'Inside out' versus 'outside in':* (philosophical proximity).

Both marketing and sales practitioners distinguished between product marketers who they saw, in a generally derogatory sense, as producing marketing that was all about the product and where the customer was absent from consideration. This was unfavourably compared to industry marketers who produced more "Outside-in" marketing where the customer was present and at the forefront of marketing.

- Aspect 3 - *Customer exposure:*

How much exposure to customers' marketers were seen to have is regarded as an important consideration relating to how they were seen by sales.

- Aspect 4 - *Multi-faceted nature*:

Marketing and sales practitioners recognised the multi-faceted role of the marketing function where their role in producing value propositions could be influenced by complementary or conflicting activities.

- Aspect 5 - *Pejorative and processual:*

Marketing practitioners talked about how their identities had evolved over time from the pejorative 'Golf ball and umbrella marketing' to something they saw as more meaningful. This reflects the processual and social nature of identity development (Mead 2007). Narrative identities were constructed using the raw material of different experiences in episodes and events described by respondents (Riceour 1991).

I will now look at each of the five aspects in detail incorporating respondent observations to help develop an explanation of how identity affects actors at the SMI.

4.1.1 Not a single entity

It appears that from a categorisation, or at least 'labelling' viewpoint individuals do not regard themselves as being part of a single monolithic identity known as sales or marketing. There seems to be a proliferation of roles, particularly in marketing, which informants cite in relation to identity. Practitioners actually hold identities of themselves, and of others, that indicate a far more diverse and fragmented organisational situation than the general monolithic functional labels of sales and marketing infer. This was particularly true of marketing practitioners. Informants ascribed themselves to a wider range of different functions. The proliferation of roles and identities was much more pronounced for marketers than for sales, as we can see in Table 4.1.

Marketing Identities	Sales Identities
Brand Marketing	Account Management
Corporate Marketing	Specialist Sales
Field Marketing	Systems Engineer
Campaign Management	Solutions Architect
Segment Strategy	Business Development
Client Marketing	
Account Based Marketing	
Proposition Marketing	
Product Marketing	

Table 4.1: Proliferation of role identities (Source: Author).

The identity participants prescribed themselves, and others, had a direct effect on how they saw the role or part they played on the SMI proposition stage (Goffman 1959). In line with Goffman the respondents can be seen as actors involved in a 'performance' of producing value propositions set on the stage of the SMI. What emerged from the data is that there is a proliferation of roles, particularly in marketing. There are not just two lead roles marketing and sales as the prevailing SMI literature would suggest (Guenzi & Troilo 2007; Kotler et al. 2006; Snyder et al. 2016), rather a whole range of roles that actors characterise themselves in, and are viewed, as playing.

4.1.1.1 Marketing role and identity proliferation

Coleen, a Senior Director for Global Campaigns in a Global Telco saw her identity as "Responsible for putting together perpetual demand generation programmes and creating an integrated factory approach". This identity framed the part she played in value proposition creation and production to routinizing the already produced value proposition which she expressed as "I am not as close to sales in value proposition development. My role is to work with segment strategy teams, who create the value proposition."

From Coleen's perspective, it seems that sales were either absent from value proposition creation or represented by proxy through segment strategy who represent one of (at least) five marketing stakeholders in value proposition production when she remarked.

> "Product marketing, brand marketing, product management, segment strategy, digital marketing, it's about five. I think those would have, not to say that other people don't influence it or have a perspective, but they're the ones that technically are paid to have some input."

This proliferation of marketing role identities and the part they play in value proposition creation is mirrored by Laura, a seasoned Senior Vice President of Sales in the same Global Telco who said:

> "Today you have corporate marketing, North American marketing helping to create the value propositions. Corporate marketing is

> saying here's the position we want to play in the market, product are saying here's the feature functionality and why it should resonate with our customers, and then North American marketing is creating those value propositions. So, where I also see sometimes where there's a disconnect is marketing is trying to solve for what all these other departments want and how to get the best value proposition is to intimately understand what the customer's problem is we're solving for and then your value proposition resonates."

Laura appears to be attributing role identity proliferation in marketing to a shift in focus in value proposition production to a point where it has now become more concerned with involving all the different marketing functions, at the expense of sales and customers. Consequently, the customer, and sales, appear to be absent from the value proposition production process. What is not being said by Coleen is whether sales are omitted from consultation because she is distant from the sales function, or whether marketing actors in the five constituent groups she identified as being involved in value proposition dialogue do not see sales as worthy of a seat at the table of value proposition production. I can infer or retroduce that the combination of the proliferation of marketing identities, the distance of some marketing actors from sales actors, and a pre-disposition for marketing actors to get input from peers rather than sales people cohere as causal mechanisms that have a tendency to act as a barrier to effective SMI collaboration for value proposition production (Danermark et al. 2002; Easton 2010; Fletcher 2016).

From a professional identity standpoint, the 'in-group' seems to be the specialist function group, in Coleen's case, Campaign Management. From a value proposition development point of view the 'in-group' seems to be the broader marketing stakeholder group (Tajfel & Turner 1986). This seems to reflect the more porous nature of identity posited by authors such as Mafessoli (2016). Marketers seem to consider themselves to be in 'tribes' which are shaped by the importance of the territory of which tribe finds itself; and sharing of common tastes (Mafessoli 2016). Maybe the association with a functional specialist tribe and the broader marketing tribe consumes too much energy, and shapes marketing actor identity, so much that marketing actors omit sales from value proposition production dialogue. The underlying causal mechanisms could be temporal, time acts as a constraining factor to effective SMI interworking because marketing actors are consumed by tribal meetings. I can retroduce that the level of agency marketing actors have is constrained by the organisational and tribal structures which leads to marketers conferring with each other for value proposition production and not with sales or customers.

4.1.1.2 Sales roles and identity

There seems to be much less proliferation of sales roles and identities. The sales respondents did not seem to feel the need to categorise themselves in the granular way that marketing informants did. Marketers did refer to some differences in sales roles in relation to value proposition production.

Saskia reflected back on her days as a Director of Marketing at a Global Telco to provide some observations on differences in sales roles:

> "I found that especially in the Global Telco scenario involving the sales engineer or the solution architect was really helpful because while they benefit from closing a sale, that’s not their primary motivation. They’re closer to the product and understand the product more than the general sales person."

The first observation differentiates between the "general sales people" (Account Managers) as motivated by closing a sale in relation to other roles, like sales engineers who may be motivated by providing the customer with a good solution design. Norma, a senior marketer in a Global IT company, also contrasts "Sales" with "Business Development" in a similar vein where one is motivated by closing sales and the other in "setting the scene" with the customer. Both Saskia and

Norma appear to be suggesting that there are a number of actors in sales who need to be considered for roles in value proposition production. Under the surface there seems to be a suggestion that marketers view people in "general sales roles" as motivated just by selling, and somehow less worthy of input than people in sales jobs who are motivated by what marketers deem to be nobler causes, such as providing the customer a good solution.

Self-identity beyond the sales label was less of a concern to the sales respondents in comparison to marketing informants. Interestingly, from a value proposition standpoint, observations were made about the ability of sales people: For example, Terry, Vice President of Sales at a Global Mobile company:

> "Value propositions are really not easy in terms of do people understand the benefits. That's probably the hardest part of this. Certainly, a level of intellect and analytical capability that perhaps isn't always a requirement in an average sales force. I think it's still quite a rare skill in a way."

Terry seems to be making the point that having the skill to produce value propositions is lacking in most average sales forces. In the prevailing SMI literature where 'sales' is seen to be a monolithic entity the individual sales actor is absent from discussion (Le-Meunier-Fitzhugh & Piercy 2009; Malshe & Sohi 2009; Snyder et al. 2016). The extant value proposition literature generally sees a value proposition as an artefact that gets produced absent of people (Anderson et al. 2006; Ballatyne et al. 201; Gronroos & Ravald 2011). It does seem that the rare skill that Terry talks of is one he regards as fundamental to how the identity of an effective sales person involved in value proposition production would be shaped. Sales actors were much more likely to talk about skills and competencies required for developing value propositions at the SMI. What I can retroduce from this is that sales people are more concerned about skill levels because personal competence is a far greater focus for them in the execution of their job and prevalent in sales practitioner literature, akin to a demi-regularity

(Adamson Dixon 2013; Miller et al. 2011; Rackham 1988). Striving for enhanced personal capability can be an enabling factor, or generative mechanism in value proposition development if effectively mobilised.

4.1.2 Distance

A number of informants made reference to factors that could be categorised as related to distance (Nicholson et al. 2013). The notion of distance relates to how near or far away actors felt other players were away from them and customers, particularly in relation to sales, or how adjacent to sales opportunities the marketing people felt. In this context distance consists of how generic or specific roles are felt to be, and how central or local the roles are.

4.1.2.1 Generic versus specific (practice proximity).

The identity of marketing practitioners seems to be tied to whether they perceive themselves to be performing a generic or specific role. Here specific seems to carry more utility, in the minds of the marketers, for sales:

Anna, Marketing Director of Account Based Marketing at a Global IT Company observes:

> "Competition is a key part of the insight that we gather. And it's very important. We're not talking about general marketing but we're talking about marketing around a specific opportunity. We need to understand the competitors' position."

Here generic marketing seems to be talked about in a derogatory manner where specific marketing is seen as directly helping value proposition production for a specific sales opportunity. From a sales perspective, the absence of value in general marketing was highlighted by Laura:

> "General marketing does not work well for me or my customers general marketing support, general value proposition, general

> account based marketing, where it's not truly unique to that account."

In relation to the task at hand, value proposition production, general marketing produces a value proposition that is too generic and does not resonate with the customer as they are absent from consideration. Sales informants observe that this generic marketing can lead to value propositions being created that are all about the selling organisation, where any reference to what customers' value is absent. In the words of Jeff, Managing Director, Global Telco:

> "So, our 'value proposition' did revert to we've got this many locations in so many countries, this many people, this many installations, this many... You know, it's all very much about me and my company and general company credibility stuff, which I think goes so far in establishing some sort of trust but I think most customers would be sitting there thinking so what?"

There is a level of congruence between how marketing and sales participants view generic and specific marketing. It is important from an identity perspective to consider it not just as something felt or experienced but as something imposed on us (Gagnier 2000). Sales here have conferred those marketers who provide generic marketing are not seen to be providing specific value to them. Marketers who see themselves as playing a role providing specific marketing to sales, such as account based marketers, proclaim their role as virtuous and see generic marketers in a pejorative light.

4.1.2.2 Central versus local

How central or local the marketing resource is seen to be was cited by some informants as important from both an identity and utility perspective. Central marketing was talked of pejoratively and seen as linked to low levels of collaboration and poor reputation.

Anna, Marketing Director, Account Based Marketing in Global IT Co. seems to directly correlate central resource with lack of collaboration with sales "Where collaboration doesn't work is when you've got a centralised marketing department that never interacts with sales people." This seems to be congruent to the earlier observation from Coleen who did not directly cite sales as involved in value proposition creation, perhaps because she sees herself as performing a central 'factory' type function. Norma, a Senior Marketer in a Global IT company with experience working in several large organisations, seems to suggest that marketing being placed in a central function is setting themselves up for conflict with sales "I think when you're centralised and seen as a service they have the opportunity to beat you up all the time."

Norma then goes on to directly contrast what life feels like in a central team compared with being in a sector team:

> "Oh, you're not delivering this or you haven't delivered that, and we constantly have to justify our existence. But if you're actually part of the team and part of the sector team, for example, you're integral. So, they see you as part of the team, board member, etcetera".

Being beaten up in a central function contrasts starkly with the apparent camaraderie of being 'part of the sector team' and feeling integral to the success of the team. The enhanced identity of feeling like the 'board member' for marketing on the sector team shines through. The implication for value proposition production seems to be that if you're in a central marketing function you are unlikely to collaborate with sales who may not see you as someone who can provide them with value. What I can retroduce is that an underlying causal mechanism that has tendency to enhance value propositions could be characterised as the structural proximity between sales and marketing actors which has a tendency to influence positive self-identity and in turn value proposition production in the SMI. The less structural distance there is between marketing and sales actors the greater the ability of the likelihood of morphogenesis, the ability of the value proposition production process to change its form in response to greater actor collaboration (Chubb 1990; Simon et al. 1985).

4.1.2.3 Distance versus adjacency

Terry, a seasoned Vice President of Sales at a Global Mobile company and a veteran of several blue-chip Telecommunications Mobile and Technology (TMT) companies contrasted his experience of marketing in two large blue chips in the following way:

> "I suppose the reality is that there were marketing people in the likes of Blue Chip Co but they were probably product marketing people stuck away in a HQ function, and basically their philosophy in that company was to try and create a global product."

The central marketing function is seen to be "stuck away" whether this is a comment on behaviour of marketing practitioners in a central function or a pre-prescribed identity associated with that function as 'held to lack everything perceived as value' (Lawler 2014, p.151) is unclear. In relation to value proposition production what is instructive is that this central role was seen to hold a product centred philosophy, absent of customer value.

> "When I came to Global Telco it was quite an eye opener in the sense that this function, called sector marketing or field marketing, I think is a term that a lot of companies use if they do have this function, and that was clearly different to product marketing. So, they weren't in a bunker hidden from view, they were right in the field with you, very adjacent."

Terry almost waxes lyrical about the marketing in the Global Telco where the marketers were with him "in the field". The war-like analogy extends to the contrast with central marketers as being "in a bunker" not fighting the same battle with him.

> “It was very much having an assigned member of the industry marketing team to work closely with us... to focus on the industry dynamics.”

Terry clearly values the fact that the marketing resource is assigned to his team. In relation to value proposition production and salient dialogue (Johnston 2014) he seems to place a high-level of value on the fact that the sector marketer focuses on issues that relate to his customers, like the industry dynamics. The identity conferred on the sector marketers by Terry as a sales practitioner is one of value (Gagnier 2000). There was a high-level of congruence with the marketing informants who clearly felt more valuable, and valued, the more adjacent they were to sales. The sales-marketing adjacency could heighten value proposition morphogenesis where greater actor proximity and collaboration leads to an improved understanding of customer industry dynamics and in turn to enhanced value propositions (Chubb 1990; Simon et al.1985).

4.1.3 Inside out versus outside in

The Inside-out versus Outside-In theme emerged from a wide-range of informants across sales and marketing practitioners. Respondents distinguished between Product Marketers who they saw as producing inside-out marketing, based on product features and functions, and absent of customer value. This was unfavourably compared to industry (read also sector or segment) marketers who were seen to produce more outside-in marketing where the customer was present and at the forefront of marketing.

Product marketing observation	Informant
Product marketing leads to “me too positioning”	Greg, Owner Sales Consultancy and former Vice President, Sales, Global Telco
Product marketers don’t care about the customer. They are just trying to launch product	Greg, Owner Sales Consultancy and former Vice President, Sales, Global Telco
In engineering companies the “widget is brilliant” prevails	Jeff, Managing Director, Global Telco
Marketing can often be product orientated in many companies	Kent, Managing Director, US Software company Former Senior Vice President, Marketing, Global Telco
Product Marketing often ends up in the lowest common denominator, absent of customer value	Terry, Sales Vice President, Global Mobile
Product Marketers are not real marketers, they are not market orientated	Saskia, Owner, Marketing Consultancy Former Marketing Director, Global Fintech

Table 4.2 Images of Product Marketing Identity (Source: Author).

There was a rich vein of meaningful quotes from informants in the inside-out versus outside-in category, especially relating to Product Marketing. A summary of some of the responses is presented in Table 4.2 to provide a sense of respondent views.

Greg, who now owns his own Sales and Marketing Consultancy and was formerly the Vice President of Sales for a Global Telco sees Product Marketing as a very Inside-out orientated function, there to launch the product.

> “Product Marketing takes a very much an inside-out view of the world. You know, I’ve got some products or I’ve got a new thing in my portfolio, how can I present that to the customer in terms of benefits, and quite often that is very me too in terms of how they position and present that in the market."

By implication Greg seems to suggest that because product marketing start with the product and work outwards the output is not a value proposition but a “me too” statement of benefits. These, by definition, cannot be known customer benefits if the customer has not been consulted, merely perceived product advantages in the eyes of the organisation (Rackham 1988). Greg goes on to emphasise:

> “They don’t really care too much about the customer because they’re trying to build often. They’re trying to build products and services to compete with other people who’ve already got them.”

In Greg's view, product marketing does not really care about customers as their role is to launch products that competitors probably already have. If customers are not being consulted then any marketing material produced by product marketers will be absent of customer value.

The overall orientation of the organisation, or the organisation’s self-identity, can be seen to shape the product marketing, as Jeff points out:

> “But I guess in an engineering company like Global Telco, sometimes what happens is the product marketers, the product buyers have built their products and so what they're interested in is, if you like, we've got a widget, this widget is brilliant. More customers must want it, please go and sell it to your customers.”

What Jeff seems to be saying is that customer value can be absent because the narrative is driven, from the top, around product obsession, versus customer orientation. In other words, it’s much easier to say “We need to sell around 100 widgets, just go do it” as opposed to taking the view that clients are looking for a benefit, let’s say organisational agility, which gives us the opportunity so sell 100 widgets.

This orientation can extend down to the marketing organisation, as Kyle, a former Senior Vice President of Marketing, at a Global Telco points out:

> “A lot of the time the marketing organisation is a more of a product-orientated organisation that's tasked with rolling out new products and not necessarily revenue goals this year.”

Kyle seems to be making the observation that if marketing is product orientated there will be an in-built misalignment with sales as they will not share the same revenue goals. This is consistent with findings seen in much of the prevailing SMI literature relating to goal alignment (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). The unsaid is that if the orientation of marketing is product-centric they are unlikely to see Sales input, as a customer proxy, to help produce value propositions. Terry observes that this can result in the “Lowest common denominator” effect in product marketing:

> “So I think there’s a lot of lowest common denominator in product marketing that says well, you know, it looks okay and it’s like that other product over there and we think that other company are selling some of this, so let’s launch it, rather than thinking about how to deliver superior value.”

What is lacking here is any dialogue with sales or the customer in value proposition production. Sales practitioners cast the product marketer role and identity in a very pejorative light. Similarly marketing practitioners who see themselves as real marketers seek to distance themselves from product marketing as a practice. We can see this in the quote from Saskia, Owner of a

Marketing Consultancy, and former Marketing Director of a Global Fintech company:

> "Product marketing folks are not marketers. They are very rational and obviously experts and passionate about their product that they're managing, but they tend to fill marketing literature with jargon and features that are maybe not the most important thing to be talking to the customer about."

There is a good amount of 'lack of' dialogue here (Lawler 2014; Sennet & Cobb 1997). The inference seems to be that product marketers lack any emotional understanding of the customer. Customer or marketing orientation appears to be a missing competence or skillset here. From a value proposition production standpoint, there is apparently a lack of sales and customer dialogue, again absent of customer value. What emerged from the data was that marketing practitioners who cast themselves as 'real' marketers held sales and customer proximity in high regard and spoke pejoratively of 'marketing' actors, usually in the form of product marketers, who do not engage in dialogue with sales and customers. There seems to be congruence between sales and marketing practitioners where sales are looking for the anti-product marketer and 'real' marketing practitioners want to be seen to have that identity conferred upon them. The absence of dialogue between marketing, sales, and customers in an organisation would not be conducive to mobilising a market-orientation, as portrayed in marketing management literature (Kohli & Jaworski 1990; Narver & Slater 1990).

In my experience mobilising product marketers towards a customer value approach is much more difficult than getting buy in from sales people (Malshe & Sohi 2009). I can recall in my time in Global Telco as the Marketing Director responsible for developing a more customer-focused approach. Coming out of a meeting with sales leaders who were warmly enthusiastic about the customer value themes and approach I had devised I was berated by product marketing leaders. They did not see any virtue in the approach because it moved away from 'sell this product' to a 'we understand your issues Mr. Customer now choose from our range of solutions' approach. What I retroduce from the combination of respondent data and my own experience is that perceptions and behaviours of product marketers are seen as an underlying causal mechanism for poor value proposition development which cannot be taken for granted for effective value proposition production at the SMI. Product marketing actors appear to be constrained by their own organisational structures, focus, and competencies which limit their agency to act in a customer-value centric manner required for effective value proposition development.

4.1.4 Customer exposure

How much, or little, exposure to customers marketers have seems to play a part in how they are perceived by sales people. There is some relation here to the concerns about how distant or adjacent to customers and their views marketing practitioners are (Nicholson et al. 2013).

We saw earlier that Terry talked about how sector marketers were "in the field" with his sales team. Here he elaborates with regard to customer exposure:

> “Industry marketing, for example, should be seeing quite a lot of customers and therefore they’re getting a view of what customers are doing. And I think that has a value to the client and to the customers themselves.”

Terry specifically goes on to mention customer workshops facilitated by the sector marketers which were all about understanding customer issues to try and determine what value they sought from his organisation. From a value proposition production standpoint, there is clear engagement between marketing, sales, and the customer here. Seasoned Sales Vice President, Laura, bemoans the lack of exposure to customers that marketers tend to have:

> "Well because marketing does not sit in front of customers every day. Marketing takes marketing data, they take product data, they take a lot of data that is also extremely important in their marketplace, so they rely on analyst reports, they rely on what data they can potentially buy on products, buy on capabilities out in the market, and so it's a bit removed from the actual day to day challenges that some of our customers have."

What Laura seems to be saying here is that the end result of lack of exposure to customers is misalignment because marketers, cannot, by definition, know what the real issues are affecting real customers. The identity ascribed to marketers by Laura is, in contrast to that of Terry, someone who generally sits at a computer and reads analyst reports. The implication for value proposition production is that value comes as the sanitised interpretation of analyst reports. This does seem to suggest, that marketers would have a more positive identity if they did see more customers, in line with Terry's sector marketers (Malshe et al. 2016). In relation to three strata of CR analysis it could be said that marketers are seen by Laura to be operating in the empirical strata with at best a meso-level focus, therefore, even the empirical 'facts' are not conducive to good value proposition production or to enable deeper understanding of the real issues affecting customers.

4.1.5 Multi-faceted nature of the marketing function

Both sales and marketing practitioners seem to recognise the multi-faceted nature of the marketing function. From a marketing perspective former Senior Vice President of Marketing, Kyle observes:

> "Well there was lots of stuff on the front end. You know the air cover stuff, where the sales teams or the marketing teams do a website,

> branding, awareness, etcetera, etcetera. So, all the front-end, high level corporate marketing stuff.”

Kyle seems to be suggesting that the “high level…marketing stuff” takes place at a corporate level some distance way from sales. The identity of these corporate marketers could be seen, by sales, as removed from the value proposition production process. Kyle goes on to contrast this with tasks marketers have to perform further along the value-chain (Porter 1980). and closer to sales practitioners:

> “Then the segment marketing team ideally is creating segment-specific content of what's going on in the market with their customers, educating the sales team on their customer, on their industry, on their segment, what challenges they're facing, what problems they have, what solutions do we have to solve those problems, and then how the products fit in. They're responsible for all of that.”

Kyle explains that there are a wide variety of jobs to be done under the umbrella of marketing. A part of this is value proposition production which may, or may not be viewed, as a central part of their identity by both marketing and sales practitioners. From a sales perspective Eli, a seasoned Sales Vice President at a Global Telco Equipment Manufacturer and veteran of five blue-chip technology and consultancy organisations sees what marketing offer to him in a much more holistic manner:

> “So, as I peel back the onion, I think the first layer is marketing has got to help me with brand awareness in segments that I’m selling into; they have to make our brand very well-known and perceived as a credible player in the market. And then the next layer of the onion is I need that value proposition. I need to understand the value prop of the portfolio I’m bringing to market and, as I said

> earlier on, I need to understand how to customise that based on segments of the marketplace verticals within those segments. And, thirdly, we're really pushing the envelope and introducing very strong demand generation."

Eli has almost created a value proposition for what marketing should be offering to him as a salesperson. The value proposition production takes place within a system, characterised by the onion, which is seen to operate in layers. If brand awareness is not being impacted the willingness to engage in value proposition production at the SMI may be affected. Under the surface of the onion what is not seen or said is the need for both marketing and sales actors to understand how the different layers inter-relate. Absent in Eli's discussion is the diverse range of skillsets implied in his account of what marketing needs to do for him. The skillset discussion is also largely absent from extant SMI literature, and in mainstream marketing management texts (Gilligan & Wilson 2009; Kotler & Keller 2015; Snyder et al. 2016). It can be retroduced that the agency of marketing actors is constrained or enabled by having the necessary skills and competencies required to perform the diverse range of activities required for effective value proposition production. Without these skills marketers may not be deemed by sales actors as having sufficient social capital to advance value proposition production (Fletcher 2016; Lawson 1997).

4.1.6 Pejorative and processual

Many of the accounts of marketing informants demonstrated that identity development is both social and processual (Mead 2007). The narrative identity espoused by respondents starts from the end and works backwards and is made up from a number of raw materials drawn from experience (Lawler 2014). The three components that are seen as crucial to these narratives are: characters, action and plot (Riceour 1991). The plot brings together episodes and events in what Riceour calls emplotment. These are stories of how we've become what we are.

To illustrate this a number of episodes and events have been drawn together from the interview with Norma plotting her career as a marketing practitioner. In her early career Norma seems to view herself pejoratively as someone who did "colouring in": She seems to cast herself in a role where she does not provide, or is not seen to provide value to sales and in the production of value propositions.

> "I think many years ago I don't think we were aligned. I think we were seen as people that did pretty pictures, brochures, colouring in, advertising."

Norma then goes on to describe a number of episodes in her career that evolves in terms of roles, seniority and proximity to sales. There is a clear set of references here back to the notion of distance (Nicholson et al. 2013). Norma seems to feel much more value was provided to sales, and the organisation, when she was closer to sales and in a "leadership" position. What is interesting here is that she keeps contrasting this with how she saw herself in her early career episode as the person who provided "mouse mats, mugs or pens". Her more recent identity as someone who provides value is set in contrast, or relative to the early career (Lawler 2014). In the central marketing communications role Norma did not feel the need to have to explain to sales or educate them about the "assets" she produced. In the roles more adjacent to sales a more advisory approach was taken.

> "So, I think previously, and this is just because of the roles that I was in, I would say I was in more of a marketing communications role. So producing the assets for people to use but not actually then explaining and educating to them about sales enablement, why they've got what they've got, what they need to use it for. I was just literally producing it. But as I've gone further through my career, you know, I'm on leadership teams; I'm advising them about what they should be doing, what they shouldn't be doing; so therefore, they

> see you as adding value to them rather than just someone who can book meetings, etcetera, etcetera, or get mouse mats, mugs and pens."

What I can retroduce from this is that under the surface of Norma's account of her marketing career progression are a number of factors than can be linked to self-image, distance, and proximity (Nicholson et al. 2013). The early "colouring in" days portray a pejorative self-identity and a world where her lack of self-worth is mirrored by a lack of understanding of the value she could be providing to sales. The marketing communications role seems to portray a level of arrogance from Norma where "assets" could be produced for sales without any explanation or engagement. Norma's view aligns with Coleen who does not engage sales in value proposition production perhaps because she feels organisationally distant. Real self-worth and identity shines through when Norma gets a seat at the sector sales-and marketing table. She cannot completely leave the "mouse-mat" days behind and uses the early days to contrast the progress she has made.

4.2 Developing identity through credibility

Informants seem to recognise that to play on the SMI stage in the performance of producing value propositions they had to be seen as credible actors worthy of taking their place on the stage (Goffman 1959).

> ‘Every putative actor of role X can be held responsible for abiding by standards which can be taught as part of the institutional tradition and used to verify the credentials of all performer’ (Berger & Luckmann 1991, p.92).

In line with this observation respondents wanted to be taken seriously, gaining and establishing credibility as an actor was seen as fundamental to creating an identity that could be taken seriously (Johnston 2014). Credibility emerged from the data as a significant sub-category under the pattern code identity. This section draws on the concepts and constructs of credibility taken from

Communications and Advertising theory, and Leadership literature. Ideas and concepts from these bodies of literature will be used to sensitise and inform the discussion of empirical data emerging from fieldwork.

4.2.1 Marketers need for building credibility

What emerged from the data was that while marketers felt the need to be seen as credible by sales this did not seem to be a reciprocal concern for sales people. Kenny, a Marketing Director with 20 years' experience in a Global IT company expresses the need for credibility per se "I think if I look at my own experience, we need to be, from the marketing point of view, we need to be credible to the sales team."

Althea, in contrast to the 20 years' experience of Kenny, had only been in post as Vice President of Marketing of a US cable company for six months and reflected a need to gain credibility:

> "Well I think there are some intangible things and some tangible things. So, I think you need some trust and some credibility. In marketing you have to earn that with sales. You know, otherwise if you try to roll stuff out sales won’t really embrace it. So, you know, building that credibility is important."

So we can see a direct contrast here expressed as "In my 20 years' experience I have observed the need for marketers to gain credibility" compared with "my team is new we have to gain credibility with sales". The starker contrast is the absence of the need to have credibility per se with marketing from the sales standpoint. This may reflect who is seen to be the 'customer' and 'supplier' in sales and marketing relationship, and who holds most power (Lawler 2014). What I can retroduce from this is that how marketers and sales actors view themselves in terms of comparative organisational standing is a causal mechanism that has a tendency to influence VP development at the SMI. If marketers feel the need to have to establish credibility they may not be assertive enough to get the required input from sales for value proposition development. On the other hand establishing credibility in the first place could be seen as table stakes for mobilising the causal mechanism of comparative standing.

Greg, Owner of a sales and marketing consultancy, and former Sales Vice President at Global Telco appears to make the point that the role of marketing is to help sales be credible in the face of the customer:

> "And as a result, the more you are comfortable and armed with information, intelligence and tools that help the customer to work through themselves that business case, the more consultative you are, the more value you're adding at that early stage in their buying process."

Here we can see that Greg wants the sales person to be "armed with information, intelligence and tools". What is perhaps unsaid here is that this would be the 'marketing work' of credible marketers (Svensson 2007).

Maurice, a thirty-year Global Telco veteran, currently Vice President of Sales Enablement, a role that acts as a link between marketing and sales, seems to suggest that sales has to confer credibility on marketing (Gagnier 2000):

> **"**Sales people, at the end of the day, are focused on results and so where they can see marketing people driving demand and driving well qualified demand to them that they can close, that's going to be respected."

This seems to suggest that the ability to confer credibility is completely unidirectional from sales to marketing and not vice-versa. If marketers understand that sales is focused on sales and revenue goals and seeks to deliver against them they will be conferred as credible (Gagnier 2000). Feeling the need to have to prove that marketing deliver value, in order to have credibility conferred upon them can, in itself, lead to tension at the SMI. Davina, Vice

President of Marketing of a Global Fintech company, and veteran of five blue chip companies, in different sectors, points this out:

> **"**I think it's a very delicate balance between, you know, we're not trying to claim any territory but we are trying to prove the value and the ROI of what we're doing. And that I find is a tension point."

What Davina is hinting at here is that the pressure to prove value to sales and the broader organisation can lead marketing to over-claim the role they may have played in bringing in business. In seeking to gain credibility, exaggerating the effect of marketing activity on ROI can be at odds with being seen to be 'honest' or acting with integrity, which some authors see as a key component of credibility (Kouzes & Posner 2003). The implication here is that you will only gain and retain credibility with sales if you don't over-claim what part you had, as a marketer, in their sales successes. I can recognise this issue from my own experience. In a previous role in a mega-global telco where we pioneered the value proposition approach I had heated conversations with sales leaders who accused my team of claiming things as revenue against their marketing programmes. A Sales Account Director said "That deal was already in flight when you guys came along with this new approach", which implied that my team was claiming credit for a deal he had already been working on. In reality, the efforts of both the sales and marketing actors combined as causal mechanisms towards the empirical result of a sales win. What I retroduce from the combination of respondent data and my own experience is that dealing with the positivistic cause-effect view prevalent in many commercial organisations can drive 'over-claiming' that can act as a generative mechanism for poor SMI interworking for VP development. Taking an organisational critical realist view and recognising that combinations of sales and marketing actor interventions influences the empirical result have tendency to cause the over claiming problem.

