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Describing marketing practices using

the social theory of practice

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ABSRACT

The world of Marketing is a multifaceted broad discipline and over recent years it has fundamentally changed. Marketing is consistently evolving and many authors are calling for a new definition. A shift in thinking is necessary in order to identify new opportunities and re-examine the conventional models.

The recent Contemporary Marketing Practice series of research has looked at describing Marketing practices within the marketing context. This programme analyses the multiple disciplines within marketing. It does not, however deconstruct or examine marketing practices. It merely examines the multiple marketing activities but does not consider practice theory.

The social theory of practice provides an opportunity to examine Marketing using a 'practice lens'. Accordingly, the purpose of this research is to investigate Marketing practices using the theory of social practice. This theory defines practices as understanding, procedures and engagement and these three components have been applied to the marketing context.

This research uses case study methodology in a large financial services organisation to explore marketing practices in more detail. This provides a deeper understanding of these components within the marketing department.

It was found that the social theory of practice provides a rich exploration into the field of marketing highlighting a new way to describe marketing. The practices etymology and terminology have been explored using the anatomy of practices as defined by the social theory of practice to ensure construct validity and a common platform for academics and practitioners. The report provides a framework that aims at describing and optimising marketing practices and concludes with recommendations and future research

KEY WORDS: MARKETING PRACTICES, SOCIAL THEORY OF PRACTICE

DECLARATION

I declare that this research project is my own work. It is submitted in partial fulfilment of the requirements for the degree of Master of Business Administration at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.

Signed ………………………………. **Date** ………………………………

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CHAPTER 1: INTRODUCTION TO THE RESEARCH PROBLEM

1.1 Background:

Over the last few years, the world in which marketing operates has fundamentally changed (Wind, 2008). The marketing discipline is in flux and it has undergone an 'evolution' (Webster, 2005, p. 121). Kumar (2004, p. 119) reiterated that marketing is losing its clout and in many companies marketing is seen as a cost of acquisition or a 'variable cost that is always in danger of being cut' (Webster, Malter, & Ganesen, 2005). It has even been said that marketing has lost its seat at the boardroom table (Fine, 2008).

"Over the last decade in particular, there has been a marked fall-off in the influence, stature and significance of the marketing department" (Webster, Malter, & Ganesen, 2005). Marketing is perceived to be 'dispersing and declining' (Webster, Malter & Ganesan, 2005 p. 35). Wind (2008, p. 28), commented that marketers must consider whether the current "theory of marketing" is still relevant in a world of rapid change. He goes on to say that every one of the marketing concepts is being challenged and changed by a world of empowered consumers, heightened competition, globalization, advances in technologies and the interdependencies of these forces (Wind, 2008, p. 28).

The current marketing thinking is bound by a set of "mental models" that governs marketing concepts and practices. These need to be 'expanded beyond functional disciplines and incorporate the broader concept' (Drucker, 1994, p. 95). In order for marketing to be more accountable for its performance, the underlying theory behind the key marketing practices needs to be challenged.

Vargo and Lusch (2004, p. 1) believe that there are new perspectives on the field of marketing that are converging to form a "new dominant logic evolving,' one that focuses on combining the traditional economic goods exchange with a service proposition, building on intangible aspects such as relationships to create value over the long term. This is the first step to re-examine the field of marketing and will assist with reassessing the traditional assumptions built over time.

The findings show that, the marketing discipline is an important aspect within the world of business, as it provides a continuous value contribution to any organisation and its key stakeholders (Fine, 2008). Kumar (2004, p. 119) stated that 'the answer lies in the marketers' ability to change the current image of being tacticians. Marketers should focus on rekindling the perception of being 'strategists, capable of helping the organisation drive growth and profitability' (Kumar, 2004).

Wind (2008, p. 32), said that, "to see new opportunities, we need to shift our thinking". This will require a "paradigm shift" (Wind, 2008 p. 32) whereby the marketing practices are, indentified and questioned to ensure that the aspects within the marketing discipline are understood and thus ultimately, providing value to the organisation. Hence, this research focuses on understanding the underlying theories of the Marketing Practices that will ultimately increase company performance.

1.2   Marketing practices

Marketing is a multi disciplinary function and as a result there are many different ways that that it has been defined, such as a department, an activity and even a process. The many definitions provide an inconsistent view. One way to look at marketing is to consider it as a series of practices, as it is easy to actualise and does not box marketing into a specific culture or structure. Even when marketing has been described as marketing practices, the definition is loosely defined and the terms seem to be interchangeable in different contexts.

For example, the Mobile Marketing Association (MMA, 2009) was reviewed as they have provided the latest waves of innovation and the latest thinking in the marketing field. The MMA defines Mobile Marketing as "a set of practices that enables organisations to communicate and engage with their audience in an interactive and relevant manner through any mobile device or network (MMA, 2009). They define a "set of practices" as "activities, institutions, processes, industry players, standards, advertising and media, direct response, promotions, relationship management, CRM, customer services, loyalty, social marketing, and all the many faces and facets of marketing" (MMA, 2009).

The Social Marketing discipline, which is on the other end of the spectrum, defines social marketing practices as "transactional by nature and focus on Price, Product, Place and Promotion to determine what benefits and costs they would consider acceptable to reach consumers effectively" (Andreason, 1995).

The American Marketing Association (AMA) has recently released a new definition. It is no longer only seen to be a set of activities and processes or even a management system. This definition includes the role marketing plays within society at large, and defines marketing as a "science, educational process and a philosophy" (AMA, 2008).

The AMA (2008) defines marketing as "the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large" (AMA, 2008). This new definition calls for the current principles and practices to be questioned and reassessed to ensure that they are still relevant and will deliver value as the definition indicates.

These definitions cited above provide evidence of the varying, broad definitions for marketing and marketing practices. Webster (1988) said that a "precise list of what can be considered a marketing activity has never been provided". This leaves too much room for interpretation and leads to increased complexity. The options for marketers could entail either to focusing on a myriad of activities that could dissipate effort and budget or adopt a

one-dimensional focus to mitigate the confusion. Marketers need to consider the longer-term strategic intent and the theory or rationale behind each activity (Webster, 2003).

Webster, Malter and Ganesen, (2005, p. 37) stated that "if marketing remains ambiguous with no clear responsibilities" the contribution and importance of the function is weakened and the link to the company performance is limited. As a result, it is imperative to tighten up these loose definitions and provide a common clear understanding and framework within a South African context.

The most recent and comprehensive study that concentrates on marketing practices is the Contemporary Marketing Practices (CMP) research programme, which was first conceptualised in 1997. The focus of this study was to develop an understanding of "how firms relate to their markets in a manner that integrates both traditional and more modern views of marketing, and incorporates an understanding of both the antecedents and consequences of different practices"(Coviello, Brodie & Munro, 1997).

The gap between theory and practice is what drove the interest to pursue this research with the most recent study published as recently as 2009 whereby marketing practices and leadership styles were analysed (Lindgreen, Palmer, Wetzels, & Antioco, 2009). However even though this research is over a decade old, it does not include an assessment of the underlying principles, definition or the theory of practice. Rather, CMP attempts to highlight the 'similarities and differences between each practice identified' (Coviello & Brodie 2009 p.86).

An opportunity exists to draw on the definition of practices using the social theory of practice from the field of sociology. The use of sociology within the field of marketing is commonplace as both disciplines are social sciences and in this context the social theory of practice is a tautology. This will provide a deeper understanding of the etymology, principles and behaviours that could lead to a tighter more insightful definition of marketing practices.

1.3   Research purpose

The purpose of this research is to grow our understanding of Contemporary Marketing practices by understanding marketing as a 'series of practices'. Even though a number of the CMP studies have identified the various marketing practices, a loose definition is evident. This study aims to gain a deeper understanding of marketing practices, drawing from the principles defined in the social theory of practice (STP). The opportunity exists to look broader and deeper using insights from another discipline to understand the theory in more detail and build on the CMP gap identified

The definition of marketing practices needs to be tightened by assessing not just the practical activities, but also the theory of marketing practices. Webster (2005, p. 125) clearly outlines a widening gap between 'managers and scholars' and goes on to say that when 'new paradigms of marketing management that shift the core focus of the field' are realised, they have the 'potential to bridge the gap and integrate rigour and relevance' to the marketing discipline. He continues this thought by emphasizing the fact that "rigorous work needs to be more relevant while the practical needs to become more analytical" (Webster, 2005). This will add tremendous value to both the academic and business fields as it will assist in identifying a tighter view of marketing practices and provide both practical and theoretical applications.

By viewing marketing through a 'practice lens' a fresh perspective will be provided, one that will provide rich descriptions of marketing practices. Not only will this assist with optimising the marketing function, but will allow for greater accountability and relevance for the discipline.

1.4　　Objectives of the study

Hill and McGinnis (2007, p. 652) suggest that there are there certain "attitudes, behaviours, and activities that can be embraced, to enhance marketing practice". They go on to say that marketers need to analyse the type of questions within the discipline and ask if these questions is "shifting direction, to set the stage for tomorrow" (Hill & McGinnis, 2007, p. 658).

The objectives for this research are to examine the CMP theory within the context of the STP principals, to develop a framework to describe marketing practices in more detail. The aim is to build rich descriptions of marketing practices using the literature within a complex organisational setting with a view to:

- · Explore how marketing practices are currently being defined.
- · Identify which marketing practices are evident within the organisation.
- · Provide rich descriptions of marketing practices using the STP framework.

1.5　　Scope of the study

The scope of this study focuses on investigating marketing practices using the social theory of practice within the context of one South African organisation. It is important to note that the intention is not to deconstruct the CMP theory; rather the aim is to gain a deeper understanding of marketing practices using the anatomy of practices outlined in the social theory of practice.

CHAPTER 2:   LITERATURE REVIEW

2.1   Literature review framework

The theory reviewed in this chapter of the report was structured according to the following framework:

Figure 1: Structure of literature review

1. Understanding practices	This provides an understanding of the how practices are defined and outlines the different terminologies. The practice definition is examined and the nuances are depicted and reviewed upfront
2. Existing Marketing Practices: CMP theory	This aims to identify and outline the current literature and existing studies within the realm of Marketing Practices. Contemporary Marketing Practices (CMP) theory has been reviewed and provides a context for this study.
3. Social theory of practice (STP)	The Social theory of practice has been outlined. This provides a theoretical definition of practices from the sociology discipline. The anatomy of practices consists of understanding, procedure and engagement.
4. Practices Framework	A framework that outlines the three key components (understanding, procedure and engagement) within the social theory of practices (STP) has been formulated.

2.2　　　Introduction

According to Drucker (1994, p. 96) "Just as businesses are shaped by assumptions of underlying theory of the business, disciplines are shaped and sometimes limited by their own assumptions and theories". It is evident that the etymology of "practices" needs to be explored using the theory, to provide a wider view of the underlying assumptions. This is then analysed further within the context of Marketing. The aim of this literature review is to discover the paradigms that exist to provide a deeper understanding of how practices are defined and employed to enable performance. The theory and definitions behind practices have been looked at in detail to define, what they consist of and the nuances when used in different contexts. A thorough review of the existing Contemporary Marketing Practice research programme provides a context for this study within the field of marketing. The social theory of practice is then analysed, from the field of sociology to provide a suitable structure and framework for a rich definition description.

2.3　　　Practices

2.3.1　　　Defining a practice

"Practice" is a prevalent term that is used across many disciplines. Even though this word has multiple connotations, it tends to be loosely defined. According to Lynch, (1997, p. 337) "a dictionary gives only a rough indication of the vicissitudes of usage". He goes on to say that the "Oxford English Dictionary lists eight "simple senses" and four more "combinations and phrases" associated with the word Practice". Turner (1994) challenges various concepts in which the term "practice" has been used within the "theory of practice" from the field of sociology. He uses examples to depict how the interpretations can differ and says, "A professional practice like law or medicine is different from a private practice, which is an institutionalised way of life within a profession" (e.g. private practice). Lynch (1997, p. 337) says that the most common use of the term 'Practice" focuses on the "actual conduct apposed to the abstract theory or preaching with the example of contrasting something done "in theory" versus "in practice." "Another sense of "practice"

implies a customary or habitual mode of conduct" for example this could even distinguish a person or group from others for example, his practice was to arrive on time" (Lynch, 1997, p. 337). A practice is commonly seen as a process, an action or in some cases practical and applied knowledge to actions. Reckwitz (2002, p. 250) defines a practice as a "routinised way in which bodies are moved, objects are handled, subjects are treated, how things are described and even how the world is understood". It is clear that a simple explanation of practices in a contemporary setting is needed.

It is important to understand what a practice is and how it is defined from a theoretical point of view. The word practice seems to be used interchangeably in many different situations. This term will need to be contextualised appropriately, whilst ensuring that not only is the term appropriate but that the practices described are relevant.

2.3.2   The difference between a practice and practices

The literature has shown that there is a difference between the terminologies used when describing practices. It is important to ensure that each variation is outlined prior to using each term accordingly. Reckwitz (2002, p. 249) notes that there is a "distinction between practice and practices". Practice (Praxis) in the singular represents the human action in contrast to 'practices' in the plural, that has a different meaning and is described as the "theory and thinking" (Reckwitz 2002, p. 249). Warde (2005) goes into more detail and describes a practice (Praktik) as a "routinised type of behaviour whereby several elements are interconnected. This includes forms of bodily activities, forms of mental activities, 'things' and their use, a background knowledge in the form of understanding, know-how, states of emotion and motivational knowledge" (Warde, 2005, p. 133).

Jarzabkowski and Spee (2009, p. 70) provide an example of how the different terminology can be used in many different contexts and highlights how the definitions change based on the nuances, within the recent 'Strategy as Practice' (S-a-P) study. However, the scope of this research is limited to the strategy domain and does not say enough about the

theoretical underpinning of the tem practices. In order to depict the different definitions Jarzabkowski (2005) says that "practitioners are those people who do the work of strategy, practices are the social, symbolic and material tools through which strategy work is done; and praxis is the flow of activity in which strategy is accomplished" (Jarzabkowski & Spee, 2009; Jarzabkowski & Whittington, 2008; Jarzabkowski , 2005).