4.2.2 Gaining marketing credibility through sales buy-in

In the prevailing SMI literature there appears to be only one isolated article that deals with the notion of getting sales buy-in to marketing strategies (Malshe & Sohi 2009). What emerged from the data was that marketers seem to feel that their personal credibility, and credibility of the material they produce, is strongly linked to whether sales have been engaged in developing the material, producing the value propositions. Saskia, a Marketing Director, with cross-industry experience in several different large organisations, highlights the difference in performance she observed in relation to sales engagement:

> "You'd have certain pieces of literature that when marketing created them directly with one or more of the experiences using sales folks those things would skyrocket and usage was nearly 100%. When marketing created certain other tactics without heavy involvement from the sales team or when the sales team was just maybe the wrong folks involved providing that input then that would not get used. It would be 20 to 50% used."

In the SMI literature involvement in strategy creation is posited as one of four key components of sales buy-in (Malshe & Sohi 2009). Saskia seems to wholeheartedly support that viewpoint and points to some impressive results. What may also be at play here is that source credibility is heightened when sales people are involved as the sales recipients now see the material as a co-created sales and marketing artefact, not just something constructed by marketers in some 'ivory tower' (Ohanian 1990). So, personal and value proposition credibility is enhanced by the level of sales engagement.

Both SMI and VP literature also recognises that marketing should be prepared to negotiate with sales and adapt strategies, value propositions, and tactics as a result of these negotiations (Cespedes 1996; Kowalkowski et al. 2016; Strahle et al. 1996). Katie, Senior Vice President of Marketing at a Global Telco, with industry experience across the TMT and consultancy sectors, sees negotiation and adaptability as challenges for marketers:

> "I think people get very stuck on, especially in marketing, you can see sometimes okay we want to roll out this campaign. Well this is how I want it to look. You have to be open to sales saying oh, well this would work better, can we do this, can we do that. I think if you're flexible and then you get the best of it rather than dig it in and say this is how I want to run it."

This seems to suggest that attitudinally or behaviourally marketers sometimes have an issue with the notion of engaging with sales because it requires the need to negotiate the shape of a campaign, or may affect what a value proposition will look like coming out of the negotiation. It might point to some missing skillsets that are required by marketing actors on the SMI stage for the production of value propositions, engagement, and negotiation. From a credibility standpoint Katie seems to suggest that engagement and negotiation is imperative for marketers. What I can retroduce from this is that fear of a value proposition changing through interaction with sales is a barrier to VP development and production and dialogue. Getting marketers comfortable with the notion that value propositions are emergent through dialogue combined with a confidence and ability to negotiate with sales coheres as a potential causal mechanism that could have tendency to improve SMI working for value proposition development. Here the agency of marketing actors is constrained or enabled by the ability to negotiate which in turn inhibits morphogenesis at the SMI in relation to VP production (Chubb 1990; Simon et al.1985).

4.2.3 Sales skills for credible value proposition production

While credibility with marketers per se did not seem to be important for sales what did emerge from the data was an awareness of the skills required by sales people to be credible in value proposition production. Greg, owner of a sales and marketing consultancy, and former Sales Vice President at Global Telco seems to feel that many sales people are not equipped to have the customer value conversations required to help provide useful feedback to marketing to help inform value proposition production:

> "And I think, if I'm fair on the marketing teams, a lot of the sales people struggle to have those conversations. So I guess marketing needs to effectively work with sales but go around sales to have those conversations themselves. I don't think they can easily rely on the sales person to have that conversation because I don't think they've got those skills generally. There are exceptions."

This view is echoed by Kent, President of a Global Data Centre company and a twenty-five year sales veteran across a number of blue-chip TMT organisations:

> "The sales team themselves aren't as equipped to be as articulate as marketing need them to be, and so marketing have a tendency to bypass them."

Kent seems to be giving marketing a get out clause to by-pass sales based on perceived source-credibility (Ohanian 1990). Kent's view of sales is mirrored by Davina from a marketing standpoint:

> **"**I don't think it's a perfect science because sometimes what you do get from the sales team are the real sort of insights on what customers are saying, what their hot buttons are, what they don't like; so (but) they're not always good at articulating what they do think is good. "

In order to provide credible input to value proposition production, to be seen as credible actors on the SMI stage sales need to be perceived as competent in having customer value conversations with customers where they extract insights about the issues affecting customers, and articulate them to marketing. Both sales and marketing leaders need to believe that the cognitive dimension or perceived sales-person expertise is consistent with what is needed for effective value proposition production (Dholaki & Strenthal 1977; Newell & Goldsmith

2001; Sharma 1990). Providing clarity to the underlying issue of how sales actors provide insights back from the field would have a tendency to improve empirical performance in VP development at the SMI.

4.2.4 The kids versus tanks syndrome

In large B2B large organisations what is often at play is what a former industry marketing colleague of mine in a Global Telco described as the 'Kids versus Tanks' syndrome. This means that often very junior marketers are working at the SMI with highly experienced sales people. Saskia points out the typical level of experience of sales people in the Global Financial services environment.

> "I would say the sales team yes, it was very connected to the customer. I mean these are seasoned sales folks, they've worked in this industry for 15, 20 years, so they're very well aware of the financial advisor's job."

Norma observes that quite often very junior marketing colleagues were "facing-off" to senior sales people. There is a credibility issue here that if sales people regard it as 'credit in the bank of experience' sales may not hold junior marketers in high esteem in terms of their ability to contribute to customer value proposition production (Kouzes & Posner 2003). Saskia goes on to point out that this 'Kids vs. Tanks' syndrome may lead marketers to react to single pieces of feedback and one off requests from sales:

> "Yeah, I mean the one thing I'll add there is I found that junior marketers or less experienced marketers will act on every single piece of feedback, and seasoned or experienced marketers will not."

It could be that 'junior marketers', in order to establish credibility in the eyes of sales, think that being responsive to every piece of feedback and every one-off request from sales is the way to go. The absent skillset from the point of view of producing credible value propositions is aggregating and making-sense of this information and looking for trends. I have witnessed this first hand working in the same Global Telco as the former colleague I credit with the 'Kids versus tanks' saying. Early career marketers, fresh out of University face-off to gnarly old salesmen with years of experience. The young marketer is often keen to impress and 'build credibility' and will often react to every single request from the gnarly old salesman. What I can retroduce from respondent data and my own experience is that marketing leaders need to provide confidence and coaching to the junior marketer, and recruit against the potential for coachable behavioural skills, not just technical marketing skills. Junior marketer behaviours and competencies can generate improved empirical performance in VP production at the SMI.

4.3 Identity - summary and conclusion

I will summarise and conclude the identity chapter by providing a retroductive discussion and explanatory models to move from empirical data to provide and alternative understanding of identity in the context of value proposition production at the SMI. By deploying a retroductive approach I seek to show through transfactual arguments (Danermark et al. 2002, p. 69) the inferences I am making about the underlying conditions which can have a tendency to influence identity at the SMI, and provide causal conditions for value proposition at the SMI (Easton 2010; Fletcher 2016; Sayer 2010). Identity is viewed as a significant theme in informant responses. Actors place importance on how they see themselves professionally and in relation to others (Weeks 1990). What emerged from the data is that actors do not see themselves as part of a holistic monolithic entity known as marketing or sales, in direct contrast to the extant SMI Literature (Kotler et al. 2006; Massey & Dawes 2007; Snyder et al. 2016). Actors, especially, marketers, appear to associate themselves with tribes, typically relating to functional specialisms (Mafessoli 2016). In this sense the notion of a dyadic sales-marketing relationship portrayed in the extant SMI literature appears to be naïve and redundant (Kotler et al. 2006; Le-Meunier-Fitzhugh & Piercy

2011; Snyder et al. 2016). The actor responses seem to aggregate to a view that would also suggest that the existence of the SMI is a mythical social construct in the SMI literature**.** The relationship between marketing and sales actors now has to be considered from the perspective of a network of tribes and actors within tribes, akin to an IMP perspective (Hakansonn & Snehota 1990). Self-identity and ascribed identity, from the view of other actors, is depicted in Table 4.3:

Elements of self-identity and ascribed identity
Tribal associations – **Marketing** - (most prevalent). Product Marketing, Corporate Marketing, Brand Marketing, Segment Strategy, Field Marketing, Campaign Management, Account Based Marketing, Proposition Marketing, Product Marketing **Sales** - Account Management, Specialist Sales, Systems Engineer, Solutions Architect, Business Development
Distance – Marketing adjacency to sales Aspects of Distance: – Generic versus specific (practice proximity) is generic marketing being provided or more marketing that can be specifically applied by sales to customer conversations? - Central vs. local (organisational proximity) is marketing placed centrally in the organisation or in a sector marketing and sales team? - Inside-out versus Outside-In (philosophical proximity) does marketing begin with the product or customer in mind?
Customer exposure - the level of exposure marketing actors get to customers affects the regard they are held in by sales actors
Multi-faceted role - marketing is recognised as having a multi-faceted role spanning awareness, brand building, value proposition development etc.
Pejorative and processual – identity can change over time from ‘golf ball’ marketers to ‘seat on the sales board’

Table 4.3 - Elements of self-identity or ascribed identity (Source: Author).

Role proliferation in marketing seems to have fostered self-identity with smaller tribes in more specialist functions such as product marketing, industry marketing, or field marketing (Mafessoli 2016). The implication for the SMI is that there is no interface defined as 'A point where two systems ….meet and interact ' (Oxford English Dictionary 2015). From a value proposition production standpoint, the SMI needs to be regarded as a stage on which the relevant marketing and sales actors are invited to play, with invited customers, at the appropriate time (Goffman 1959). What is apparent is that the SMI stage will be much more akin to a big-ticket Broadway show like '42nd Street' with lots of actors coming into scenes compared to a small production, like Harold Pinter's 'The Caretaker'.

Utility was ascribed to marketers, and formed a large part of their self-identity based on the notion of distance (Nicholson et al. 2013). How proximate or distant the marketing actors perceived themselves, or were perceived to be in relation to sales and customers. Whether marketing actors were providing generic or specific marketing support was an element of distance. Generic marketing that was not specific to customer accounts was not seen to be helpful as compared to specific marketing, aimed at certain customers, sectors or segments. Similarly, centralised marketing was seen to be of less utility than localised marketing. Sales see marketing as more valuable the more adjacent they are to them, especially if marketing resource is assigned directly to sales. Marketing actors felt more valued the closer they perceived themselves to be to sales, the less distance (Nicholson et al. 2013).

Identity was ascribed to marketing actors depending on whether they were seen as producing Outside-in or Inside-out marketing. Outside-in marketers start with the customer or market problem and work backwards from there (Hammer 1996). 'Inside-out marketing' was a label used by respondents to pejoratively describe 'marketing' that starts with the company products and moves out to the customer as product-feature led. This pejorative identity was ascribed by marketing and sales respondents alike to Product Marketers. Favouring outside-in practitioners is congruent with the marketing concept literature (Levitt 1960) and sales practitioner literature (Adamson & Dixon 2013; Miller et al. 2011 Rackham 1988). The implication for the SMI and value-proposition development is that adjacent sales and marketing functions need to treat product marketing as at least the third-leg of a triad (Kowalkowski et al. 2016) before consideration of more fragmented tribal association.

In line with previous SMI studies exposure to customers was seen as virtuous in helping build value propositions (Malshe & Sohi 2009). Sales actors ascribed positive identity to marketers who spent time with customers. Marketing actors who spent more time at their desk compared to with the customer could be seen as 'Ivory Tower' marketers not 'in the trenches', fighting the same battle as sales. Marketing was acknowledged by sales to perform a multi-faceted role from strategy development to execution, such as web site maintenance. There was a danger that the importance of the central SMI task, value proposition production, was relegated in terms of importance, or buried among the myriad more organisationally visible tasks such as corporate brand or website.

Development in a marketing career could be seen to be processual. From the early days where marketers see themselves as mugs and mouse-mat providers to a time when they are more adjacent to sales and seen to have a seat at the board-room table driving strategy. While marketers felt the need to establish credibility with sales there was no apparent reciprocity. This may be linked to who is seen to be customer and supplier in the marketing and sales relationship. Acting with integrity, delivering on promises, and not ‘over-claiming’ successes is seen to be key to establishing, and maintaining credibility for marketing actors. Taken together these factors are causal mechanisms that can have a tendency to influence value proposition production at the SMI through enhanced self and ascribed identity.

Getting sales buy-in to value proposition production was seen to be important by marketers. At the same time narrative around attitudes, behaviours, competencies, and skillsets, such as negotiation, that may affect marketers' propensity to gain buy-in appeared to be absent. There was a self-ascribed perception from sales respondents that a cadre of sales people did not possess the pre-requisite skills to effectively develop value propositions with marketing or customers, or project customer needs and wants back to marketing. Detail on what these absent competencies and skillsets was not forthcoming.

In short, Identity emerged as a theme that served as a generative mechanism for value proposition production. A number of different identities, specifically for marketers, emerged from the data, which I have depicted in Table 4.4 below using original labels emerging from the data.

Identities of marketers
Distant Deidre - sees herself as distant from sales occupying a 'factory' type role where no consultation with sales is required for VP production
Ivory Tower Ian - university educated. Develops 'value propositions' based entirely on desk research, not 'real world' interactions with sales or customers
Trench fighting Trevor - fighting alongside sales people. Engaged with customers and sales in producing value propositions. Usually in a role adjacent to sales e.g. industry marketing
Product pushing Pete - typically a product marketer. Viewed pejoratively by sales and 'real' marketers alike for always pushing product features.
Generic Geoff - produces generic marketing based on a surface level understanding of a market seen to be of little utility to sales.
Specific Sheila - produces value propositions very specific to individual customers or opportunities, viewed as highly relevant by sales people.

Table 4.4 Identities of marketers emerging from data (Source: Author).

The underlying theme that runs through these identities is distance and proximity (Nicholson et al. 2013). Where marketers are proximate to sales either philosophically, organisationally, or in the way they practice shapes these identities. Typically, 'Specific Sheila' would be in a role like ABM or Industry marketing working with sales to produce specific output for individual customers. This type of output is viewed as highly relevant by sales and gives marketers a positive self-identity. Where there is a greater distance between marketers and sales characters like 'Product Pushing Pete' lurk who produce product centric output that is not conducive to effective value proposition development and production by sales. To activate effective value proposition production at the SMI identity must be understood as an entity, and recognised as an underlying generative mechanism with a tendency for causal power in value proposition production (Danermark et al. 2002; Easton 2010; Fletcher 2016). Sales and marketing proximity facilitates morphogenesis where through better collaboration and understanding of customer issues value proposition development can be enhanced. Distance between the two functions, and failure to recognise the tribal nature of marketing, will promote a tendency for morphostatis (Chubb 1990; Simon et al.1985).

Figure 4.1 presents a summary of the identity theme depicting the salient factors that form part of identity that can be influenced to generate movement towards better SMI working for value proposition production. Taken together the factors that make up identity emerging from the data can be seen to be generative mechanisms that have tendency to influence empirical outcomes for VP production at the SMI:

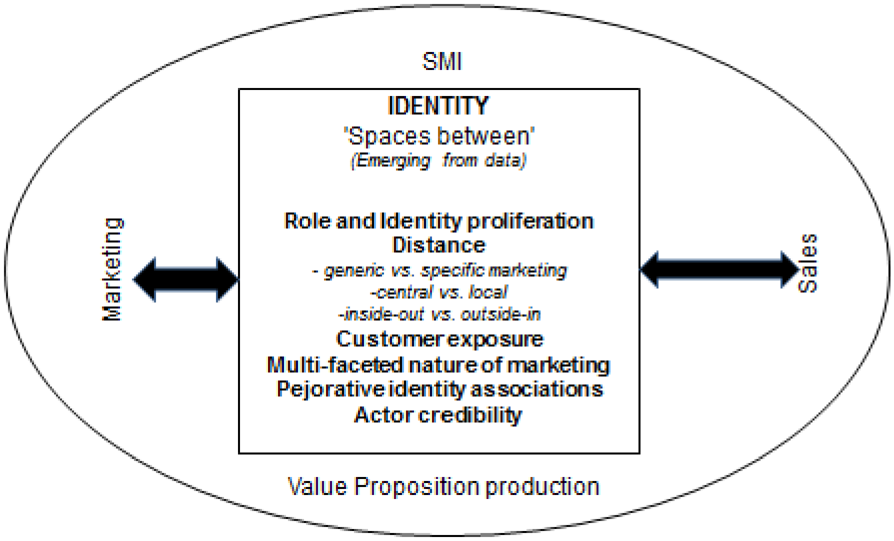

Fig. 4.1 Identity: Spaces in-between marketing and sales in relation to value proposition production (Source: Author).

In Chapter 5 I will now consider the second theme that emerged from the data, Contextualisation. In Chapter 6 I examine the third theme, Thought worlds. In Chapter 7 I will draw together the key findings from Chapters 4 to 6. At the end of Chapter 7 identity will be factored into an integrated model for SMI interworking to produce value propositions.

Chapter 5 - Contextualisation

This chapter considers the part contextualisation plays in how marketing and sales work in the production of value propositions. The following themes are discussed:

- The perceived importance marketing and sales actors place on contextualisation for value proposition production.
- Actor understanding of contextualised value proposition production at the SMI.

What emerged from the data was that marketing and sales practitioners were concerned about context and contextualisation in relation to how actors at the SMI were engaged in value proposition production. Responses that drew out issues about context were categorised under the pattern code ‘contextualisation' which is the central theme of this chapter. The chapter draws on the discussion of the context and contextualisation literature in chapter 2 bringing forward ideas from theology, sociology, and anthropology. The marketing and value-in-context literature, as a body of work is also considered for its market orientated relevance. I have used these bodies of literature in an abductive sense in order to provide a recontextualisation of conventional marketing management descriptions of sales and marketing roles and titles from a sociological perspective, consistent with CR (Danermark et al. 2002; Easton 2010; Fletcher 2016; Sayer 2010). The ideas and concepts from context, contextualisation, and marketing in context literature will be used to sensitise and inform the discussion of empirical data emerging from fieldwork. The discussion moves between theory and data to help develop an explanation of how contextualisation is considered by actors in the Sales and Marketing Interface (SMI), especially in relation to the production and development of value propositions. The chapter concludes by proposing models for contextualisation of value proposition production at the SMI.

5.1 Actor concern with context and contextualisation

A central concern of my thesis is whether value proposition production engages the customer and the SMI. Many respondents mentioned the importance of the need for the SMI to be fluid to customer contexts with regard to value proposition production. Several marketing respondents feel that this fluidity needs to take place within a holistic understanding of the macro-environment for the customer and their own organisation. Here Eli, Vice President of Sales for a Global Equipment Provider talks about the need for fluidity and a link between the macro-level, vertical market and individual customer value propositions by recounting his experience in an earlier sales role in a US Telco:

> "Maybe the core of the conversation between sales and marketing is in developing a value proposition of our offering and customising that value proposition into the segments in the verticals that we're addressing. What I really want marketing to do for sales is to develop go to market messages for specific verticals to my target customers that will address their problems and will fill a gap in my customer's business and improve their probabilities of buying."

What I am able to retroduce from Eli's observation is that the conversation between marketing and sales needs to facilitate developing a value proposition for the overall company offering in a macro, cross industry context. This would need to have the fluidity to be customised for an industry context and be fluid enough to enable Eli to help solve his individual customers' problems. This is what I call contextualisation.

Context heterogeneity means there are a wide variety of value proposition scenes that can be encountered by actors, or stages value propositions can be played out on (Goffman 1963). The heterogeneity of contexts for value proposition production emerged strongly from fieldwork data. The need to contextualise value propositions for different contexts was a theme that all respondents referred to in some shape or form. Consistent with Eli's remarks

Greg, Owner of a sales and marketing consultancy, former Vice President of Sale Global Telco, observes:

> "Yes, because I think it's very easy to have very broad value-based statements, you know, high-level benefit statements but I don't believe it becomes a value proposition for a customer until such time as they can make it relevant to their particular company or situation and can see how they can get value from it."

Here Greg, whilst acknowledging the need for "broad value-based statements" at the macro-level, makes the point that what really matters is being able to develop a value proposition that is relevant to a "particular company or situation", in other words, in context. Building on the observations made by Eli, Greg and other respondents, for the purpose of this chapter context will be considered to mean 'A setting, challenge, matter at hand' (Schiller 1912, p.53) emerging from the data that can be deemed to be a measurable, observable context as it relates to value proposition production

The contexts coming out of the data were many and varied; some of the most prevalent are show in Table 5.1. A number of customer side contexts will be examined in more detail in Chapter 5. The supply side contexts will be considered in more depth in Chapter 6 under the thought worlds theme.

Supply side	Customer side
Individual deal: VP has to be set in the context of single deal	**Macro-Micro**: VP has to traverse macro environment customer exists in and individual context of customer
Opportunity: VP has to be set in context of an opportunity in an customer account or market	**Industry vertical:** VP has to pay attention to issues that may be faced in an industry vertical e.g. Pharmaceuticals
Product: VP has to be able to contextualise value that a new product can promise	**Economic context:** VP has to take account of prevailing economic conditions and promise economic value

Table 5.1 Examples of contexts emerging from empirical data (Source: Author).

Building on these example contexts I have developed my own definition of contextualisation as it relates to value proposition production at the SMI: 'Production of value propositions at the SMI that are set in the context they are to be placed'. My definition can be seen to be congruent to contextual marketing as a philosophy recognising the need for fluidity of value proposition production with respect to the market or customer context (Hackley 2013).

5.2 Contextualisation - theological literature analogies

Parallels can be drawn with the theological literature introduced and summarised in Chapter 2 to make sense of respondent observations relating to contextualisation. The theological literature plays an abductive role (Danermark et al. 2002, p.96) in which value proposition production is recontextualised and reinterpreted through the context of theology. Jeff, MD for the business division in a Global Telco which also serves the residential, small and medium enterprises and major corporate customer markets expressed his frustration at a "one size fits all" approach to marketing to customers, drawing theological analogies in his "broad church" view:

> "But it's a very broad church, so it's a million customers, right from the sort of hundreds of thousands of one to five employee organisations right through to the FTSE 100 I was looking after. And one of the problems in the early years I had in Global Telco Business division, which was a frustration for my team as well, was when marketing were trying to use a one size fits all blunt instrument in terms of the way they wanted to position propositions for a million client universe, and by definition when you're in that situation you go to the kind of lowest common denominator."

In Jeff's experience, this preaching from the gospel "one size fits all approach" led towards the "lowest common denominator". The prevalent view from respondents was that this type of generic marketing does not work, which is reflected in the findings in Chapter 4. The SMI needs to work together to understand different customer segments and contexts to produce contextualised value propositions. The prevalent view coming from most respondents had some alignment to the four- stage process for critical contextualisation put forward by Hiebert (1985, p.188). first introduced in Chapter 2: The *gather* stage consists of gathering information on context and culture, the study stage involves becoming familiar with biblical teachings, the first two stages underpin the third stage in which missionaries *evaluate* different cultures and context in the light of biblical teachings. The first three stages allow theological practitioners to *create* new Christian practice align to the recipient cultures.

Parallels can be drawn between the critical contextualisation process and value proposition development in the light of data emerging from fieldwork. Vanessa, Sales Account Director for Global IT Co, referring to her days as a Director in a Global Telco that "did value propositions better" than her current organisation suggests a processual approach (Nicholson et al. 2013) to value proposition production that starts with an understanding of a customer problem, where the problem is seen as the context setting:

> “We’d start from the business issue and the problem, the pain our customers are feeling, and working back to potential solutions rather than talking about the solutions before we’ve articulated that we understand the pain, or got some understanding from them of what the pain is.”

The company product catalogue would only be referred to in the context of the customer problem. Evaluation of the customer problem would lead to the recommendation of new solutions, very akin to Hiebert's critical contextualisation process (Hiebert 1985).

Theology literature provides two contrasting techniques used in bible translation which can help make sense of respondent data. Formal equivalence can be understood to be about word-for-word translation in a literal sense. While dynamic equivalence aims at sense-for-sense translation which aims to translate the same meaning, in the eyes of the receptor, such that response of the receptor is like that of the original recipients (Nida & Tabor 1969).

Respondents indicated differences between organisations that directly translate value propositions to new receptors compared with those who sought a deeper understanding of context and culture of different industries, companies and individuals. Caila, Vice President of Sales at Global Telco recounts a previous role which demonstrates a deep understanding of a customer problem:

> "I think probably, if I take an extreme case, and this is years ago, this was in Mega-Global Telco; and this (the customer) was Galactic Bank. Galactic Bank used to go around all their branches with magnetic tapes and update each individual branch system one by one. By the time they'd rolled out some new software it would take them six months to get around all the branches, then the next set of branches. We developed a value proposition which help solved this problem."

Caila's quest for deep customer understanding led her to develop a value proposition that solved Galactic Bank's problem of the six months lead time to roll out new software to branches. In direct contrast Katie, who had recently taken on the role of Senior Vice President, Marketing at Global Telco, was struggling to move the organisation from a formal equivalence translation approach with customers:

> "I wouldn't say it's perfectly finished but it's something we're training across sales currently because we feel that we're weak in the way we talk to customers around Widget X, and then when we started to think about it we realised hey, it's not just a Widget X story."

What Katie says she inherited was a situation where Global Telco was selling Widget X by pushing technology at customers, which is not congruent with how a value proposition is defined (Ballatyne et al. 2011; Kowalkowski et al. 2016; Vargo & Lusch 2008). Katie goes on to say that they are working on understanding the problems of the key customer for a Widget X service, the Chief Information Officer (CIO). At the point where the CIO issues are understood Katie still has a choice to make between a translation approach and deeper customer understanding. From a basis of understanding generic CIO issues translation would look like 'we understand issues people like you face now buy our Widget X'. Seeking deeper understanding would involve having empathy for the particular issues faced by an individual CIO and tailoring the value proposition for Widget X to specific needs.

5.2.1 Contextualisation and the anthropological model

In theological literature the anthropological model of contextualisation views cultures (contexts) as different and unique, arising from a more catholic view of culture (Bevans 1992), and can provide a useful lens through which to make sense of respondent data. In the anthropological model individuals are seen to be their own best contextualiser. Here the role of the theologian is to help enable the process to allow people to contextualise theology. In the context of my thesis this model is akin to those respondents whose organisations try to develop deeper understanding at the meso-level, often defined by an industry. For example, Davina, Vice President Marketing, Global Financial Service Technology Company spoke of work she had taking place to form a deeper level understanding of vertical markets that sit underneath the umbrella of the broader financial services market:

> "Actually, we’re working on *a* more granular understanding of vertical markets right now because we feel like it needs some work. You know, we need to kind of crystallise it a bit more because it’s such a big organisation and actually we cover the spectrum of financial markets, so the capital markets world; the asset management world etc."

In contrast, some respondents seem to be more aligned to language translators in their value proposition practices. These models can be usefully used to critique and 'make-sense' of the empirical fieldwork data.

5.2.2 Praxis models of contextualisation

Praxis models put forward different views of how theology can be practiced (Schreiter 1985). This is about the practice of theology in the here and now. Two models provide different starting points for 'doing theology' in a hermeneutic cycle

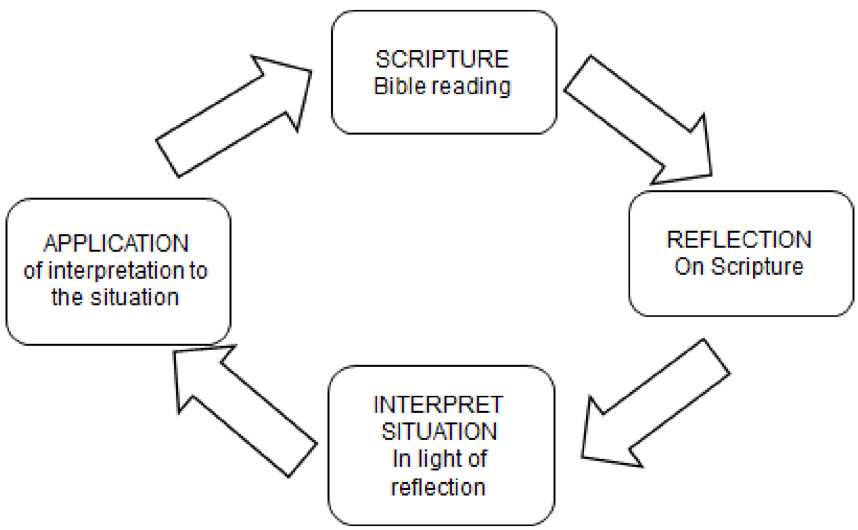

Fig. 5.1 - Evangelical model - starts with scripture - adapted from Harrower (2001, p.13).

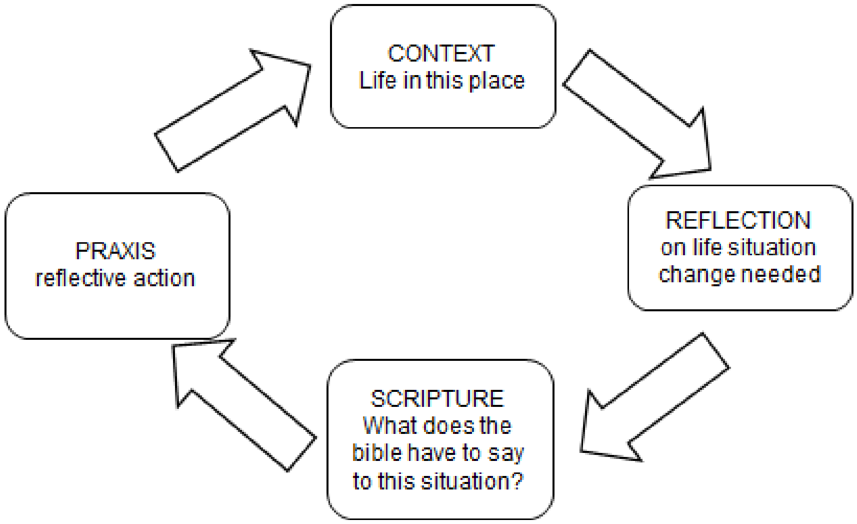

Fig. 5.2 - Liberation Praxis model- starts with context 'life in this place - adapted from Harrower (2001, p.13).

Theological praxis models of contextualisation are highly relevant for making-sense of how sales and marketing work together at the SMI to produce value propositions. The Liberation theology model begins with ‘life in this place’ as the starting concern, before turning to scripture. The Evangelical model begins with the bible using scripture to reflect and interpret the contextual situation. Empirical data can be made sense of in the light of these models. Does it seem that marketing respondents act akin to the evangelical model by passing down biblical ‘value propositions’, like high priests, without much involvement from sales, or the customer? Do actors see praxis as more akin to liberation theology and how does this play out in developing value propositions at the SMI? Contextualisation is a key issue to both understand and implement for *relevant* and effective practice.

Althea, Vice President of Marketing at US Cable Company seems, at best, to be articulating an evangelical approach in her organisation:

> "I think our overall company actually has a pretty powerful set of value propositions. I think a lot of business units say something similar to what we do, which is our company has an overarching value proposition that makes sense at the company level but we are in a narrower part of our business. So, we need to customise that value proposition for what it means specifically for the enterprise business."

What is unsaid is whether the "overarching value proposition" actually has any basis in customer value, or if it is just an inside-out statement of who the Cable Company is. Given that the aspiration is to develop a value proposition for the "enterprise business", which describes the business unit rather than its customers, it looks like the emphasis is inside-out. An evangelical approach to value propositions is doomed from the outset unless it has a basis in customer value (Kowalkowski et al. 2016; Payne & Frow 2014; Vargo & Lusch 2008). What I can retroduce from Althea's observation, supplemented by my own experience, is that the Vice President of Marketing can often be seen as the voice of the Executive Leadership, not the customer. A causal mechanism for enhanced value proposition development at the SMI is marketing leadership that champions customer value which will manifest itself empirically in value propositions, and a value proposition production approach that takes into account customer value.

In contrast Thomas, Senior Vice President of Sales at Global Telco seems to be adopting a Liberation theology type practice by beginning with 'life in the customer's place':

> "We've got to attach it right back to the value proposition and it would be what's the customer priority, what is the customer major issue or pain point that they're looking to address over the next business cycle or business period."

Thomas is advocating understanding the customer's "pain point" and using this as the basis for developing a value proposition. When Thomas says, "We've got to attach it to" he is referring to the overall value proposition and capabilities of his organisation at the macro-level. In other words, Liberation praxis is set in the broader context of the problems a particular organisation is set up to resolve.

5.3 Making sense of perspectives of contextualisation

Sociology, Contextual Marketing, and especially Theology literature has provided some useful models and frameworks with which to help interpret what emerged from the data which I categorised under the contextualisation heading. I will try to make sense of the respondent data, with the help of the models and ideas coming from Sociology, Contextual Marketing and Theology following a flow of different contexts articulated by respondents. In developing abductive inferences from the outwith literature I will provide a retroductive discussion which moves from the empirical data to provide an alternative understanding of value proposition by enriching analysis with outwith literature.

5.3.1 Market and customer orientation as the starting point

Respondents, especially from the marketing side, cited product-centricity as an organisational issue affecting value proposition development. For example, Norma, a Senior Marketer in a Global IT Organisation:

> "I think actually what I'm working on or have been working on over the last nine months. So Global IT Co. has what I call a bunch of offerings which are bits of technology. So, let's go and sell them a bit of Software X; let's sell them a bit of Software Y. That means nothing to the customer if you don't put it in their context."

In Norma's world, the prevailing organisational orientation is product-centric. It appears that Global IT Co. rejects market centricity. Equally it could be taken to mean that Norma, who identifies herself as being 'closer to the customer' accepts it as her role, or lot, to translate the product-centred company approach at the macro-level into customer value propositions at the micro level, akin to an evangelical view of marketing praxis (Schreiter 1985). In Norma's world the marketer may need to begin the translation before any interaction with the sales person takes place. The customer context does not appear to be the start point of the praxis cycle. The translation is from a product-centred gospel, where "product" is 'the text'. What can be retroduced from this is that marketing and sales actors at times have to be evangelical with and about customers in a praxis that is product-centred. While more supportive customer-centred senior executives could act as causal mechanisms for Liberation Praxis this is not something Norma has the luxury of. Equipping B2B sales and marketing actors with ability for customer interpretation with an Evangelical Praxis could have a tendency to enhance VP development at the SMI. The interplay between structure and agency is evident. How top-level executives view their company offer, and how marketing actors view their role can constrain or enable actor agency. In spite of a product centred perspective and an evangelical view of contextualisation coming down from company executives Norma does feel that she has agency to develop customer-centric value propositions in her role which is proximate to sales (Fletcher 2016; Lawson 1997). However, a structure that operates as customer-centric following liberation praxis will have tendency towards production on more relevant and resonant customer value propositions (Anderson et al. 2006; Ballatyne et al. 2011; Payne et al. 2017).

5.3.2 Macro-level context of marketers

Some marketing respondents believe, like Davina, Marketing VP, at Global Financial Services Technology Company, that their role involves developing a macro-context value proposition (referred to as "this") spanning across the whole of the customer base.

> "Actually, we're working on this right now because we feel like it needs some work. You know, we need to kind of crystallise it a bit more because it's such a big organisation and actually we cover the spectrum of financial

> markets, so the capital markets world; the asset management world and so on."

In contrast with Norma's world it appears that Davina is attempting to build an overall customer-centred gospel that transcends the different market contexts of the customer base, while recognising their different market contexts. Davina's statement also seems to recognise the issue that there is a need to make the Weberian macro-micro link across contexts (Boudon 2014). This seems more akin to theological liberation praxis that begins with a customer-centred orientation (Schreiter 1985). The gospel in Davina's world is more likely to worship the glory of the customer than the product. Philosophically the academic marketing management literature, and value proposition literature, would see Davina's approach as more akin to a market orientation (Kotler & Keller 2015; Levitt 1960; Vargo & Lusch 2004). What is not clear here is whether the customer, and sales, are absent, or present, in helping frame the macro-level organisational value proposition (Knox & Maklan 1998; Payne & Frow 2014). What is clear is that respondents did see the role of producing this macro-level value proposition as a marketing function.

5.3.3 Localised contexts or 'congregations'

Emerging from the data was a set of more localised contexts depending on the organisational situation, job function and viewpoint of the respondent actor. Using the theological analogy where Davina talks of a value proposition akin to The Pope's Easter address, to all her customers, what emerged from the data was a set of nested contexts increasing in localisation.

5.3.3.1 Industry or vertical context

The Meso-level of context that emerged from the data was customer industry sector, often referred to by practitioners as "verticals". Many respondents cited that they were organised by industry verticals for sales and marketing purposes. Respondents felt it important to understand the industry vertical context for value proposition creation. For example, Jeff, MD of the business division of Global Telco:

> "So, you must find ways to be, you know, adding value in your understanding of the client's industry, their business issues and how you can make them survive and thrive."

Jeff advocates an approach in line with Liberation Praxis (Schreiter 1985) that seems to start with understanding 'life in this place', in the context of the "client's industry", akin to the first stage of the critical contextualisation process (Hiebert 1985). "Adding value" appears to emerge from analysis of customer business issues followed by recommendations about how the selling organisation can help the customer "survive" or "thrive". What is absent from Jeff's response is how the SMI should work to develop this understanding of "the client's industry" to be able to produce meso-level "vertical" value propositions.

Caila, Vice President Sales Global Telco, bemoaned that sales people were generally not consulted enough about industry issues, and offered a way forward for harnessing their input:

> "So, if you sit down a group of sales people in each vertical and you can sort of thrash out between yourselves what are the common themes and challenges running through banks or content or broadcast or manufacturing or retail or whatever, and that generates a lot of similarity that you can see around the room, and then really you need kind of somebody to develop that into okay, so these are the challenges, within that vertical."

Caila wanted to draw on the experience of sales people, who work with customers every day, to develop a better understanding of challenges within an industry. Here a facilitative role seems to be being suggested to draw out this experience. What is absent here is any mention of the skillsets required to do this, and the other activity inherent in Caila's statement: making sense of, and analysing themes. There appears to be an implied third stage skill in the processual view being put forward by Caila which involves crystallizing and articulating the customer challenges. What I can retroduce from this is that Caila feels that sales input to value proposition development is valuable and under-represented. Combine the opportunity to draw together sales input with the necessary skills required to facilitate and make sense of sales input could have a tendency to cause improved value proposition production at the SMI.

Some respondents felt that to take customer industry sectors seriously more vertical subject matter experts needed to be in place. For example, Vanessa, Sales Account Director, Global IT Co:

> “We have a lot of technology officers that can translate technology; we just don’t have those industry vertical subject matter experts in enough numbers to actually help shape how we message to the market. I don’t think we do…that they understand the context.”

Vanessa observed that because "they don't understand the context" Global IT Co was unable to develop an appropriate “set of messages for the market”. This is consistent with Hackley's view of contextual marketing as a communications based praxis requiring fluidity, in this case at the “vertical” level. The implication for the SMI is the requirement for more industry vertical expertise (Hackley 2009).

Respondents consistently put forward views in line with Liberation Praxis and critical contextualisation (Hiebert 1985; Schreiter 1985). In the context of the SMI working to develop value propositions there seems to be an additional phase being suggested, absent in the theological models, the creation of an industry vertical 'bible'. In my experience, the term 'industry bible' is widely used by sales and marketing practitioners, to describe a document that draws together the selling organisations understanding of, and response to, the industry context. The need for industry sector knowledge, need for greater engagement of sales in the process of assembling industry trends, implied skillset gaps needed to 'make sense' of industry trends and articulate an organisational response clearly emerged from the data.

5.3.3.2 Horizontal role context

What sales people deemed to be important was producing value propositions at the SMI for horizontal roles present across industries. For example, Jeff, MD, Business Division for Global Telco:

> "Solving a functional problem that works across multiple industries, whether it be a problem with HR that would apply to lots and lots of customers in different verticals or a problem with sales or a problem with field force engineering. So where it's worked well it's marketing being able to create succinct messages that the sales people can get behind and customers."

What is absent here is the knowledge, skillsets, processes and relationships required to develop a level of understanding of functional problems. How the SMI would work to get to a point of understanding, for example, the HR functions problems remains unanswered, but an unequivocal requirement from Jeff's standpoint, is the need for marketing to "create succinct messages" that would resonate with the appropriate roles. Quite what marketing actors need to do to ensure that sales people get behind the messages is left unsaid. Jeff seems to suggest that some process of sales buy-in is required (Malshe & Sohi 2009). What has emerged from the data is a horizontal cross-industry role context meso-layer for which there is a requirement on the SMI to develop value propositions for. Below the surface is a requirement for a skillset in marketing actors for making sense of horizontal issues and creating value propositions that resonate with customers in roles like HR Director.

5.3.3.3 Account and customer level context

A more recent development, or maybe a fad, in B2B marketing and sales is a move towards *Account Based Marketing* (ABM). *Account* is a term used by practitioners typically to describe a company who is a large current customer or who has the potential to be. ABM can be defined as 'Treating individual accounts as markets in their own right' (Information Technology Services Marketing Association definition cited in Burgess & Munn 2017, p. 6). There is very little academic work, as far as I can tell, on ABM. Practitioner focused books (Burgess & Munn 2017) seek to provide a mechanical 'how to' approach to operationalise ABM for practitioners.

Anna**,** Marketing Director, Global IT Co, has responsibility for the ABM programme at her company and was among a number of respondents who talked about account level value propositions:

> “From an account based marketing perspective we start off with the premise that you need to properly understand the customer so that what you’re talking to the customer about is aligned to what they need.”

Anna suggests the starting point is “to properly understand the customer”. This view seems to be preaching alignment to a Liberation Praxis (Schreiter 1985). Here becoming “aligned to what they (the customer) need” seems akin to critical contextualisation process (Hiebert 1985). From a processual perspective starting with “proper customer understanding” through to production of value propositions aligned to customer needs mirrors a Liberation Praxis flow (Schreiter 1985). What is absent here is any consideration of the respective roles of sales and marketers, and the dialogical flow required between the customer and the SMI to facilitate value “proper understanding” in order to develop value propositions.

Some respondents did reflect that sales actors do want marketers to be more focused at an account level. For example, Laura, SVP Sales, Global Telco:

> "I'm pushing marketing to feel more and more account based for our customers that place in the top 10 account list by, every sales director, so that our value propositions resonate…..you have the very targeted value proposition that I have seen a higher success rate with."

Here Laura appears to be expressing frustration about having to push marketing towards a more account based focus. There are huge (unsaid) resource implications in expecting marketers to move to an account level focus, as opposed to operating at the meso or macro layers. What was clear was the prevalent view coming from respondents of the need to develop value propositions at the account or micro-level. This approach was seen to produce value propositions that "resonate" with "The Account", and deliver sales growth (Anderson et al. 2006). Largely absent was any discussion of the skills and resources required to do ABM along with any dialogical and relationship enablers at the SMI, and with the account.

5.3.3.4 Actor-level value propositions

The sales literature recognises that companies are made up of people who may all see value in different ways (Adamson & Dixon 2013; Miller et al. 2011; Rackham 1988). Many respondents make reference to individual roles within customer organisations. The actor-level is distinctly different from what I identified as the horizontal meso-layer where the "congregation" could be seen to be, for example, all HR Managers. This is about the individual who is, for example, the Vice President of HR within a particular account. Thomas, Senior Vice President of sales at a Global Telco made reference to a former company he worked for who he thought did this well:

> "I remember using role level value propositions to get access to customer service managers, to HR managers and marketing managers, and they allowed me to move away from just the IT buyer."

What Thomas sees as important here is the role level value propositions helped him get access to people in the "account" other than the IT buyer which helped him achieve his sales objective. This is increasingly important in an environment where decision making in large organisations has become much more consensus based, with an average of around 5.4 decision makers on any significant deal (Adamson & Dixon 2013). Sales literature goes beyond job title roles to examine roles played in buying decisions (Miller et al. 2011). Discussion of role level value propositions is largely absent in mainstream marketing texts, though clearly recognised as important from the respondents' standpoint.

Kyle, MD of US Software Co. and former Senior Vice President of Marketing at a Global Telco highlights the point that reasons to purchase vary by individual, almost by transaction:

> "I mean when you have an organisation selling multiple products to multiple segments, the reason for any one purchase can be very different between one segment of one customer with one product versus another segment with another product, right?"

What Kyle appears to imply here is that a value proposition needs to take into account the segment, customer, and product combination of any individual purchase situation. How the SMI interacts to get to these individual value propositions is absent here. Kyle also suggested a temporal dimension to context here (Nicholson et al. 2013). Reasons to buy will vary depending on the customer issue, at the time of the issue. What did clearly emerge from the data was the need for actor-level propositions nested inside the micro-level of the customer account. Said differently, what Kyle is referring to is the need for a VP production process and system that allows sales actors to develop VPs inside a nested structure. Without this structure agents are likely to feel constrained as they will have limited information on which to build VPs (Fletcher 2016; Lawson 1997). It can be retroduced that this nested structure provides a dynamic tension between the need for overall structural morphostasis and morphogenesis required to produce VPs that are in tune with market and customer developments (Chubb 1990; Simon et al.1985), that are recognised as transitive in nature (Payne et al. 2017).

5.3.3.5 The customer problem as the central focus

Emerging from the data as a prevalent view was that the "customer problem" was seen to be the central focus for value proposition production. Katie, Senior Vice President Marketing at Global Telco, stated this explicitly:

> "I think not as much in the value proposition but in the precursor to the value proposition, which is what’s the problem you’re trying to solve? So to me a value proposition is only interesting if it’s addressing something someone cares about."

I can retroduce from this that "someone" in a customer organisation needs to have a problem that they care about being solved. The implication for the selling organisation is that they need to know what this problem is, which requires a level of intelligence that comes from customer understanding. Who does this, and how, is absent from Katie's statement. Sales literature provides numerous questioning techniques to help the sales person to uncover a deeper understanding of customer problems from the standpoint of an individual customer (Rackham 1988). Mainstream marketing literature places the focus on mainly macro, and at best, meso-level issues faced by companies (Gilligan & Wilson 2009; Kotler & Keller 2015). The bifurcation in the focus of the marketing and sales literature has emerged from the data as a problem witnessed by practitioners as generic or specific focus (Hiebert 1985; Schreiter 1985). The theological literature and models can provide a useful bridge between the marketing and sales literature to help the SMI produce value propositions in context.

In defining a problem as something “someone cares about” Katie seems to be referring to an individual person inside a customer account. It is acknowledged to be a problem once the customer recognises that it is and wants it to be solved.

A problem can be identified at any of the levels or localities. What this highlights is that if an organisation is product-centric and believes ‘the text’, or its scripture to be about product there will not be a mechanism for marketers to identify potential customer problems, as they won’t be looking for them. Laura, Senior Vice President Sales, Global Telco draws attention to issues that arise when marketing actors do not have this customer-centric view:

> “Well if marketing has no customer intimacy then sales have to translate very clearly and articulate a very good assessment of our customers and if we’re not good translators to share that intimacy of our customers or our industries with marketing then marketing will have a very poor chance of creating things that resonate with our customers."

Laura seems to be suggesting that marketing can use sales as a proxy to get a better understanding of customer needs and concerns. What she seems to be concerned about is sales ability to “translate” their customer intimacy back to marketing in a meaningful way. Not only does this highlight the need for dialogue about customer value at the SMI it calls into question the skillsets required for contextualisation. If the sales person is cast in the missionary role then at the individual account and actor-levels they will need to be able to develop an understanding of these customer contexts, in line with Liberation Praxis and Critical contextualisation (Hiebert 1985; Schreiter 1985). Translating these into a view of what customers value back to marketing at the SMI requires them to ‘unpack' that customer understanding into something meaningful for marketing (Johnston 2014). If the 'unpacking' skillset is absent then there is no foundation for building value propositions that resonate with customers (Anderson et al. 2006).

5.4 SMI views of tailoring the 'final' value proposition

One aspect that all respondents expressed a view on was the degree of tailoring of customer presentations that sales people are required to do to create relevant value propositions set in the customer context. While the prevalent view was that sales do need to do some tailoring, there was a range of opinion which could be arrayed along a Theological Praxis continuum from near-evangelical to those observing liberation praxis tied to critical contextualisation (Hiebert 1985; Schreiter 1985). There was universal agreement on the need to tailor, though some views were more akin to language translation models (Kraft 1979).

Speaking as a marketer, Coleen, a Senior Director, Global Telco observes:

> "I would have to say, in my personal view, the customer presentation that allows them the flexibility to update messages instead of them building their own, which they often do. Marketing puts out something slick and then they take pieces of it but they're always building their own. If we could just crack that nut".

Coleen expressed a view that there was too much tailoring taking place with the implication that the slick marketing presentation was being diluted by a high degree of tailoring. Coleen recognised too much tailoring as a problem she cares about being solved expressed in a desire to “crack the nut”. What is absent here is any view on why sales feel the need to apply a high level of tailoring to marketing presentations. Under the surface is the question why does Coleen see tailoring of presentations by sales as a problem, is it because the tailoring violates the "slick" marketing presentation, or a concern for brand consistency, or a feeling that sales people are ruining her 'marketing work' (Svensonn 2007). Why sales may feel the need to tailor is absent from Coleen's observation.

Vanessa, Sales Account Director, Global IT Co, recognises the same problem from a sales perspective, and does bring to light why sales may feel the need to do "too much tailoring":

> “Marketing don’t talk about why it might be important in enough detail for me. What you would want is 80% there, 20% tailoring. And I would say it’s 20% there and 80% tailoring, would be my observation.”

Applying a crude numerical view to the size of the problem Vanessa seems to articulate that current practice is almost complete reconstruction of marketing value proposition presentations by sales. It sounded like this was causing sales people too much work, the desire was to get to a point where sales could just tweak presentations. The perception that marketing "don’t talk about the why" is cited as a reason for the current situation of 80% tailoring. Coming from a product-centric organisation it maybe that some marketers, in this case product marketing, presentations are created from a ‘Product bible’. If there is no company-wide scripture about macro-level customer concerns the sales person is the first point where the ‘why?’ question will arise. What I can retroduce from this is a potential causal mechanism for the high percentage of value proposition tailoring at the empirical level is a lack of understanding and ability to articulate why something is important to a customer. Easton (2010) draws out the difference between 'Perceived balance of responsibility' and 'Enacted balance of responsibility'. Marketing may perceive they only have to develop the 'what' when sales need the 'why'. Bridging the Perceived-Enacted gap (Easton 2010) could act as a generative mechanism for the what-why gap which could have tendency to resolve the high percentage of tailoring at the empirical level. There is tension here between how structure and agency are perceived. Sales people appear to be in need of a greater level of structure as they believe it can enable less tailoring of value propositions, encapsulating the ‘why’ in macro and meso-level value propositions needs to move from voluntary individual marketing actor behaviour to enable reproduction of compelling value propositions through improved structure (Archer 1995; Sayer 1992).

Greg, Sales Consultancy Owner and former Vice President at a Global Telco provides more insight into current practice, and the problems this over tailoring can cause at the meso and macro-level:

> “I think the sales people generally make up their own content because what they will typically do is take the deck that they’ve just received from the marketing team, take a couple of slides from it, add it to a deck they’ve already got, and make up their own version of that particular message. So, on the ground, sales people in my experience generally don't take the marketing content and collateral from marketing and just use it, they would generally take it, strip it apart and rebuild it in the way that they want to do it, which it loses some of that consistency in terms of how that message gets to market.”

Greg appears to see the overt tailoring as established custom and practice. While he seems not to see a high degree of tailoring as a problem at the customer level, he sees over-tailoring as a practice that could create a consistency issue about how that “message gets to market”. Greg seems to have recognised the need for a Weberian micro-macro link (Boudon 2014), or in this context a link from actor-account level to macro-level value propositions.

Saskia, Owner of a Marketing Consultancy and former Marketing Director at a Financial Services Technology company, provides a view of what that macro-micro link could look like:

> “What sales generally find the most useful are materials where the story absolutely resonates with our customer and where they have the ability to make small tweaks or customisations."

Saskia went as far as to detailing what marketing should put in a value presentation before it gets to sales. There was acknowledgement of the need for the sales actor to tailor to a customer set within a clear articulation of an organisational understanding of the solution to a customer problem at a macro and meso-level. There has to be a view of a dependent level of contexts to help the sales person contextualise, without the need for complete reconstruction of value proposition presentation. Recognition that value propositions are produced in this kind of contextual system can help achieve customer resonance and macro-meso-level consistency.

5.5 Contextual layering: the recognition of a systemic approach to value proposition production

Achieving this micro-macro link transcending contexts from actor-level to macro environment was a challenge a number of respondents recognised (Boudon 2014). Kyle, MD of US Software Company and former Senior Vice President of Marketing at Global Telco frames this succinctly:

> **“**So therein lies the trick as to how you layer your value propositions such that it's not too generic and it's not too detailed or where it misses the mark.”

In this observation Kyle views the starting point as marketing developing macro-level value propositions that can be built, moving towards the customer in layers; macro-meso-micro-individual actor. What he went on to say was critical of “marketing teams” who he felt fail to see the “broader context”.

> “What happens is the marketing teams tend to roll… they tend to roll-out new content in a very… without the broader context. So they might roll-out new content for a new product, new value proposition to a current segment. But it's not necessarily put in the broader context of the entire company and entire layered value proposition.”

In Kyle’s view there needed to be a “broader context” in which to place a new “value proposition”. He characterises this "broader context" as a “layered” or "nested" set of contexts. The need for a systemic approach for value propositions that operates up and down the contexts, is what seems to emerge from the data.

I call this systemic approach *Contextual layering*, cognisance is taken of a meta-layer where all actors, individual companies, industries, functional managers interact with each other (Chandler & Vargo 2011). In Contextual layering a new product, service or value proposition has to be able to resonate with the intended target context, be able to co-exist, and be internally consistent with the "entire layered value proposition". Ideally any new product or service should enhance the layered value proposition, or why else would it be being brought to market? What I can retroduce from this is that actor recognition of the need for contextual layering and placing products into a broader value proposition could have tendency, as a causal mechanism, to improve value proposition production at the SMI. Contextual layering can facilitate balance between morphogenesis required to be respondent to customer and market development with a structural morphostasis that allows actors a level of voluntarism to shape value propositions with deterministic boundaries set by the macro and meso-level themes that shape contextual layering (Chubb 1990; Simon et al.1985).

5.6 The sophistication gap as a barrier to effective SMI working

What emerged from the data was a rich vein of responses referring to the generic-specific dynamic where marketing primarily exists at the macro and meso layers and sales operates primarily operate at a customer account and individual actor-level. While a number of respondents saw the need for an effective value proposition system, which I refer to as Contextual layering, a major barrier to this was seen to be the ability of marketing and sales to bridge between their main operating domains.

Kent, President, Global Data Centre Co from a long background in Telco Sales called this the *Sophistication Gap:*

> "You have an environment where marketing is so scientifically sophisticated and theoretical that sales cannot grasp or translate the theory into usable material."

Kent went on to explain what he meant by the sophistication gap:

> "Yeah, I mean I think generally speaking there is a sophistication gap and certainly you'll hear from sales generally that I need use cases, I need references, I need a translation of your insights into actionable discussions."

What Kent appears to say is what marketing provides to sales can be seen as either too sophisticated, or not sophisticated enough, at the same time. If a value proposition emanating from marketing is too scientific it will fall through the sophistication gap because sales people will not be able to "translate" the value proposition into actionable discussions with individual customers. It could be said that Kent is portraying a value proposition that is not sophisticated enough to traverse the sophistication gap between the macro-level layer that marketing operates in and the meso-nano layer of customer conversations that sales operate in. There is an absence of discussion of the skillsets required to traverse the sophistication gap from both a marketing and sales perspective.

In Kent's experience of working for several large organisations, he feels that the level of level of sophistication he sought was found wanting. A world where value proposition material coming from Marketing was:

> "Usually cumbersome, it's usually over-thought, it's usually the material itself is obtuse or just is too general in nature; it doesn't create very specific hooks for a sales person to really grab on to and feel comfortable with."

Central to this observation describing what the sophistication gap looks like is that Marketing does not bridge the context layers to a point where the salesperson can see a specific sales hook. Kent goes on to bemoan this failure to bridge the context layers from Marketing to Sales:

> "It becomes an environment where it's just either too sophisticated, it misses the mark, it doesn't address the level at which the buyer and the sales people actually have access to."

Here Kent is making reference to the frequency with which marketing material "misses the mark" because it does not align with the customer and sales actors, even from a linguistic perspective. Kyle, in answering a question about overall alignment between marketing and sales helps provide an explanation of why there is this "sophistication gap".

> "In my experience, not very well aligned. With the root-cause typically being that the marketing messaging is geared towards a broader market or a broader segment and the sales professional is often trying to solve a specific customer concern and while there is oftentimes overlap, there's oftentimes not overlap."

What perhaps is new here is captured at the end of Kyle's observation "there's oftentimes not overlap." Where there is no overlap, as it would seem in Kent's world, marketing would not be seen to be spending enough time contextualising value propositions underneath the broader market, which maybe suggests a lack of understanding of the need for *contextual layering*. Being able to transcend operating context layers both up and down contexts emerged from the data as an important world view for actors and a necessary skillset for SMI actors for value proposition production.

5.7 Inferences and models of context and contextualisation

I will now conclude the contextualisation chapter by providing a retroductive discussion and explanatory models to move from the empirical data to provide an alternative understanding of value proposition contextualisation. By deploying a retroductive approach I seek to show through 'transfactual arguments' (Danermark et al. 2002, p.96) the inferences I am making about the underlying fundamental conditions which can have a tendency to influence the contextualisation of value propositions.

5.7.1 What is a context…in the context of SMI interworking to develop value propositions?

I can now build on the definition of context I brought into the contextualisation discussion at the beginning of Chapter 5: 'A setting, challenge, matter at hand' (Schiller 1912, p.53) by providing an explanatory model of the constituent parts of a context as it relates to SMI interworking for value proposition production in Figure 5. 3 below:

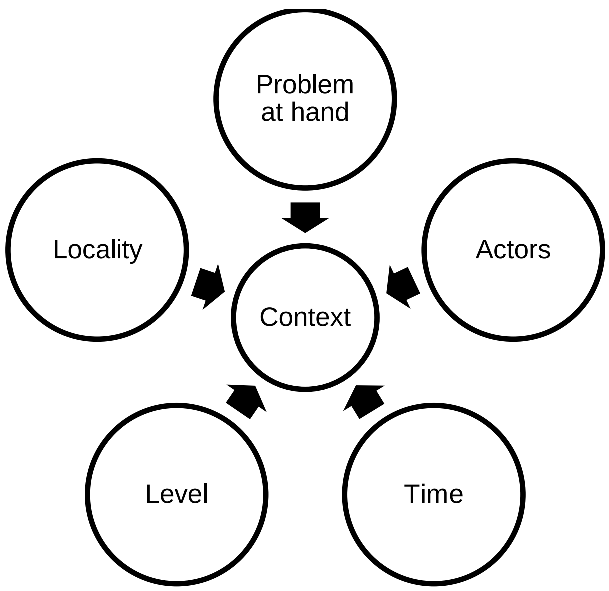

Fig.5.3 Constituents of context - SMI interworking for value proposition production (Source: Author).

For respondents who portrayed practice congruent with Liberation Praxis the start point for context is a *problem* that can form the basis of a value proposition. A problem can exist at a number of levels as was illustrated earlier in the chapter when I looked at potential problems that could be faced by British businesses in relation to Brexit. The levels that emerged from the data can be layered onto the multi-levels of context provided by Chandler and Vargo (2011):

- Meta-level : could be a problem at the level where all companies interact.

- Macro-level: could be a problem faced by all organisations, for example, agility, productivity (Adamson & Dixon 2013; Thull 2005).
- Meso-level (vertical): understanding problems and concerns at an industry level, for example, how will UK fruit growers survive post-Brexit without access to cheap European labour?
- Meso-level (horizontal): concerns job function problems, for example, what problems are HR Managers predicting with the onset of Brexit.
- Micro-level: relates to customer level problems like how is Sheffield Business School coping in a more competitive environment for international students?
- Individual-level (nano): problems at the individual customer level. For example, how does the HR Director of Coffee Shop X seek to resolve the post-Brexit EU labour crisis?

Actors are involved in any context of value proposition production, despite, in large part, the absence of actor-level discussion in the SMI literature (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). On the SMI stage developing productions of value propositions are sales, marketing, and customer actors (Goffman 1959). It is the actors who must engage in dialogue and deploy a range of skills to develop an understanding of problems, at the appropriate level, in order to produce value propositions.

A context is set at a particular point in *time,* so value proposition contexts can be seen as temporal. The time a value proposition discussion takes place in may reflect very different economic, social, political, and technological circumstances (Gilligan & Wilson 2009; Kotler & Keller 2015). Under the surface actors may be in very different situations depending on temporal factors, for example, is it important for their promotion prospects that their issue is resolved quickly (Miller et al. 2011). Buying and selling cycles are temporally dynamic with the need to tailor value propositions moving through the buying cycle, which suggests a need to bring different SMI actors into play at different points of the buying cycle. What I can retroduce from this is that actor awareness and ability to bring relevant actors onto the SMI stage for value proposition development is a generative mechanism that could have tendency to enhance value proposition production on the SMI stage (Goffman 1959).

5.7.2 Contextual layering - produce layered value propositions that work up and down contexts

What emerged from the data was a number of contexts in which the SMI has to work to develop value propositions. Respondents suggest the SMI needs to develop value propositions that fit into a broader 'meta-level' context that can be layered up and down the identified contexts namely: meta, macro, meso (vertical), meso (horizontal), micro, and individual actor-level. I call this phenomenon, Contextual Layering.

This is in line with my own definition of contextualisation, which I introduced earlier in Chapter 5 'Production of value propositions at the SMI that are set in the context they are to be placed'.

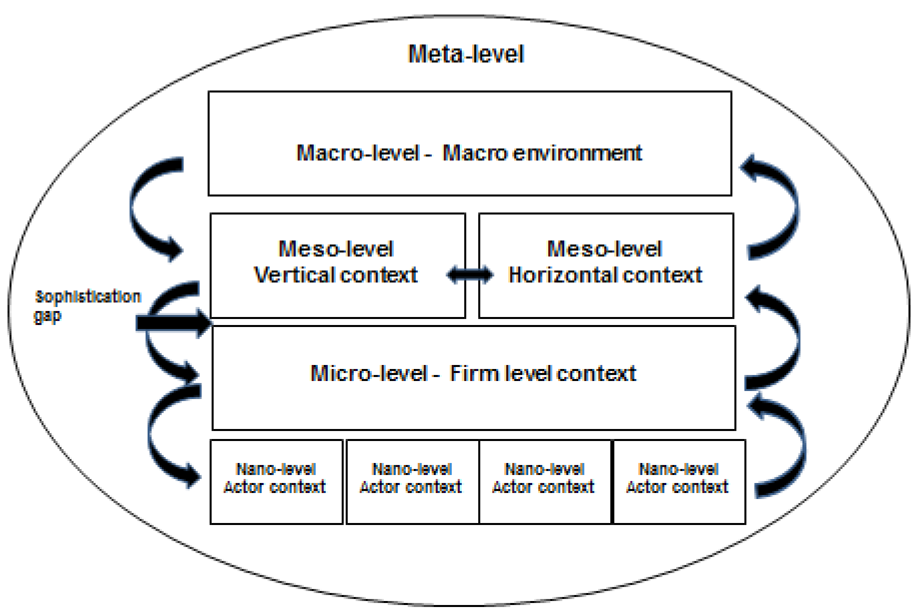

Fig. 5. 4: Contextual layering - developing value propositions up and down the contexts (Source: Author).

The overall setting is a meta-context in which all companies and individuals interact. At both the meta and macro layers SMI actors needs to pay attention to prevailing political, economic, sociological, and technological circumstances (Gilligan & Wilson 2009; Kotler & Keller 2015). From an understanding of the macro environment marketing actors can develop value proposition themes in the context of meta and macro factors, for example, productivity (Thull 2005). At the meso-level these themes can be aligned and tailored to horizontal and vertical contexts. At the firm level SMI actors must work together to develop value propositions that take into account specific problems faced by that firm. For effective contextual layering, the value proposition developed for an individual company, for example, HSBC, should nest inside the overall themes developed at the macro-level, consistent with critical contextualisation and Liberation Praxis (Hiebert 1985; Schreiter 1985). At the nano-level value propositions need to be fine-tuned to tap into the individual concerns of the 5.4 customer actors that are typically involved as decision makers in a customer organisation (Adamson & Dixon 2013). The challenge for SMI actors at the nano and micro levels are to bridge the "sophistication gap" that emerged from the data. For effective Contextual Layering themes developed in the broader contexts should be well-considered enough for SMI actors to be able to draw out specific value propositions from.