2.3.2.1 Practices and activities

Practices consist of practical activity, both doings and sayings that hang together in a coordinated way (Schatzki, 1996). At times it is difficult to identify practices, as they are seen to be "entangled and interrelated elements of activity". As a result it is hard to separate one particular 'practice' or activity from the interwoven fabric of practices (Schatzki, 1996).

"Practices are comprised of multiple elements and a clear distinction must be made" (Warde, 2004). For example, the term 'marketing activities' is often used loosely as an umbrella term for the various activities that are executed (AMA, 2008). However these need to be assessed and questioned based on whether they are mere "human actions" (practice – singular) or "theory and thinking" (practices – plural) (Warde, 2005, p. 133). The way that the practices are defined changes the context and meaning of the situation.

It is apparent that there is a difference between practices and activities. "Activities (actions) and bodies are constituted within practices" (Schatzki, Knorr Cetina, & Von Savigny, 2001) and these activities are broken down when executing. For example, Jarzabkowski and Spree (2009, p. 70) have carefully defined 'Strategy as Practice' (S-a-P) as "a situated, socially accomplished activity". They go on to say that "while strategizing is comprised of actions, they also include interactions and negotiations of multiple actors and the practices are drawn upon to accomplish that activity" (Jarzabkowski & Spee, 2009, p. 70).

2.3.2.2   Dispersed and integrative practices

The definition, description and physiology of practices have a "broad scope" and are more complex than meets the eye. The multifaceted nature of the theory of practice is defined even further and Schatzki (1996, p. 91) provides a simple discription by distinguishing between dispersed practices and integrative practices. He says, "dispersed practices appear in many sectors of social life and uses the examples of describing, following rules, explaining and imagining" (Schatzki, 1996, p. 91). The performance that presupposes this practice is 'understanding'. "This entails an understanding of how to carry out an appropriate act of 'explaining', an ability to identify, prompt or respond to an explanation" (Warde, 2005). This highlights the need for detailed descriptions of marketing practices as only by gaining a deeper understanding will a tighter framework and definition be possible.

Schatzki (1996, p. 98) describes 'Integrative practices' as being more "complex as they are found in and constitutive of particular domains of social life". The examples he uses include "farming practices, cooking practices and business practices" (Schatzki, 1996, p. 98). Integrative practices could involve dispersed practices and these generally form part of the "components of saying and doing which allow the understanding of a practice, along with the abilities to follow rules governing the practice and to evaluate performances" (Schatzki, 1996, p. 98).

2.3.3   The impact and relevance of practices

The value of understanding practices goes beyond a singular action. "Each practice demonstrates a physiology", in which the multiple parts outlined, function together" (Schau, Muniz, & Arnould, 2009, p. 35). Practices may vary in their anatomy. However, when they cohesively function they act as a "co-ordinated entity" (Warde, 2005). The literature suggests that practices are relevant because they generate consumption, enable performance and create value. These are described in more detail below:

Practices generate consumption

The nature and composition of practices enables them to "generate consumption" (Schau, Muniz, & Arnould, 2009, p. 39). "Through practices, members generate, reify and perpetuate consumption patterns and bevaviour" (Schau, Muniz, & Arnould, 2009, p. 39). Warde (2005) says that most "integrative practices require and entail consumption". However, it is to be noted that "consumption is not in itself a practice but rather a moment within a practice" (Warde, 2005, p. 137). "The practice is the conduit and raison d'être for the gratifications which arise from the moments of consumption and contributes to the delivery of a range of varied rewards" (Warde, 2005, p. 142).

Practices as performance

Warde (2005, p. 134) says that practices are "a temporally unfolding and spatially dispersed nexus of doings and sayings", and also a "series of performances". A "performance presupposes a practice, and practice presupposes performances" (Warde, 2004, p. 134). According to Schatzki (1996) practices are based on the "successful inculcation of shared, embodied know-how" and if maintained over time allow for continued performance. As a result, it is evident that when practices are operationalised they require "performance for their existence" (Warde, 2005, p. 134). This demonstrates that when practices work together they have the ability to enhance value through performance. However, without understanding practices, good performance is limited.

Practices create value

Schau, Muniz and Arnould, (2009) have noted that "an array of practices" must be fostered before value can be created. Practices can structurally add value within organisations if the actions and activities are reproducible and repeatable". However, practices must be known and work together, prior to becoming part of the "value creation repertoire" (Schau, *et al*., 2009 p.35).

Embedding practices and commitment

The role that individuals play within the development and deployment of practices is key. Reckwitz (2002, p. 256) says that the "individual is the unique crossing point of practices and bodily-mental routines". Warde (2005, p. 145), says that "the practice, so to speak, requires that competent practitioners to avail themselves of the requisite services and command the ability to manipulate appropriate tools and devote a suitable level of attention and to some degree commitment to the conduct of the practice".

Practices link behaviours, performances and representations" (Schau, *et al*., 2009 p.31). Warde (2005, p. 140) says that "formal and informal codifications govern conduct within a practice". He goes on to say that these generally happen without "reflection of conscious awareness". In order for these practices to be embedded within an organisation they will need to be understood and reinforced.

As a result, not only do practices create value, they also help to reveal the "embedding conditions of organisations" (Seely Brown & Duguid, 2001), which have the ability to allow for a deeper level of commitment. It is this level of commitment to the practices employed by individuals that allows for greater performance over time. "Commitment becomes embedded into institutional life through structures, processes, decisions, channels and forms of communication, resources and institutional practices" (Maki, 2004, p. xviii).

Seely Brown and Duguid (2001, p. 8) have looked at understanding how knowledge, a key aspect within the social theory of practice, as an example, is embedded within an organisation and have said that "distinct practices create distinct embedding circumstances". Therefore, to understand where knowledge flows and where it sticks, we need to ask where and why practices (and embedding circumstances) are common, and where and why they are not. In order to realise the effects of practices described above, a deeper understanding and awareness needs to be outlined. This consciousness is the first step to enable practices to become embedded within the organisation.

A comprehensive understanding and relevance of practices is outlined, however these definitions and nuances need to be contextualised within the Marketing context. The current literature within this realm will be examined in more depth to provide a context that is specific to practices within the marketing discipline.

2.4 Contemporary Marketing Practices

2.4.1 Contemporary Marketing Practices defined

The definition of practices can only be analysed when it is contextualized within a situation or discipline. Over the past decade various authors have investigated different practices within the realm of marketing (Coviello & Brodie, 1998; Brodie, Brookes & Coviello, 2000; Grönroos & Helenius, 2001; Little, 1997; Brookes & Palmer, 2004; Brodie, Pels, & Saren, 2006; Brodie, Winklhofer, *et al*., 2007; Brady, Fellenz, & Brookes 2008; Winklhofer, 2008; Domegan, 2008; Palmer, Wetzels & Antioco, 2009, Lindgreen, Swaen, & Johnston, 2009; Palmer & Wilson, 2009; Schau, Muniz, & Arnould, 2009 – see table 1 below).

Contemporary Marketing Practices (CMP) provides an example of how practices have been defined and employed within the marketing context. One of the unique factors of this study is that it links academic arguments with business implications within various countries across the globe. CMP describes practices as 'bundles of marketing activities', with a focus on the actions, 'the doing' or even the channels. The theory versus practice characteristic comes through strongly as a key principle along with the nuances of practices as activities.

The CMP research was conceptualised and first published in 1997 (Coviello, Brodie *et al*. 1997). The formal CMP research programme's original focus was to "profile the Marketing practices in a contemporary environment and examine the relevance of relational marketing in different organisational and economic contexts" (Brodie, Coviello, & Winklhofer, 2008, p. 85). In an attempt to develop an understanding of how firms relate to their markets Contemporary Marketing Practices (CMP) research programme has been

developed. CMP integrates traditional and modern views of marketing and incorporates an understanding of both "antecedents and consequences of different practices" (Brodie, *et al*., 2008). The gap between theory and practice is what drove the interest to pursue this research. However, there is no assessment as to the underlying principles or theory of practice. Rather, Coviello *et al*. (1997) attempted to highlight the similarities and differences between each practice that was identified, as determined by the relational exchange and management process dimensions derived from the literature (Coviello & Brodie, 2009 p.86). The premise is that CMP embraces a "multidimensional approach and the activities are mutually exclusive" (Coviello & Brodie, 2009, p. 85).

2.4.1.1   The CMP classification of transactional and relational marketing

Marketing is changing probably now more than ever before and as a result "different ways have been proposed to classify marketing practices" (Lindgreen, Palmer, Wetzels, & Antioco, 2009, p. 16). The CMP research provides a rigorously developed framework that takes into consideration the recent changes within the marketing context.

When developing the classification for the CMP theory, "two common themes were identified (relational exchange and management activities) and then underpinned by nine dimensions pertaining to how companies relate to their markets" (Brodie *et al.* 2008, p. 85). Five dimensions were associated with relational exchange: purpose of exchange; nature of communication; type of contact; duration of exchange; and formality of exchange. The remaining four dimensions pertained to management activities: managerial intent; managerial focus; managerial investment; and managerial level of implementation" (Coviello, *et al.* 1997).

Coviello, *et al.* (1997), defines CMP as either transactional or relational marketing and then further characterises them into five types of marketing practices namely, transactional, relationship, electronic, networking and interaction marketing. The focus was on extending the traditional marketing practices to provide a deeper understanding of the relevant

disciplines. The aim was to categorise them as transactional or relationship marketing disciplines, activities or specialist tasks.

2.4.2 The evolution of CMP

This theory is now over a decade old and has been used as an "umbrella term" for what constitutes a practice within the realm of the marketing discipline. The focus has been on assessing whether firms subscribe to a specific type of marketing practice or whether they use a combination of practices (Coviello & Brodie, 2009, p. 91). Over the last 10 years, this body of work has evolved through continued investigation to become a comprehensive study within the marketing field (see table 1 below).

Table 1: Outlining the various studies in the field of CMP

STUDY	CMP FOCUS	AUTHOR
Towards a paradigm shift in marketing	Challenging Transactional Marketing methods and focusing on the new paradigm of relational marketing	(Brodie, Coviello, Brookes & Little, 1997)
CMP of high technology firms in the UK	Compare CMP in high tech vs low tech companies	(Dhanani, O'Shaughnessy & Louw, 1997)
Investigating Marketing Practice by firm size	CMP analysis between small vs large firms	(Coviello, Brodie & Munro, 2000)
Pluralism in CMP	Pluralistic view of Marketing – Transactional and Relational Marketing need to co-exist.	(Lindgreen, Davis, Brodie & Buchanan-Oliver, 2000)
How firms relate to their markets	An empirical analysis of CMP in goods, services, consumer and business firms to define if Transactional or Relational Marketing is more prominent	(Coviello, Brodie, Danaher & Johnston, 2002)
Assessing the role of e-Marketing	CMP needs to be updated to include e-Marketing, representing the technology developments in the field of Marketing	(Brodie, Coviello, Brookes & Palmer, 2003)
Marketing Practices and Performance in small businesses	Examining the Tourism Accommodation sector	(Coviello, Winklhofer, Hamilton, 2006)
CMP in professional services	Explore CMP in relation to professional services	(Reid, 2008)
Focus on B2B Specific CMP	Practices in West Africa, Argentina and the United states – which countries use Transactional vs Relational Marketing	(Dazie, Johnson, Pels, 2008)
Application to various countries to test CMP and understand cultural nuances (15 countries world wide)	· Russia · China · Romania · Cote De Ivorie · Ireland · Argentina · New Zealand · Canada · Finland · Sweden · UK · Thailand · Germany · USA · Australia	(Wagner 2005) (Vanhonacker, Zweig & Fung Chung, 2007) (Miller, 2004)
Social Marketing and CMP	Social marketing: implications for contemporary marketing practices classification scheme	(Domegan, 2008)
Marketing Practices and Leadership	Do different types of CMP require different leadership styles	(Lindgreen, Palmer, Wetzels, *et al.*, 2009)

2.4.3   The CMP Framework

The CMP classification scheme is a "multi-theoretical approach that enables a comprehensive taxonomy encompassing a broad range of practices" (Brodie, *et al*. 2008, p. 85). The CMP framework does not view transactional and relational marketing as separate paradigms, but rather accepts the premise that "marketing is characterised by multiple complex processes and considered a pluralistic conceptualization of marketing" (Reid, 2008, p. 375; Coviello *et al*., 2002, Lindgreen *et al*., 2000). A key element within this framework is that "it does not place distinct boundaries between the five types of marketing" (Lindgreen, *et al*., 2009, p. 22).

The five marketing practices that are described by Coviello et al., (1997, 2000, 2002), and Lindgreen et al (2009) are as follows:

2.4.3.1   Transactional Marketing (TM)

The TM practice involves a company attracting and satisfying potential buyers/customers by managing the elements in the marketing mix (4 P's: product, price, place, promotion), whereby the company actively manages communication to buyers in a mass market to create discrete arms length transactions This approach uses "aggressive marketing to attract customers" (Lindgreen, *et al*., 2009, p. 17). According to Lindgreen et al., (2009) marketing activities are intended to continuously search for new customers to create sales. When this approach is deployed, the focus is on products, and their prices and marketing resources are linked to the four P's. Customer contact is generally impersonal, with limited personal contact. However, relationships with buyers are discrete or generally one-off transactions. "Functional marketers, including sales managers and product-development managers, mainly carry out marketing activities" (Coviello, Brodie, & Munro, 1997; Coviello, *et al*., 2000, 2002; Lindgreen, *et al*., 2009, p. 17).

2.4.3.2   Database Marketing (DM)

The DM practice uses data base technology to create a relationship, allowing a firm to compete in a manner that is different from mass transaction marketing. The intent is to retain identified customers; marketing is still to the customer (rather than with the customer). Relationships are facilitated and personalized through the use of database technology. The strategy is focused on customers as well as the product and brand. When this is deployed the purpose is to acquire customer information for the company's database. This is measurable and as a result the focus is on ensuring that profit is increased. The contact tends to be personalized through the use of technology. The general objective is to improve customer management and resources are invested in database technology to achieve success. Specialist marketers tend to carry out these activities (e.g. customer service managers and loyalty managers). Meetings with customers are mainly at a formal level, yet attuned to the situation of the individual customer (Coviello, Brodie, & Munro, 1997; Coviello, *et al*., 2000, 2002; Lindgreen, *et al*., 2009, p. 17).