5.7.3 A liberation praxis view of contextualisation and contextual layering

A question practitioners often ask me if they want to move towards a more customer-value centred approach is 'where do I (or we) start.' Norma, who led the implementation for ABM in Global IT Company, can help provide an answer to this question. Although she waxed lyrical about how ABM helped Global IT Co. develop and articulate value propositions at an account level when asked what sets Global IT Co. apart from competitors her answer was: "Nothing, this is the IT industry, it's commoditised, everyone sells the same".

I would make two observations here: The first would be that contextual layering has not been mobilised effectively at Global IT Co. What I mean here is that any superior value created at account level could have been communicated back into the organisation to help shape how they articulate broader level value propositions. Secondly, and more importantly, if critical contextualisation (Hiebert 1985) has not taken place at the meta and macro-levels Global IT Co. will not understand the world from a broader customer environment perspective and will not be working from a customer bible. What I am advocating is a model consistent with a critical contextualisation and a Liberation Praxis view (Hiebert 1985; Schreiter 1985) depicted below in Figure 5.5.

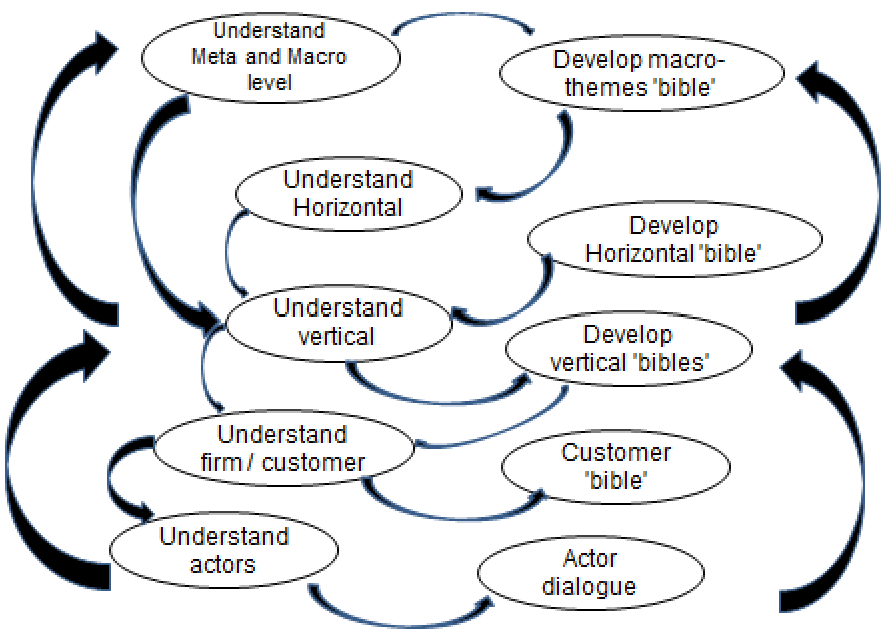

Fig. 5.5 Liberation Praxis view of contextualisation (Source: Author).

I am recommending that organisations begin at the meta and macro layers in line with critical contextualisation by developing an overall understanding of customers and markets so that the main company bible is customer and not product centred (Hiebert 1985). The company level bible will allow for arraying products and services under customer themes (Ham 1993; Thull 2005). At each subsequent level a deeper understanding of the context is developed to form more detailed 'bibles' at the horizontal, vertical, customer, and individual levels.

If a sales actor identifies something at an individual customer level that could shape the higher level context propositions at, for example, the macro-level, the SMI has to work to re-shape value propositions up and down the contexts. What this model also tries to depict is that sales and marketing actors are *contextualising entities*. At the lower levels sales play a primary role with marketers taking primacy at the higher levels. Central to the effective working of the SMI in value proposition production is the ability to develop value propositions relevant to the context and internally consistent with the broader context (Anderson et al. 2006). Actors have agency to act to develop and produce VPs within set inside a liberation praxis structure that enables actors by providing customer themes and industry bibles. Actors are constrained in this liberation praxis view from producing VPs that are product-centred and inconsistent with customer themes, or at odds with what the organisation can deliver.

5.8 Contextualisation - chapter summary and conclusion

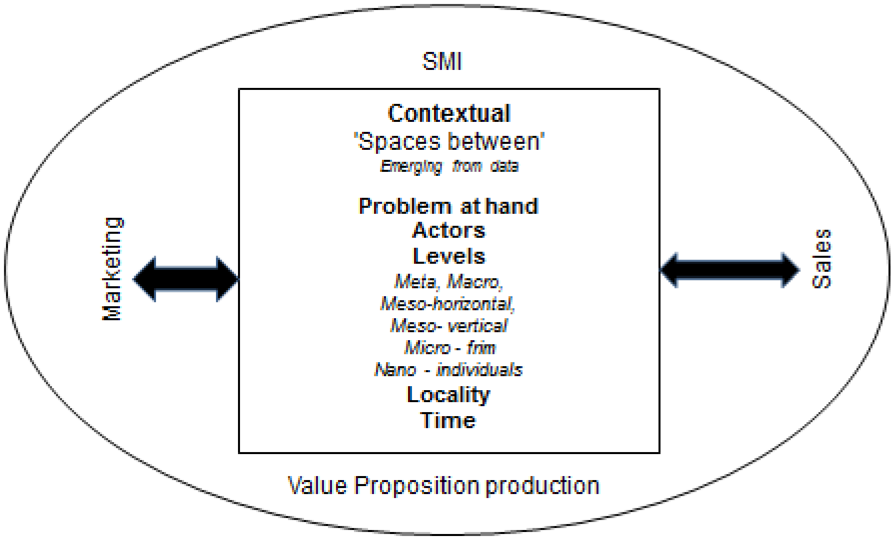

Fig. 5.6 contextual spaces 'in between' marketing and sales (Source: Author).

Figure 5.6 depicts a summary of the spaces in between marketing and sales from a contextualisation standpoint as it relates to value proposition production at the SMI. How the different levels of context are viewed by marketing and sales actors, the will, ability, and skills required to contextualise value propositions at and context level, and with an understanding of broader context, reflects barriers and enablers to effective value proposition production at the SMI. I can retroduce that context and contextualisation, and the factors that make them up, are generative mechanisms with a tendency for causality in value proposition production at the SMI.

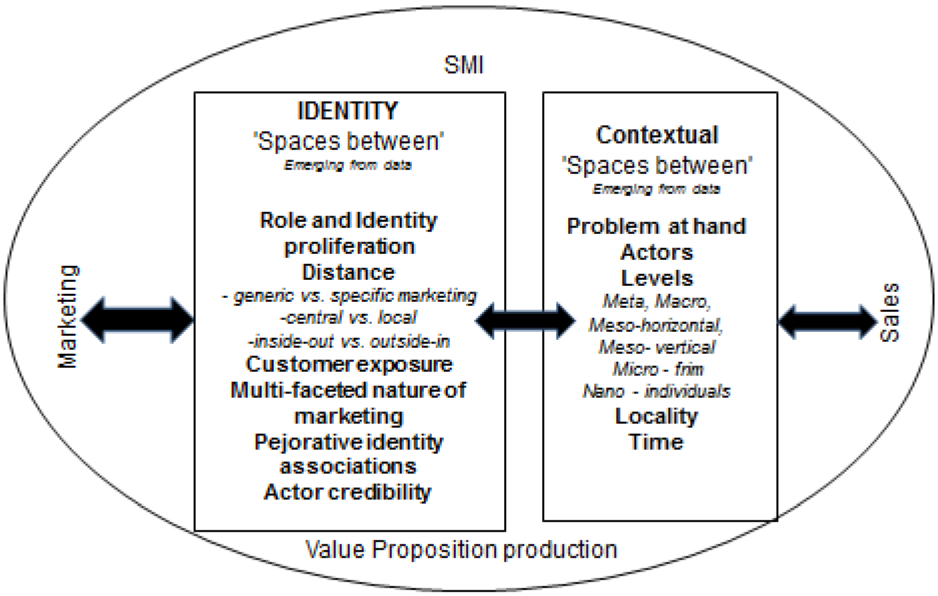

Fig. 5.7 Identity and contextual spaces 'in between' marketing and sales (Source: Author).

Figure 5.7 provides a cumulative view of what has emerged from the respondent data so far in relation to identity and contextualisation themes. I can retroduce from this that there is a lot going on at the SMI in relation to value proposition at the empirical strata and below the surface at the actual and real strata (Danermark et al. 2002; Easton 2010; Sayer 2010).

In Chapter 6 I will now consider the third theme that emerged from the data, Thought worlds. In Chapter 7 I will draw together the key findings from Chapters 4 to 6. At the end of Chapter 7 Contextualisation will be factored into an integrated model for SMI interworking to produce value propositions.

Chapter 6 Thought Worlds

This chapter considers the part thought worlds play in how marketing and sales interact in the production of value propositions. The following themes are discussed:

- The perceived differences in thought worlds of actors in marketing and sales.
- The role thought worlds play at the SMI specifically in relation to value proposition production.

What emerged from the data was that marketing and sales practitioners talked about their perceptions of differences in cognitive orientation between actors at the SMI, in value proposition production. Responses that drew out issues about perceived cognitive differences were categorised under the pattern code ‘thought worlds' which is the central theme of this chapter. The chapter draws from the thought world literature discussed in Chapter 2 emanating from organisational behaviour and culture, psychology, and anthropology literature. Studies into other departmental relations in organisations are also taken into account. The SMI thought world literature examined in Chapter 2 will also be considered along with the relevant outwith literature. Ideas and concepts coming from extant literature will be used to sensitise and inform the discussion of empirical data emerging from fieldwork. I have used the thought world literature in an abductive sense in order to provide a recontextualisation of conventional marketing management descriptions of sales and marketing interactions at the SMI in relation to value propositions consistent with CR (Danermark et al. 2002; Easton 2010; Sayer 2010; Fletcher 2016). The discussion moves between theory and data to help develop an explanation of how thought worlds are considered by actors in the Sales and Marketing Interface (SMI), especially in relation to the production and development of value propositions. The chapter concludes by proposing models for incorporating thought worlds in the overall context of the SMI interworking in value proposition production.

6.1 Thought worlds, micro-cultures, and tribes

The data that emerged under the pattern code identity in Chapter 4 showed that respondents identify themselves as existing in micro-cultures or tribes (Mafessoli 2016; Schein 2010), particularly marketing actors. So, while this study began as an investigation into how the SMI interacts to produce value propositions I now acknowledge that coherent units like product marketing, industry marketing, and account based marketing are what actors assign identity to, rather than a monolithic marketing or sales function (Schein 2010).

Based on the evidence that emerged from data presented in Chapter 4, relating to identity, respondents seem to suggest that their identities were shaped by a fragmentation into micro-cultures, at least for marketing actors (Martin 1992; Schein 2010). In Chapter 6 I will explore what emerged in terms of perceptions and beliefs, or thought worlds. Respondents seemed to indicate that thought worlds were working at cross purposes to SMI collaboration and cohesion. For example, Maurice, Vice President of Sales Enablement and thirty-year stalwart at Global Telco, talked of the struggle to achieve collaboration and cohesion:

> "I think we’ve wrestled to bring together the different worlds of sales and marketing to align around the customer and how by meeting the customers’ needs we can then satisfy stakeholders and ourselves."

Maurice identifies sales and marketing as being in different worlds. What remains unsaid here is what the causal (generative) mechanisms are for the two functions existing in separate worlds. The notion of thought worlds although not explicit in Maurice's observation seems to be an underlying implication in the sales-marketing bifurcation in Global Telco. What is not lost is that Maurice recognises that the two worlds need to cohere to align with the customer.

Where Schein (2010) sees the importance of culture is as a concept that strives towards integration. Even though, evidence that has emerged from marketing and sales respondents, and in many groups identified by Schein, shows that their actual history of experiences, perceptions and beliefs is getting in the way of integration. Saskia, Owner of her own marketing consultancy, and former Marketing Director in Global Financial Services and Telco organisations observed:

> "And I would just add the primary reason is that in the past that feedback that sales provided or those committees that they sat on never really produced the content or the value propositions that the sales team was looking for, and so they viewed it as a waste of time."

When Saskia talks of the primary reason she is referring to why it is sometimes difficult to get collaboration from sales, is, in line with Schein (2010) related to their history of experiences. History leaves sales actors with the perception that nothing gets done by marketing after sales has provided customer or market feedback. Sales actors now believe that providing this input is 'a waste of time'. Actor agency is constrained by history, which determines behaviour. Saskia goes on to say "What sales people learn is like the Pavlov dog experiment. They learn to keep their mouth shut because it won't get them anything." Saskia's concluding observation is congruent with the view of culture espoused by Schein (2010) who differentiates between three different levels of culture, first introduced in chapter 2:

> Level 1. Artefacts - are visible and feelable structures and processes and observed behaviour.
>
> Level 2. Espoused beliefs and values these are ideals, goals, values, aspirations • Ideologies. Level 2 also includes Rationalizations, which may or may not be congruent with behaviour and other artefacts.

> Level 3. Basic underlying assumptions • Unconscious, taken - for - granted beliefs and values – Determine behaviour, perception, thought, and feeling

Chapter 4 concerned itself with Level 1 and, in some part, Level 2 aspects of culture. Chapter 6 has Level 3 aspects of culture, the cognitive concerns of thought worlds, as its major focus. Previous organisational studies have sought to understand habits of thinking, mental models, and linguistic paradigms, looking at shared cognitive frames that guide the perceptions, thought, and language used by the members of a group and is taught to new members when they join (Douglas 1986; Hofstede 2001; Senge et al. 1994; Van Maanen 1979). There is a level of coherence between the three levels outlined by Schein (2010) and the three strata inherent in critical realism (Danermark 2002; Easton 2010; Fletcher 2016). In relation to Saskia's observations concerning getting sales actor collaboration Schein (2010), in line with critical realists (Danermark 2002; Fletcher 2016) would rationalise that in the absence of an empirical response from sales actors, look beneath the surface for underlying assumptions, or generative mechanisms, that determine the lack of empirical response.

Lawrence and Lorsch (1969) see organisations as open systems where behaviours of members are interrelated. They observe that as systems become large they differentiate into parts (Lawrence & Lorsch 1969; Martin 1992). They believe that the functioning of these separate parts has to be integrated if the entire system is to be viable. One of the primary motivations for this thesis was the need for marketing and sales to behave in an integrated manner in order to drive a market orientation (Kohli & Jaworski 1990; Slater & Narver 1995). Evidence that has emerged from empirical data under the identity pattern code, in Chapter 4, shows that the organisational monolith known as marketing in the SMI literature has differentiated into parts. Chapter 6 examines this from the standpoint of cognitive thought worlds.

6.2 Actor thought worlds and bounded rationality

In Chapter 2 I introduced the concept of bounded rationality in which Simon (1986) contrasts rationality in economics as being substantive rationality, based on choices made, with rationality in psychology as procedural, and based on the best information available at the time. The view of rationality held by psychologists accepts that both knowledge and the computational power of the decision maker are limited. The limitations create a frame for decision making to take place in, a bounded rationality. The notion of bounded rationality can be inferred from respondent data. For example, Coleen, Senior Director for Global Campaigns at Global Telco, observes:

> "I do believe sales has a different take on what's important to the customer relative to marketing, which is why else would they create they own presentations?"

The starting point for Coleen was the empirical observation about sales presentations as an artefact (Danermark et al. 2002; Sayer 2010; Schein 2010). In simple terms Coleen was critical of the fact that sales spend a lot of time and energy creating their own customer presentations, and not using those created by marketing. In seeking to rationalise this Coleen put this down to the different take sales and marketing have on what is important to the customer. Building on the contextualisation theme I explored in depth in Chapter 5 these different takes reflect the bounded rationality of sales and marketing actors (Simon 1986). Sales is bounded by regular contact with one or a few customers, marketing is bounded by reference to market research reports and online data. What can be inferred from the data that the bounded rationality of actors could be causal mechanisms or tendencies which help Coleen answer the "why else would they create their own presentations?" question.

6.3 Thought worlds - problem parameters versus assumed values

In Chapter 2 the paucity of SMI thought world studies (Frankwick et al. 1994; Homburg & Jensen 2007) led me to look towards OSM literature for evidence of a thought world study outwith marketing management. Niranjan et al. (2014) observed that actors had differing views of some of the main tenets of OSM practice, for example, costs. Niranjan et al. (2014) recommend that OSM scholars should factor in managerial perceptions of problem parameters, for example costs, instead of relying on assumed values. What emerged from the data in my thesis were contrasting views and definitions of one of the main problem parameters of sales and marketing practice, value propositions. Here I have provided two contrasting definitions of value propositions that emerged from the data:

> "Value proposition means to me is the compelling reason that a customer would be interested in your product. It's your differentiator or what makes you different, unique and, most importantly, valuable to a customer."

Althea, Vice President of Marketing, US Cable Company

> "The value proposition where you really get customers' attention is completely about understanding what concerns a business or what the next challenges are. They can be short-term, they can be long-term, but basically all companies have concerns and issues with making sure that they're either there to pick up the next market or launch the next product, to be in the next region, to cut cost and future proof themselves for consistent growth. And a value proposition is where you can come in, really show you understand that; maybe not even match it, but take the conversations forward where you can be a piece of that problem solving. And it's a little bit like detective work. You have to find out what's been going on and then you have to solve for it."

Caila, Sales Vice President, Global Telco

For Althea, the start point for the value proposition appears to be the product and providing the customer with a compelling reason to buy the product. In contrast, Caila starts with the customer from a position of trying to deeply understand the customer issues and sees the value proposition as being about solving customer problems. These contrasting views would seem to have congruence with the notion of bounded rationality (Simon 1986). Althea's rationality is bounded by the underlying goal to sell more products. For Caila rationality is bounded by the underlying motivation to satisfy her customer and the belief that solving customer problems will facilitate this. Again, the marketing actor is bounded by a market level view, the sales actor, by a customer view. The rich depth in Caila's observation seems to reflect that she sees a value proposition as something that requires some detective work to get inside a customer's thought world, not just an artefact to communicate product advantages.

Value propositions can be seen to be one of the main problem parameters of the SMI, or the 'central organising principle' (Webster 2002). With this in mind there is strong congruence between what emerged from the data in my thesis and the findings of the highlighted OSM study (Niranjan et al. 2014). Different SMI actors having variant perceptions of what value is and what propositions are is a problem my colleagues and I have experienced multiple times in working in and with large organisations. For example:

In 2010 through 2012 I was working as a Senior Director for a large tech company in the US that was acquiring a similar sized company. The Chief Marketing Officer (CMO) position was given to someone from the acquired company who was based on the other side of the country. After a few weeks, the CMO called an emergency value proposition session for a selection of the Vice Presidents, Directors and Managers in the marketing team who were told to fly in over the weekend. The purpose of the meeting was not made entirely clear, it seemed to be about deciding what the 'value proposition' of the newly united company was. The task of doing the pre-work for developing the joint company ‘value proposition’ and presenting it to the broader team had fallen to a couple of managers from the acquired company. What quickly became apparent was the complete absence of customer value in the work that was being presented. It was all about the combined assets of the company and the features that those assets could provide for customers. Even the people from the acquiring company were talking past each other because they had completely different views of value depending how close to the customer they were. A fruitless, frustrating day was spent trying to help refine these capability statements and features. I didn't hang around long in the new company as it was clear that the difference between what I interpreted as a value proposition and the incoming CMO was untenable. In relation to VP development and production a customer value thought world is a generative mechanism which can facilitate a morphogenesis where actors enhance value propositions through an enhanced understanding of customers and markets. An inside-out product orientation, as by the CMO, can lead to a morphostasis where an organisation 'value propositions' lack congruence with customer value (Chubb 1990; Simon et al.1985).

6.4 Thought worlds in the SMI literature re-visited

In the SMI literature review in Chapter 2 I noted that coverage of thought world differences was sparse with only two studies in this millennium (Beverland et al. 2006; Homburg & Jensen 2007). Homburg and Jensen (2007) posited that market and product knowledge were competency differences that contributed to thought world differences at the SMI. Beverland et al. (2006) in examining the question of cultural frames causing tension at the SMI drew out differences in what was considered to be valid knowledge contrasting experience to training, and applied to theoretical knowledge. Validity in this respect concerns questions such as: do marketers regard sales as a valid source of information for anything other than short-term transactional information about an individual customer? The combination of knowledge and its validity were certainly areas of concern that emerged from my research data. Sales questioned whether marketers' college education could be considered as valid knowledge in relation to value proposition development. For example, Laura, seasoned Senior Vice President of Sales at Global Telco, observes:

> "And what I’ve also noticed is when we have a breakdown in maybe alignment is sometimes you’ll have folk that are very, very smart, with a marketing mind, coming out of college but they only look smart. They don’t know. They’ve never been in front of a real customer….. And so because of that you get misalignment."

Laura calls into question the knowledge provided by college educated "marketing folk" because their rationality is too bounded (Simon 1986) in desk based research while the "real world" of the customer is underrepresented.

6.5 Respondents perspectives on thought worlds

Respondents provided rich material on orientation differences and of what could be seen as valid scope of focus and activity (Beverland et al. 2006; Homburg & Jensen 2007). Orientation differences will be explored first before turning to other facets of thought world concerns. After this, explanatory models will be put forward based on the data, and building on extant literature, that seek to explain how thought worlds influence value proposition production at the SMI.

6.5.1 Orientation differences

6.5.1.1 Sales 'deal' focus

Previous SMI research has drawn distinctions between the narrow 'single or few' customer focus of sales people versus the market spanning scope of marketers (Beverland et al. 2006; Homburg & Jensen 2007). What emerged from respondent data was a more granular view of differences which could be classified as existing at a nano layer.

In making reference to barriers to effective working across the SMI, Norma, Senior Marketer, Global IT Company cited time as a big constraint in getting sales input or asking them to execute marketing strategy and tactics:

> "I think it’s time. I really do think it’s time. And if they’re caught up in a deal, a bid, etcetera, it’s really hard to get their attention. And I

> actually think you can only give sales people three things to do or three things to remember. Give them too much information and over communicate, they just ignore it."

What Norma brings out here is the deal level focus of sales people. It is not just about customer versus market focus, it's all about deals. In my experience in working in large B2B organisations there are times when sales are very protected. I'm not sure I can think of many other roles where one of the key organisational interfaces feels they can only give their counterpart "three things to remember". The second point, "give them too much information and over communicate, they just ignore it" links back to valid focus and activity, which is another of the cultural frames differences observed by Beverland et al. (2006). Sales people are often seen by marketing, in this case Norma, as having a narrow role, selling. They only play a secondary role in carrying out 'strategies from above' which could also be seen to be marketing strategies. If you give sales too much to remember they are seen as being able to reserve the right to ignore it. Given that sales are the link between the customer and the organisation, it is seen as important to get their buy-in to implement marketing strategies and tactics (Malshe & Sohi 2009). Norma sees time as a constraining factor in getting sales involvement in conversations beyond the deal, this may include value proposition production. Sales actor agency to act to help longer term VP development is constrained by the short-term deal focus. There appears to be no structural requirement for sales actors to provide support for VP production. Marketing actor agency is constrained by a thought world that accepts that sales being involved in deals is acceptable, leading to sub-optimal sales input in VP development.

Kyle, MD of a US based software company and former SVP of marketing at a Global Telco brings out the issue of how sales engagement in taking new value propositions to market is constrained by this deal focus:

> "Sometimes the marketing team comes up with training on a new value proposition and benefits and what-not and in the sales team,

> the sales guy, you know, Joey's working on this deal right now, the one that's hot for him that he's got a commission cheque coming in. The value proposition doesn't necessarily line up for that one deal."

The deal focus thought world of the sales person means whilst in the midst of a deal new value proposition training could be ignored, at the behest of the deal. Unless, through fortunate timing, the value proposition can be tailored at this nano-deal level, consistent with the contextualisation findings in chapter 5, to help get 'the deal' that is currently being worked on, over the line. What is unsaid by Kyle and Norma is that there appears to be organisational permission for the sales people to "ignore" market requests or their role in taking new value propositions to market. While they are 'in the deal' the bounded rationality of their thought world is constrained by the deal (Simon 1986). At the real level of analysis (Danermark et al. 2002; Easton 2010; Fletcher 2016) it could be that perceptions of personal actor orientation could be a generative mechanism for forecast behaviour. For example, is Kyle suggesting that sales people are only interested in short-term commission cheques and not in longer term customer growth?

6.5.1.2 Opportunity versus strategy orientation

Another level of orientation that respondents referred to which could be perceived to be operating at the nano-level is opportunity orientation.

Norma, reminds us of her strategic role based on her tribal identity, emerging from the research data, as an Account Based Marketer:

> "Sales is very opportunity led and marketing is trying to be more strategic with account based marketing, which of course is about understanding the customer as a market in their own right, and you have to have a value proposition for that customer."

In Norma's ABM thought world sales people focus on individual opportunities. Here opportunity can be defined as potential pieces of business with a customer that typically sales have identified where they can see a direct path to a winnable deal at some time in the future. In the deal thought world the sales person can see the prospect of money on the table or a "commission cheque coming in". In the opportunity thought world the sales person can see the prospect of a new car, or house at some time in the near future. This instrumental orientation is contrasted with the strategic thought world of the ABM tribe member, Norma, who is interested in developing a customer level value proposition. Here the thought worlds of sales and marketing lack contextual congruence as I discussed in Chapter 5. I personally experienced this on a consultancy assignment for a global telecoms equipment provider. The client for the consultancy work was the marketing manager responsible for customer accounts in the market sector. Working with the client we produced an account level value proposition for a potentially large customer that did not really resonate with the sales people because they were focused on certain deals and opportunities.

Respondents who were sales leaders generally hold responsibility for a whole customer industry sector, for example, Airlines. Caila, Vice President of Sales at Global Telco in reflecting on her key expectations of the marketing at Global Telco said:

> "I suppose if you say in an ideal world I'd like marketing to say in this set of customers you've got more opportunity because A, B, C and D, and your opportunity is this type of solution. But it doesn't happen."

Caila seems to suggest, that from a temporal standpoint, she would like to see marketing providing a view of industry or meso-level opportunities before they become sales opportunities at the nano-level. Caila's thought world orientation is at the meso-level even though her focus in on opportunities. Here the bounded rationality of marketers seems to prevent them from seeing any congruence between sales role in developing opportunities and the part marketing should play in providing intelligence on market level opportunities (Simon 1986). Easton (2010) talks about differences between the 'perceived balance of responsibility', who is believed to responsible for doing what, and 'enacted responsibility', who actually does what. As a real below the surface causal mechanism the 'perceived' versus 'enacted' responsibility gap surfaces as the empirical problem of something important not getting done and the need for a normative fix in role clarity. These differences could also serve as a causal explanation for the "sophistication gap" identified in Chapter 5.

6.5.1.3 Customer versus product orientation - perceptions of value

Customer versus product orientation has been cited in previous research as a dilemma the SMI has to contend with (Beverland et al. 2006; Homburg & Jensen 2007; Malshe et al. 2016). The tension between a product and customer or market orientation was a prevalent view emerging from the data. Althea, Vice President of Marketing at a US cable company, portrays a product-centric thought world when asked to describe her company value proposition:

> "So, it's the best product at a compelling value, price point coupled with leveraging an all-digital network and the best service experience to go along with this."

Sales respondents often cited marketers as starting from an inside-out thought world standpoint manifesting itself in a product-centric view of value. Here Greg, Owner of a Sales Consultancy and former Vice President of Sales criticises this inside-out perspective:

> "Again, they take very much an inside-out view of the world. You know, I've got some products or I've got a new thing in my portfolio, how can I present that to the customer in terms of benefits, and quite often that is very me too in terms of how they position and present that in the market."

Here Greg is referring to the tribe identified in chapter 4 as product marketing. If sales come into an interaction at the SMI concerned with developing value propositions for their set of customers, with marketing, the conversation will begin from incongruent positions. Sales customer orientation will likely be at odds with the marketer, especially if they came from a product marketing tribe or in an organisation where the marketing leader, like Althea, describes a value proposition that seems to emanate from a product-centric thought world.

In Chapter 4 where we examined identity what emerged from the data was that neither marketing nor sales could be viewed as monolithic holistic organisations. Based on this it is likely that thought worlds are fragmented in line with the tribal identities. Going back to questions about adaptability in the literature relating to North American Indians (Carpenter 2004; Graymont & Martin 1979): For Hurons read Product Marketing, for Iroquois read Industry Marketing.

Respondents also make reference to living inside a larger corporate thought world, which could be product-centric. Caila, Vice President of Sales, Global Telco, makes this point:

> "But we don’t do that. We go, we’ve got to sell voice, we’ve got to sell data, we’ve got to sell this, and that ….it just might as well have a grocery shop."

By we Caila is referring to the executive level officers of the organisation whose thought world gets enacted by corporate marketing who line up products like in a grocery shop. Caila, in making this analogy, recognises that her role is understanding what the customer wants and presenting a solution using ingredients from the grocery shop. Coming from a customer-centric thought world her contextualising role is made much more difficult by the pervasive corporate product-centric thought world. Here actor agency to develop customer centred VPs is seriously constrained by a structure where corporate marketing supports an inside-out product centred thought world.

The sparse literature on SMI thought worlds (Beverland et al. 2006; Homburg & Jensen 2007) focuses on the contrasting thought worlds of sales and marketing. What emerged from the data is that what must be taken into account is the SMI thought worlds exist inside a constellation of thought worlds in the broader organisation. I can recall the tension caused in more than one organisation I have worked in. In one instance, while my marketing team and I worked with sales to help develop value propositions to resonate with customer concerns so we could sell value to customers the executive officers sales, and product marketing, often just talked about the products, like items in a "grocery shop". In another similar instance, I recall leading a marketing team that had great success in helping drive revenue growth predicated on developing customer value themes to large business customers (cited in Payne & Frow 2014) while the corporate executives kept harping on about technology widget X. The question raised here is about the organisational susceptibility of the SMI to higher executive views relating to value proposition production (Danermark et al. 2002; Easton 2010; Fletcher 2016). Executive views certainly need to be paid attention to as they can have a causal tendency to shape value proposition production in different contexts.

6.5.1.4 Holistic versus atomistic views of the customer world

In the preceding sections I observed that some respondents talked about sales not having a holistic customer view because of their deal or opportunity focus. In this section I draw out respondent views which referred to marketing tribes as taking a more atomistic view of the customer world.

Saskia, Owner of her own Marketing Consultancy, and former Director of Marketing at a Global Financial Services company, in referring to how value propositions were produced in the former organisation makes this point:

> "So, value propositions were created mostly by the product team and the product team had, I would say, a tiny sliver of interaction with potential customers. So, what they thought the customer cared about was not holistic."

The bounded rationality of the product marketers means that their thought world is one product at a time (Simon 1986). I observed in Chapter 5 that bounded rationality (Simon 1986) can prevent product marketing from being able to place products in the broader context of the overall organisation value proposition. What is being referred to here is potentially much more dangerous as the customer is being presented with a nano-level 'value proposition' which does not reflect a full understanding of the "customer's concern". In the UK, this kind of scenario caused mayhem in the financial services sector with lots of banks losing the right to provide best-advice to customers because they had been found to be miss-selling products poorly suited to a customer's circumstance. Here the danger of one tribe dominating the production of value propositions imposing their thought world onto the customer can be seen. A tribal SMI council to draw in a full picture of customer understanding, to put the value propositions in context is lacking here.

What emerged from the data was a view that thought worlds can be developed and legitimised based on atomistic exposure to customer conversations. Here Saskia explains how she has seen this in two organisations, from different sectors:

> "So, they didn't have to see six or seven conversations that the sales person had or all of the other marketing literature or materials about thought leadership that was sent to the customer to get them to create awareness, even get them to consider and evaluate possible solutions. So, because of that, product had this very narrow view of what the customer cared about, because when they got on the phone finally with the customer he was asking feature-oriented questions about the product. Why? Because the customer was in comparison mode."

The tribal thought world of product marketing 'It's all about the product features' is reinforced by the atomistic view they are being given of the customer. At the point product marketers are being drawn into the conversation the customer is likely to be considering one vendor against another, or in comparison mode. The customer may well be concerned with product features, by way of competitor comparison. This reinforces the product marketing world view and legitimises what a good value proposition should look like. The customer's thought world changes through the sales cycle have not been observed by the Product Marketing actors. Saskia seems to be suggesting that thought worlds can be temporal, changing over time, and so must the articulation of the value proposition. VP production at the SMI needs to pay attention to this, bringing in the right tribes and actors onto the stage at the relevant point in the sales cycle.

What also emerged from the data is that Product Marketing's atomistic understanding of the customer is problematic. Laura, Senior Vice President of Sales, Global Telco, makes this point:

> "Because we can create products all day but if our product teams do not understand how the customer uses them or the pain points of the customer we will continue to create products that no matter how great the value proposition is that marketing creates, we will never sell it because we’re not solving a problem the customer needs, we’re just creating another product so that we can say whoo-hoo, this year we created this many products. So, it all comes to solving customer problems and the need that a customer has that we solve through our solutions."

From Laura's standpoint imposing the product marketing thought world onto the customer is not only ineffective, but counter-productive. The emphasis here is that the customer's thought world is all about solving their business problem. The "woo hoo we have a product" thought world of product marketing is totally incongruent with the customer world-view. Laura is emphasising the point that value proposition production at the SMI needs to involve the relevant tribes and actors in the appropriate context.

The extant SMI literature almost always seeks to place sales and marketing at different ends of continua in terms of knowledge, behaviour, orientation and thought worlds, to name a few (Beverland et al. 2006; Homburg & Jensen 2007; Kotler et al. 2006). Given the tribal nature of the SMI this approach is no longer tenable. For example, the prevalent view in the SMI literature is that sales have a narrower world view than marketing. Sales rationality is bounded by a focus on fewer customers, and is more short-term (Beverland et al. 2006; Homburg & Jensen 2007; Kotler et al. 2006). The 'marketing is broad, sales is narrow' viewpoint did emerge from the data. For example, Kyle, MD of US software company and former SVP of Sales, Global Telco, said:

> "Well it should be all valuable, if the marketing team and the sales team take the time to articulate the broader marketing plan and all of the content in context. Sometimes the sales guys couldn't care less about the website, for example. Well the website is critical. And taking the time to educate the sales team on why the website is critical and all you can do with it and how much information they can get about their customers from the website, that's important."

This remark was set inside an overall view that Kyle was expressing that fell in line with the prevalent 'sales is narrow marketing is broad' view where sales maybe interested in one customer and marketing is focused on a whole market. Kyle is recognising what the SMI literature calls differences in valid scope of focus (Beverland et al. 2006):

> "Yeah, because on the organisation, the sales guy has a limited… he doesn't have a view of the whole market, he has a view of his customer patch."

Marketing has a broader responsibility for websites and broader communications channels, as compared to sales who are narrowcasting to one or few customers. Kyle takes the view that marketing needs to help sales understand the broader context, and is supporting the prevalent SMI literature with a 'marketing is broad, sales is narrow' perspective. What this does not take into account is the tribal nature of marketing roles. We have seen that sales can be seen to take a more atomistic view than marketing in the deal versus customer dilemma. However, the tribe known as Product Marketing, is seen to take a narrower, more atomistic, view than sales in a product launch context. From an academic standpoint more accurately labelling marketing tribes and presenting contrasting thought worlds that do not view sales and marketing as monolithic organisations will help provide a more insightful view of how sales and marketing work together. The tribal involvement in value proposition production was certainly felt by practitioners to be an area of concern as outlined in Chapter 4.

6.5.1.5 Short term versus long term orientation

A prevalent view of the marketing literature is that sales have a short-term perspective and marketing has an orientation that is longer term in nature. (Beverland et al. 2006; Homburg & Jensen 2007; Kotler et al. 2006). Althea, Vice President of Marketing, US Cable Company, made this point:

> "So, you need to demonstrate that you can relate to that and understand that and actually help them in that quest for really needing immediate results while at the same time solving the bigger picture, longer term things."

What is important here is the word "immediate" we have already seen that "immediate" can be 'help me win this deal', 'help me with the next opportunity' which are thought worlds not typically congruent with the longer-term view of marketers. From a value proposition production standpoint, actors in the SMI need to work to develop "immediate" value propositions to help win deals and longer-term value propositions that recognise the need to grow new markets. The need for immediate (tactical) and strategic value propositions that emerged from the data is in line with value proposition classification presented in an earlier study by Johnston (2014) and discussed previously in Chapter 2. What is called into question from a thought world standpoint is the capability for marketers to transcend from bigger picture to immediate results. What is unsaid is that marketers may be doubting the ability of sales actors to be able to see the "bigger picture" for their myopic concern with immediate results.

6.5.2 Thought world barriers and enablers

6.5.2.1 Education and customer exposure

Previous SMI studies have brought out differences at the SMI caused by a perception that marketers do not spend enough time with customers (Beverland et al. 2006; Malshe & Sohi 2009; Malshe et al. 2016). Lack of customer exposure for marketers was certainly a prevalent view that emerged from the data. For example, Laura, SVP of Sales at Global Telco, observed:

> "And what I've also noticed is when we have a breakdown in maybe alignment is sometimes you'll have folk that are very, very smart, with a marketing mind, coming out of college but they only look smart. They don't know... They've never been in front of a real customer. They've never gone out even to TED talks about things that are going on in the industry. And so, because of that you get misalignment."

Laura appears to fold two issues into one here. In line with previous SMI studies Laura does express concern that marketers don't spend time 'in front of a real customer'. What it also draws out is the view that marketers come with a college education, they are book educated rather than schooled in the field with customers. From a value proposition production point of view Laura was concerned that this desk versus field orientation would affect the development of customer relevant value propositions. From a thought world standpoint, it seems to suggest that sales start point is:

> 'I am not sure if I believe that marketers can be a valid source of knowledge in value proposition production. Their thought world is dominated by desk learning and lacks customer grounding' (Source: Author).

Sheila also expressed a concern about the lack of marketing actor exposure to customers. Sheila is currently a UK based Sales Account Director at Global IT

Co, who has also worked in marketing. When reflecting on the 'value proposition' material supplied to sales by marketing, she observes:

> "And a lot of this is done by people sat on another continent, they've never seen a customer in their lives, you know, and, and, and. So that bit can be frustrating."

Doubting the material provided from a 'valid source of knowledge' standpoint comes through here (Beverland et al. 2006). Sales respondents seem to suggest that there is a desire to bring the customer view into value proposition production at the SMI, they do not perceive the customer view to be something that marketers can currently access. Bounded rationality from the perspective of marketers is viewed by sales as being based on desk research and seen as having a derogatory effect on value proposition production (Simon 1986). Sales people feel they really need to see more evidence of marketers spending time with customers. From a thought world perspective, sales would see marketers as incorporating field experience into their college and book learning enriching value proposition production.

6.5.2.2 Goal differences or different thought worlds?

The extant SMI literature has a primarily normative focus in terms of making recommendations for improvements in practice. The normative focus leads to a concentration on goal, role and incentive alignment. (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). These normative factors were evident in the emerging data.

For example, Maurice, Vice President of Sales Enablement, Global Telco who currently plays an integrating role sitting between marketing and sales, said:

> "Sales people, at the end of the day, are focused on results and so where they can see marketing people driving demand and driving well qualified demand to them that they can close, that's going to be respected."

Saskia, MD of her own marketing consultancy and former marketing director at a Global Financial Services Technology company, said, in direct contrast to Maurice:

> "I would say that marketing has an over reliance on data, meaning they look at web trends and how many likes or comments they get on a social media post in lieu of actually talking to customers. So marketers are making a lot of assumptions based on the trends that they're seeing on the data side, you know, how many people open their email or whatever."

At the surface, empirical strata, these comments could be seen to be referring to goal differences. What they depict to me are differences in thought worlds related to how success is viewed. In Saskia's comment "over reliance on data" reflects the presence of a desk-based research orientation in marketers. Their success thought world is bounded by how many people open their email not on what sales would regard to be results, closing business with customers. It seems that success thought worlds lack congruence. This may misinform value proposition production as if marketing deem something to be successful based on email open rates this may shape the development of a value proposition that does not improve actual sales results. Here thought worlds that lack congruence can be seen to be a causal mechanism in the real strata for misaligned actor behaviours in the empirical strata.

There was a prevalence of responses relating to role alignment emerging from the data, in line with the normative perspective reflected in SMI literature (Avliontis & Lionakis 2015; Kotler et al. 2006; Snyder et al. 2016). Appreciating the role that other actors play in the SMI was also something respondents referred to. In the extant SMI literature this leads to normative responses like suggesting job rotations (Kotler et al. 2006). The issue of empathy between actors in the SMI was seen as important by a number of respondents, for example, Saskia said:

> "I’ve seen so many times, for example, where the product team especially, who’s generally disconnected from the sales team, will point fingers back at the sales team and kind of roll their eyes at the sales team asking this question yet again about the product and how do they not know everything about the product intimately; I’ve already answered this question three times. So that to me is like there’s just a basic respect that’s missing in that situation because it’s kind of that concept of walk a mile in my shoes."

This was in the context of her saying that in two large organisations she had worked in she had witnessed disconnect between sales and marketing because of this lack of empathy. I would interpret this as being about having actors in the SMI who have adaptive thought worlds that can be re-made to allow them to walk a mile in the shoes of other actors (Carpenter 2004). Again, this refers to a particular tribe, Product Marketing, who may have to re-make their thought world rather than just re-new it in order to facilitate improved value proposition production at the SMI.

Saskia's walk a mile in my shoes perspective was mirrored by Maurice, Vice President of Sales Enablement at Global Telco:

> "Sales want to have the problem of too much opportunity for them to get at and so when they love marketing the best is when they’ve got marketing people who are different and are taking a different lens and a different focus, different horizon, but are highly effective, have a foot in the sales world and are tasky and outcome focused, not I’ve done something clever that looks pretty and is going to win an award."

Maurice's observation neatly encapsulates a number of the different facets of thought world differences identified in earlier analysis. Maurice seems to take the view that "different lens, different horizon" is fine providing the combined thought worlds are "outcome focused" on the sales results. According to Maurice this can be facilitated by having "one foot in the sales world". This would seem to require people at the SMI who have the competency to adapt their thought world, rather than completely 're-make' them (Carpenter 2004). In other words, an adaptive thought world can be a generative mechanism for better alignment between marketing and sales and more favourable outcomes.

6.6 Chapter summary - inferences on thought worlds

I will now conclude the thought world chapter by provided a retroductive discussion and explanatory models that move from empirical data to provide an alternative understanding of thought worlds. By deploying a retroductive approach I seek to show through 'transfactual arguments' (Danermark et al. 2002) the inferences I am making about the underlying fundamental conditions which can have a tendency to influence how thought worlds shape value proposition production at the SMI.

In concluding this chapter, I would observe that the orientation differences that emerged from the data in my thesis are far greater in prevalence and granularity than the extant literature (Homburg & Jensen 2007) as can be seen in Table 6.1.

Differences in orientation between marketing and sales	
Extant SMI Literature	**My thesis**
Customer versus product	Customer versus product
Short term versus long term	Short term versus long term
Single customer versus whole market	Deal versus customer or market
	Deal versus market
	Opportunity versus strategy
	Inside-out versus outside-in
	Holistic versus atomistic

Table 6.1 Differences in orientation - contrast between extant literature and my thesis (Source: Author).

What appears to be a level of congruence between the extant literature and my findings in customer versus product orientation is actually a contrast. My findings cast different marketing tribes at different points of a customer-product orientation continuum. Product marketers are seen to have an overt product focus, in contrast with sales people and marketers who operate closer to the customer interface; like account based marketers. In contrast to previous studies (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996) I found that product marketers were seen to have an atomistic view of customer deals or opportunities as they are drawn into customer conversations at a time the customer is in comparison mode between product suppliers. Thought worlds, like value propositions, are seen to be temporal in nature as the way the customer will be thinking, during the course of a buying cycle, changes over time (Lawrence & Lorsch 1969). Sales people, have a holistic view of the whole sales cycle as would other marketing tribes, such as Industry marketers. This contrasts with extant literature which normally views sales as having an atomistic single customer view while marketing look at a whole market (Kotler et al. 2006; Le-Meunier & Piercy 2009). Contextual factors, like whether the sales person is involved in a deal or opportunity emerged as an important consideration, which again reflects the temporal nature of thought worlds. A key finding is that thought worlds are both tribal and fragmented. Whereas SMI literature characterises sales as being at the opposite end of a thought world continuum to marketing, where sales and marketing are seen as holistic monolithic entities, my findings say that the tribe an actor belongs to can affect their orientation, as depicted in Figure 6.1.

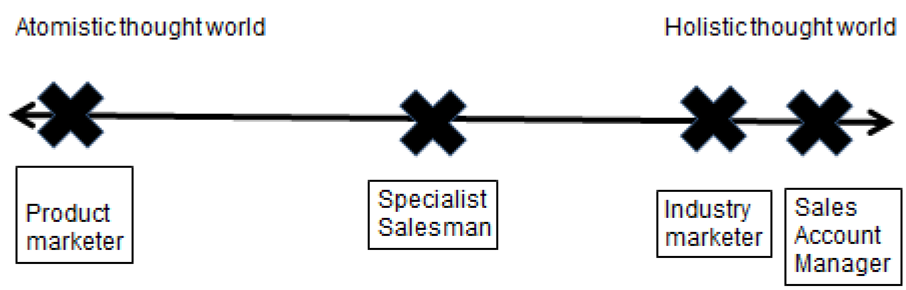

Fig. 6.1 Thought world differences along atomistic holistic continuum (In relation to customer buying cycle). (Source: Author).

A finding that, as far as I am aware, has been absent of consideration in extant SMI literature is that SMI thought worlds exist inside a broader constellation of thought worlds. For example, what emerged from the data was that sales may be trying to operate in a customer-oriented manner and develop value propositions that resonate with customer concerns (Anderson et al. 2006; Ballatyne et al. 2011; Vargo & Lusch 2008). At the same time company executives can have too overt an 'inside-out' focus where much of their time is spent communicating internal capability and product advantages. Extant OSM literature (Niranjan et al. 2014) pointed to differences in thought worlds that related to where functional units were in the supply chain. For example, finance managers will take far greater account of inventory holding costs than sales or marketing actors.

A number of enablers and barriers to thought world congruence emerged from the data. In line with previous studies marketers were seen to be more likely to have a university education and a 'desk-research' mind-set. This, at times meant that sales actors doubted marketers as 'Valid sources of knowledge', as did the perceived lack of marketers exposure to customers (Beverland et al. 2006). I called into question the prevalent view in extant SMI literature that normative goal differences, in and of themselves, are a key enabler to SMI performance (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). I observed that differences in thought worlds related to how success is viewed could be seen to be generative mechanisms affecting the attitude to goals (Danermark et al. 2002; Easton 2010; Fletcher 2016). For example, if a marketer views success as being web site visits setting a goal to target marketers on revenue, like sales actors, may not affect their motivation.

A summary diagram which depicts how thought worlds act as generative mechanisms for improved effectiveness of value proposition development at the SMI is depicted is figure 6.2.

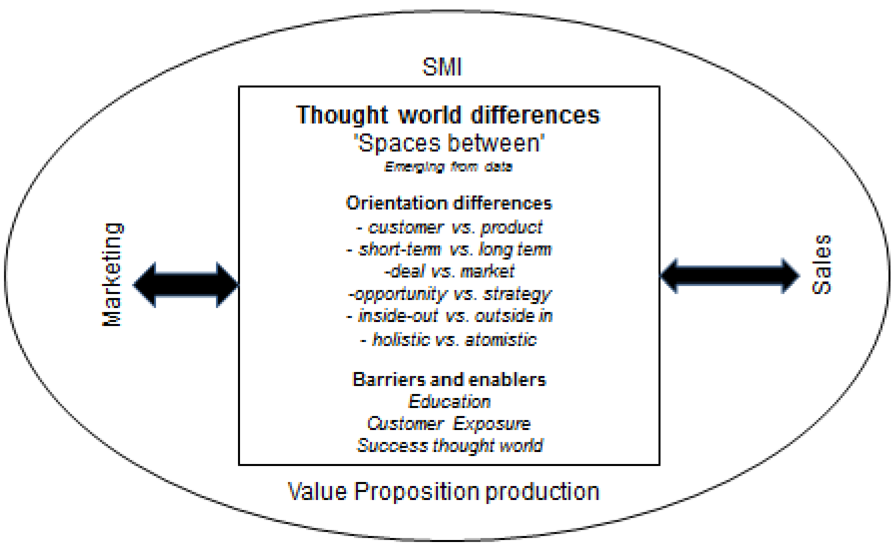

Fig. 6.2 - Thought world spaces in between at SMI for value proposition production (Source: Author).

In Chapter 7 I will draw together the thought world findings with the preceding findings chapters to discuss my overall contribution to knowledge. At the end of Chapter 7 thought world differences, as depicted in Figure 6.2, will be factored into an integrated model for SMI interworking to produce value propositions. Figure 6.3 depicts a cumulative view of the spaces in-between marketing and sales taking account of the three main themes that emerged from the data: Identity, Contextualisation, and Thought worlds. Figure 6.3 shows that there is a lot going on at the SMI in relation to value proposition production in all three critical realist strata: empirical, actual, and real.

In Chapter 7 I will draw together the thought world findings with the preceding findings chapters to discuss my overall contribution to knowledge. At the end of Chapter 7 thought world differences, as depicted in Figure 6.2, will be factored into an integrated model for SMI interworking to produce value propositions that will combine findings from my research with the literature review.

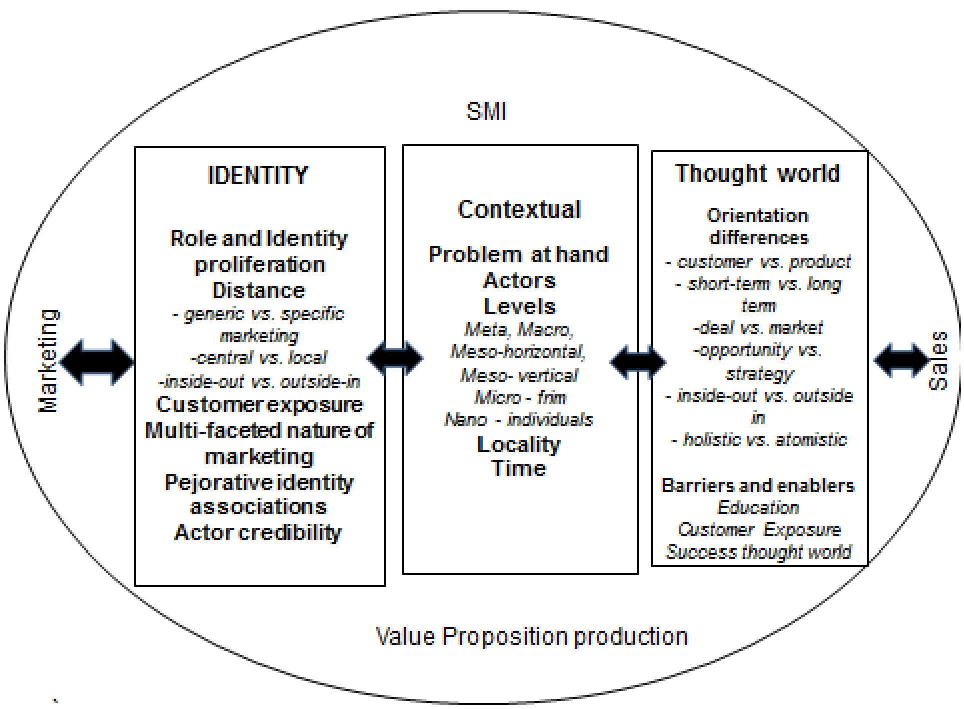

Fig. 6.3 Spaces in between - cumulative model of actual and real differences (Source: Author).

Chapter 7 – Discussion of contribution to knowledge and practice

In this chapter, I will draw together the findings of my thesis. Findings will be considered in respect of contribution to knowledge in business marketing management and with regard to methodological contribution provided by the research approach. Contribution to practice will initially be considered in the context of how the SMI works to develop value propositions. Subsequently consideration will be given to any broader contribution to practice in business marketing management and sales.

Contribution to knowledge and practice will be considered using a framework provided by Corley and Gioia (2011, p.15) to help facilitate discussion of contribution in terms of both scientific and practical utility. The limitations of my research and the approach to my thesis are followed by a discussion of potential directions and opportunities for further research. I will conclude by claiming that generative mechanisms for value proposition production between sales and marketing are characterised by cognitive and competency dimensions, going beyond rational normative considerations. A personal reflection of my DBA journey will be the final capstone of my thesis.

7.1 Thesis contribution in relation to research objectives

The contribution of my thesis is based on an engaged scholarship approach combining scholarly rigour *and* practitioner relevance (Hodgkinson & Rousseau 2009) to an under researched aspect of marketing and sales practice. New insights have been uncovered about generative mechanisms that facilitate SMI interworking, particularly in the production of value propositions (Danermark et al. 2002; Easton 2010; Sayer 2010). Hopefully this has drawn attention to factors that go beyond the normative suggestions made in extant SMI literature (Kotler et al. 2006; Snyder et al. 2016; Strahle et al.1996) towards cognitive, competence and thought world dimensions. My thesis took me in directions that I did not quite anticipate leading to contributions beyond the original thesis aspiration, aim and objectives, which I will explore later in this chapter.

In seeking an answer to my Primary Research Question, how does the SMI work to produce value propositions, I had an aspiration to ease the path for future scholars with a practitioner background. The aspiration, aims and objectives I set out to achieve are set out below:

Aspiration

To provide a recommendation for an educational approach to DBA study and thesis production that takes account of, and optimises, previous practitioner experience and which is both rigorous and relevant to practice.

Aim

To provide B2B marketing and sales practitioners with critical insight and recommendations that reframes their understanding and can facilitate improved SMI interworking in relation to producing value propositions informed by market data.

Contribution to science and practice is summarised in Figure 7.6 using an adaptation of a useful model provided by Corley and Gioia (2011).

Objective 1

To provide an understanding and explanation of the relationship between sales and marketing actors at the SMI in a B2B context.

Objective 2

To understand more deeply, unpack, and explain the phenomena of SMI interworking for value proposition production informed by market data.

Objective 3

To understand and explain the underlying *generative mechanisms* that have the tendency for causal power on SMI interworking in the production of value propositions.

I feel that these objectives have been achieved facilitated by an engaged scholarship perspective and a critical realist philosophy that provided a multi-layered, 'beyond normative' perspective of the phenomenon of the sales and marketing practitioner and how they work at the SMI in value proposition development.

Three major themes emerged from the data:

- Identity
- Contextualisation
- Thought worlds

The three major themes that emerged from the data: identity, contextualisation, and thought worlds represent a picture of how things take shape in the relationship between sales and marketing. The themes exist at the real strata (Sayer 2010). and contribute a beyond-normative explanation that identifies pre-prescribed identities, cognition, thought-worlds, and competencies as generative mechanisms for value proposition production at the SMI. It is proposed that an explanation has been put forward to address Objective 1. By considering the experiences of marketing and sales practitioners my thesis attempts to address ‘what is going on’ in marketing work from the actor’s point of view (Salomonson et al. 2012).

My overall aim reflects the practitioner focus to my thesis outcomes. Suggestions were made in Chapters 4, 5 and 6 that could help practitioners at the SMI improve value proposition production. To claim that these suggestions could optimise SMI interworking would be a bold one. I would propose that offering explanations that invite practitioners to pay attention to beyond normative factors such as thought world differences between actors would provide practitioners a fresh perspective about what needs to be considered, and not taken for granted, for more effective SMI interworking. Looking for what actors appeared to be taking for granted helped to surface ‘absent generative competencies’ for SMI interworking. The notion of a *‘cohesive spiral’* for a more holistic approach to value production, recognising sales and marketing roles as part of a cohesive effort to operationalise customer orientation (Slater & Narver 1996) also emerged from data interpretation as taken for granted, and discussed in more depth later in chapter 7.

Locating my findings at the actor-level of analysis went beyond previous SMI research and mainstream marketing management approaches that view marketing and sales as monolithic, holistic entities. This actor focus was a unique element in my research, as was the focus on the key output of the SMI, value propositions. The findings called into question the existence of an interface at the SMI and pointed towards a more tribal actor identity. I would propose that viewing sales and marketing as holistic entities in a dyadic relationship is naïve. The relationship, interaction, and network perspective consistent with the IMP approach seems a more appropriate lens to view how marketing and sales work to develop value propositions (Hakansonn & Snehota 1990).

Another unique aspect of my thesis was the adoption of engaged scholarship as an approach to research, along with a critical realist philosophy, which facilitated a multi-layered beyond normative perspective. The combination of engaged scholarship, critical realism, thematic analysis, and an actor-level focus represents a methodological contribution from my thesis.

7.2 Discussion of main research findings

Before an attempt to analyse how my thesis contributes from the standpoint of practical or scientific utility (Corley & Gioia 2011) I will provide a recap of the major findings.

In seeking to provide an explanation about how the SMI works, using market data, to produce value propositions informants often went beyond normative descriptions of what was going on at the place known in the literature as 'the interface', or SMI (Kotler et al. 2006; Le Meunier-FitzHugh & Piercy 2011; Rouzies et al. 2005). Many respondent narratives, especially from marketers, reflected a concern or allegiance to a tribal identity (Mafessoli 2016).

Understanding and being able to hold dialogues at the SMI that place value propositions into the appropriate context was a facet of interactions writ large in respondent narratives. The thought worlds of sales and marketing actors were seen as an important generative mechanism for effective SMI dialogue. Drawn together the three main themes that emerged from my thesis reflect an observation that actors see beyond the normative recommendations that typically inhabit extant SMI literature (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). The three themes and their components were:

- Actor Identity
    - The actor's perception of self in the SMI.
    - Using identity to achieve credibility when producing value propositions.
- Contextualisation
    - The perceived importance significant actors place on contextualisation for value proposition production.
    - Actor understanding of contextualised value proposition production at the SMI.
- Thought worlds
    - The perceived differences in thought worlds of actors in marketing and sales.
    - The role thought worlds play at the SMI specifically in relation to value proposition production.

My findings add a different perspective to the largely normative recommendations that emerge from SMI literature. These affective concerns, while they may have appeared on the odd occasion in SMI literature, for example, thought worlds, (Homburg & Jensen 2007), have not as yet been developed theoretically. I present an integrated framework model that recognises that these affective phenomena are additive to the normative recommendations emanating from extant literature (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). While the normative recommendations can help write the script for 'the play', the affective recommendations emerging from my thesis can facilitate 'dramatic realisation' for the actors on the SMI stage (Goffman 1959).

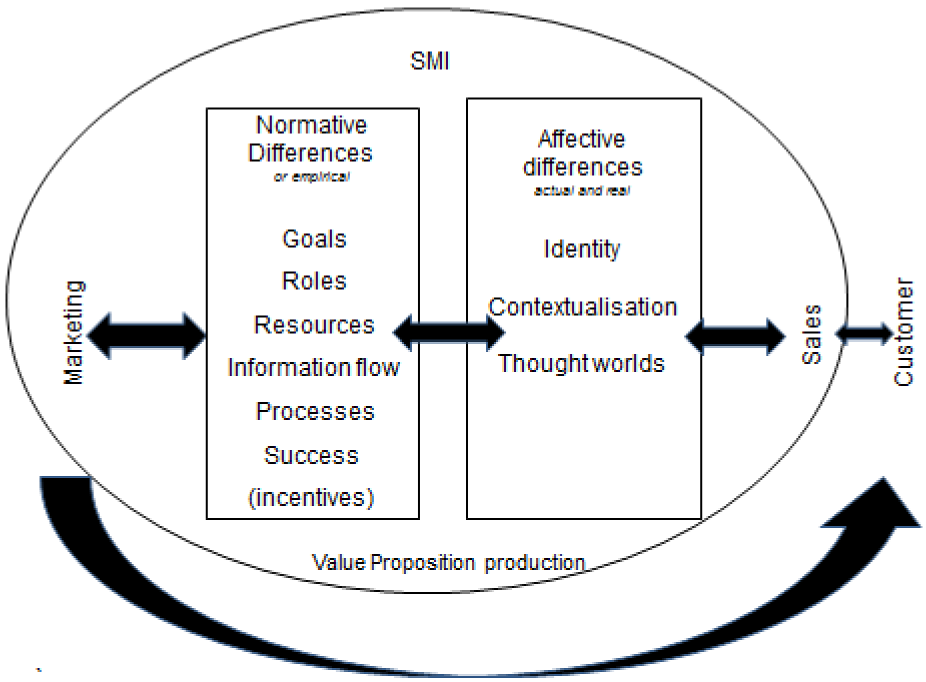

Fig.7.1 An integrated framework: SMI interworking for value proposition production (Source: Author).

The model provides a holistic view of the literature review research findings and is intended to provide an integrated framework for considering the factors sales and marketing actors need to pay attention to for effective SMI interworking in value proposition production. The affective elements are an actor perspective of what are considered to be the important facets of effective sales and marketing alignment, to produce value propositions, informed by market data. The relationship between the affective elements is not strictly linear, unlike many marketing management models. What has emerged from the data, and is inherent in this model is that cognitive, and identity issues cannot be ignored. Sales and marketing practitioners who may have followed a 'how to' panacea typical of in much practitioner focused work (Burgess & Munn 2017) may have written the script and agreed ‘aligned’ goals, roles, and rewards for sales and marketing. What this integrative model suggests is that the SMI, such that it exists, is less likely to be successful if the affective factors have not been paid attention to. Some authors believe that the image actors hold of ideal aims, organisations, processes, and roles lies behind the actions of every individual (Boulding 1961), from that standpoint understanding image, in the shape of identity and thought worlds, could be seen as a pre-cursor or generative mechanism for effective SMI working. Other authors view the cognitive thought world considerations of primacy because how actors think can determine how they act. Mental models are seen to be generative mechanisms that have facilitated business success, for example, South West Airlines having a service business mental model, or thought world (Bonchek & Libert 2017). What was clearly of concern, emerging as an affective dimension from analysis, was the competencies surrounding effective contextualisation at the SMI, reflecting a need for sales and marketing to holistically develop dynamic capability to sense and respond to market data (Teece 1999).

Each of the affective elements of this model can be de-constructed and examined in more detail by consideration of their component models presented in preceding chapters, which I will now turn to, beginning with identity.

7.2.1 Actor Identity

Identity was viewed as a significant theme in informant responses. Actors placed importance on how they saw themselves professionally and in relation to others. ‘Identity is about belonging, about what you have in common with some people and what differentiates you from others’ (Weeks 1990, p.88). What emerged from the data was that actors do not see themselves as part of a holistic monolithic entity know as marketing or sales. There is now a proliferation of tribes that actors appear to associate themselves with, especially in marketing that makes it appear naïve to view the relationship between marketing and sales, and its study, as dyadic. This finding is clearly at odds with the extant SMI literature (Kotler et al. 2006; Le Meunier-Fitzhugh & Piercy 2011; Snyder et al. 2016). The actor responses seemed to aggregate to a view that would also suggest that the existence of the SMI is a mythical social construct in the SMI literature. The relationship between marketing and sales actors now has to be considered from the perspective of a network of tribes and actors within tribes, more akin to an IMP view (Hakansonn & Snehota 1990). Actor self-identity and ascribed identity, from the view of other actors, was seen to be a function of a number of elements seen in Table 7.1.

Elements of self-identity and ascribed identity
Tribal associations – **Marketing** - (most prevalent). Product Marketing, Corporate Marketing, Brand Marketing, Segment Strategy, Field Marketing, Campaign Management, Account Based Marketing, Proposition Marketing, Product Marketing **Sales** - Account Management, Specialist Sales, Systems Engineer, Solutions Architect, Business Development
Distance – Marketing adjacency to sales Aspects of Distance: – Generic versus specific (practice proximity) is generic marketing being provided or more marketing that can be specifically applied by sales to customer conversations? - Central vs. local (organisational proximity) is marketing placed centrally in the organisation or in a sector marketing and sales team? - Inside-out versus Outside-In (philosophical proximity) does marketing begin with the product or customer in mind?
Customer exposure - the level of exposure marketing actors get to customers affects the regard they are held in by sales actors
Multi-faceted role - marketing is recognised as having a multi-faceted role spanning awareness, brand building, value proposition development etc.
Pejorative and processual – identity can change over time from ‘golf ball’ marketers to ‘seat on the sales board’

Table 7.1 Elements of self-identity and ascribed identity (Source: Author).