2.4.3.3   Interaction Marketing (IM)

The IM practice consists of face-to-face interaction between individuals. IM is truly marketing 'with' the customer. Both parties invest resources to develop a mutually beneficial and interpersonal relationship. The relationship is ongoing and often long term. Sizeable marketing resources are needed when investing in establishing, maintaining, and developing relationships. Employee teams that span across the company's different functions and levels execute marketing activities. Communication with customers also involves employees who have a sales skill as they personally interact with the potential buyers. Meetings are generally either at a formal business level, informal social level or a one-to-one basis. (Coviello, Brodie, & Munro, 1997; Coviello, *et al*., 2000, 2002; Lindgreen, *et al*., 2009, p. 17).

2.4.3.4   E – Marketing (eM)

eM practices use the Internet and other interactive technologies to create and mediate dialogue between firms and identified customers. eM encompasses one-to-one marketing and allows for mass customisation. The dialogue is ongoing and as a result of the technology used, this happens in real time. The aim is to create information-generating dialogue with many identified customers. Resources are invested in operational assets (e.g. information technology, web site, and marketing) and functional systems integration (e.g. electronic marketing). Cross-functional marketing teams execute these activities. Meetings with customers are mainly customized using interactive technologies (Coviello, Brodie, & Munro, 1997, Coviello, et al, 2000, 2002; Coviello *et al*., 2003 p 861, Lindgreen, et al 2009, p. 17).

2.4.3.5   Network Marketing (NM):

The NM practice is characterised as marketing "with" the customer but occurs across and among organisations. In this practice, managers commit resources to develop their firm's position in a network of various firm-level relationships. The aim of the Marketing activities is to coordinate activities between the multiple parties involved company. (e.g. customers, and other parties such as suppliers, partners and service providers) within the wider marketing system. The contact ranges from impersonal to interpersonal, and is ongoing. Marketers and cross-functional teams deploy these activities. Meetings with various stakeholders are both at a formal business level and at an informal social level. (Coviello, Brodie, & Munro, 1997; Coviello, *et al*., 2000, 2002; Lindgreen, *et al*., 2009, p. 17).

Figure 2: Summary of 5 contemporary marketing practices types.

1	**Transactional Marketing (TM)**	• Attracting and satisfying customers. • Managing marketing mix (product, price, place, promotion). • communication to buyers in mass market . • Discrete arms length transactions.
2	**Database Marketing (DM)**	• Relationship facilitated/ personalised. • Database technology. • Customer retention. • Marketing to customer (not with the customer). • Not mass/transactional.
3	**Interaction Marketing (IM)**	• Face-to-face interaction between individuals. • Marketing 'with' customer. • Both parties invest resources for mutually beneficial/ interpersonal relationship. • Long term relationship. • Sizeable marketing resources needed.
4	**Network Marketing (NM)**	• Interaction across and among firms. • Marketing "with" the customer • Network of many firm-level relationships. • Develop activities between multiple parties. (e.g customers, suppliers, partners/service providers)
5	**E Marketing (eM)**	• use of Internet/interactive technologies • dialogue between firms and customers. • One-to-one marketing and customisation. • Ongoing dialogue is ongoing in real time. • information-generating dialogue.

Source: CMP Theory: Coviello, Brodie, & Munro, 1997; Coviello, *et al*., 2000; Lindgreen, *et al*., 2009

Table 2: CMP themes and dimensions

FOUR ASPECTS OF MARKETING CLASSIFIED BY EXCHANGE AND MANAGERIAL DIMENSIONS					
Transactional Perspective --Relational Perspective					
	TM	DM	IM	NM	eM
1. Purpose of exchange	Economic transaction	Information and economic transaction	Interactive relationship between buyer and seller	Connected relationships between firms	Information generating dialogue between the seller and many identified buyers
2. Nature of communication	Company to mass market	Company to targeted segment or individuals	Individuals with individuals (across organisations)	Companies with companies (involving individuals)	Companies using technology to communicate with and among many individuals (who may form groups)
3. Type of contact	Arms length, impersonal	Personalised (yet distant)	Face to face, interpersonal (close, based on commitment, trust & cooperation)	Impersonal to interpersonal (ranging from distant to close)	Interactive (via technology)
4. Duration of exchange	Discrete (perhaps over time)	Discrete over time	Continuous (ongoing and mutually adaptive – short or long term)	Continuous (stable yet dynamic – short or long term)	Continuous (interactivity occurs in real time)
5. Formality of exchange	Formal	Formal (personalised through technology)	Formal and informal (at both a business and social level)	Formal and informal (at both a business and social level)	Formal (yet customised and or personalised via interactive technology)
6. Management intent	Customer attraction (to satisfy the customer at a profit)	Customer retention (to satisfy the customer, increase profit & reach objectives e.g. increase loyalty, decrease customer risk etc)	Interaction (to establish, develop and facilitate a cooperative relationship for a mutual benefit)	Coordination (interaction among sellers, buyers & other parties across multiple companies for mutual benefit, resource exchange & market access etc)	Creation or IT enabled dialogue
7. Managerial focus	Product/Brand	Product/Brand and customers (in a targeted market)	Relationships between individuals	Connected relationships between companies (in a network)	Managing IT enabled relationships between the company & many individuals
8. Managerial investment	Internal Marketing assets (focus on product/service, price, promotion and place capabilities)	Internal Marketing assets (communication, Information and technology capabilities)	External market assets (focusing on establishing and developing a relationship with another individual)	External market assets (focusing on developing the companies position in a network of companies)	Internal operational assets (IT, website, logistics) functional systems integration
9. Managerial level of relations	Functional Marketers (e.g. sales manager, product development manager)	Specialist marketers (e.g. customer service manager, loyalty manager)	Managers from across functional and levels within the company	General Manager	Marketing Specialists (with) technology specialists (senior managers)

Source: Adapted from Coviello, Brodie & Munro 1997; Coviello *et al*., 2003 ; Lindgreen, 2009

2.5   The social theory of practice

Merely describing practices within the CMP framework is not the end point. CMP is an example of how practices have been defined within the field of Marketing. Thus, CMP is necessary to provide a context for practices to be analysed. However this does not provide a sufficient framework to explore this definition in more detail.

It is evident that a deeper understanding of the 'practice' terminology is required to provide further insight and tighten the various loose definitions. The social theory of practice (STP) is an integral part of this exploration. The theoretical background and etymology is examined from a sociological perspective. The theory of social practice assists in providing a richer definition of practices and outlines a framework to view marketing as a cluster of practices.

It is useful to look back to the history and origin of this theory, which dates back to the 1960's. Bourdieu (1990) who is known for his pioneering work within the field of sociology has written many seminal articles that emphasize the role of practices in society. He added tremendous value to this body of work by defining terminologies such as the concepts of "Habitus" and "Praktik" (Warde, 2005).   Bourdieu (1990) believes that the theory of practice is based on "the human ability to act upon and change the world from the constrictions of structuralism and systemic models" (Bourdieu, 1990). This rich insight into "practices" provides an opportunity to view the world based on a series of practices.

Building on the existing theory, Reckwitz (2002) noticed a resurgance and interest in theroies of practice and refined this thinking within the context of sociology. He commented that "both social order and individuality result from practices" (Reckwitz, 2002, p. 243). A practice is social, as it is a 'type' of behaving and understanding that appears at different locales and at different points of time" (Reckwitz 2002, p. 250). However he concluded that if one says that practices are social then this is a tautology.

Schau, Muniz and Arnould (2009) have used STP to reveal the process of collective value creation within brand communities. This provides one example of how the principles of STP have been used successfully within the Marketing context. The study demonstrates how value is created by identifying the physiology of practices using STP and fostering them within the organisation (Schau, Muniz, & Arnould, 2009). When the term 'practices' is used within within various contexts such as marketing, they should be viewed " through a lens of practices" using STP as the foundation (Warde, 2005).

Warde (2004), being one of more recent sociologists of practice, developed the theory of practice further with relevence to the 'sociology of consumption'. He emphasises that practices are complex ways of saying and doing things that are "implicit and inextricably linked". "At any given point in time, practices can have a set of established understandings, rules and objectives" (Warde, 2005). This forms the basis of the social theory of practice (STP) and outlines a simple classification to analyse what they consist of and how they are organised (see figure 3 below).

Figure 3: Social theory of practice principles
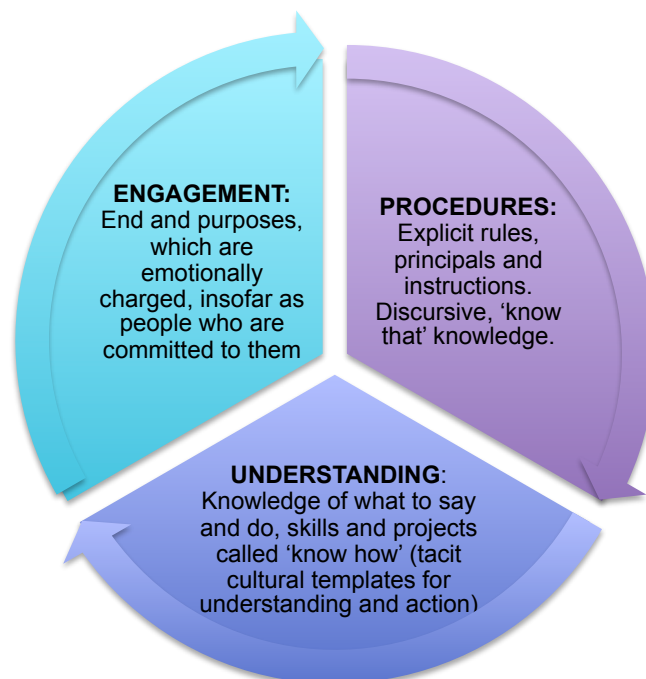
Source: Warde, 2005; Schau, Muniz & Arnould, 2009

2.5.1   The anatomy of practices

'Practices' exhibit a "common anatomy", which has been outlined by Schau, Muniz, & Arnould, (2009). In this study the authors have clearly articulated three key Principles that provide the foundation for the anatomy of practices. These are understanding, procedures and engagements and they are defined as follows:

· ***Understanding:*** This entails general procedural understandings and knowledge: what to say and do, explicit, discursive knowledge. This is also known as "know how or tactic cultural templates for understanding and action" (Schau, *et al.*, 2009, p. 47).

· ***Procedure:*** This includes skills, abilities and procedure*:* tacit, embedded knowledge or how-to. This is made up of explicit rules, principles, precepts and instructions (Schau, *et al.*, 2009, p. 47).

· ***Engagement:*** Emotional commitments expressed through actions and representations, such as purposes, beliefs, and emotions. This includes purposes, which are emotionally charged, in a sense that people are attached or committed to them (Schau, *et al.*, 2009, p. 47).

A comprehensive outline of the proposed framework that includes the rich descriptions and definition of practices based on the social theory of practice provides more depth and insight towards a tighter definition of practices to be tested and utilised within the realm of marketing (See figure 4 below).

Figure 4: Marketing practice framework

UNDERSTANDING
General understanding and knowledge of,
what to say and do, explicit and
discursive knowledge.
* Conceptualisation

**Social Theory
of Practice
(STP)**

PROCEDURE

Skills and abilities. Tacit knowledge, how to.
Explicit rules, principles, instructions processes.
* Implementation

ENGAGEMENT

Emotional commitments expressed through
actions / representations. 'End purposes
that' are emotionally charged & people are
attached/ committed to them
* Commitment

(Source: Schau, Muniz, & Arnould, 2009; Reckwitz, 2002; Schatzki 1996)

2.6   Conclusion

The CMP framework and research is extensive in that it describes the varying marketing practices. This study has integrated both traditional and modern views of marketing and has evolved with the rapidly changing external factors. The CMP research has added tremendous value to the marketing fraternity as it has organically extended to include 15 countries. This theory has then been used within multiple research studies. Such has become the conventional way of understanding and detailing the activities within marketing practices (see table 1 above).

Although the above table (table 1) provides a comprehensive and recent list of studies that have used the CMP research, it does not attempt to review the principles or the theory of practices. The literature provides a comprehensive detailed view of the key studies that have been undertaken over the years. There is a strong focus on the Theory vs Practice approach, using the 'practices' umbrella term. The social theory of practice provides an opportunity to gain a deeper understanding of the term practices, how to define them and what they are comprised of.

The literature has shown that there are many different definitions and applications of the term 'practices'. It is evident through the social theory of practice that the anatomy of practices contains three key Principles: procedures, understanding and engagement (Warde, 2005). This simplified definition should be used as a guideline to determine the difference between practices and activities, theory and practice and practice and practices. Practices and performance go hand in hand and in order to generate value, the first step is to gain a clear understanding of practices.

A common understanding and simplification of the term practices will allow marketers and practitioners alike to strive for performance. "Practices structurally add value by making actions reproducible and repeatable" (Schau, *et al*., 2009). However, the aim is not only to define and develop practices, but also to ensure that they are embedded within the organisation.

CHAPTER 3: RESEARCH QUESTIONS

It is apparent that within the CMP body of literature, Coviello et al (1997) have mapped the practices based on marketing activities and the classification of transactional and relational marketing. There is an opportunity to use STP to explore practices in more depth within the marketing department of a single organisation.

This research study will explore the relevant marketing practices within the marketing discipline in order to identify and describe them within the organisation. The aim of this research is to gain a deeper understanding of what the practices are, how they are defined and deployed within the organisation. The "marketing practices framework" model as described in the literature (figure 4) outlines the three key areas within the social theory of practice (STP) – understanding, procedures and engagement (Schau, *et al*., 2009; Reckwitz, 2002; Schatzki, 1996). This model provides the basis to achieve the research objectives outlined.

3.1 Research objectives

- · To explore how marketing practices are defined within the organisation.
- · To identify what marketing practices are evident within the organisation and provide rich descriptions of them, using the STP framework.
- · To determine if the different components are interlinked and how they work together.

3.2   Research questions

The aim is to explore the deeper classification of these practices, within the marketing realm using STP framework. In order to achieve this, the following questions are emphasised:

3.2.1   Research question 1: <u>Understanding:</u>

When conceptualising marketing practices, what type of skills, abilities and knowledge is required to gain a level of understanding for marketing practices to take place and yield performance?