Actors, particularly in marketing, did not identify themselves as part of a monolithic entity called marketing or sales. Role proliferation in marketing seems to have fostered self-identity with smaller tribes in more specialist functions such as product marketing, industry marketing, or field marketing (Mafessoli 2016). The implication for the SMI, is that there is no single interface defined as 'A point where two systems ….meet and interact' (Oxford English Dictionary 2015). From a value proposition production standpoint, the SMI needs to be regarded as a stage on which the relevant marketing and sales actors are invited to play, with invited customers, at the appropriate time (Goffman 1959). What is apparent is that the SMI stage will be much more akin to a big-ticket Broadway show like '42nd Street' with lots of actors coming into scenes compared to a small production, like Harold Pinter's 'The Caretaker'.

Utility was ascribed to marketers, and formed a large part of their self-identity based on distance (Nicholson et al. 2013), how proximate or distant the marketing actors perceived themselves, or were perceived to be in relation to sales and customers. Whether marketing actors were providing generic or specific marketing support was an element of distance. Generic marketing that was not specific to customer accounts was not seen to be helpful as compared to specific marketing, aimed at certain customers, sectors or segments. Similarly, centralised marketing was seen to be of less utility than localised marketing. Sales saw marketing as more valuable the more adjacent they were to them, especially if marketing resource was assigned directly to sales. Marketing actors felt more valued the closer they perceived themselves to be to sales, the less distance (Nicholson et al. 2013).

Identity was as ascribed to marketing actors depending on whether they were seen as producing outside-in or inside-out marketing. Outside-in marketers start with the customer or market problem and work backwards from there (Hammer 1996). Inside-out marketing was a label used by respondents to pejoratively describe marketing that starts with the company products and moves out to the customer as product-feature led. This pejorative identity was ascribed by marketing and sales respondents alike to product marketers. Favouring outside-in practitioners is congruent with the marketing concept literature (Levitt 1960), and sales practitioner literature (Adamson & Dixon 2013; Miller et al. 2011; Rackham 1988).The implication for SMI and value-proposition development is that adjacent sales and marketing functions need to treat product marketing as at least the third-leg of a triad (Kowalkowski et al. 2016) before consideration of more fragmented tribal association. The implication is that value proposition development cannot be treated as a dyadic process because the monolithic holistic entities known as marketing and sales in the SMI literature do not exist in that form. I can retroduce from this that recognition and engagement of all the relevant actors and tribes, willingness and ability to negotiate value propositions, and the skills to engage and negotiate are generative mechanisms for VP production, at the numerous sales and marketing interfaces that exist between actors.

In line with previous SMI studies marketing actor exposure to customers was seen as virtuous in helping build value propositions (Malshe & Sohi 2009). Sales actors ascribed positive identity to marketers who spent time with customers. Marketing actors who spent more time at their desk compared to with the customer could be seen as 'Ivory Tower' marketers not "in the trenches", fighting the same battle as sales. Marketing was acknowledged by sales as performing a multi-faceted role from strategy development to tactical execution. There is a danger that the importance of the central SMI task, value proposition production, is relegated in terms of importance, or buried among the myriad more organisationally visible tasks such as corporate brand or website. From a CR perspective, activities like re-branding and website updates are much more empirically visible than the below the surface work required to produce value propositions.

Development in a marketing career could be seen to be processual. From the days where marketers see themselves as mugs and mouse-mat providers to a seat at the sector board-room table driving strategy. While marketers felt the need to establish credibility with sales there was no apparent reciprocity. What I can retroduce from the non-reciprocal need for marketing to establish credibility with sales is that marketers see themselves as the suppliers in a one-sided marketing-sales customer-supplier relationship. Acting with integrity, delivering on promises, and not 'over-claiming' successes is seen to be key to establishing, and maintaining credibility for marketing actors. Marketers see credibility as an enabler for effective value proposition development. What can be inferred from this is that a desire to gain credibility to lead marketers towards more visibly empirical activities, link re-branding, which could be a barrier to effective VP production.

Getting sales buy-in to value proposition production was seen to be important by marketers (Malshe & Sohi 2009). At the same time narrative around attitudes, behaviours, competencies, and skillsets (such as negotiation) that may affect marketers' propensity to gain buy-in appears to be absent. There was a self-ascribed perception from sales respondents that a cadre of sales people did not possess the pre-requisite skills to effectively develop value propositions with marketing or customers, or project customer needs and wants back to marketing. Detail on what these absent competencies and skillsets was absent.

In summary, through a process of retroduction Identity emerged as a theme that can have a tendency to influence value production between sales and marketing, a generative mechanism for value proposition propositions. A number of different identities, specifically for marketers, emerged from the data, depicted in Table 7.2 below:

Marketing actor identities
Distant Deidre - sees herself as distant from sales occupying a 'factory' type role where no consultation with sales is required for VP production
Ivory Tower Ian - university educated. Develops 'value propositions' based entirely on desk research, not 'real world' interactions with sales or customers
Trench fighting Trevor - fighting alongside sales people. Engaged with customers and sales in producing value propositions. Usually in a role adjacent to sale**,** e.g. industry marketing
Product pushing Pete - typically a product marketer. Viewed pejoratively by sales and 'real' marketers alike for always pushing product features.
Generic Geoff - produces generic marketing based on a surface level understanding of a market seen to be of little utility to sales.
Specific Sheila - produces value propositions very specific to individual customers or opportunities, viewed as highly relevant by sales people.

Table 7.2 Marketing actor identities emerging from data (Source: Author).

7.2.2 Contextualisation

Through a process of retroduction what emerged from the data was that marketing and sales actors are contextualising entities in relation to value proposition production. They have to inform, be informed by and circumnavigate meta, macro, vertical, horizontal, micro and meso-layers of context in order to develop compelling and resonating value propositions. In other words, to span, beyond the micro-macro link by providing a meta-nano link (Boudon 2014). Value propositions have to have fluidity and the ability to transcend contexts. There needs to be a systemic approach for value proposition production that works up and down the-contexts from nano to meta-level and back the other way. The overall value proposition approach should start at the meta and macro and move towards the customer in a layered approach. I call this *contextual layering,* I present a model in Figure 7.2 as a representation of this approach:

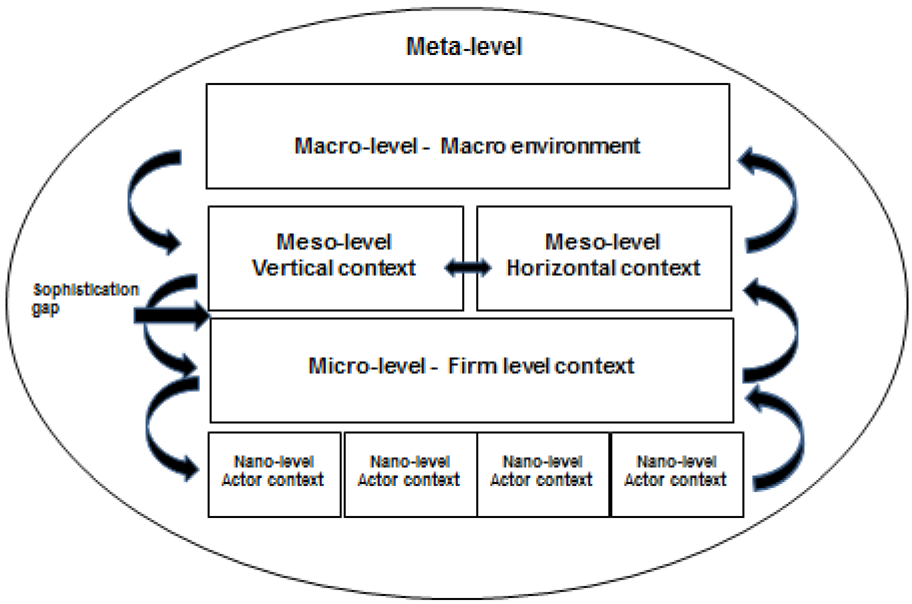

Fig. 7.2 Contextual layering of value propositions (Source: Author).

Surprisingly the inspiration for this model came from Theology where the concern of contextualising the gospel for different countries and cultures presents a similar challenge to value proposition development. The approach I have put forward in Figure 7.2 is akin to a theological praxis model of contextualisation (Schreiter 1985). The over-arching 'gospel' should set out meta and macro-level value-themes developed through an understanding of the key issues facing customers. The value theme based approach was informed by the thematic interpretation work of Professor Sam Ham (1993). Ham posited that themes help people internalise what is being said, rather than be overwhelmed by detail. Having a small number of meta-level value themes that could be placed in context at the micro and nano-levels of the customer is seen to be much more effective than bombarding customers with 1,000 products.

Value themes are seen as the gospel developed at the SMI worshiping the glory of customer value, not the product. An overall market and customer orientation is an easier cultural start point to produce value propositions in context. For organisations where product-centricity is the dominant paradigm marketing and sales actors who are closer to the customer than the product marketers who construct product-level ‘value-propositions’ have a much bigger translation job to do to create value propositions in context, as there is no overall meta and macro value-context, in which to place, or set their nano-level propositions. In this sense actor agency is constrained by the organisational orientation, structure, and process (Archer 1995; Sayer 1992). Actor behaviour can be enabled and determined by a customer orientation, and is not entirely voluntary.

There is currently seen to be a sophistication gap that exists in between marketing actors’ main operating domains, between the meta and meso layers, and sales who operate mainly at the micro and nano-levels. Here there is a poor organisational understanding of role clarity, overlap and gaps. There is an absence of contextual layering. Figure 7.2 shows where the sophistication gap is perceived to be. What is absent from discussion here is the competencies and skills required, an absent generative competency to be able to translate in between contextual layers. The contextual layering model and the current fracture at the SMI labelled as the sophistication gap demonstrate that the SMI needs to see itself as part of a cohesive entity that holistically produces and articulates value propositions in the appropriate contextual frame.

There could be a much larger sophistication gap if an orientation difference exists between marketing and sales actors. If micro-level value propositions are developed inside a product orientated culture in the absence of a customer gospel it is likely that the customer will get mixed messages. The actors inside the organisation may not have a clear understanding of what their organisational level value proposition or competitive advantage is. The translation job for the sales person will be much more difficult to do than translating from a customer-centred gospel.

Practitioners recognised that there are competencies and skillsets required for contextualisation. Any detailed understanding of exactly what these competencies were was not forthcoming. There is some discussion of the skills required to contextualise value propositions in sales literature (Miller et al. 2011; Rackham 1988), a discussion that is absent from mainstream marketing literature (Kotler & Keller 2015).

In summary, through a process of retroduction contextualisation emerged from the data as an important element in value proposition development. Informed by theology contextualisation praxis (Schreiter 1985) and by the thematic communication work of Sam Ham (1993). I developed the contextual layering model with a layered approach to value proposition producing. From an SMI perspective this places an emphasis on sales and marketing practitioners as contextualising entities. A generative competency for value proposition production at the SMI is contextualisation. The underlying detail that describes what contextualising looks like is an absent generative competency.

7.2.3 Thought worlds

Through a process of retroduction the presence of different thought worlds among sales and marketing tribes and actors emerged through analysis. An unlikely source of inspiration came in the anthropology literature related to North American Indians. In this literature Calvin Martin (1978) is seen as the originator of the term thought world. Carpenter (2004) provides a useful definition of thought world 'Encompasses a culture's logic, ontology, epistemology, and values…it can be defined as a culturally adapted mode of thought' (Carpenter 2004, p.47). Carpenter (2004) compared the fate of the five nations Iroquois tribe to the Hurons in 17th century America at the time of European settlement. He credited the lack of adaptivity of the Hurons thought world in relation to animals and the environment for their demise in the face of settlement. The notion of renewing or remaking thought worlds in order to survive, or otherwise be destroyed, is a useful lens through which to view SMI thought worlds (Carpenter 2004).

There were differences in what sales and marketing actors regarded as valid scope of focus and activity (Beverland et al. 2006). This manifested itself in a granularity of orientations that is not currently recognised in the SMI literature, for example deal orientation, and opportunity level orientation which I have presented in Figure 7.3. These orientations are temporal in nature dependent on whether sales actors are in deal or opportunity mode at any point in time. The temporal nature of thought worlds could also be related to where the customer is in the buying cycle. SMI responses to the temporal nature of thought worlds can be influenced by whether they take a holistic or atomistic view of the customer buying cycle. Because marketers see themselves belonging to tribal groups it is naïve to believe that sales and marketing thought worlds exist at polar opposite ends of thought world and behavioural continua as has been characterised in the extant SMI literature (Homburg & Jensen 2007). Organisations and academics need to pay attention to thought world differences before jumping to normative conclusions and recommendations.

Actors in the SMI do not think about things in the same way. While this is not always role related how the term value proposition is conceived seems to be related to customer distance. Clarifying actor thought worlds in regard to contentious terms like value proposition would seem to be a pre-cursor, or an enabler to, normative empirical action. A number of orientation differences emerged from the data; these are presented in Table 7.3 along with the differences drawn from extant SMI literature (Homburg & Jensen 2008; Kotler et al. 2006; Snyder et al. 2016).

Differences in orientation between marketing and sales	
Extant Literature	**My thesis**
Customer versus product	Customer versus product
Short term versus long term	Short term versus long term
Single customer versus whole market	Deal versus customer or market
	Deal versus market
	Opportunity versus strategy
	Inside-out versus outside-in
	Holistic versus atomistic

Table7.3 Orientation differences between marketing and sales actors (Source: Author).

Sales actors when chasing a significant piece of business could be said to have a deal focus. When they are in this mode they have organisational permission to ignore marketing initiatives, which may include requests for involvement in new value proposition production or execution. Similarly, when sales actors are developing a potential piece of business that could become a deal in future they could be said to be in opportunity focus. While sales actors are in deal or opportunity mode their bounded rationality is constrained by that focus (Simon 1986). What occupies sales actor thought worlds is winning the deal or developing the opportunity. What I can retroduce is that a deal or opportunity focus can be an enabler for VP production for that deal or opportunity and a liability with regard to broader value proposition development efforts.

Customer versus product orientation appears in the thought world theme in an importantly different guise from the identity category. From a thought world standpoint it is important to recognise that the starting point for a sales and marketing actor could be 'I believe that the product is of primacy' or 'I believe the customer is king'. Marketers and sales actors are not at opposite ends of a customer-product orientation continuum, contrary to the extant SMI literature

(Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). Role and tribal identities can shape where actors can be seen on this continuum, Figure 7.3 illustrates this point.

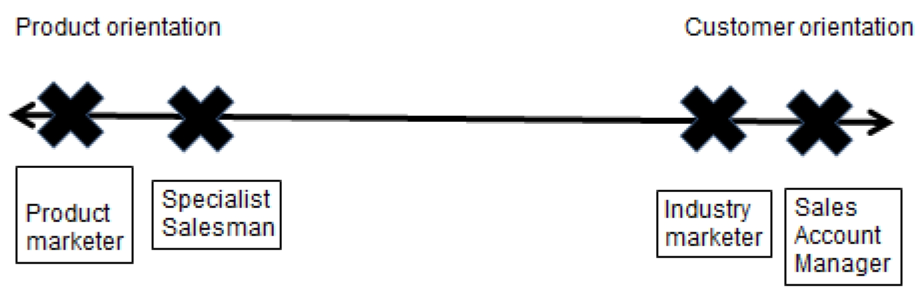

Fig. 7.3 Sales and marketing actor orientation continuum (Source: Author).

While Figure 7.3 is purely illustrative it serves to show that treating marketing and sales as holistic entities from a thought-world perspective is naïve. Product marketers emerged from the data as being perceived to be the most product orientated actors in the SMI. Sales specialists, who are targeted to sell specific products, are also likely to have a product focus. Account managers and Industry marketers are more likely to have a level of congruence around a customer orientation. This naivety in placing sales and marketing at opposite ends of continua is present in SMI literature in relation to a number of dimensions, for example, time horizons (Beverland et al. 2006). Role and tribal factors should be considered before jumping to normative conclusions. Unless dialogue draws out individual thought world orientations they can never be known in advance. SMI thought worlds can be reinforced by whether they have a holistic or atomistic view of the customer buying cycle. The product marketing tribal view of 'it's all about the product feature' is reinforced by its atomistic role in the sales cycle at the 'comparison' stage. If product marketers are asked to attend only customer meetings where widget x is being compared with widget y, at the comparison stage of the buying cycle the 'product is god' centred view will be reinforced. What I can retroduce from this is that actor orientations need to be understood and surfaced at the onset of value proposition development as an enabler to effective VP production.

Consistent with extant SMI literature sales actors see marketers as college educated with a desk research oriented thought world, as opposed to one that thinks customer contact is essential (Homburg & Jensen 2007; Kotler et al. 2006; Malshe et al. 2016). Sales actors question the validity of marketing actors as a useful source of knowledge in value proposition production based on a college educated desk oriented perception of the marketers. Often what can, on the surface, appear to be normative differences in goals, as is often the case in extant SMI literature (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996), could more usefully be interpreted as thought world differences. For example, if a marketer was given the same revenue goals as a sales person would that stop the marketer viewing tactical factors, such as awareness or perception ratings as measures of their success? Paying attention to the 'affective' issue of thought worlds is what is being suggested here, beyond just a normative goal-setting response. In other words, I retroduce from this that thought worlds are below the surface causal mechanism that have tendency to influence value proposition production at the SMI. Thought worlds need to be recognised and mobilised by sales and marketing actors in preference to applying normative goal setting as a quick organisational fix.

7.3 The conundrum of absent generative competencies and the cohesive spiral

In looking beneath the surface for generative mechanisms that may be being taken for granted I found inspiration while climbing Mount Quandary, in Colorado. Quandary is a synonym for conundrum 'A confusing and difficult problem or question' (Oxford English Dictionary 2015). What occurred to me was that all through the data analysis and interpretation a lot of difficult tasks were being mentioned that "they" or "we" should do more of. With an absence of discussion around what a skilful marketing or sales person would need in terms of competencies to successfully navigate the fragmented SMI to develop effective value propositions. I have labelled this conundrum absent generative competencies.

7.3.1 Absent generative competencies

A dictionary definition of competence seems elegantly simple, a competency can be defined as: 'The ability to do something successfully or efficiently' (Oxford English Dictionary 2015). However, in the pantheon of Management literature competency is one of many contestable terms. What I mean by competency is well aligned to Woodruffe:

> 'A competency is the set of behaviour patterns that the incumbent needs to bring to a position in order to perform its tasks and functions with competence' (Woodruffe 1993, p.29).

Given what has emerged from the data there are a number of areas where a high level of competence appears to be required, which are given little attention, and are largely absent in mainstream marketing literature. Specific examples of 'absent generative competencies' that emerged from the data were:

Orchestration skills

Given the fragmented and tribal nature of the SMI what competencies are required to bring the relevant players together at the right time to produce an effective value proposition? This could be seen to be a set of orchestration skills (Lindgreen et al. 2012).

Outside-In competence

A bigger question is given that outside-in marketing was seen as being preferable to inside-out marketing what competency set is required to become a competent practitioner of outside-in marketing, particularly if the orchestration skills required to draw the relevant parties together would involve some actors from a product-centric organisation.

Buy-in skills

Given the need to get sales buy-in for effective value proposition production and operationalisation, what competencies are required to get sales buy-in? (Malshe & Sohi 2009).

Contextualisation competencies

From a sales standpoint if developing value propositions involves transcending from nano to meta layers what competencies are required for nano value propositions and to provide feedback to marketing to help inform higher level propositions? With the identification of contextual layering as a conceptual approach for value propositions development what competencies are required to transcend contexts and traverse the sophistication gap?

Adaptive thought world competence

How do practitioners pay attention to thought worlds? What does it take to develop adaptive thought worlds, to be the sales and marketing tribe analogous to the Iroquois Indian tribe, who survived the European settlers, not the Huron tribe who failed to adapt and perished? (Carpenter 2004; Graymont & Martin 1979).

These types of competencies have been described at a more macro theoretical level in dynamic capability literature (Teece et al. 1997; Teece 1999) where dynamic capability is:

> 'The firm’s ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments' (Teece et al. 1997, p.509).

The ability to react in a timely manner to external changes requires a combination of dynamic capabilities to: Sense and shape opportunities and threats, to seize opportunities, and maintain competitiveness through re-configuring intangible and tangible assets. This translates at the micro theoretical level of my thesis to a need for a more granular set of skills and competencies that help deliver the crucial SMI competency set that delivers the sales and marketing aspects of the dynamic capability set out in Table 7.4:

Macro Organisational Dynamic capability	SMI dynamic capability
Sense and shape opportunities	To harness secondary research with feedback coming back from sales about customer interactions and aggregate into new opportunities.
Seize opportunities	Developing new value propositions in order to exploit new opportunities. Developing the organisational case for change to exploit new or emerging opportunities.
Re-configure intangible and tangible assets	Develop value-themes to facilitate adaptability of assets. Shape new solutions and value propositions from existing assets to fit new opportunities. Implement 'change case' to re-configure sales and marketing assets to exploit new opportunity.

Table 7.4 SMI dynamic capabilities for value proposition production (Source: Author).

To be of utility to practitioners the set of absent generative competencies required for marketing and sales people needs to be expressed at a meso-level to help leaders in this field hire people that can operate effectively in the SMA (sales and marketing arena) to produce value propositions. Absent generative competencies for marketers that emerged from the data are outlined in Table 7.5, which I have called the Marketing practitioner competence manifesto.

Marketer competency	Competency detail
P = Philosophy	*A Marketer has* to be able to put themselves in the shoes of customers and salespeople as a pre-cursor to effective value proposition development.
V = Visionary	Marketers need to have vision, imagination, be agile and able to course correct. Anticipating market opportunities and recognising changes in the customer environment are key competencies.
A= Activator	Getting sales buy-in (Malshe & Sohi 2009) and bringing in actors from across the SMA to produce value propositions to get buy-in to close the "sophistication gap", and have the ability to contextualise.
L = Learner	Learning by bringing market data in through customer research and through regular dialogue with sales actors about their customer interactions.
U = Useful	Tuning in to what customers/ sales needs in order to propose practical solutions.
E = Evaluator	An ability to evaluate new opportunities. Evaluation of marketing campaign ROI and ability to course correct.

Table 7.5 Marketing practitioner competence manifesto (Source: Author).

From an academic perspective, the conundrum of absent generative competencies is worthy of development as value propositions are not self-creating artefacts. Attention needs to be paid to the competencies required by people in the SMI to operationalise a marketing-orientation. The personal competence of actors in the sales and marketing arena (SMA) will have a tendency to influence the quality of value proposition production, personal competencies are the ultimate generative mechanism in that respect, especially in light of the conundrum of the cohesive spiral which I shall examine next.

7.3.2 The Cohesive spiral

In the Contextualisation theme, what emerged from the data was that at any level or locality value propositions have to be produced in recognition of the context they take place in and in the broader context (Meta layer) the lower level value proposition exists in. Mainstream marketing management literature characterises a marketing orientation as one that begins with an understanding of the customer where value propositions are developed in response to potential marketing opportunities that are then articulated to customers (Jobber & Ellis-Chadwick 2013; Kotler & Keller 2015). This marketing orientation is generally presented as a linear process.

What has emerged from the data is a phenomenon which I call the Cohesive Spiral, which draws some inspiration from psychology and the field of spiral dynamics (Beck & Cowan 1996; Graves 1974). Spiral dynamics can be defined as a philosophy which recognises that the psychology of the mature human being is an unfolding, emergent, oscillating, spiralling process marked by progressive subordination of older, lower-order behaviour systems to newer, higher-order systems as man's existential problems change. In spiral dynamics, each whorl represents the flow from one reality to the next. Individuals, organizations, and societies move in a spiral trajectory, shifting their priorities and values, as they move towards their conception of the future. Given that the future can lie anywhere along the spiral the question of what is next for a person or group is called into question. The model is not a typology but a flowing process of emerging, nested systems (Beck & Cowan 1996; Graves 1974). Akin to spiral dynamics value proposition production can be seen as a spiral process of nested systems as depicted in Figure 7.4.

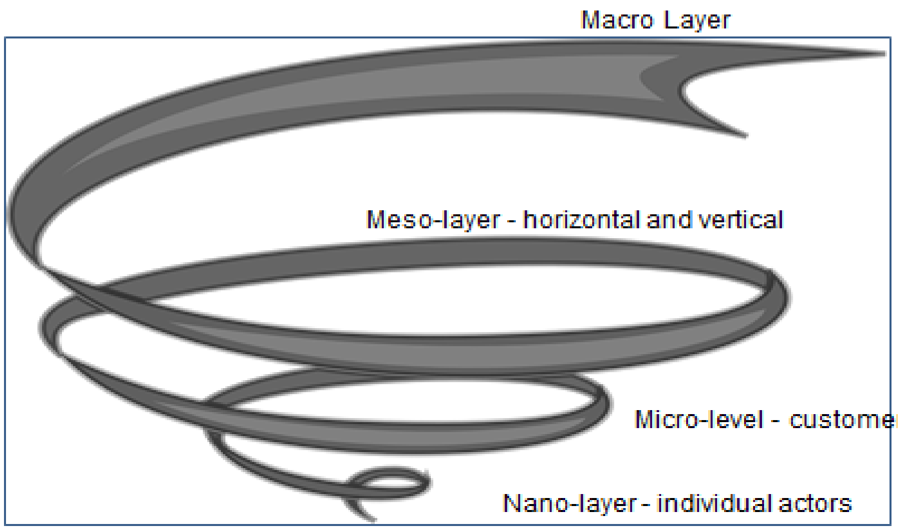

Fig.7.4 The Cohesive Spiral (Source: Author).

If a line was drawn in the sand at time X on day Y for organisation Z then for that moment in time only a static set of value propositions could be seen to exist ideally from the Meta layer through to the nano layer. In an ideal state interactions in the SMA could inform value propositions at a point of the spiral that would generate movement in the spiral and impact on value propositions in all the other layers. For example, a security breach into the customer database at Money Bank in Oklahoma could affect a change in value proposition at the micro level from a provider of website security that could shape a new value proposition for financial services customers at the micro level working up through the whorls to a macro and meta-levels across the globe.

The cohesive spiral views value proposition production as a system where sales and marketing need to work in cohesion at the SMA to bring market data into the spiral. It recognises that value propositions are emergent and can be affected by an interaction with a customer or another sales and marketing actor at any point of the spiral. From a practice standpoint recognising the spirally dyamic nature of value proposition production facilitates the need for effective dialogue at the SMA. From an academic perspective the spiral model respresents a contibution to knowledge, which I will consider next in the light of the total contributions both practical and scientific (Corley & Gioia 2011).

7.4 Contributions to knowledge

A useful model through which to view contributions to knowledge is provided by Corley and Gioia (2011, p.15). This model looks at contribution from the perspectives of utility and originality. The Utility dimension bifurcates into scientific and practical utility; scientific utility is seen as an advance that improves conceptual rigour or enhances its potential to be operationalised and tested. Practical utility is when theory can be directly applied to problems practicing manager's face, 'The observation of real-life phenomena, not from scholars struggling to find holes in the literature' (Hambrick 2005, p.124). Originality bifurcates into incremental and revelatory insights. The distinction between the two levels of insight is based on distinction between extending current understanding and offering new insights: From a CR perspective revelatory insight can be achieved by challenging existing assumptions and providing new insights (Danermark et al. 2002; Easton 2010; Sayer 2010), or by bringing forward 'Entirely new points of view' (Conlon 2002, p.489). Revelatory insight can be seen as the 'Distinction between contributing to a current conversation and starting a new conversation' Huff (1999). My intention was to contribute both practically and academically, and to aspire to revelatory insights. I have adapted the Corley and Gioia model (2011) and summarised my contribution to knowledge in Figure 7.6. Before I embark on some narrative to explain why I categorised my contributions the way I did I have to agree with Rynes (2002, p.311):

> 'The notion of contribution - like many other abstract concepts, such as quality or truth - is somewhat subjective and can only be

assessed in the context of each unique manuscript' (Rynes 2002, p. 311).

I am probably not the best judge of what is a useful contribution, especially where laying claims to being revelatory. In my days as a full time corporate marketing practitioner I have been on the receiving end of academics making claim to revelation for things I had long since adopted or discarded, and I don't want to fall into the 'so what' trap here. I do believe that the door to contribution was made wider by a perspective that 'The route to good theory leads not through gaps in the literature but through an engagement with problems in the world' (Kilduff 2006, p.252). Throughout my thesis I adopted the view that I was contributing to helping find explanations and solutions to a real -world problem: how does the SMI work to develop and produce value propositions?

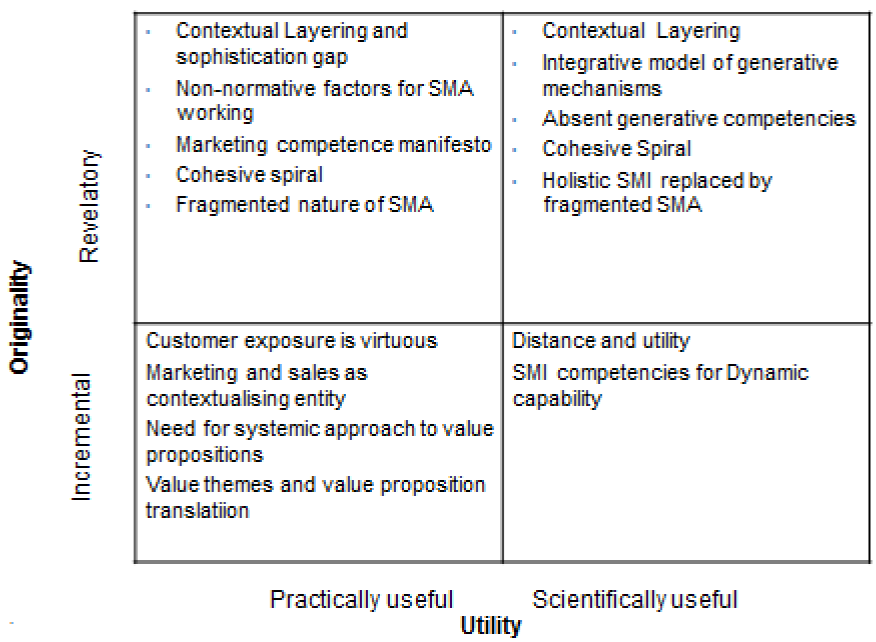

Fig. 7.5 Contributions to knowledge: adapted from Corley and Gioia (2011, p. 15).

Rather than replay the summary findings outlined in Chapter 7.3 and 7.4 I will provide some rationale here for my categorisation. I made judgements on originality based on whether I felt I was contributing to a current conversation or starting a new one (Huff 1999). On this basis, I classified my contributions as:

Utility Scientific: Originality - revelatory

Contextual layering is a new concept for the both SMI and value proposition literature. New models are offered that present new perspectives of how sales and marketing work to produce value propositions.

Integrative model of generative mechanisms represents a step-change from the largely normative factors considered in SMI literature (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). The model offers a number of affective factors: Identity, contextualisation and thought worlds as new elements of an integrated model for effective value proposition production.

Absent generative competencies is a revelatory notion from the perspective of SMI and value proposition literature which is largely absent of personal competency narratives (Ballatyne et al. 2011; Kotler et al. 2006; Snyder et al. 2016).

The cohesive spiral offers a new conceptual model for considering the dynamic nature of how the SMI works to develop value propositions.

In respect of the *SMA replacing the SMI* what emerged from the data was a sense of tribal identity, especially in marketing practitioners (Mafesolli 2016). The notion of the SMI presented in the literature, appears to be naïve (Hughes et al. 2012; Massey & Dawes 2007; Snyder et al. 2016). What is offered is a Sales and Marketing Arena (SMA) where the relevant sales and marketing actors and tribes are invited to contribute, with customers, at the relevant time, in the production of value propositions.

Utility Practical: Originality - revelatory

Contextual layering and the sophistication gap I feel the notion of contextual layering is directly transferable to practice. Although practitioners would recognise the notion of different levels of value proposition with albeit different labels to academic literature the notion of layering of the contexts adds to practice, especially as the issue of the 'sophistication gap' is a revelatory label and solution to a widely recognised practice problem.

Non-normative factors for SMA working offering new explanations for more effective SMA working which go beyond the normative solutions provided by SMI literature (Kotler et al. 2006; Snyder et al. 2016) and typically focused on by practitioners, can only serve to enhance SMA working.

Marketing competence manifesto is a practitioner articulation of absent generative mechanisms and offers insights into the competencies required by marketers in the SMA for effective value proposition production.

Cohesive spiral is seen as a concept that is directly transferable to practice and provides perspective of a more systemic approach to value proposition production which is more dynamic than typical practitioner approaches.

Fragmented nature of the SMA is maybe one where the problem itself would not be seen as a revelation by practitioners who would probably say 'OK so we already knew there were several different flavours of marketing and sales people in our organisation, tell us something new'. Offering solutions for dealing with the tribal nature of marketing especially, and relating the fragmentation to new sets of orchestration competencies required at the SMA could be seen as revelatory.

Incremental contributions

I feel claims can be made for a number of incremental contributions of both scientific and practical utility. From a scientific perspective the notion of distance is incremental to existing SMI work providing insight into how marketers perceive providing value to relating to proximity to sales and customers (Nicholson et al. 2013). While the competencies discussion can be regarded as revelatory in respect of the SMI literature it also provides incremental insight to the Dynamic Capabilities literature, specifically offering an additional layer of competencies required at the SMA for value proposition production, which helps operationalise dynamic capability (Teece et al. 2007; Teece 2009).

From a practical utility perspective, a number of findings can be seen to be incremental. Customer exposure emerged from the data as desirable for marketers' perception and positive self-identity. While the customer exposure finding was supportive of existing SMI literature findings (Malshe & Sohi 2009) the effect on actor identity can be seen as a new incremental contribution. From a practical perspective, it should provide incremental impetus for marketers to seek, and be given access to more customer facing time. The notion of sales and marketing as a contextualising entity for value proposition production provides incremental utility to practitioner understanding of the need for value propositions to be set in a series of inter-related contexts set inside a more systematic approach. Providing practice with the notion of a ‘customer value bible’ that sets the context at a meta and macro-level for developing value propositions in lower whorls of the spiral, while not entirely new, provides new explanations additive to existing value proposition literature (Anderson et al. 2006; Ballatyne et al. 2011; Payne et al. 2017).

7.4.1 Contribution to marketing education practice

It is hoped that the overriding contribution to marketing education practice is provided by a more actor based view as to how marketing orientation is operationalised. This more actor centric perspective can provide insights into how sales and marketing actor interactions shape production of value propositions. At a macro-theoretical level this pragmatically means weaving dynamic capability (Teece 2009) and actor competencies into undergraduate and postgraduate modules related to market orientation and competitive advantage (Gilligan & Wilson 2009; Kohl & Jaworski 1990, Kotler & Keller 2015).

A strong focus on the centrality of value, and the importance of value propositions as promises of future value that articulate competitive differences (Vargo & Lusch 2008) can usefully be supplemented with concerns about the actors that need to be on the stage, or SMA, to develop and produce value propositions, and the competencies required by the marketing and sales actors (Goffman 1959). Encouraging students and fellow scholars to go beyond the normative and consider generative mechanisms, such as thought-worlds (Carpenter 2004; Graymont & Martin 1978), can provide a more humanistic perspective to bring the bland normative models of mainstream marketing education to life.

Marketing and sales education can be bridged by incorporating my thesis findings into B2B academic modules that seek to develop a more holistic approach to marketing and sales. Given that commercial research suggests that B2B buyers are now typically about 60% of the way through the buying process before they speak to a sales person (Pisello 2015) the need for SMI integration felt by customers and organisations needs to be mirrored in marketing education. Academic modules that take a more competence based focus to B2B market and opportunity development can be enhanced by some of my key research findings. The book I co-authored ‘Value-Ology: Aligning Sales and Marketing to shape and deliver value propositions' (Kelly, Johnston & Danheiser 2017) provides a unified approach in value proposition production and articulation for B2B marketing and sales practitioners. Supplementing this with a 'Competencies for value-ology' book is an intended contribution to marketing education.

Without being accused of academic eclecticism (Corley & Gioia 2011) or colonialism (Burton 2005) what I have learnt most from my thesis journey is the value of theory emanating from other social sciences and academic disciplines. Providing background and colour to marketing education from areas such as American Indian Anthropology (Carpenter 2004; Graymont & Martin 1979) or from Theological perspectives of translation (Harrower 2001; Hiebert 1985; Schreiter 1985) and developing these theories in a marketing context can only add to academic rigour. Although now I can see why marketing as a subject discipline has been accused of occupying and assimilating theories of other disciplines (Burton 2005; Troye & Howell 2004). I can see the value inherent in introducing underpinning theory from other disciplines.

Overall, contributing actively to the B2B network, relationship and interaction focus on the IMP school of academics (Hakansonn & Snehota 1990; Kowalkowski et al. 2016; Nicholson et al. 2013) is where I feel the biggest contribution to marketing education can be made. The proximity to practice and the philosophical approach of the IMP makes me feel I can develop the identity of an 'academic' while retaining my core 'pracademic' identity in discussions with marketing practitioners.

7.4.2 A DBA thesis approach to optimise practitioner experience

Given my personal struggle at times during the DBA thesis I had an aspiration, beyond the subject focus of my thesis, to provide a recommendation for an educational approach to Doctor of Business Administration (DBA) study and thesis production that takes account of, and optimises, previous practitioner experience that is both rigorous and relevant. In my biography (Section 1.4) I explained some of the travails and tensions I faced as a recent ex-senior practitioner on the DBA journey. At times I felt like experience was seen as a barrier to research objectivity. I would like to suggest an approach for practitioners that follow the DBA path that helps them feel that interpretive ability is enhanced by their previous experience. Especially as selecting a DBA instead of a PhD is often based on the wish to produce something of worth for practice, whilst achieving the academic rigour required at a doctoral level of study (Hodgkinson & Rousseau 2009).

The combination of engaged scholarship (Boyer 1996; Cunliffe & Scaratti 2017; Hoffman 2016; Struminska-Kutra 2016) and critical realism (Danermark et al. 2002; Easton 2010; Sayer 2010) was liberating for a recent senior practitioner. Engaged scholarship gave me motivation as it brought back the feeling that my experience did matter, a stark contrast from how I felt during taught DBA sessions and in producing anodyne pseudo-empiricist essays. Critical realism is a philosophy that provides a formalised framework in the form of a stratified ontology (Bhaskar 1978; Easton 2010; Fletcher 2016) that I feel many accomplished practitioners intuitively deploy. Looking below the surface of empirical events is liberating for a practitioner, especially the creativity required for the inference as part of the process of retroduction (Easton 2010; Fletcher 2016; Sayer 2010). Bracketing-out (Rennie 2000) was a technique I used as a filter to my own personal bias during the data gathering stage. I put my previous experience back into the literature review and the abduction and retroduction phases of my thesis to optimise my experience whilst producing a thesis of social-scientific rigour and relevant to practice (Hodgkinson & Rousseau 2009). Thematic analysis (Braun & Clarke 2006) is a good methodology for practitioners as novice researchers providing a more rigorous approach to what many senior practitioners often do intuitively. I recall on taking on the Marketing Director role at BT I had lots of one-to-one discussions and meetings akin to focus groups with sales people to understand what they needed help with. Throughout and after these meetings I deployed a crude version of thematic analysis which led me towards set of marketing strategies to carry forward. I have used this approach many times. Thematic analysis helps the novice researcher do this is a much more systematic, rigorous way.

On reflection, the only thing I would change is bracketing myself out of the data gathering phase (Rennie 2000). I think the rich data that came out of the interviews would have been further enhanced had they been infused with my own experience and been more discursive. I am sure that interpretive ability is enhanced by experience, so why bracket it out? As a novice researcher bracketing was to avoid personal bias, this would be the challenge if experience was bracketed in during data gathering while maintaining rigour (Hodgkinson & Rousseau 2009). I would like to write an academic paper summarising the approach and would look to present a summary to upcoming DBA scholars.

7.5 Limitations and research opportunities

There are a number of limitations to my research largely related to the approach which was qualitative in nature. Respondents were a particular set of marketing and sales actors who took part in a cross-sectional research study which sought to draw out their views related to the chosen topic at a particular point in time. Given this approach, and the narrow context bounded by the topic of how the SMI works to develop value propositions, scope for generalisability is limited. The purposive sampling frame was marketers and sales actors in B2B. A large proportion of respondents came from a TMT background; I recognise that there may be some idiosyncratic aspects to how SMI interworking for value proposition production was perceived in the TMT industry sector, which potentially limits transferability of the research.

There are a number of potential research opportunities arising from my thesis. It would be tempting to suggest a more deductive approach across a larger sample size in search of greater generalisability. However, many of the concepts that emerged from data are new, and the SMI literature itself appears to be in too nascent a state to offer any demi-regularities or afford itself to any credible hypothesis testing.

Research that adds depth and colour to the beyond normative themes, or generative mechanisms, that emerged from the data may be of most utility to what is known as the SMI literature, which I now prefer to call SMA literature. Exploring marketing and sales sense of self-identity and perceptions of identity could provide useful insight into SMA interactions. How actor thought worlds influence behaviour at the SMA could help provide further insights that help practitioners and scholars take further steps beyond normative. A deeper understanding could usefully be sought into how contextualisation is currently practiced in B2B organisations. More instrumental research could usefully seek to link value propositions developed in context to performance. Research into the systemic nature of value propositions could develop the cohesive spiral concept I developed in my thesis. Any further research into value proposition development at the SMA could usefully recognise the tribal nature of the SMA and treat future studies from more of an IMP network perspective (Kowalkowski et al. 2016). Following on from the notion of absent-generative competencies I feel that research into the competencies required to operationalise outside-in value proposition production at the SMA would be of high utility for both practice and academic insight. Personal competencies, for marketing actors, seem to be taken for granted by both fields. How the SMA works in relation to other fields impacted by the relationship in terms of value proposition production would be tapping into an under-researched field. For example, how is the SMA seen to work with the service organisation for value proposition production and operationalisation? Research encompassing marketing, sales, and service organisational interactions has particular relevance given the move from GDL to SDL which shifts the focus of value from value-in-exchange to value-in-use (Ballatyne et al. 2006; Kowalkowski et al. 2016; Vargo & Lusch 2008).

7.6 Concluding remarks

In framing my primary research question from the outset I wanted to understand how the SMI works to develop value propositions in a B2B context. My aim was to provide B2B marketing and sales practitioners with critical insight and recommendations that reframe their understanding and can facilitate improved SMI interworking in relation to producing value propositions informed by market data. I think that it is reasonable to claim that I have provided an explanation of how the SMI works to produce value propositions that is revelatory and of utility to both science and practice. The primary research question has been addressed and my original aim has been achieved through an engaged scholarship research approach combined with a critical realist philosophy contrasting with the conventional research paradigm of mainstream academic marketing management. The actor based focus to the research has provided a fresh perspective to what is going on at what was known in the extant literature as the SMI, and I now term the SMA. In contrast to the SMI literature which depicted sales and marketing as monolithic, holistic entities what emerged from the data was a fragmented sales and marketing world seen by participating actors as tribal in nature.

In the fragmented tribal world of the SMA beyond normative factors emerged as generative mechanisms for SMA interworking namely: identity. contextualisation, and thought worlds. Actor self-identity and perceptions of other actors was considered as important by practitioners, especially for marketers. Viewing sales and marketing as holistic, monolithic entities in a dyadic relationship, as portrayed in the extant SMI literature (Homburg & Jensen 2008; Kotler et al. 2006; Snyder et al. 2016) is naïve. Marketing actors felt less valued the greater the distance (Nicholson et al. 2013) between marketing, sales, and customers. Marketing and sales actors spoke pejoratively about product marketers who were seen to have an inside-out, product orientation, towards value. Future SMI studies should recognise that there is now a fragmented SMA which should be considered as a network of actors in line with the IMP school (Hakansson & Snehota 1990).

Actor thought worlds are a prevalent concern for sales and marketing actors. For practice the importance of thought worlds suggests a beyond normative response is required for developing relationships at the SMA. For example, setting similar revenue goals for marketing and sales actors may not deal with the different orientations to what different actors have in terms of how they think of success, their thought world. Thought worlds combined with the notion of identity provides an SMA perspective that actors, representing various functional areas, are likely to perceive a strategic decision from perspectives that originate in different functional subcultures, different beliefs about desired ends and their means of achievement, and different self-identities (Deshpande & Webster 1989; Lyles & Mitroff 1980; Shrivastava & Mitroff 1984). From an academic standpoint more attention needs to be paid to the non-normative factors and their interplay with typical normative recommendations made for the SMI, for example, goal and role alignment (Kotler et al. 2006; Snyder et al. 2016; Strahle et al. 1996). Further critical realist studies could help facilitate a better understanding of the below the surface causal (generative) mechanisms that have a tendency to influence value proposition production in the SMA.

The notion of contextualisation was writ large in actor responses in relation to how sales and marketing actors work towards developing effective value propositions. Seeing value propositions from a systemic perspective moving between a meta layer, involving all B2B companies and their interactions, down to the nano layer of an individual actor inside a B2B company was what emerged from the data. The ‘spiral cohesion’ required for effective value proposition development at the SMA was offered as fresh thinking arising from the data. Absent generative competencies emerged from critical realist view (Danermark et al. 2002; Easton 2010; Sayer 2010) of taken for granted factors in SMA value proposition production. My thesis has offered a new focus on the competencies required at the SMA for effective value proposition operationalisation, particularly for marketers.

In conclusion, I present my thesis as a step forward in thinking, conceiving the SMA as an arena where sales and marketing actors interact to develop value propositions. Fresh thinking and perspective has been provided in the shape of a number of revelatory and incremental contributions to both practice and academic theory (Gorley & Gioia 2011). I believe a new level of understanding has been provided for SMA interworking for value proposition production.

7.7 Personal reflection

To conclude my thesis I will be reflecting back on the DBA journey from inception to this completed document. Here I am treating reflection as ‘The way we learn from an experience in order to understand and develop practice’ (Jasper 2003). I am reflecting here with the intention of learning from a current experience, in this case, my thesis journey (Moon 2004).

Looking back my thesis journey has been long and at times tortuous. My journey involved a first attempt, which was terminated by a step back into a full time commercial marketing role, involving a physical move to the USA. When I returned to Sheffield Business School three years later I would like to think I carried some of the scars of the ‘mistakes’ from the first attempt, or did I?

I was excited by my very first intellectual encounter with the DBA which was reading philosophy in support of the ‘what is truth?’ assignment. Re-connecting, or in truth connecting, with literature I had originally been introduced to in the first two years of my undergraduate degree in Economics and Politics led me to dive into the philosophy reading with a high level of commitment. I recall reading Popper on a sun-bed in Greece when I would usually be escaping into some Michael Connelly crime fiction. On reflection, I feel too much time elapsed before committing to start the essay writing process. I was already finding having to squeeze the DBA in-between my business school schedule and consultancy assignments a little difficult. Especially as I was at the time the point marketing subject group person for any business development work that came into Sheffield Business School. Two essays into my first attempt I was relieved of a decision to continue or not as I took a commercial job in the United States. I took the view that the combination of new job, new country, and DBA was not viable.

I returned to the UK intent on starting the DBA again matched with a determination to write a book about customer value for practitioners, fuelled by commercial experiences in the USA. The learning I had brought forward from my first attempt was to not to over commit myself to business school activity beyond my teaching work. Alongside this I found a way of committing to starting the essay writing process earlier on. This gave me a clearer view of a path to success. My optimistic feelings were sent crashing when I got a referral in one of the DBA essays. Following hot on the heels of this was when I asked a colleague to be part of my supervision team I got a 'you'll not finish' response. Rather than be discouraged by this, after a brief period of mourning, and moaning, I ploughed on. I was finding co-authoring the book, rather than being a distraction, gave me confidence that I could sit down and write productively, albeit in a different style.

So, here I am today, and what have I learnt…Well, the different perspectives of truth were new to me as was the plethora of research philosophies and approaches spawned by these different truth perspectives. I discovered that factors that I thought would remain fixed can be much more emergent. In getting a better understanding and appreciation of intellectual pluralism, I appreciate that rushing to early judgment on research approaches, methodology and methods and sticking to a decision is replaced by a more fluid approach. This can happen because a new perspective is provided by the last article read, or by a new colleague. Sometimes serendipity comes to the rescue; an enforced change of Director of Studies resulted in some great fresh insights from John Nicholson, my current director. He has helped me understand that the problem at hand is the focus of scientific and practical contribution (Corley & Gioia 2011), not just a small gap in the literature. John also elevated my self-view of what I could contribute to the research process from the perspective of a former senior practitioner. This led to me landing on an engaged scholarship approach to research which helped un-fetter me from neo-empiricist perspectives. I also have John to thank for facilitating attendance at an IMP conference in 2016. Presenting a paper I co-authored and meeting the kind of academics who are part of the IMP gave me confidence that I can make a contribution to a practitioner connected body of academics.

One of the most surprising things for me has been the value I have got from literature taken from other disciplines. I was amazed to find the theology literature as the most direct parallel that could be drawn for contextualisation of value propositions (Harrower 2001; Hiebert 1985; Schreiter 2005). Even more so was my discovery of the North American Anthropology literature as a prime source for helping me understand thought worlds (Carpenter 2004; Graymont & Martin 1979). Going forward I hope I can source inspiration and examples from other academic disciplines without leaving myself open to an accusation of just blindly occupying and assimilating theories of other disciplines without adding sufficient value to the marketing context (Burton 2005; Troye and Howell 2004). The DBA journey has taught me that someone somewhere has always written something connected with a topic you may be interested in. Seeking out contributions from academic literature and appreciating the power there is in synthesising academic and commercial literature, for both academic and practitioner audiences, will be of immense lasting value to me. I cannot underestimate the effect that critical realism has had on me. In one respect CR is like a formalisation of what I naturally did as a senior practitioner in my commercial roles. On the other hand, the combination of CR and Engaged scholarship was a liberating force for me, using new literature outwith marketing management in the process of abduction and applying my experience to analysis and retroduction was a paradigm shift from the anodyne pseudo-empiricist DBA essays I was turning out.

The biggest revelation in my thesis findings and movement forward in my own theory development was in the discovery of the *cohesive spiral.* Before I began my thesis I had developed a model which I call the cohesive loop to describe how the interrelationship between marketing and sales, which is depicted in Figure 7.6:

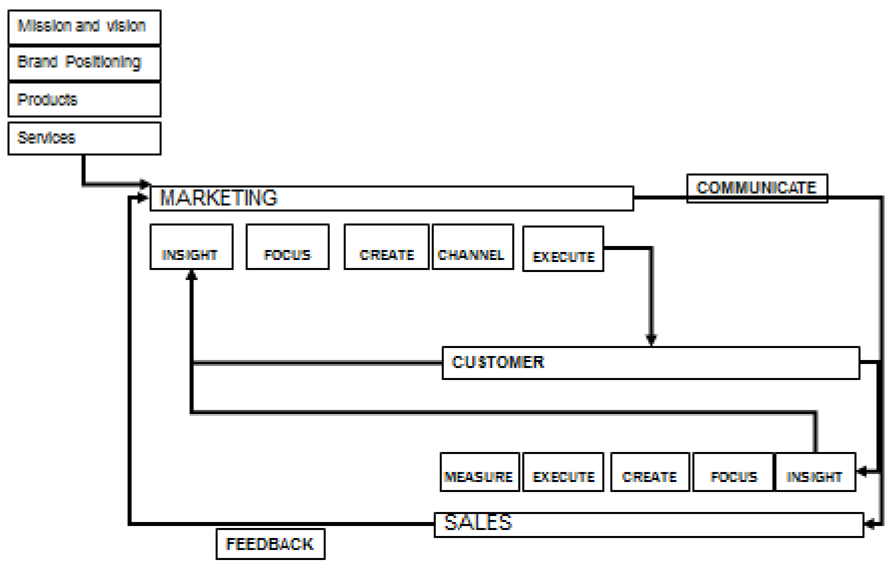

Fig. 7.6 The Cohesive Loop (Source: Author).

I have used the cohesive loop model, in my last two full-time commercial roles, on consultancy assignments, and in academic teaching. Primacy is given to marketing for the creation of artefacts such as company mission and vison, brand positioning (including the overarching company value proposition), along with product and service development. Marketing can communicate customer insights and communicate company strategy and tactics directly to the customer. The overall marketing strategy also has to be communicated to sales people who then set the company value proposition in the context of their particular customer set. There are feedback loops from sales and customers back to marketing, which should re-shape mission and vision, brand positioning, product and service development.

What emerged from my research was a much more dynamic view of how sales and marketing actors work to produce value propositions (Beck & Cowan 1996; Graves 1974). In the Cohesive Spiral model (see Fig. 7.5) value proposition production is viewed as being set in a spirally dynamic world where sales and marketing need to work in cohesion at the SMA to bring customer and market data into the spiral to shape value proposition development. An event at the nano-level between actors could cause movement of the spiral and affect the overall company value proposition. On reflection I would critique the cohesive loop model as one dimensional and normative. The cohesive spiral pays much more attention to the levels of interactions between actors and regards sales and marketing interactions as generative mechanisms for value proposition production. I believe that adopting a critical realist philosophy (Bhaskar 2008) enabled development of the cohesive spiral as looking below the surface at the real strata helped me see beyond the empirical strata. It could be said that the cohesive spiral is a realisation of Bhaskar's transformational model (Figure 7.7) of the connection between agency and structure such that both simultaneously inform and shape the other. The SMI, VPs, identity, context, and thought worlds are structures that individual marketing and sales agents have a degree of agency to change. VPs evolve and develop through time and are 'elaborated' during the interactions between the actors and the current iteration of the value proposition (Archer 1995).

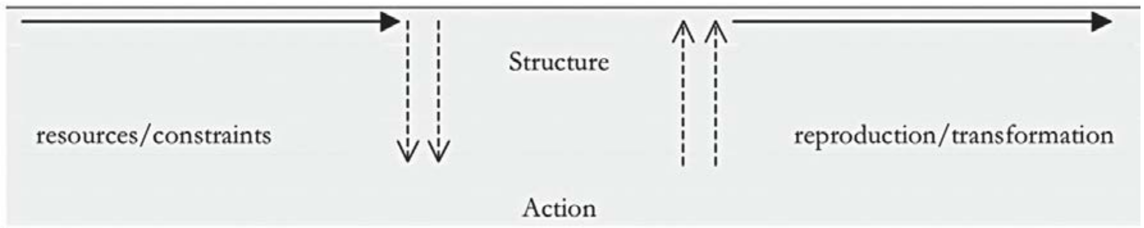

Fig. 7.7 The transformational model of the connection between social structure and agency. Source: Based on Bhaskar (1998, p. 217).

I look forward with a mixture of enthusiasm and trepidation. The enthusiasm is driven by a feeling I can contribute to academic conferences, like IMP, and their associated academic journals. I have already written a paper for a practitioner journal (Journal of Sales Transformation) (Kelly 2015) and co-authored a book (Kelly et al. 2017). I am excited to write more in both these genres. My trepidation is centred around the perception of contribution made to the world of practice. Gorley and Gioia (2011) recount a story of a piece of work that was reviewed by an academic as a marvellous contribution and by a practitioner as 'trivial and obvious'. Having been the 'so what' muttering practitioner sat across the table from Cranfield academics during my time at BT I don't want to be that guy. Finally, the biggest challenge of my thesis was adjusting to a formulaic doctoral writing style that appeared to require more narrative than anything I had written previously. Again Corley and Gioia (2011) recount a story of an academic who, concerned about losing touch with practitioners, brought a few people into academia for discussions. When the academic asked for feedback from practitioners, he was told 'you people talk funny!' As a recent practitioner and someone who prides himself as a pracademic I do not wish to be that guy either.

I take encouragement from far more credible writers, like Daniel Kahnemann, a leading academic who can write in plain English for non-academics. Closer to home, Frank Cespedes, who is a lecturer in sales at Harvard Business School, also seems to be able to make the transition from academic to practice easy.

Like Kahnemann and Cespedes I aspire to be able to speak with impact to both academic and practitioner communities.

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Appendix 1

Example of a Contact Summary Sheet

Observation Event: Semi-structure interview with Saskia by Skype

Observation Date: 10th September 2015

Today's Date:

1. **What are the main themes that struck you as interesting?**

The fact the product marketing was seen in a completely different light from sector or segment marketing. Product could be seen to be at least the 3rd leg of a stool at the SMI with segment marketing or sales.

Interesting that product marketing were spoken off in a pejorative manner having the most product (non-customer). centred view of all potential players at the SMI. Cast as being involved only at the comparison stage so having a very narrow view of the soup to nuts buying cycle, perpetuating the skewed view they hold towards products.

Also, interesting that a marketer takes the view that most marketing people in B2B don't spend enough time with the customer, or deploying primary research. Junior marketers react to sales one request at a time as opposed to senior marketers who are able to interpret and filter requests from sales.

Spoke a lot about difficulty marketers have setting things in context for sales.

2. **Was there any information that you think is missing?**

No, this was a long interview, about 1 hr 15 mins.

3. **Any other things that struck you as salient?**

Marketing does not appear to be the holistic, monolithic organisation portrayed in the SMI literature, rather looks like tribes

Identity seems to be important to marketers

Is there a missing capability in marketers relating to setting things in context?

4. **Any questions provoked from this observation?**

Is the way the SMI is viewed in literature too simplistic?

Appendix 2

An example transcript memo.

Section format after Miles and Huberman (1994).

What stood out from initial reading:

Different phases and development during marketing career. Started as 'golf balls and umbrellas marketer. Now in 'strategic role' in a sales sector.

Practicing Account based marketing (ABM) which puts the marketer over just a few accounts

Good clarity on what a value proposition is able to provide detail of how Global IT Co is developing VPs

Notes that getting sales engagement is often problematic and dependent on what the sales person is focusing on at any point in time

Second Reading:

Identity as a professional marketer is important. The need to be seen and feeling she is doing something strategic rather than 'golf ball and umbrella' marketing was clear

Proximity to sales seemed to be important. The closer her roles were to sales the more valued and strategic she felt

Interesting that when she was in a more central marcoms role she didn't feel sales needed to check her work

Seems to feel sales has organisational permission not to engage. Struck me as an orientation is, if they are focused on a deal, they don't have to respond to other marketing requests.

Links to Literature

SMI

Value proposition

Account based marketing (ABM) - is there any?

Identity

What's happening below the surface?

You need to demonstrate you are valuable to sales

You need to feel like a professional marketer by doing strategic work

If you're in the centre you are worthless but don't have to have your work checked by sales. You feel worth by being close to sales but don't expect them to respond to your requests.

possible discourses

I need to demonstrate to sales that I am more than a golf ball marketer

I need to demonstrate to myself that I am more than a golf ball marketer because the early career feeling of doing tactical work stays with me

If I am distant from you I don't feel valued, if I am near, I do

Sales set the rules for interaction at the SMI

Appendix 3 - Written explanation of research and consent form

DBA research project – Simon Kelly

Customer Participant Information Sheet

Project Title: How do sales and marketing work to develop value propositions in a B2B context?

What is the project about?

The project is looking at how sales and marketing work to develop value propositions in a B2B context. In a competitive business environment, how one organisation positions its value proposition is increasingly important. How sales and marketing work together with the customer to develop, shape, and produce value propositions can be an important part of mobilising customer value in an organisation. I am trying to establish how sales and marketing work in B2B organisations to produce value propositions that resonate with the customer.

How will the results by used?

The insights and implications generated from the study will do two things:

Firstly, they will make a contribution to academic management knowledge in the areas of sales marketing interface (SMI) and value proposition development. Literature in the SMI area lacks consideration the SMI plays in developing value propositions. Much of the value proposition literature tends to underplay the role individual sales and marketing people play in value proposition production.

Importantly it is hoped that the findings will be useful for helping practitioners think about how sales and marketing people can work together more effectively to develop and produce value propositions.

How can you help this study?

Participation is voluntary. Consent is always in your control and you can withdraw whenever you wish. No names or other information that might identify you will be used in any publication or documentation arising from the research. No organisationally sensitive information will be disclosed. There will be no reference in the research at any time to specific brand, product and project names, or references to trademarks, patents or any other commercially sensitive information.

You can help this study by consenting to have one conversation between yourself and a business engagement representative of Sheffield Business School observed and recorded.

All recordings and transcriptions will be stored at Sheffield Business School in a locked cabinet. They will be strictly private. Following completion of the project (circa 10 months) this material will be destroyed.

Further Information

If you have any questions about this study please contact me Simon Kelly at s.j.kelly.shu.ac.uk at any time, or my supervisor Dr Paul Johnston at Sheffield Business Schools 0114 255 5555.

DBA Research Consent Form

Study: How do sales and marketing work to develop value propositions in a B2B context

Please answer the following questions by circling your responses

Have you read and understood the information sheet about this study?	YES	NO
Have you been able to ask questions about this study?	YES	NO
Have you received enough information about this study?	YES	NO
Do you understand that you are free to withdraw from this study?		
• At any time?	YES	NO
• Without giving a reason for your withdrawal?	YES	NO
Your responses will be anonymised before they are analysed.	YES	NO
Do you agree to take part in this study?	YES	NO

Your signature will certify that you have voluntarily decided to take part in this research study having read and understood the information in the sheet for participants. It will also certify that you have had adequate opportunity to discuss the study with the researcher and that all questions have been answered to your satisfaction.

Signature of participant:.. Date:............................

Name (block letters).:..

Signature of researcher:.. Date:............................

Simon Kelly, Stoddart Building, Sheffield Business School, Sheffield Hallam University, Arundel Gate Sheffield S1 1WB

Please keep your copy of the consent form and the information sheet together.