3.2.2   Research question 2: <u>Procedures:</u>

When implementing marketing practices, what explicit rules, principles, instructions and procedures are currently in place?

3.2.3   Research question 3: <u>Engagement:</u>

What type of engagement or emotional commitment is expressed through actions/representations that takes place to successfully deploy and embed the marketing practices?

CHAPTER 4:   RESEARCH METHODOLOGY

4.1   Introduction

This study aims at exploring and delving into the underlying definitions that have been described within Contemporary Marketing Practices (CMP) Theory (Coviello & Brodie, 1998).   This approach views marketing management through a 'practice lens' and is explored using the anatomy of the social theory of practice to provide a deeper understanding of marketing practices.

The literature highlighted three key areas within the anatomy of the social theory of practice (understanding, procedure and engagement), which provided deeper insight into the existing CMP Theory.   Each of the three areas within the 'marketing practice management' model, described in the literature review, were tested. The marketing practices were interrogated using multiple sources of data, which included analysing various documentation, interviewing marketers and observing the practices in action. Leedy (2001) says that this involves a collection of numerous forms of data that is examined from many different angles. The outcome generally allows for a rich and meaningful picture within a complex multifaceted organisation.

4.2   Research design

Leedy (2001) proposes that a qualitative study is best suited to a situation when the researcher is delving into a new or complicated phenomenon. This methodology is able to provide answers to questions that require an in-depth analysis and probe deeper into aspects, not just skimming the surface. This approach is appropriate where the researcher needs to "test the validity of certain assumptions, claims, theories and generalisations within real world contexts (Leedy, 2001, p. 153).

Daft (1983) has said that the qualitative research process is seen as a 'journey of discovery' and the focus is not necessarily on the data collection, but more about the continual questioning. This adds a level of depth that will ultimately enable companies and

marketing managers to gain a deeper insight into how practices are defined, what practices are being used and more importantly why.

This exploratory study lends itself to a combination of "inductive and deductive reasoning" (Perry, 2001 p. 309). Zikmund (2003, p.54) said that exploratory research should be conducted to clarify ambiguous problems. The literature review has highlighted an alternative way of looking at marketing practices and as a result the discovery phase will not be a linear process. An objective, scientific methodology will not be able to identify the embedded practices that have been followed over the years. To truly understand the practices implemented within marketing, a qualitative research methodology in the form of a case study technique has been used.

4.3   Case study technique:

Yin (1994, p. 13) defines the scope of a case study as an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident. Case research is, therefore, useful when the problem defined is "broad and complex" (Dube & Pare, 2003 p. 598). This is key to understanding how marketing practices have been defined and why they have been employed within the organisation.

Zikmund (2003, p. 116) stated that the primary advantage of the case study method is that the "entire organisation can be investigated in depth with attention to detail". "An order of events" within a company can be "monitored closely as they occur to show the relationship among functions, individuals and entities". (Zikmund 2003, p. 116). Marketing practices tend to be embedded within the organisation and the marketing function requires an analysis of documents, records and reports to gain a holistic view.

The case study technique has been used widely within the field of marketing and examples have been cited by Perry (2001 p. 204) in areas such as the "marketing

communication function, marketing of community museums, marketing on the internet and business reengineering", to name a few.

4.3.1   Building the case study using different types of methods

This method incorporated multiple aspects to build a compelling and in-depth case study. The first method was an analysis of various documents within the marketing department and this stage was imperative to outline a framework of the practices. This required multiple sources of information and access to archives over a period of time rather than "mere frequencies of incidence" (Dube & Pare, 2003 p. 607).

The second method, comprised of intensive in-depth interviews. This provided an understanding of how marketing practices are described using the findings from the document analysis. The respondents interviewed were specifically chosen, as they were responsible for the development of the Marketing practices and responsible for creating the documentation.

Thirdly, the type of marketing practices was observed in 'real time' along with the activities engaged in. This allowed for an objective view and interrogation based on the aspects unearthed in the interviews (see table 2). Once the interviews were completed the document analysis was used again to corroborate the evidence to confirm or disconfirm the findings.

Table 3: Qualitative case study methods

Type	Aim	Tool
Analysis of Documentation (2007 – 2010)	Analyse the documentation such as reports, minutes of meetings, presentations to gain specific examples.	Theory analysis, framework outlined and confirmation/disconfirmation.
In-depth – Interviews (Marketing experts)	Understand marketers' views and definition of marketing practices.	Exploratory questions using a Semi-structured discussion guide.
Observation (in company practices)	Observation of the type of marketing practices adopted and activities engaged in.	Observation journal (data collection) describing nuances based on the marketing practices in action. Theory analysis and confirmation/disconfirmation.

The focus of this study was to gain an understanding of how marketing practices are defined by exploring how and why marketers are adopting marketing practices. Case study research is theory building, whereby the need for a general understanding is a key objective (Perry, 2001, p. 305). The types of research problems that drive case research are usually a 'how and why' problem and usually involve a complex social science issue where little is known (Perry, 2001, p. 305).

Zikmund (2003, p. 116) says that this type of method requires "flexibility" as the focus was to unearth information and insights from multiple aspects, "wherever they can be found". Interviews alone could not provide the answers required, as marketers found it difficult to play back information that is still unknown. A combination of Interviews, observation and documentation was required to provide reliable and valid information.

The following guidelines provide a set of characteristics of case research to ensure the success and reliability of the case method (Dube & Pare, 2003; Yin, 1994):
· A phenomenon is examined in a real-life context or setting
· One or few entities (person, group, organisation, technology) are examined
· The complexity of the unit is studied intensively
· The phenomenon of interest is not isolated from its context, especially at the data analysis stage
· No controlled observation that involves manipulation is involved

4.4   Unit of analysis

Zikmund (2003) has defined the unit of analysis as the level of investigation for data collection, and he has said that this can include the entire organisation, departments, work groups, individuals, or objects. The unit of analysis for this study was comprised of the marketing practices. The case study methodology described the views and opinions of the marketers, regarding marketing practices specifically within the marketing department.

4.5 Sampling and number of cases

The respondent selection was based on a single organisation that displayed the relevant marketing practices and this was identified as the target population. Within this organisation the various people within the marketing department were interviewed and consist of senior level marketing professionals and experts such as marketing directors, senior marketing managers, brand managers and external advertising partners. Their experience and track record qualified them as experts within the marketing discipline. (see table 4).

The company was carefully selected to "maximize what can be learned in the period of time available for the study" (Dube & Pare, 2003, p. 610). Perry (2001, p. 302) said that careful consideration must be taken when selecting the amount of cases studies and judgement or purposive sampling should be used.

The sample selection for this research was defined as one case, which was justified due to the availability and access to information. This was defined as "unusual access for academic purposes" (Perry, 2001, p. 313). Yin (1994) stressed that the choice of case and company should be based on predictable reasons. Drawing from convenience sampling, this choice was based ease of access to the level of detailed information and resources required.

A large financial services company, Company X was identified using judgment sampling. An analysis of the company size, marketing structure and marketing budget were taken into consideration prior to the selection. One case would need to provide a level of detail and rigor to ensured the success of this research. This company exemplified the Contemporary Marketing Practices (Coviello & Brodie, 2001) outlined in the literature review. This Company exhibited the key criteria pertaining specifically to marketing practices and through a thorough analysis, would be able to provide a deep understanding of how they are actually defined and employed in the 'real world' (Perry, 2001).

The author has an in-depth understanding and knowledge of this organisation and the industry and as a result this company was chosen. She has been in the industry for over four years in Group Marketing. This group role entails involvement in all the business units from both a horizontal and vertical perspective. This long-standing relationship with the organisation has allowed the author to gain comprehensive information and insight about the organisation and the marketing practices.

4.5.1   Interview sample size:

The sample size for the interviews was comprised of the above-mentioned population. A total number of 7 respondents were interviewed within the company. Three levels of seniority were selected within the population scope to ensure that the information was comprehensive. This was classified as Executives (Marketing Directors), Senior Management (Senior Marketing Managers) and Marketing Executors (Brand Manager and external parties). The Marketing Directors were able to answer the in depth research questions pertaining to the company performance, strategy and the principals behind the theory. Interviews with The Senior Marketing Managers and Brand Manager provided a more detailed view of the executional activities (see table 3 below). Marketing is a dynamic, multiple disciplinary function that does not operate in a vacuum and as a result it was imperative to extend this to marketing and advertising partners that play an important role in the marketing practice value chain. This formed part of the qualifying questions prior to identifying the respondents.

Table 4: Respondent selection and Sampling: sample size and respondents

Company case study Total: 1	Large Financial Services Company (Company X) (More than 200 people in marketing and distribution, local and global marketing, Marketing budget over R50 million listed on the JSE)
Respondent level and number Total: 7	Executives (2) • MD Group Marketing • Divisional Director: Marketing Senior Management (2) • Head of Marketing Retail SA • Senior Manager: Channel Activation and Coordination Marketing Executors (3) • Group Marketing: project coordinator • ATL Advertising Agency – Business Unit Director • BTL Agency - Client Services Director

4.5.2 Interviewer interaction

It was important to ensure that the respondent and interview biases were minimised upon commencement of this study. Once the interview was confirmed the respondent was emailed a copy of the research guide along with a letter that explained the rationale and objectives for the research.

In-depth and open-ended questions were necessary during the interview stage, however it was evident that the respondents may be governed by personal bias during the interviews. Minimal input was required from the interviewer at this stage, as the observation and documentation stages would provide enough evidence to mitigate these concerns.

4.5.3 Interview and questions

Deep discussion and dialogue were required during the interview process, using a few questions. The interview time was approximately 1 hour long. The interview process began with an introduction of the interviewer along with a brief description of the research objective and topic. A semi-structured guide focused on guiding the respondent from broad to specific questions.

Each question had pre prepared sub questions to gain in-depth insight. The questions were designed not to lead the respondents in any way and this ensured that the interview bias was mitigated. (Proposed questions - see appendix C).

4.5.4   Recording and transcription

The transcription process provided a reliable depiction of the series of events during the interview. Each conversation was recorded while the interview was in progress. Post completion of each interview, the information was transcribed and edited. On completion of all the interviews, the information was then consolidated, coded and analysed. Evidence of the recording is available to be reviewed if required.

4.6   Data collection

The success of the case methodology was based on the ability to collect multiple sources of evidence. Yin (1994) identifies a multi-method approach that includes several sources of the qualitative evidence that is required. This includes the transcriptions from the interviews, the various documentation, direct observation, and physical artifacts. This is also known as a case study database (Dube & Pare, 2003). This multi-method approach provides a richer depiction of the series of events within the case study.

The marketing practices subject matter tends to be complex in nature and it is imperative to analyse and observe how the marketing practices are described and employed within the marketing context. This required a thorough observation of the respondents while they were being interviewed and an analysis of the practices while they were being implemented within the setting in the organisation. Further observations were recorded when the documentation was analysed. Zikmund (2003, p. 234) says that the participant, setting, purpose and social behaviour must be analysed when observing the social setting. This provided insight into both behaviour and motivations.

The relevant marketing practices and required characteristics were identified by analysing physical documentation. This included marketing presentations, strategies, plans reports and minutes of meetings. This was one of the only ways to identify the type of practices adopted using the social practice theory as a guide. This was then depicted in tables with a summarised view of the findings (Dube & Pare, 2003).

Case Study "research depends on multiple perceptions of reality" (Perry, 2001, p. 319). Perry (2001, p.319) suggests using "triangulation" to improve construct validation as it uses several sources of information.

4.7   Method of data analysis

The data analysis process that was required within qualitative research is simultaneous with the data collection (Creswell, 1994). While the interview was taking place, the information was recorded and transcribed to provide a context for analysis. It was also important to measure non-verbal communication and the relevant observations were recorded. Post completion of the interviews, the editing process took place to ensure that the information was valid and reliable. The information was then be summarised and placed in categories to identify similar themes. A coding system was useful to "identify and classify each answer with a numerical number or character symbol" (Zikmund, 2003, p. 457).

Yin (1994), suggests a method of data analysis called pattern matching. This is a form of analysis that builds a "textual explanation of the case". Categories or themes are created to capture the recurring patterns that emerged from the multiple sources of data collected. Quotes were then taken from the interviews and the documents to justify the conclusions (Perry, 2001, p. 316).

Quotes "bring in the voice of participants in the study" (Creswell, 1998, p. 170). The quotes provided a depiction of the relationship between the researcher and the participants, and are an appropriate use of data to support the conclusions (Dube & Pare, 2003). "Quotes present compelling evidence allowing the reader to reach an independent judgment regarding the merits of the analysis" (Dube & Pare, 2003, p. 620).

Once the emergent concepts were outlined they were compared with the theory, existing literature and documentation. This is known as a project review strategy (Yin, 1994) and was used to corroborate the essential facts and evidence presented in the case report.

4.8 Validity and reliability

Qualitative research is emergent by nature and as a result the validity and reliability was taken into careful consideration. According to Dube and Pare (2003, p. 615) "the goal of reliability is to minimise the errors and biases". They go on to say that this can be avoided by ensuring that the case research is documented using the "case study database and case protocol". This will allow another researcher to repeat the procedures and arrive at the same conclusions. To increase the reliability of the information presented in a case study, a key principle that was followed was the maintenance of a logical chain of evidence.

Perry (2001, p. 314 quoted from Patton, 1990, p.185) said that the validity, meaningfulness and insights generated from qualitative enquiry have more to do with the information richness of the cases selected, the observational and analytical capabilities of the researcher. The validity and reliability of qualitative research design was based on the "researchers presence, the interaction between the researcher and the respondents, the triangulation of data, the interpretation of perceptions and the rich description" (Merriam, 1998, p. 204).

Qualitative research, by nature, requires a level of exploration and insight gathering rather than scientific interpretation. The criteria for assessing validity and "reliability seems to be limited in qualitative data, Merriam (1998) suggests that there are numerous steps that can be taken to improve validity and reliability.

4.8.1   Validity

Internal validity can be improved through the following (Merriam, 1998):

·   Triangulation through using multiple sources to collect data

·   Ensuring that the data analysis confirms the conclusions drawn from the data

·   Involving all participants in all phases of the research

·   Identifying and clarifying interview biases at the beginning of the research

4.8.2   Reliability

Reliability refers to the degree of which measures are free from error and yield consistent results (Zikmund, 2003, p. 300). Within qualitative research, the reliability is based on whether the results are consistent with the data collection (Merriam, 1998). This can be achieved through (Merriam, 1998):

·   Triangulation through multiple sources of data collection

·   Identifying and clarifying interview biases at the beginning of the research

·   Providing a clear audit trail to show how the data was collected, the categories derived and conclusions drawn.

4.9   Potential biases and limitations

The following biases and limitations were identified

- The potential bias of the researcher such as leading questions and interpretation of answers (Yin, 1994).

- A response bias is also evident as the interviewer may influence the respondents. The respondents might not provide in-depth answers and as a result the observation and analysis of documents will need to provide greater insight.

- Judgement sampling was used to define the company and a sampling bias is evident.

- The research was conducted in a single organisation, namely Company X Group.

- An existing research methodology, which provided predetermined definitions, was used namely, Contemporary Marketing Practices (Coviello & Brodie, 2001) to assess the marketing practices.

CHAPTER 5:   RESULTS

5.1   Introduction

In this chapter, the research findings are presented and the sample characteristics described. This section details the various stages of the case study methodology to provide multiple sources of evidence and describe the current marketing practices within Company X. The social theory of practice has been used as a framework to provide a deeper understanding of these Marketing Practices.

5.2   The sample description

A large Financial Services company (Company X) was chosen as it depicts the various practices described within the CMP and STP theoretical constructs. Company X is a long standing traditional Financial Services Company and comprises of more than 200 people in marketing and distribution. They are involved in both local and global marketing activities. The marketing budget is over R50 million and it is listed on the JSE.

A description of the document analysis, in-depth interviews and observations provide the context for this qualitative research case study. The sample for the interviews comprised of 7 in-depth interviews from various levels and disciplines both within the company and amongst external partners.

It was imperative to ensure that the interviewees were from various disciplines within the marketing function and covered three tiers of seniority within the organisation. This consisted of two executives, two senior managers, and three executors including two external advertising agency partners/suppliers. The tenure of the respondents varied from 2 to 10 years of service at or with Company X. Most of the respondents had worked in two or more positions throughout their tenure and this added another dimension to the understanding of practices within the organisation.

5.3   Document analysis

The first goal was to identify and compile an extensive list of the marketing practices within the case setting at Company X. The document analysis provides a structure for the marketing practices and allows for an objective analysis. The document analysis guided the interviews based on the findings within the organisation. Multiple documents were prepared from 2007 – 2010.

The document analysis has been outlined according to the type of documents that are used within the marketing discipline such as strategic documents, industry information and reporting, research and tracking and internal recording and reporting. In order to validate what the respondents said, it was important to analyse documents according to the level of seniority, as each level would have access to different documents and would be involved in different practices.

Table 5: Document Analysis

DOCUMENT ANALYSIS			
This was comprised of the components of STP: Understanding, procedure and engagement			
DOCUMENT TYPE	**UNDERSTANDING**	**PROCEDURE**	**ENGAGEMENT**
Strategic Documents · Company X Group Annual Reports 2006 – 2009 · Group Brand positioning strategy · Marketing strategy 2008 – 2010 · Product Strategy · Company X Life FSB strategic plan for 2008 · Disruption consultancy analysis · Summary of key strategic shifts	· Business Strategy & Objectives: Volume / value of clients – referrals, migration and incentive - who to target with highest propensity to purchase (SM) · Role of customer experience (SMJ) · Build a long term relationship – From sale to relationship (SMJ) · The sales process (MJ) · Consumer risk profiles (MJ) · Executing strategy & objectives – acquisition/retention (MJ) · Target Market – Consumer information, demographics and psychographics (SMJ) · Business structures (SM) · Competitive	· The Marketing Approach: How to market to advisers and consumers (MJ) · Selling process (SMJ) · Adviser Remuneration/ commission structures (SM) · Consumer life time value (SMJ) · Adviser lifetime value (SMJ) · From initial customer sale to retention process (SMJ) · When do customers stay and when do they churn (SM) · Training – up skilling the advisers (SM) · The value chain/ relevant touch points (SMJ) · Activations – to advisers (MJ) · Communication	· Company – embedded value (SMJ) · Road shows – information sharing (SMJ) · Handing over the cheque -helping people when the are in times of need (SM) · The right advice – high commitment (SMJ) · The value of advice (SMJ) · Empowerment – the control continuum from coach to pilot (SMJ) · The long term relationship (SMJ) · When and where to connect /communicate (SMJ) · Role of reputation: skilled people, financial stability (SMJ) · Awards/ fame: incentive trips & cash prizes, certificates (SMJ)

	environment (SMJ)
	· Macro & Micro Environment (SMJ)
	· Marketing Aspects – product knowledge, pricing structures, distribution, promotion (SMJ)
	· Communication approach & Advertising (SMJ)
	· Hard vs soft sell – getting the message right (MJ)
	· Consumers life stage and income (MJ)
	· Brand proposition - Experience, empowerment/control and real tangible value (SMJ)
	· Selling advice to consumers (SMJ)
	  - Type of advice, how to give best advice (SMJ)
	  - Education & training (SMJ)
	  - Knowledge/ Experience (SMJ)
	  - Performance (SMJ)
	  - Pioneering spirit (SMJ)
	  - Innovation/technology (SMJ)
	· Value proposition (SMJ)
	  - Recognition (SMJ)
	  - Customer profile (SMJ)
	  - Bus development & leveraging (SMJ)
	  - Personal/professional development (SM)
		procedure to consumers/advisers (MJ)
		· Advertising process (MJ)
		· Sales, marketing and distribution tools
		· Segmentation – identify a need and satisfy it (SMJ)
		· Financial Planning - – when is the best time to save, invest or retire (SMJ)
		· How to invest and save (SMJ)
		· Managing your book – CRM, churn rate (SMJ)
		· Plan, measure & execute your campaign (SMJ)
		· Technology enablers and tools (SMJ)
		· Business model – how to unlock value (SM)
		· Customer experience (SMJ)
		· flexibility- based on consumer profile (SMJ)
		· Advertising and Marketing - Road shows, Brochures (MJ)
		· Migration strategy – keep the client for life (SM)
		· Checklist for needs driven offering (MJ)
		· Matching client profile (SMJ)
		· Product/service (SMJ)
		· Value proposition (SMJ)
		· Role of functional vs emotional aspects of the sell (SMJ)
			· Relationship management and performance – how communicate, understand needs (SMJ)
			· Level of support provided (SM)
			· Financial Needs analysis (SMJ)
			· Training/ development (SMJ)
			· Pride within the organisation, Trust/ credibility & heritage (SMJ)
			· Partnership (SMJ)
			· Role of culture – power to make decisions " the way we do things" (SMJ)
			· Level of influence (SMJ)
			· Measurement – performance – people and funds (SMJ)
			· Sales driven culture (SMJ)
			· Management buy in (MJ)
			· How to communicate – call centre, advisers, written, telephonic etc..(MJ)
			· How up sell, cross sell/ Repeat purchase (SMJ)
			· How to engage with customer (SMJ)
			· Research metrics and dashboard (SMJ)
			· Roles and goals (SM)
			· Role of the emotional messaging and the functional benefit that is created – leaving a legacy for those left behind/fear of loss (SMJ)
			· Alignment with all stakeholders (SMJ)
			· A common vision (SMJ)
			· Creating tangibility of what sell – profitability, productivity (SMJ)
			· Evidence and proof (SMJ)
			· Engagement with client (SMJ)
			· Cultural engagement – internal staff (SMJ)
			· Role of change – re-work, wastage and central strategic services (SM)
			· Managing sustainability

			· (SM) · Succession planning (SM) · Role of time spent – multiple contact/ duration (SMJ)
Industry information and reporting · Deloitte Insurance Models · Harvard Business Review – a learning organisation · SAIA – South African insurance association · The VIP forum	· The economy – future of changing dynamics vs current (SM) · The Industry(SMJ) · Trends – science and technology, e.g. longevity(SM) · Legislation – FAIS etc. (SMJ) · Pension fund adjudicator (SMJ) · Tax structures (SM) · wealth creation (SM) · Tax benefits (SMJ) · Social challenges/ change management (SM) · Saving/ planning ahead – for a rainy day, your Child's education/ when you are gone (SMJ) · Investment vs Insurance (SMJ) · Segmentation- customer/adviser (SMJ)	· How to talk to the consumer – simplify complexity, fear tactics (SMJ) · The level and ability to access your policy and communicate to with the insurance company (SMJ) · Role of the broker channels (MJ) · Competitor intelligence (SMJ) · Information/ sales support (MJ) · How to sell – based on lifestage /income (SMJ) · Modular advice: estate planning, insurance analysis, F&A, retirement planning, cash management (SMJ) · Mortality & morbidity (SMJ)	· Financial institution regulators e.g. FSB (SMJ) · Performance of funds (SMJ) · Case studies of success stories (SMJ) · Great advice realised (SMJ) · Role of technology – tangibility /accessibility (SMJ) · Role of story telling – lasting memories (SMJ) · Level of support provided for adviser teams – specialists, sell onto others, activity behind the scenes (SMJ)
Research and tracking · Research papers on protecting profitability in Insurance · Internal FA research documents · Report Summaries · Milward Brown Research	· Macro Environment – external factors (SMJ) · Insurance is sold not bought (SMJ) · The Adviser – IFA, Broker, Franchise and Agents (SMJ) · Insights - consumer behaviour (SMJ) · Brand: equity, awareness etc (SMJ) · The category conventions – low interest, indirect, grudge purchase, benefit seen upon death (SMJ) · Transparency /integrity (SMJ) · Brand trust /credibility · Mitigating risks – protecting against the uncertainty of life (SMJ) · Investment philosophy (SMJ) · Need expertise and intelligence (SMJ) · Experience – 50 years of existence, strong network and own the distribution chain 'advisers" – can provide wisdom & knowledge to consumers (SMJ)	· Plan, save and manage your finances (SMJ) · Premium structure (SMJ) · Research – consumer/ intermediary (SMJ) · Referrals – the value of word of mouth (SMJ) · Getting things done in the company – who to speak to and how to get approval (MJ) · Building up loyalty (SMJ) · Prevent Customers from churning (SMJ) · Referral tracking system – leads bank ensuring that the leads generated are converted (SM)	· Broker, IFA, Agents, Franchise communities (SMJ) · Security for your family (SMJ) · Empowerment (SMJ) · Deliver on promises (SMJ) · Alignment model – links everyone up (SMJ) · Co-creation (SMJ) · Relationships built over time (SMJ) · Better advice = better business now and in the future (for longer) · Helping the community/ environment (SMJ) · Claims stats – how many people have been paid out (SMJ)

	· Stability & reliability – saving for the future for me and my family (SMJ)		
Internal recording and reporting · Knowledge management Documents · EXCO reports – date · Minutes from key meetings · Briefs	· The organisation structure (SMJ) · Tacit knowledge – knowing how to deal with the brokers (SMJ) · Statistical and Actuarial Assumptions/ probability (SM) · service offering – set the customer expectation (SMJ) · Many specialists – based on area of focus and role in the business e.g. tax expert, trust officer, portfolio/fund manager etc (SMJ) · Assets under management (SM) · How to build relationships (SMJ) · Broad based wealth company: Categories of Life insurance, (long/ short term), Investment, Asset Management, Health Insurance, Property Management & Employee benefits (SMJ) · Strong focus on knowledge – industry, consumers etc – training, Insurance University, Wealth focus, training/ development (SMJ) · The need for experts to navigate through the complexity of the industry (SMJ) · Sales process (SMJ) · Follow up/feedback (SM) · Geting customers · Key terminology – simplification (SM) · Wealth creation (SMJ) · What is the economic value of each relationship (SM)	· Process from brief to execution (SMJ) · Sign off and alignment process (SMJ) · Incentive schemes (SM) · Internal communication(SMJ) · Sales initiatives – three key aspects per year (MJ) · The sales process – ownership of the customer (SMJ) · Policy documents from development to delivery (MJ) · Manage relationships (SMJ) · Time period – short, medium/ long (SMJ) · The underwriting procedure (SMJ) · Wealth philosophy (SMJ) · Front vs back office protocols and development (SM) · Incentives – client satisfaction, usage, growth, no of clients, length of relationship (SMJ) · Type of service – proactive or reactive (SMJ) · Rules – treat adviser like a king (SMJ) · Budget allocation (SM) · Product innovation (SMJ) · Financial needs analysis (SMJ) · Channel management (SMJ) · Measurement of complaints (MJ) · Recruit advisers, train/ sell (SMJ) · Create /capture knowledge (SMJ) · Procedures - long vs short term contract or policy (MJ) · SLA's – annuals reviews, frequency of contact, event initiatives (SM) · Book size/ Fees (SMJ)	· Remuneration and commission structures (SMJ) · Company – embedded value (SMJ) · Commission: consultation and management fees (SM) · Systems to measure and monitor (SMJ) · Service and support – for adviser/consumer (SMJ) · Mandate to commence projects – boundaries (SMJ) · Level of management input (SM) · Embedding process – based on time, agenda and level of commitment (SM) · Governance: Minutes, graphs, reports – feedback into the organisation (MJ) · Centralized relationship management (SM) · Incentives (SMJ) · 360 degree feedback (SMJ) · How breakdown complexity (SM) · Where to engage within the process (SM) · How to train people to have knowledge/ expertise (SM)

FREQUENCY – BASED ON LEVEL OF SENIORITY AND PRACTICE COMPONENTS			
CODE	Understanding	Procedure	Engagement
SMJ: Executives/ Senior Managers & Executors	36	42	49
SM:Executives/Senior Managers	13	10	12
MJ: Senior Managers /Executors/Junior	5	13	4

Document Analysis findings:

The document analysis has then been grouped based on level of seniority. The following code represents the same tiers outlined in the sample and includes: Executives (S), Senior Managers (M) and Executors (J). The coding represents documents that all the levels are privy to and this is represented by the SMJ acronym, SM represents the Executives and Managers and MJ represents the Senior Managers and Executors.

The findings show that when the frequency is measured, the Executives and Senior Managers (SM) are the most involved in the understanding component of STP and focused on the strategic documents. This is followed by engagement with a frequency of 12 and lastly procedure at 10. The Managers and Executors (MJ) have the highest score in the procedure and based on the groupings are the most involved in the internal recording and reporting documents.