Appendix 4 - List of Primary codes taken from Nvivo data base.

academic value

account based marketing

account management

account planning

account vs product marketing

adding value to client

advantage vs. benefit

afraid of honesty

agility - as a theme

agility - market understanding

agility vs process

air cover

alignment process - not natural

alignment is it valued

alignment

alignment - account based marketing

alignment - collateral

alignment - compensation differences

alignment - conflicting objectives

alignment - culture

alignment - customer involvement

alignment - customer value

alignment - delicate relationship

alignment - depends on organisation

alignment - disconnect marketing and sales

alignment - DIY or too sophisticated

alignment - facets of an alignment 'ideal world'

alignment - formal forum

alignment - goals

alignment - honest feedback from sales
alignment - importance
alignment - infrastructure
alignment - joined up thinking - lack of
alignment - lack of aggregation
alignment - lacks engagement
alignment - language barrier
alignment - market understanding
alignment - marketers aligned to sales
alignment - marketing and product
alignment - marketing and sales engagement
alignment - marketing and sales forum
alignment - marketing not comfortable
alignment - not in lock step
alignment - not very good
alignment - organisational
alignment - planned interactions
alignment - process development
alignment - product or corporate
alignment - resource constraints
alignment - rewards
alignment - roles
alignment - roles and responsibilities
alignment - sales involvement
alignment - sales time investment
alignment - scoring out of 10
alignment - seat at the table
alignment - size and complexity related
alignment - strategic level
alignment - transactional
alignment - two-way street

alignment - value proposition development
alignment - variable
alignment barriers
alignment breakdown
alignment by segment
alignment capability
alignment challenge
alignment commitment to
alignment facilitators
alignment goal
alignment goal conflict
alignment good
alignment joint performance reviews
alignment journey
alignment leadership
alignment -leadership belief in
alignment link to how strategic marketing is
alignment organisation size
alignment organisational structure
alignment paper
alignment priorities
alignment -skillset dependent
alignment sophistication gap
alignment structural
alignment struggles
alignment tactical activity
alignment tactical demand gen
alignment tension
alignment tools
alignment variable
alignment with customer

alignment-journey
alignment - good M+S alignment
alignment - traditional misalignment
Alone - not isolated
analysis of research
analysts as intel providers
analyst reports
anecdote vs trends
arrogance
arrogance - who knows most
articulate proposition
articulate uniqueness
attitudes and leadership
B2B vs b2c
bad marketers
baked in technology features
bandwidth - marketing bandwidth
barrier - alignment - no need to do it
barrier - arrogance
barrier - central marketing
barrier - communication
barrier - costs and budget
barrier - deal focus
barrier - disruptive thinking - lack of
barrier - formal mechanisms differ
barrier - goal alignment
barrier - marketing is product orientated
barrier - marketing under resourced
barrier - proximity
barrier - role perception
barrier - sales translators

barrier - seeking glory
barrier - stereotyping
barrier - stovepipes
barrier - time
barrier -customer understanding
barrier- marketing customer intimacy
barrier -organisation size
barrier-empath
barriers - long term
barriers - organisational
barrier-trust
beaten up
benefit understanding not easy
best practice
big data
box ticking objectives
brand - air cover
brand awareness
brand importance
brand investment
brand perception
bridges - to value proposition creation
broad vs specific
broader context
broader marketing plan
business case
business case - be realistic
business challenges and issues
business clichés
business impact
business outcome

collaboration for vp development
collateral - all about our offer
collateral - broad range
collateral - low value
collateral broad range
collateral currency
collateral development - ad hoc
collateral feedback
collateral put to use
collateral review
collateral vs. drawing
commodity product
commodity vs value
communications sporadic re competition
communication - close and constant
communication
company culture
company operating model at odds
company orientation
competition - common enemy
competition - customer view
competition - general feel
competition - lack of input
competition - me too
competition - product vs brand level
competition - public companies
competition - sales input
competition contextual
competitor analysis - formal
competitive differentiation
competitor analysis - large vs small accounts

competitor analysis - product focused
competitor complexity
competitor feedback - not natural
competitor focus
competitor intelligence
competitor intelligence - chicken and egg
competitor intelligence - lack of investment
competitor intelligence - marketing response
competitor intelligence - sales input
competitor intelligence gathering - sales
competitor intelligence through bids
competitor positioning - marketing role
competitor understanding
complex solutions
complexity
complexity in B2B
conflicting priorities
connecting the dots (from customer feedback)
consistency -channel consistency
consistent messaging
consistency
consultative selling
consumer vs. B2B
content - formal vs. informal input
content - give sales he base content
content - lots produced
content - mixed perception
content - more is more
content - premium content
content - sales input none
content - sales usage

content - useful
content - way too much
content - why not less and more relevant
content development - lacks collaboration
content linked to buying cycle
content refresh
context - organisational performance
context differences - consumer vs. business
context versus care blanche
contextual understanding
contextual value
conversation - two-way
conversations - customer insight and value
conversations - sporadic and reactive
conversations - value
conversations - value limited
conversations customer limited
conversations full gamut
conversations- ROI
conversations strategic
conversations strategy
conversations tactical
conversations- tactical
cook up stuff
co-opetition
corporate direction
corporate marketing
cost savings
credibility - value not volume of marketing assets
credibility enhancement
cross-fertilisation

cross-selling opportunity
crutch to lean on
culture -risk averse
customer - reference customer
customer - sales honesty (lack of)
customer - self-informed
customer advice
customer advisory boards
customer air time
customer alienation
customer as advocate
customer being involved was variable
customer benefit
customer benefits
customer business drivers
customer business issue or pain point
customer business problem
customer buying behaviour
customer centric - smart thing to do
customer centric vs cost management
customer centricity
customer challenges
customer collaboration
customer engagement
customer experience
customer experience is same
customer feedback
customer feedback - allocate time
customer feedback - formal or formulaic
customer first
customer focus

difficult to implement
direct customer business knowledge
discussion - not enough
Disparate feedback
disrupt customer thinking
distance from customer
distance- marketing and sales
duties and rights
enabler - proximity
easy for customer to buy
effective customer comms.
empathy for sales
enabler - appreciation of expertise
enabler - colocation
enabler - credibility
enabler - flexibility
enabler - not taking credit
enabler - sales and marketing leaders get on
enabler -leadership expectations
enabler -reward and incentives
enabler -rotation
enabler-organise round
engineering involvement
engineering led
environmental context for value
event driven input
event support
events
executional detail
expectations of sales
expensive data sources

expert help
external organisational learning
factory approach
famous - what famous for
feedback - activation of
feedback - continuous process
feedback - pricing
feedback - systematic
feedback 360 degree
feedback formal vs. informal
feedback informal
feedback messaging
feedback not actioned
feedback -not systematic
feedback transactional (single customer)
fights
forma vs informal input
formal commitment
formal input
formal input or process
formal intelligence gathering
formal lead definition
formal planning cycle
formal process
formal vs informal
formal vs informal input
front line resistance - passive aggressive
funnel
future
gap spotting for solutions
generic marketing material

generic marketing material vs, contextualised
global consistency
goal alignment
good marketers
good marketing people 'different lens'
granularity for utility
growing pain
hard work
head of sales and marketing - good relationship
help for sales
help sales sell
historical view of input
humility vs preaching
hustle
I think consumer brands do it probably better because they evolved in that space.
importance of air cover
importance to customers - different perceptions
in your blood
industry marketing
inertia
informal catch ups
informal communication
informal input
informal networks
input - official or not
input as formulaic
input as sporadic
inside out value (delusional)
inside out view
insight
insight consumability

leads vs. nurture

learning organisation - not

lip service to customer value

listening vs telling - sales vs marketing

local needs

Lowest common denominator vs. superior value

loyalty surveys

macro-level - why us

make a difference - for customers

making promises

making versus delivering promises

marketing types - central minus field

marketing - access to customers

marketing - resource as barrier

marketing as thought leadership provider

marketing asking for sales output

market based pricing

market evolving

market focused workshops

marketers - good ones

marketer - everyone thinks they are one

marketing - as onion - metaphor

marketing - assigned member to sector

marketing - broad remit

marketing - campaign driven

marketing - chronological phases

marketing - competitor positioning

marketing - cost or revenue centre

marketing - customer engagement

marketing - customer understanding

marketing - customer understanding poor

marketing - social media
marketing - strategic
marketing - support for platform events
marketing - too theoretical
marketing - training role
marketing - types of
marketing - value add
marketing - we don't do it
marketing - who takes on board the sales feedback
marketing academic background
marketing address customers business issues
marketing and innovation
marketing as awareness creator
marketing as brand awareness
marketing as colouring in department
marketing as direction setter
marketing as event creator
marketing as facilitator
marketing as first contact
marketing as insight providers
marketing as listener
marketing as order takers
marketing as portal to product development
marketing as positioning
marketing as PowerPoint valet
marketing as problem solver
marketing as range finder
marketing as sales enablement
marketing as sales engagement
marketing as sales support
marketing as sense maker

marketing as slide ware providers

marketing as smart fools

marketing as tactical

marketing as value aggregator

marketing as value articulator

marketing as value prop trainer

marketing as value proposition development

marketing assertiveness

marketing bypass sales

marketing conflicting priorities

marketing credibility

marketing customer engagement

marketing customer intimacy

marketing dichotomy

marketing director background

marketing earn trust

marketing events

marketing fluff

marketing generic

marketing informing customer through digital channels

marketing knowledge - what is legitimate

marketing lack broader context

marketing language

marketing maturity

marketing metrics

marketing myopic (market data only)

marketing not involving sales

marketing on the hook for sales numbers

marketing opportunity spotting

marketing people investment

marketing- perception of what a marketer is

marketing perceptions different
marketing priority and resource
marketing provides platforms
marketing resentment
marketing role
marketing sales interworking importance
marketing sales operating model
marketing seeing customers
marketing seeking permission
marketing skillsets
marketing strategy gap
marketing v product disconnect
marketing value
marketing value - demonstrate it
marketing value chain
marketing visibility
marketing vs campaigns
marketing vs sales stand-off
marketing vs. product
marketing-marketing interface
marketing-understanding of value proposition
market-led company
marketplace changing
matching - sales person as value matcher
maturity
meaning
messaging process
message tailoring
mindset
mindset shift
missing link

missing middle

multiple value propositions

multiple segment customer base

multi-segment multi-product

needs - unarticulated or unaware

no mechanism - for feedback

noise vs feedback

not enough

offering manager

operationalising marketing (and revenue)

optimise to solve customer problem

optimistic internal view

organisation complexity

organisation maturity

organisation structure

organisation structure barriers

organisation structures

organisational goal conflict

organisations don't get it

organisational maturity

outside help

outside in view

overwhelming sales - don't do it

partners channels

partnership - field marketing

Pavlov’s dog

people - need for bright people

people dependent

people vs system

perception - marketing think has right answer

perception - who has the best answer

perception of sales - what can we sell
perceptions of each other
perceptions of what works
personalities
persuasion
platform for sales input
platform for value
playbook fluidity
playbooks
political environment
power
pressure to sell - as strategy
price as competition
primary research
priorities - shared marketing and sales
proactive intelligence collection
process and output uniformity
process and planning
producer vs collaborator
product developers in value props
product focus
product management involvement in VP
product marketing
product marketing - narrow view
product push
product push - over productizing
product push vs. value
product v sales disconnect
product vs marketing orientated
products vs propositions
proof points

proposition creation functions
proposition development flow
proposition development process
proposition sweet spot
proposition themes
rational and emotional
relationship maturity - marketing and sales
receptive customers
reference stories
regular catch ups marketing and sales
regular catch-ups
relationship trust
relationships - cyclical
relevance
relevance of message
repeatable solutions
repeated requirements-spotting them
replicating success
research - customer change
research v insight
research - B2B lacks detail
resilience - sticking with it
resonate
resonating value
resonate with customers
resource allocation
reviews - lack of formal reviews
review performance
reward and compensation
rewards for input
roles in organisation

rotation as enabler

run it by sales at the end

sales - intelligence providers

sales - closest to customer

sales - commission cheque

sales - content evaluation role

sales - frequent input

sales - minimal input

sales - presentation skills

sales - seasoned tenure

sales - taking them off the road

sales - time available for feedback

sales = not salesy

sales accountability

sales as closers

sales as customer proxy

sales as gatekeeper to customer

sales as litmus test

sales as making promises

sales as market test

sales as marketing top customer

sales as regular customer contact

sales as reviewers

sales as subject matter experts

sales as translators

sales assets

sales belief

sales buy in

sales buy-in

sales capability

sales collateral - clear statements

sales involved throughout whole process
sales involvement
sales involvement
sales job vs marketing job
sales know customer best
sales leadership - encourage to give feedback to marketing
sales leads
sales led
sales marketing - loose linkage
sales marketing dialogue frequency
sales marketing interface (API)
sales marketing relationship cycle
sales need driven
sales needs
sales opportunity led
sales overwhelmed by content
sales overwhelmed by products
sales people - traditionalists
sales person background or philosophy
sales person intellect or capability
sales pipeline and number to hit
sales presentation collateral
sales provide validity
sales responsibilities
sales sell
sales selling vs providing market input
sales skillset shortfall (latent needs).
sales support for marketing
sales time commitment
sales training and education
sales transformation

sales understanding of value
sales vs product markeiting conflict
sales wealth of information
salesperson - type of - value or product
sales-product focused
salesy - more salesy less successful
savvy buyers
scatter-gun sales
sector (industry) skillset
sector context
sector expertise
sector focus
sector investment
sector knowledge
segment attractiveness
segment marketing
segmentation
self-fulfilling prophecy
service people involvement
shampoo rinse repeat
sharing with sales team
short term thinking - driven by finance
short versus long term
silver bullet - there isn't one
single customer vs whole market view
size and complexity
skills - value propositions difficult
skillset - latent needs (sales)
skillset - sales providing feedback
skillset - trend spotting vs short term reaction
skillset - uncovering latent needs

skillset - value proposition
skillset - value proposition skillset is rare
skillsets - consumer vs. B2B
skillsets - hard to find
skillsets - marketing as facilitator
skillsets - marketing need softer skills
skillsets - marketing v sales
skillsets - questioning skills
skillsets - technical understanding
skillsets - trending
skillsets- sector expertise
short vs long term focus
solution
solutions to problems
sophistication
sophistication - too sophisticated misses mark
sophistication gap
speaking our marketing language
speed
sophistication -competitor analysis
sporadic knowledge
stakeholder management
stereotypes
strengths - play to them
strong personalities
story telling
structured campaigns
subject matter experts
subject matter experts vs. sales
superficial
sustainability

symbiotic relationship

symbolic - take sales off the road

systematic customer value

systematic feedback process

systematised process (content refresh)

tactical conversations

tactical marketing support

tactical support

tactical vs strategic

tactics as strategy

tail wagging dog (sales vs. marketing)

tailoring

tailoring collateral

target audience

target setting

target stretching

targets - for legacy vs. growth

teamwork

teamwork - broader team

technology as an enabler

technology as enabler

technology differentiation

technology enablement

technology led = too late for marketing and sales

technology sells itself

technology tools

technology up vs. customer down

tension - product marketing

tension -finance

tension point

tension point - claiming credit vs ROI

testing actively
That does happen but I'm not sure how systematically that's then tracked and implemented.
themes
thought leadership
thought worlds
three-legged stool - marketing sales product
throwing products at sales
tick box exercise- research
time investment
toolset for complex environment
top down focus
targeted campaigns
training and coaching
translate
translation
trust
trust and credibility
trust as cyclical
trust - marketing vs sales
two cows
types of marketing
types of sales people (sales vs BD)
understand customer challenges
understand local markets
unique
validation - from customer and sales
value - bring to the table
value - future challenges
value - getting to heart is tough
value - level of detail

value - mutual value

value - not about features

value - proving value above just the sale

value - relationship value

value - sales understanding patchy

value - systematic development

value - time investment

value benefits

value capability

value conversations

value dialogue - lack of

value dichotomy

value differentiator

value disconnect

value equation

value expectations

value in use

Value proposition Language

value promise

value prop = generic vs specific

value proposition - corporate

value proposition - belief in offer

value proposition vs. competition

value proposition - bottling sales goodness

value proposition - case study

value proposition - company vs BU

value proposition - customer business challenge

value proposition - customer feedback

value proposition - customers world

value proposition - customised

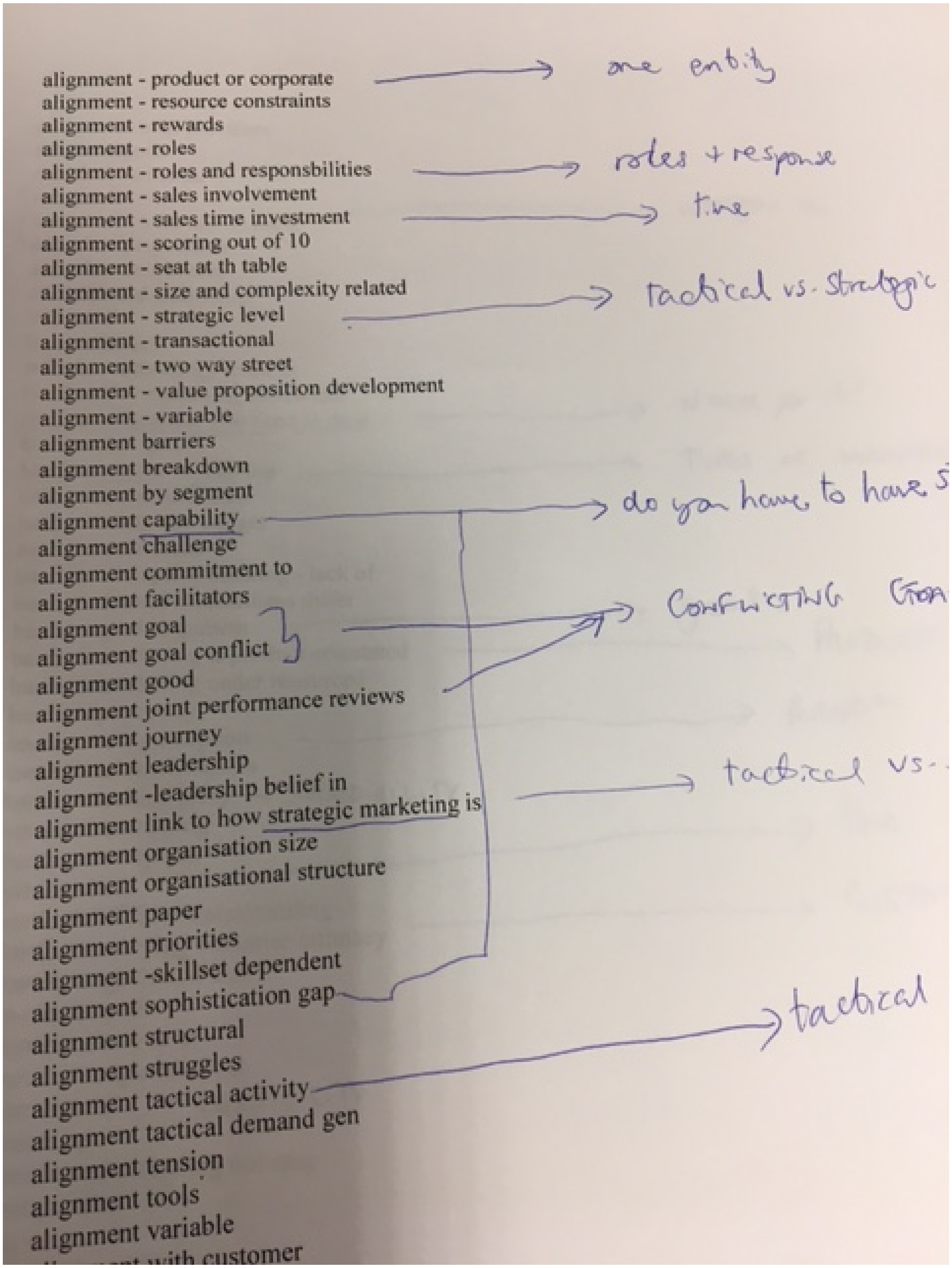
value proposition - economic vp

value proposition - finance involvement
value proposition - formal process
value proposition - future promise
value proposition - go sell it
value proposition - hard to do
value proposition - impactful
value proposition - operations involvement
value proposition - product vs holistic provider
value proposition - sales driven
value proposition - service people involvement
value proposition - skillset
value proposition - sophistication gap
value proposition - why customer would buy
value proposition absent of customer value
value proposition as detective work
value proposition as door opener
value proposition as pain point
value proposition as problem solver
value proposition as problem solving
value proposition building
value proposition -by event
value proposition clarity
value proposition communication
value proposition context
value proposition customer benefit and outcome
value proposition customer focus
value proposition definition - absence of customer value
value proposition development promotes M+S Linkages
value proposition example
value proposition implications
value proposition input

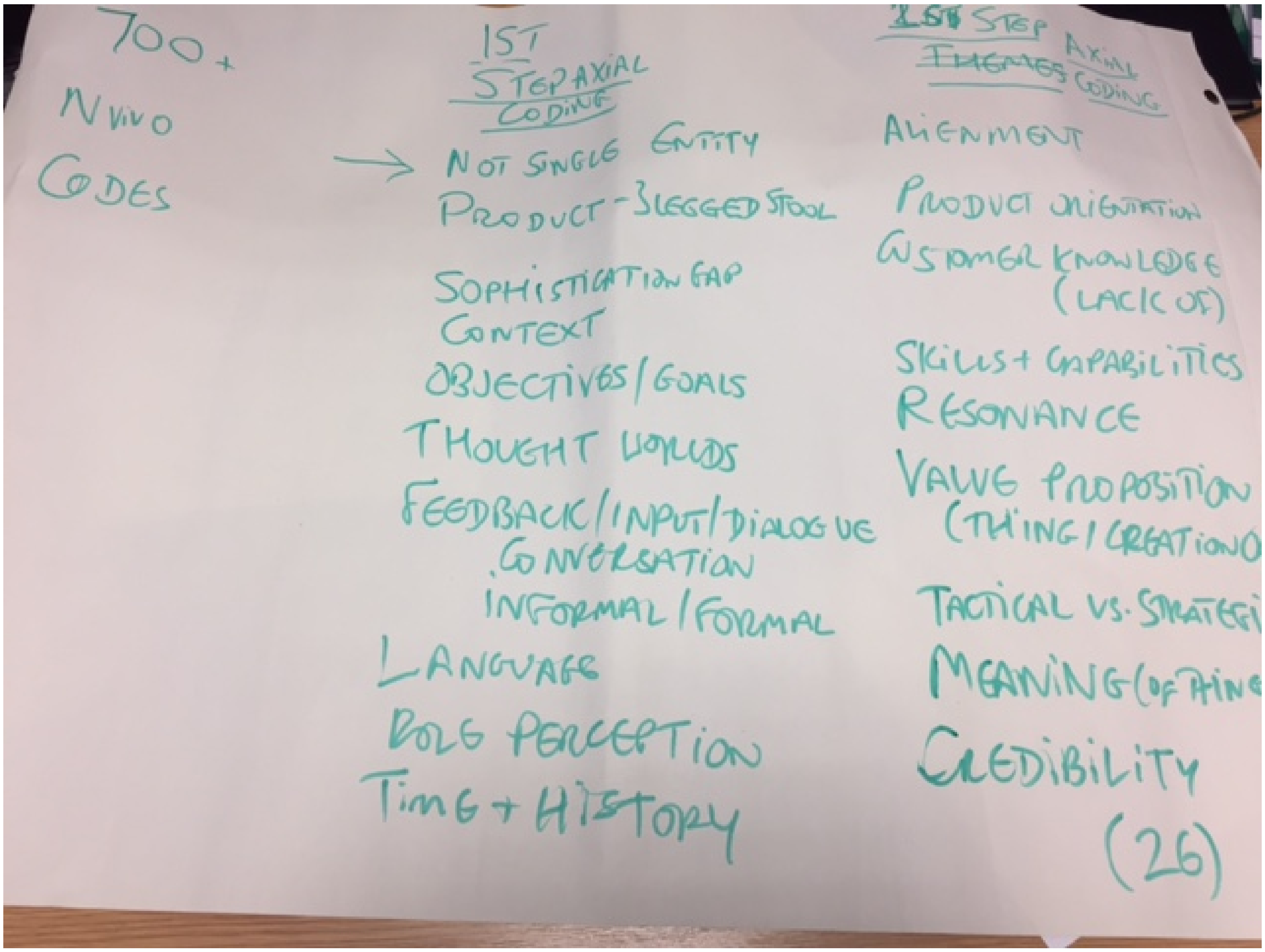
value proposition inputs
value proposition layering
value proposition methodology
value proposition organisational maturity
value proposition process
value proposition process- traditional
value proposition product capability
value proposition product word lexicon
value proposition refresh
value proposition strategic input
value proposition structure
value proposition templates
value proposition testing
value proposition themes
value proposition understanding - patchy
value propositions - differentiated
value propositions - generic
value propositions - individuals inside customers
value propositions - loose m+s linkage
value propositions - no training
value propositions - not on same page
value propositions - proper vps
value propositions - resonant
value propositions - sales input - lack of
value propositions - sales led
value propositions - specific
value propositions - that resonate
value propositions as liberator
value propositions crisp and pithy
value propositions science
value propositions-structured thinking and process

value proposition - solution to pain
value proposition - about the customer
value propositions - validation questions
value proposition - efficiency
value stack
value themes
value to customer
value unique
value vs commodity
value vs price
value vs volume
value-in product
value meaning to customer
virtuous cycle
vision versus value proposition
value proposition - learning from consumer
voice of the customer
walk in other shoes
warm leads
website - narrow definition of company
what does good look like
what we are doing vs what going on
what we are rolling out
what's wrong vs. what’s right
why change- lack of collateral
why didn't buy
why us
why us - general sense or off pat
why us - lack of forensic analysis
why us not somebody else
why win

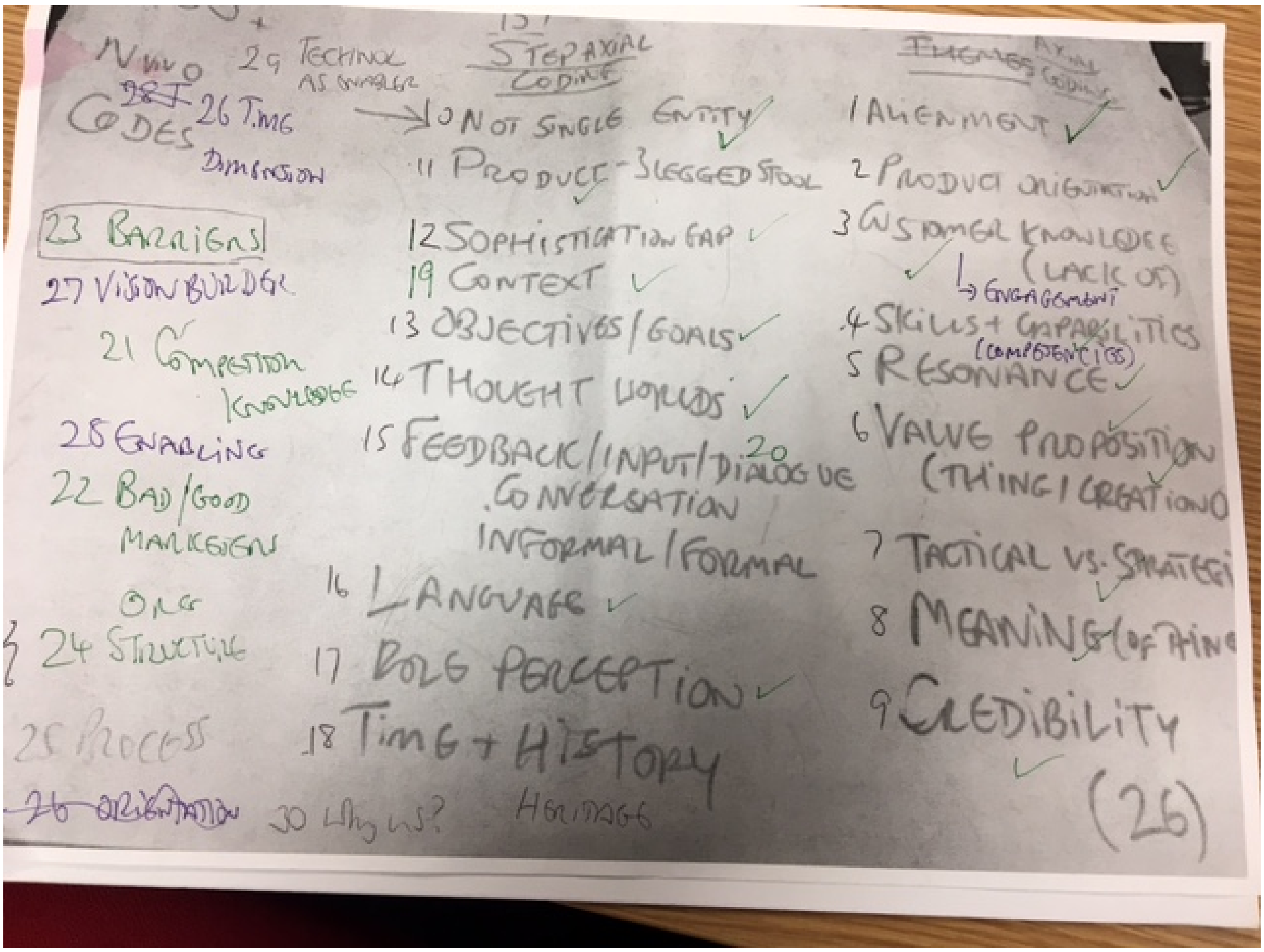
Appendix 5 - example worksheet from workshop to move from primary codes to pattern codes


alignment - product or corporate → one entity
alignment - resource constraints
alignment - rewards
alignment - roles
alignment - roles and responsbilities → roles + response
alignment - sales involvement
alignment - sales time investment → time
alignment - scoring out of 10
alignment - seat at th table
alignment - size and complexity related → Tactical vs. Strategic
alignment - strategic level
alignment - transactional
alignment - two way street
alignment - value proposition development
alignment - variable
alignment barriers
alignment breakdown
alignment by segment
alignment capability → do you have to have s
alignment challenge
alignment commitment to
alignment facilitators
alignment goal → CONFLICTING GOA
alignment goal conflict
alignment good
alignment joint performance reviews
alignment journey
alignment leadership
alignment -leadership belief in
alignment link to how strategic marketing is → tactical vs..
alignment organisation size
alignment organisational structure
alignment paper
alignment priorities
alignment -skillset dependent
alignment sophistication gap
alignment structural
alignment struggles
alignment tactical activity → tactical
alignment tactical demand gen
alignment tension
alignment tools
alignment variable
with customer

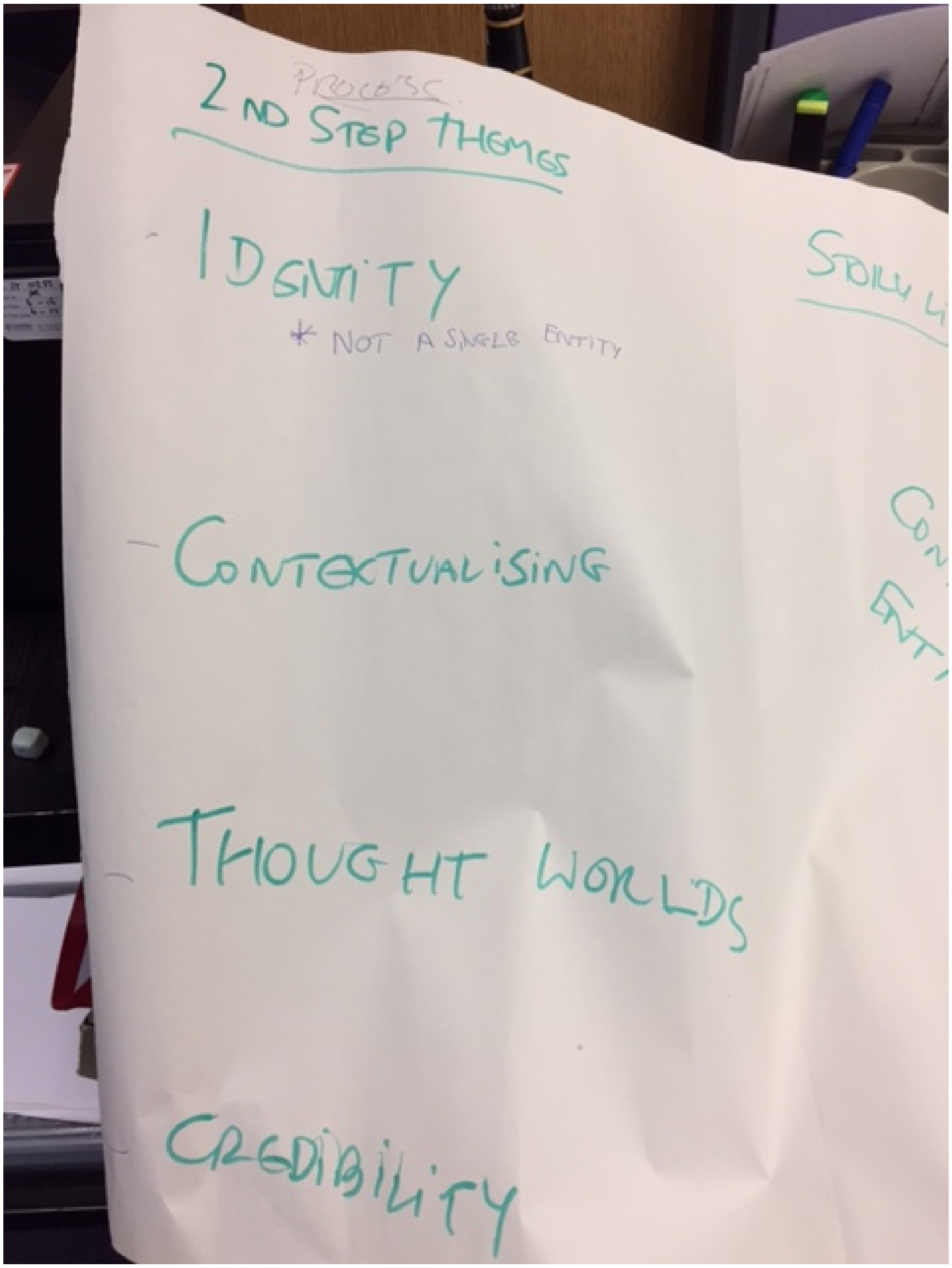
Appendix 6 - workshop to rationalise from primary codes to pattern codes



Appendix 7 - workshop chunk up from 83 pattern codes down to 26 core thematic pattern streams



Appendix 8 - workshop to move from 23 thematic streams to three overarching themes



Appendix 9

3 Final themes with the 23 core thematic streams

Identity

Bad and good marketers

Credibility

Heritage

Not a single entity

Product as 3-legged stool

Role perception

Contextualising

Alignment

Competitor knowledge

Context

Dialogue

Feedback

Process

Resonance

Sophistication gap

Tactical vs. Strategic

Value propositions

Thought Worlds

Barriers

Customer knowledge

Language

Meaning

Objectives and goals

Product orientation