One of the challenges identified within this research is that most of the practices are embedded within the organisation and are based on tacit knowledge. This made it difficult for people to define and provide an exact account of the practices. These documents provide an outline and substantial 'proof' of the type of practices within the organisation and act as tangible 'artefacts'.

5.4   Interviews

The purpose of the interviews was to identify the marketing actors within Company X and provide a rich description of the practices based on the respondent's perceptions. Throughout the interviews key themes emerged which have been identified and grouped with relevance to the specific research questions outlined. Nuances relating to the respondents level of seniority have also been highlighted so that specific similarities and differences across levels could be identified and observations drawn. This has been grouped according to the key research questioned as outlined in Chapter 3.

Marketing scope and overview

Prior to delving into the research questions, it was important to scope the marketing practices within the organisation. This initially explored the type of marketing activities and then outlined a description of the spontaneous marketing practice definitions. This provided a context for the research questions and allowed further in depth analysis.

Table 6: Marketing scope and overview: scoping marketing at Company X

MARKETING SCOPE AND OVERVIEW: Scoping marketing at Company X	
Type of Marketing practiced within the organisation	
THEMES	**COMMENTS**
"Relationship Marketing"	· This is based on the strong focus on sales to build the internal intermediary networks. · There is a relationship marketing focus with many different teams that have different specialisations.
Target Market split	· The target market split is 30% Brand and 70% Advisers. However there is a gap between the customers and the intermediaries. · Financial adviser is seen as consumer and the intermediary target market consists of the tied force, which are the agents and franchise owners, and the untied force, which are the independent financial advisers. · The target market is focused on the financial advisers, which are the intermediaries, with 85% of the budget allocated to target them. The other 15% is aimed to the end consumer. · The target market is evenly split between consumers and the Intermediaries or brokers who drive the sales.
Adviser focus/intermediated channel	· Most of the activities are geared towards the financial adviser and activations in the intermediary channel. · Marketing at Company X is aimed predominately at the adviser with a focus on product and retail based activity · Marketing to the advisers is where most of the concentration is.

	· This is based predominately on sales and relationships. "We are focused 100% on the adviser and the product and advice aspect more than anything else". · Marketing at Company X was historically focused on the financial adviser. This involved providing all types of marketing activities and collateral to enable the adviser to sell policies to the consumer. · "Giving advice and selling it to people". · "The business is sales driven but seems to be on a journey to becoming more consumer centric".
Staff	· Staff are key to market to specifically in Financial Services. · , "At times it seems as if we only market to staff, I am not sure if anything actually gets out into the market". · "The staff are the ambassadors of the brand and they live brand, they are the drivers of the business strategy and enable the business to operate effectively"
Specialised functions	· The business functions in silos and each division has different budgets and objectives and this leads to conflict between each department. · "There is no alignment at Company X between the multiple areas of specialty, we have outsourced our distribution and have intermediaries who are our customers".
Building trust and credibility	· Trust and credibility is important in financial services marketing and this is linked to the reputation of the company. · Editorial aspects and PR are the key activities that support this.
Brand Building	· Brand building aimed at consumers and advisers. · Marketing should leverage opportunities between all disciplines and build the brand. Some of the functions involve segmentation, sponsorship, corporate social investment, competitor insights and consumer research as the cornerstone of marketing practices. · Brand, product and market proposition development generally targeted to the financial advisers.
Integrated campaigns	· Integrated campaigns were developed using above the line and below the line channels being utilised. · The focus is on big external mediums that reach consumers, internal activity targeted at the internal staff. · This entails the use of big media types, brand building to generate trust and credibility. · "Traditional, integrated classic marketing" to a broad audience.

The scope of marketing within Company X was explored and the findings show that the type of marketing at Company X is focused on marketing to the financial adviser and is described as an intermediated business. This has resulted in specialised marketing functions and the practices seem to be tailored to these types of marketing activities. It was also mentioned that the staff are important, particularly within the Financial Services category. The types of activities include traditional integrated campaigns with the aim to build trust, credibility and strong brands.

Table 7: Marketing scope and overview: spontaneous practices – descriptions & themes

<table>
<tr><td colspan="2" align="center">MARKETING SCOPE AND OVERVIEW:

Describing marketing practices: Spontaneous practices – descriptions

Is there a clear description of the marketing practices in the organisation?</td></tr>
<tr><td>THEMES</td><td>COMMENTS</td></tr>
<tr>
<td>General Marketing activities</td>
<td>
·   Marketing Practices consist of general marketing activities based on developing marketing strategies and the implementation thereof.
·   This involves all the general marketing activities such as strategy and implementation.
·   Marketing practices are governed by the vision of the company followed by the brand and sales.
·   "What you are selling, to whom and why".
</td>
</tr>
<tr>
<td>Don't know</td>
<td>
·   Don't really know how marketing practices are described but they are so broad.
·   Practices are learned on the job and differ based on the client and scope of work.
</td>
</tr>
<tr>
<td>Best practice</td>
<td>
·   "It's all about 'marketing best practice" and I have seen these case studies".
·   Marketing practices are based on the best practice that follows international standards. "We tend to follow certain gurus both local and international, who coin a phase".
</td>
</tr>
<tr>
<td>Branding, advertising, marketing</td>
<td>
·   Marketing practices are branding, advertising and marketing.
·   "This is based on supply and demand of products and the marketing practices need to provide for demand". "The market is commoditized and selling the value of advice which is intangible and makes it harder to define".
·   Practices such as customer segmentation and insights.
</td>
</tr>
<tr>
<td>In development stage/ transition</td>
<td>
·   The company is in transition and the practices are still being developed.
·   Company X is in the process of developing these and they have already made a lot of headway.
·   Marketing is not consistent at Company X and the brand is not top of mind. The reason for this is probably due to the constant change of people and business objectives.
·   Many of the practices have changed based on Company X having to deal with the issues post the financial crisis and the external environment.
·   "Company X is moving away from being sales focused to have consumer know how and this is an outside in, approach, rather than inside out and this is a big change".
</td>
</tr>
<tr>
<td>Marketing processes</td>
<td>
·   "Marketing processes within the organisation to market the business and their offerings to the advisers and the end consumers".
·   Some of the activities described include specialised skills and disciplines such as brand development and management, advertising and events, brand internalization, product marketing, design and market research.
·   Marketing processes from strategy to execution.
</td>
</tr>
<tr>
<td>Business as usual</td>
<td>
·   "Most big companies in financial services pay lip service to marketing, especially if there is no representation of a marketing person on a board level".
·   "The focus is on business as usual which is selling policies and Company X is not focused on marketing per say and marketing is lipstick on the bulldog".
</td>
</tr>
</table>

A spontaneous definition of marketing practices was explored within the organisation and the findings show that there is no consensus or a firm view of marketing practices, how they are defined or what they are comprised of. There were a few respondents that commented outright that they don't really know how to define a marketing practice.

The respondents who commented on marketing practices described them as processes or 'best practice'. There is a general view is that marketing practices consist of the marketing elements that form part of the daily activities. There were a few respondents who expressed their opinion, saying that there is a distinct "lack of marketing practices within Company X". They depicted scenarios of business as usual where marketing was simply given "lip service". For others the lack of a clear definition is evidenced by their somewhat "narrow" description in that they outlined activities pertinent to their specific job or business unit.

There are no mentions of a holistic view that encompasses the three aspects defined in the STP framework, for example the embedding component seemed to be absent. The findings show that a holistic view of marketing practices is required along with a tighter definition.

Table 8: Research question 1 - Understanding themes

RESEARCH QUESTION 1:	
UNDERSTANDING When conceptualizing marketing practices, what type of skills, abilities and knowledge is required to gain a level of understanding for marketing practices to take place and yield performance?	
THEME	**COMMENTS**
Skills and resources	· There is a small number of people that are highly skilled at Company X. · "Skill and ability is not the problem, it is the lack of resources. The issue is that there is limited resource allocation with a few people doing larger jobs". · Company X is a large organisation and this requires people to understand how the company operates within the external environment. · Skills and knowledge about the industry are extremely important. This type of understanding is "a skill that is developed through experience and the more you know the more you learn". · 'Resources are needed prior to understanding" and Company X has "too few people doing too much".
Relationships/ People Skills:	· People skills are necessary when focusing on relationship marketing. · "It is important to understand the power of relationships as they are at the

	centre of all activities". This sales culture permeates through the organisation.
	· "Its about who you know and what relationships you have".
	· Marketing is at the centre of all activities and needs to build relationships amongst the various networks and play a coordination role.
	· "Relationships drive face to face contact".
	· Company X is a relationship-based business and "you have to know who is who in the zoo".
	· There are two distinct jobs that need to be understood. The first is relationship building and the second is classic brand building.
Internal environment - How the company operates	· "Just knowing how the different pieces fit together is a challenge and requires know how, to ensure one single minded coherent message.
	· "Understanding the company complexity and politics – who's who takes about a year to know". "You need to get buy-in upwards, sideways and downwards – team alignment is the biggest aspect.
Role of strategy	· Understanding is a 'strategic role'.
	· This involves various activities such as knowing how to develop a strategy based on value propositions and consumer insights.
Specialised skills are required	· There are many different specializations within the marketing function. It is important to understand systems thinking and view the marketing function from a holistic perspective.
	· "Even though there are various specialisations, all the various skills must be understood to ensure that everyone is on the same page".
	· "People are very narrow minded and focus on their job at hand and this causes silo thinking".
	· Company X business structure is extremely complex. There are so many aspects to understand and various specialised skills that are required to navigate through this complex industry and business.
Elements of Marketing discipline:	· "The 4 P's - understanding the product, price, place and promotions.
	· "Understanding the competitor strategy and activity is an imperative part of marketing as this forms part of the external landscape".
	· This is a category where the need is latent and it is a grudge purchase. The challenge is that the benefit is only seen when you die. This type of marketing is "services marketing and it involves selling the intangible".
	· Company X is 'sales driven and intermediated' and you need to know about relationship marketing because the stakeholders and the performance drivers are very different to traditional marketing.
	· "Marketing is the right balance between an art and science when developing and selling the value proposition to the right customer at the right price and right time".
	· Copywriting to simplify the products to benefits, technical product knowledge in multiple categories such as insurance and investments and the brand corporate identity.
Target Market:	· One of the most important aspects of this business is understanding the target market.
	· "It's not only about who you are targeting, its even more important to decide who you are not going to target and committing to that stance".
	· There is confusion between consumers and intermediaries and defining who is the customer is and they require a different set of skills".
	· Understanding the customers is important. For example "Company X's database should be cleaned to actually know who is on their books ". "If this knowledge and data is mined the customers could be rewarded for their loyalty and this will help retain more of them".
External environment	· Specialised skills are required to gain a good understanding of the many external and internal factors that drive the business.
	· "You have to provide advice to others about their financial matters and knowledge of the economy is one of the aspects that are needed".
	· The environment is fast paced and requires capabilities to deal with the speed of delivery. The studio and design capabilities are extremely important when quick turnaround is needed.

Complex industry and business structure:	· Company X's business structure is extremely complex. · There are so many aspects to understand and various specialised skills that are required to navigate through this complex industry and business. · "Insurance is a complex environment as there are three key areas that need to be understood – Company X, The Adviser and consumer". · "If they are not understood or aligned, the marketing efforts will not be effective as they are not pulling in the same direction and working together". · Company X is a complex industry and Senior Manager 1 commented that marketers need technical knowledge to educate the advisers and support them in all their activities. · The Insurance industry is a fast moving environment and the necessary skills must be developed to ensure quick speed to market. He gave an example of recruitment and project management skills that would facilitate this.
Takes time to build	· "It takes a long time to build and focuses on multiple product categories ranging from investments to risk". · "It takes a while to understand the lay of the land prior to knowing what is actually required".
Multiple stakeholders and alignment	· Company X operates in a complicated matrix structure with multiple stakeholders that need to be aligned and involved at every step. · There are multiple stakeholders and all messaging and activity should be aligned. · Knowing this business inside and out and understanding how to deal with the various decision makers in the various departments.
Knowledge is key	· Knowledge about the products, experience and service and is paramount to the marketing function. · Knowledge is key for learning and must take place continuously. Knowledge is important and is empowering and should be take place continuously. "People learn from shadowing because you learn by watching people and sometimes you are never sure if this is the right way of doing things". · Understanding the level of skill, knowledge 'know how'.
The business strategy	· The business strategy must be simplified and understood to ensure that all activities are aligned and that the advisers are selling products that add to the bottom line. · Understanding is important but the respondent felt that a clear vision should be defined first. · "We need to teach people what we stand for and what the key business drivers are first before pushing sales". · The business strategy must be understood and communicated.
Planning	· "Planning drives understanding based on where the business wants to go and who you are targeting". · "It's a conceptualisation process".
Leadership	· Role of leadership to filter down key business knowledge and understanding. The respondent added that "this helps to uncomplicate the complexity and stay focused on what the company is striving for". · "Senior management must understand people at a deeper level and talk to them about what is happening in the company, because information is powerful".
Need for change and adaption	· The company is always changing and knowing how to adapt is imperative in marketing. For example understanding technology as one of the aspects that drives change, and the impact of these trends must be understood to communicate to the various target markets. · "We must not be stuck in our old ways of doing things based on old knowledge". · "We must always reinvent ourselves and adapt accordingly".
Staff turnover	· There is no lack of skill but said that the issue is the high staff and adviser turnover as it takes a long time to understand the complexities. · A high rate of staff turn over is noted " a lot of knowledge has left Company X and this takes a long time to build up as it is very complex and technical".

Research question 1: Understanding

When questioned about the type of skills, abilities and knowledge required to gain a level of understanding for marketing practices to take place and yield performance; respondents observed that the understanding component is directly related to level of skills, knowledge and availability of resources (people). Most of the respondents believe that this is based on the strategy and conceptualisation.

There are multiple aspects that require understanding both within the external and internal environment:

·   Internal: This is based on understanding the company. How it operates, the multiple stakeholders and political nuances. This requires a high level of intellectual capital and sophisticated skills that relate to the industry and the marketing discipline. It is clear that there is not a lack of skill within Company X. Although, it was noted that the environment is complex and that specialised skills are needed. High staff turnover is seen as a result of the industry dynamism and this has a negative impact on the company's intellectual property. Leadership and senior management are essential as they are responsible for developing the company strategy, vision and objectives and filtering down messages and communication thereof.

·   External: This includes the economy, the industry, competitors, target market and internal stakeholders' and politics. Company X has been described as a complex industry and the level of understanding increases based on the multiple external factor conditions. It is observed that the changing dynamics of the macro environment such as the economy and legislation have an impact on the company and the level of understanding required.

It was observed that planning is needed to manage the high level of change and time is needed to implement and evaluate accordingly. However time and experience play an important role in this component and there are many specialist disciplines that need to be understood.

Table 9: Research question 2 - Procedure themes

RESEARCH QUESTION 2:	
PROCEDURE When implementing marketing practices, what explicit rules, principals, instructions and procedures are currently in place?	
THEMES	**COMMENTS/QUOTES**
Driven by the business strategy	· Its the process that links strategy to marketing. The company philosophy drives strategy development and then procedures follow. · Company vision and business strategy drive the marketing processes. · The processes help to achieve the objectives and strategy by driving execution for example the calendar of events drives the objectives. · There should be policies and procedures in place but they must be aligned to the business. · The planning and strategising needs to happen before so that the processes are single minded. It was noted that this gives direction and focus. Respondents believe that the structure dictates the processes.
Activation and implementation	· Processes are inextricably liked to successful implementation and this should be a priority as execution is a key driver of marketing. · "Marketing is actually more scientific than people in the organisation give it credit". · Procedure is defined as the marketing value chain with the many processes that make things happen along the way. "this is how people, products and distribution come together and there are relevant mediums that have an impact on the processes". · There are multiple diverse target markets, which also need to be taken into consideration as this process requires customisation prior to execution. · "Corporate Identity manual is an example of one of the activities to help facilitate processes but you need buy-in from all parties involved and aligned in the process". · Procedures and processes are important aspects within the marketing discipline and "they help get the job done. If they were absent the business would be in chaos".
Size plays a role	· Company X is 'a large organisation' and as a result all processes must be linked to strategy and company direction. · "Processes provide control in large companies – if you have a company over 1000 people this is essential".
Accountability	· "It's the accountability that is important when dealing with processes, but you need one person to be accountable and responsible". · Accountability is key especially because Company X operates in silos and each person needs to take responsibility for each aspect".
Limited processes	· Company X has nothing documented and there are very few procedures that people follow. "The obvious processes are in place, but no practices are really documented to drive the way we do marketing here". · "There are no corporate manuals of how to do things and not much corporate procedure in marketing". · There are not that many procedures in marketing at Company X. However it is based on the nature of the area and the leadership. · Company X as a 'big ship'. It was observed that the processes at Company X are limited and but noted that there are pockets of process that work really well. This is based on the experience and understanding of the marketing directors.
Inherent vs formalised	· "It's just the way things are done and they seem to get done". · Procedures are formal and informal processes take place within the organisation. · Procedures provide the guidelines for what people are supposed to be doing and this is based on the executional aspects of marketing.

Senior Management and leadership	· The Type of processes depends on the organisations appetite and the level of commitment from senior management. "By the time it filters down to marketing its worse e.g. the budget processes are just based on getting the numbers in or what you can get approved - it's a scrabbled mess to say the least". · "Marketing needs someone to govern procedures and take accountability for this". These processes must be defined and understood prior to commencing any marketing activity. · There is so much red tape and decisions tend to get stuck at an executive level and the whole process is vetoed". · The leaders define this and they set roles and responsibilities per division or team. These should be aligned to each other and linked to the business strategy.
Outsourced	· There is reliance on third party providers, "Third party partners add an extra layer of credibility". · "We have always relied on third party partners, as they are not part of the fabric of the company and it is much easier to change the output or even the supplier – the not invented here syndrome". · Suppliers and third party partners play a role within the processes at Company X and they actually are involved from the project commencement. "We give away too much of our IP and outsource our knowledge". · 'The advertising agency steps in to help guide the process'. "we are an extension of the clients marketing department". It is better for the agency to institute their processes such as briefing templates because this helps to facilitate the execution process.
Culture has an impact	· "A culture of sales" at Company X is based on the intermediary focus. This leads processes relating directly to 'the way things are done here'. · "There is a strong link of processes to the company culture, the problem is that at Company X there is a culture of inertia which is based on historical and legacy issues – the company is 50 years old". · There is a strong link between processes in place and the culture of the organisation and legacy issues provide the stumbling block for new processes to be developed. "We need to move with the times and change our procedures to facilitate positive change". · The culture of the organisation determines the processes. Company X is diversifying and as a result has many disparate companies. Economies of scale would help facilitate the process and allow for increased productivity.
Communication/ messaging	· Processes within the marketing discipline enable communication and messaging from the organisation to the advisers and the end consumers. · Staff is important. "It is one thing getting the administration aspects in order, but communication is one of the key aspects to bring people along the journey". · This takes a long time to establish but once the processes are in place it is a systematic approach that can be developed".
Requires Rigour	· Marketers need to add rigor to the practices. "Marketers should not be seen as marketing on a wing and a prayer – there needs to be specific processes". · There is no formalised body to govern what marketers do and how they do it. "There is so much freedom for people to talk rubbish and it is just accepted".
Rules and regulations	· Processes are the rules and regulations that drive corporate governance. "Governance helps to ensure that the business is run smoothly and the same processes must be implemented in marketing". The respondent commented that, " They must be linked to the business objectives and the problem comes in when these processes don't have any relevance to the executives". · Administration processes must be in place first and this then aligns to corporate governance, "Its how any company operates". · "85% of our time is spent on governance, ensuring that meetings take place, minutes are recorded and the information is shared". · Procurement is responsible for most of the procedures. · Procedures such as setting up contracts for all suppliers with the legal department, developing business cases for all projects, agency management processes and dashboards to measure and monitor.

Legislation and compliance	· Financial services companies have strict procedures due to legislation and the various regulatory bodies. Marketing plays a key role in compliance "for example all advertising needs to have the FAIS line and needs to be approved by the legal team prior to execution · There are many complexities and legalities that need to be adhered to which "have an impact on the way things should be done".
Change/ company transition has an impact	· The company is in transition and "this does not really allow many processes to stick". There is a diversification strategy in place, which means that the company has to expand first and is growing at a rapid rate. As a result there are not many enduring processes in place. · "You can implement processes today but the company will change and new processes will have to be implemented". · At Company X the structure is always changing which makes it hard to maintain the same processes".
Process	· Marketing does not really focus on procedures, as this term 'seems too formal'. Marketers need a level of freedom to allow for creativity. · "We generally speak about marketing processes and these change based on the type of activity and the people you are dealing with". · Procedures are processes require action. · Process is important in all companies and "no process leads to rework, specifically when executing campaigns and this leads to brand schizophrenia". · It is essential to design processes and to have them in place as it provides a level of clarity and prevents knee jerk reactions because no processes are in place. · "Process or procedure must have a purpose otherwise procedures don't make sense".
Repeated activities	· Activities that are repeated lead to processes and this requires a number of executions over a period of time. · Need to be coordinated and repeated and a process is put in place to ensure that all activities take place according to plan". · This is based on habitual behaviour and they are developed over time. "A process is when people do the same things" and "positive behaviour that is rewarded is generally repeated." · Feedback is an essential component and 'if things don't work you can learn from this, try again and repeat it in a different way'.
Behaviour drives process	· "Ego runs the process and it all depends on who you are, who you know and who you are friends with". · The sales environment governs all processes at Company X and this is based on the focus on relationship building. · "This is a result of the sales driven business and relationships drive behaviour, not the processes". · The brand procedures are followed at all times. "Brand footprints, Brand DNA and Corporate Identity documents are developed and policed".
Deadlines and quick turnaround	· Deadlines are always tight and quick turnaround is needed at all times. "This drives a negative behaviour and people do what they have to get the job done in anyway possible, they seem to ask for forgiveness rather than permission". · "There is so much to be done by too few people which leads to a state of anxiety and then inertia and this is counterintuitive to processes." · A high volume of output requires processes to ensure quick turnaround · Planning in advance and knowing what is needed will help to prevent last minute deadlines.
Flexibility and adaptability	· The processes in Marketing should not be too rigid. · " In Marketing we need flexibility otherwise people become frustrated". · Processes, particularly in marketing need to be flexible adapt and adjust.

Research question 2: Procedure

The respondents were questioned about the implementation of marketing practices, the explicit rules, principals, instructions and procedures that were currently in place. The findings showed that the procedures are termed processes within the marketing discipline. This was based on the activation and implementation aspects of marketing. In order for the processes to be successfully implemented they need to include multiple activities that are repeatable and reproducible to become "the way things are done" at Company X.

This involves all the rules and regulations and it is clear that a level of rigour is needed. Company X requires external regulators and legislation plays an important role. Accountability is key as there are quick turnaround times and deadlines drive the execution. However, it has been stated that marketing requires a level of flexibility and adaptability to allow for creativity to flourish.

The respondents believe that the processes are driven by the marketing strategy and business objectives. These need to be set by the senior managers and leaders of the business. The size and structure of the organisation dictates the type of processes required and the level of processes implemented. Culture and behaviour seem to be key drivers of procedures and this is based on the heritage of the company.

Company X's processes appear to be limited and the reason cited was constant change (external and internal) resulting in a lack of rigour. It is apparent that many of the processes are outsourced as a result of limited resources, multiple suppliers and a lack of documented processes.

Table 10: Research question 1 - Engagement themes

	RESEARCH QUESTION 3:		
	ENGAGEMENT What is type of engagement or emotional commitment expressed through actions/representations that takes place to successfully deploy and embed your marketing practices?		
THEMES	**COMMENTS**		
Commitment	· Engagement is a high level of interaction and commitment between people and processes. · Commitment is key to the success of the organisation as it is the level of interest engagement and effort applied. A high level of commitment is needed from above and below. "A high level of commitment and sufficient resources is what drives this". · A high level of commitment and involvement is needed from the key decision makers. · Level of commitment is directly related to understanding of and individual buy in "Company X operates in a matrix structure. Need to get buy in upwards sideways and downwards."		
Interaction with people and processes	· Engagement consists of all types of office interactions. · The term engagement is very broad "because every interaction is an engagement". · This includes networking between staff and colleagues as well as customers and advisers. "This is depending on where you engage with them and if it's part of your job description".		
Driven by the top down	· "The outcome of greater engagement will lead to more income for the organisation because the philosophical view of the chief executive can be pulled through from the staff and intermediaries to the end user". · Engagement to be a top down approach and the senior management dictates who will engage in what mechanism. · "If you want people to engage you need buy in from the top and if there is representation on a board level this will dictate the level of engagement". · Marketing "can't operate as an island and if there is no exco representation you are doomed from the start". · Senior management seem to set the level of engagement that is required within the organisation and this works hand in hand with aligning all the various disciplines. The executives have to drive this process and it is enforced even further as it is filtered down. · The role of the executives in the engagement process is key and marketing needs a seat at boardroom level before it can be taken seriously.		
Enduring and replicable	· Engagement should be enduring and the processes help to embed 'the way things are done' within the company. · Marketing processes must be entrenched in a replicable way. "Embedding is key to successful marketing practices at Company X and this is the aspect that can lead to increased revenue generation. The problem is that this is not the focus and no embedding leads to limited commitment and accountability". · The engagement process must be continuous and consistent, not sporadic.		
Embedding and engagement go hand in hand	· There are many technical systems are in place to ensure people are engaging. It was questioned whether the embedding process was effectively linked to the engagement activities. · The embedding process "helps to freeze the processes and the way marketing is done in the organisation". · Engagement practices are not effective if they are not embedded into the marketing function.		
Multiple stakeholders	· Engagement with the various stakeholders not only internally but also externally and the consumer is one of the most important areas. "The aim		

	at the end of the day is to increase profitability and this is where the rubber hits the road". · Is this effective when there are multiple parties involved? "The problem comes in when too many experts are put in one room and no-one wants to take accountability or do anything". · "You need to know who you are talking to, it's about understanding customers."
Relationships	· Engagement is based on the role of relationships that are built over time. "Because we are selling advice, this is intangible, it's the relationship and engagement that people buy into, not really the product". · Engagement is based on 'know who" rather than "know how". · Engagement is based on relationships. "The advisers own the relationship with the customers, they decide when and where engagement should take place. · Planning ahead facilitates the engagement process. "Once the everyday functional process stuff is out of the way (such as budget allocation and contact reports) the relationship building can start". · Engagement is based on the people involved and "you need buy in".
Business/compa ny structure	· Business structure also drives the level of engagement. "It's based on where you fit into the structure and who you report to. Your roles and responsibilities also drive this". · "This is where the real monetary exchange takes place"." We need to ensure that the advisers are energised and engaged at all times and we need to help them sell products by providing a support function". · Engagement is an important aspect of the key drivers of the brand and business strategy.
Measurement	· Measurement also drives behaviour and positive reinforcement leads to commitment over time and drives performance. · Many people have different measures that are not aligned. "Consistent, single minded key performance indicators and accountability to the strategic objectives is what should drive engagement". · Metrics are important to the level of engagement but you need relevant measurement tools.
Driven by communication	· Communication drives engagement along with the strategic direction that has been set. · This needs to be translated into a simple easy to understand executable elements and measurements thereof. · Communication and contact with people drives this. However this must filter down to all staff using language that the people can understand. · Good communication and change management systems must be implemented.
Integrity/trust	· The level of engagement is based on the integrity of the people and the product and services provided. "This is based on the heritage and culture of the organisation and this has been set in the company over 50 years". · "The role of the emotional connection is key this actually embeds the process along with each personal value and commitment". · Trust facilitates meaningful engagement. "People trust that Company X is solid and reputable. The processes and engagement with consumers must mirror that". · Pride, integrity and trust all add to how people and will dictate whether this process is enduring. "Successful engagement is based on how people are treated and valued". · The Insurance claim statistics of how much Company X has actually paid out to their customers provides a reason to engage and instils trust and credibility.
Collaboration	· "Collaboration and team work help to increase commitment and ensure that everyone is on the same page". · For example "co creation workshops, one on one talks, status meetings as successful mechanisms that lead to engagement". · When people engage new ideas are generated and this allows for new

	· thinking and different perspectives.
	· "Feedback drives and sharing information increases the level of sincerity when engaging and this should be enhanced by mentoring to develop lasting skills".
	· This allows all the specialists and external partners to work together.
	· "Clients can get more out of the agency through teamwork and good debates".
Roles and responsibilities	· Good processes allow for opportunities to engage and the roles and responsibilities must be defined upfront.
	· Engagement should be meaningful. At times people engage for the sake of it and there are too many people involved in the process.
	· Different roles are needed and the level of engagement is different between each party for example the agency creative development process.
Remuneration and rewards	· How people are incentivised drives how people behave and engage.
	· There is a strong emphasis on commission and this drives the level of commitment and engagement.
Respect	· Respect is the most important aspect to engagement, commitment and performance.
	· Respect builds long term commitment because it's how you treat people".
	· Egos impact engagement and "sometimes people are too busy looking out for their own turf and their own needs".
A company in transition	· Commitment is the most important aspect and "A high level of commitment is needed from the top, especially when the company is in transition".
	· Low morale is a detractor and this is spurred on by change fatigue.
	· "There seems to be "so much change at Company X and the staff are too scared to put in effort and commit because this will all change in a few months".
Ambassadors	· Engagement is about "ambassadorship" and noted that because "Company X is a sales environment, face to face engagement takes place all the time". This needs to take place with the right people.
Alignment	· "The hard part is ensuring that everyone is engaged and on the same page".
	· There needs to be a single focus area whereby all objectives are aligned
Long-term sustainability	· Engagement drives the enablement of the processes and leads to long-term sustainability.
	· Long-term relationships need to be built and nurtured over time.
Marketing is the hub of the business	· It is fundamental for marketing to be seen as a key discipline within the organisation.
	· Marketing acts as the central hub within the organisation and must be complimented by top down ratification.
	· Marketing is also responsible for effective communication internally and externally.
Training and learning	· Training and learning are important aspects when engaging. This teaches people what to do and how to do it.
	· Company X's weaknesses are the fact that they are seen as the trainers in the industry and to teach an adviser to sell and it takes about 18 months. Because of this there is a high turnover of staff, which hampers sustainable engagement.
	· Training sessions and workshops help people to engage. However, engagement should not be a once off exercise.
Diversity	· The rules of engagement have changed, particularly in South Africa. "Now we have a rich culturally diverse environment and must be taken into consideration.
	· The industry must engage with these changes and the various people accordingly.
	· For successful engagement, the processes need to include standardisation, particularly within a large organisation.

Research question 3: Engagement

The respondents were questioned about the type of engagement or emotional commitment expressed through actions/representations that have taken place within the organisation successfully deploy and embed your marketing practices. The findings showed that engagement is described as commitment, interaction and measurement. Marketing is seen as the hub of the organisation and as a result there is a greater need to engage and interact with multiple stakeholders.

Engagement is reliant on relationships, collaboration and alignment between people and processes. Through collaboration and communication, the appetite for engagement and level of commitment is increased. Ambassadorship and mentoring facilitate this and the mention of training and learning is a key aspect. The role of rewards and remuneration drive behaviours and create a platform and incentive to engage for a specific purpose.

Integrity, trust and respect on an individual level have been highlighted as a key aspect for a favourable environment to engage. Alignment between people and their personal values drives deeper commitment and intent. People need a specific purpose that is communicated clearly in their own language prior to engaging. There is a strong focus on the role of senior management and the belief is that this needs to be a top down approach.

It has been identified that companies in transition and amidst change hampers the openness to engage. It can be inferred that a positive, stable environment allows engagement to flourish.

Most of the respondents commented that engagement should to be repeatable and sustainable before it can be successfully embedded. Although, there was no mention of any relevant mechanisms.

Additional interview observations:

Post the in-depth findings regarding the three key research questions outlined. Additional interview observations aimed to provide insight into how the components of STP (understanding, procedure and engagement) work together or do they exist in isolation.

Table 11: Additional interview observation themes

ADDITIONAL INTERVIEW OBSERVATIONS: Do they work together	
THEMES	**COMMENTS**
They work together	· They all lead into each other. · All these activities are interconnected and one is not more important that the other, certain businesses will focus on one element within the practice more than the other for example in services marketing. · A balance of all three aspects is important. · A balance is important, "they are all rolled up into one, generally intellect is needed for this".
A focused direction	· The company vision provides the northern star and guides practices accordingly. · "This will add value and help people to focus on one activity at a time instead of trying to get everything done at the same time".
Business alignment	· "Business alignment is the value add". · "Agencies should not make assumptions about what is going on or what should be happening. They need guidance from the client and clarity to allow for a smooth relationship".
Knowledge and engagement	· Knowledge and engagement are first and then processes are last. However , "even though the processes are how you execute. This is the most critical aspect of how you engage". · Understanding leads to engagement that is underpinned by processes
Understanding and communication	· Understanding is important and emphasised knowing who you are talking to. · The value is generally placed on the output not the process. He commented that "the level at which one communicates is key and should be aligned and focused".
Reinforcement over time	· Practices are habitual and it is the marketing experience that is built over time through reinforcement and consistency.
Clarify definitions	· These definitions need to be understood before any action takes place. He believes strongly that "marketing practices should actually start with the business strategy".
Strong link to culture and understanding	· "There is a strong link to the way practices take place at Company X based on the cultural nuances. These are not really known until you have been at working there for a while".
Commitment from the top	· Commitment from the top should come first, followed by understanding throughout, skills and then engagement. · "If you get the first two right, engagement becomes self-fulfilling".

The additional observations showed that most of the respondents believe that all the components must work together. None of the respondents indicated a specific order in which they should operate. However, it was mentioned that understanding and engagement play an important role followed by process. It should be noted that there was no order of importance.

It was mentioned that practices should be habitual and time plays a key role. In addition, the culture and senior management who should set the direction and drive the process influences this.

5.5 Observation

As highlighted earlier, it is apparent that there is always a discrepancy between what people say and what they do and as a result the practices in action have been observed and recorded. The observation adds another layer onto this multi-method approach and leads to a more robust triangulation of the research findings. A summary of the observations recorded provides an objective account of what people are actually doing as well as the behaviours exhibited. This view of the nuances involved in the practices within the organisation enables the corroboration, or otherwise, of emerging themes drawn from the document analysis and interviews.

Table 12: In-Company Observations and Comments

IN COMPANY OBSERVATIONS/COMMENTS		
UNDERSTANDING	**PROCEDURE**	**ENGAGEMENT**
Positive/ Neutral Observations		
· Relationship marketing focus. · There is both B2B and B2C marketing, which is split up into retail and institutional divisions. · Industry bodies govern some procedures such as legal compliance. · Procedures differ based on who targeting – advisers, staff or consumers. · Blurring of the lines –	· The business is intermediated - advisers are the company's primary distribution network. · Limited knowledge repositories – no access to procedure records. · Procedures predominately focused on the adviser. · Advisers need to have a Certified Financial Planners (CFP) qualification prior to giving real advice. · Body language – geared to	· Level of referrals and word of mouth are high. · The advisers own the relationship. · Company Measurement and incentives are based on the traditional sales model. · Influenced by degree of collaboration of internal structures and systems. · Drives levels of interaction and satisfaction.

financial services products and offerings. · Intangibility of industry increased need for deeper understanding. · Three key levels to know about – Company X, Adviser and customer. · Legacy practices are still embedded deeply with many people who have been in the company for years.	selling. · The company was focused on acquisition and due to low persistency ratio's retention has become the focus for the organisation & practices – a multidisciplinary customer retention task team has been established that reports independently to Exco. · Advisers recruit others through relationship building – reliance on intermediated processes. · Practices change based on BU and focus area. · Procedure highly regulated E.g. PPI (personal protection act).	· The commission structure drives sales and behaviour both internally and externally.
Negative Observations		
· Culture - fear of sharing, based on too much change. · Gap between senior and middle management. · Work in silos – separate business units have their own unique practices. · Importance of Technology and operational support is underestimated. · Slow moving – takes a while to change. · The advisers own the relationship with end customer – loss of IP. · Reliance on third party suppliers – loss of IP. · Knowledge not explicit – takes a long time to understand the structure and the industry.	· Changing to consumer centric – taking time – dual target market and two pronged business and marketing strategy/approach. · Economic volatility has driven change in the organisation and the practices. · Structural inefficiency – being consistent is a challenge. · Majority marketing activities aimed at the financial advisers, broker force and independent financial advisers – limited focus.	· Seems to be quite a closed community and environment. · Consumer affinity to Company X is limited due to reliance on intermediaries. · Engagement is based on strong relationships – sales and relationships go hand in hand. · Intangibility of the sector – need for more relationship based activity. · Staff' turnover is high - indicator lack of Long-Term engagement. · Advisers need to be continuously recruited – high churn rate. · Personal efficiency low – indicator of low commitment.
Total Observations: 16 **Positive/Neutral: 8** **Negative: 8**	**Total Observations: 13** **Positive/Neutral: 9** **Negative: 4**	**Total Observations: 13** **Positive/Neutral: 6** **Negative: 7**

In-Company observation findings:

The in company observations were grouped according to positive/ neutral and negative categories to evaluate the practices based on the findings in the document analysis and the interviews.

The levels of Understanding is high across all levels. Investment (financial, time, skill) in obtaining external and internal knowledge is high. This is translated well into strategic and planning documentation. Communication at upper levels is good but failure to carry through to lower levels via successful avenues of engagement is apparent.

Procedures within certain BU's / aspects of the business are high e.g. Intermediaries and relationship building procedures are well established. This is not surprising as these are traditional focus areas of the business. However, they are lacking in the internal and consumer direct aspects of the business. This is indicative of lack of follow through on the plan towards more consumer centric approach.

Engagement across the organisation is extended to third party suppliers and the staff and intermediary network are experiencing high turnover. This is a result of low levels of commitment, high churn and moderate to low levels of personal efficiency. This is partly attributed to an outdated remuneration model which does not recognise or reward the additional value created by follow through of marketing practices.

The document analysis and observation methodologies have validated the existence of the components of STP within marketing practices at Company X. Understanding and procedure score the highest number of observations followed by engagement. This shows that the procedures and understanding components come through the strongest and are the most prominent. Engagement seems to be less prominent, as it scored the lowest. These insights will be explored further in chapter 6.

CHAPTER 6:   DISCUSSION OF RESULTS AND FINDINGS

6.1   Introduction

This chapter combines the key observations identified in the literature reviewed in chapter two and the research results presented in chapter five. The qualitative case study methodology used three aspects of analysis that included interviews, document analysis and observation. Gillham, (2000) stated that "one source of evidence is not likely to be sufficient".

This study aims to gain a deeper understanding of marketing practices, drawing from the principles defined in the social theory of practice (STP). The opportunity exists to look broader and deeper using insights from another discipline such as sociology to understand the theory in more detail and build on the CMP gap identified

A qualitative analysis of various practices within the case setting has been undertaken. This research focused on ascertaining insights and opinions to gain a rich description of marketing practices within Company X. The document analysis provided the context, the interviews have provided the richest source of information and the observations have corroborated some of the insights. Examples of marketing practices in Company X have been cited to depict the practices in action. This attempts to establish a marketing practices model based on the interviews and theorectical contructs.

6.2 Marketing scope and overview: providing a context for marketing practices

6.2.1 Scoping the type of Marketing at Company X

OVERVIEW: Is there a clear definition of Marketing Practices in the organisation?		
QUESTION/FEATURE	**KEY THEMES**	**DESCRIPTION**
Type of Marketing at Company X	· "Relationship Marketing". · Target Market split · Adviser focus/intermediated channel · Staff · Specialised functions · Building trust and credibility · Brand Building · Integrated campaigns	Marketing at Company X is predominately /Relationship Marketing based. There is a focus on the intermediated channel and the Financial Adviser.

Company X has been described as a broad based financial services company. Currently the focus is still heavily skewed towards the intermediary channel. This is apparent by the fact that marketing investment allocation is 70% aimed at the adviser and 30% at the end consumer. This provides the context within which current marketing activity takes place within Company X and the practices are customised accordingly.

6.2.2 Is there a clear definition of marketing practices in the organisation?

OVERVIEW: Spontaneous Marketing Practices description		
QUESTION/FEATURE	**KEY THEMES**	**DESCRIPTION**
Spontaneous Marketing Practices	· " Relationship or General Marketing activities" · Don't know · Marketing best practice · Branding, advertising, marketing · In development stage/ transition · Marketing processes · Business as usual	There is no clear definition of marketing practices. The description ranges from being seen as the marketing process, activities and best practice.

All the respondents were asked to give a spontaneous definition or description of marketing practices. This observation shows via means of multiple responses, across all levels within the organisation, that there is no single definition. Most of the respondents

define marketing practices as " the general marketing process from strategy to execution", or they describe the type of activities that they are involved in such as 'branding, advertising or consumer research'. Some of the respondents replied that they didn't know.

As a result of this, it was observed that there is an inconsistent understanding and application of marketing practices against the STP definition. In addition, it was observed that each tier sees the marketing discipline based on their level of seniority and experience. This finding was supported by the examination of relevant documentation within the organisation where no example or attempt of a definition was provided. This includes but is not limited to the strategy documents, industry information, research and tracking and internal recording or reporting documents. For example, the Executives and Senior Managers are focused on the strategic aspects and seem to describe these aspects, whereas the executors are focused on the process and implementation.

6.3   Research questions: Identifying and describing the marketing practices

The "social theory of practice (STP) anatomy that includes understanding, procedure and engagement" (Schau, *et al*., 2009) has been used as a basis to provide a holistic point of view of the marketing practices that are present within the organisation. The research findings show that all three components are observed within Company X. This is indicative of the potential relevance and usefulness of the STP framework in assisting in moving towards a tighter definition of marketing practices.

Marketing is a multidisciplinary function and as a result different views and definitions have emerged. This calls for a tighter definition, a deeper description and a common understanding of all the aspects within marketing (Webster, 1992, Webster, 2003, Wind, 2009). The interviews and document analysis have provided a detailed portrayal of how this framework is described and applied across the various levels within the organisation.

6.3.1   Understanding: Summary

RESEARCH QUESTION 1: When conceptualising marketing practices, what type of skills, abilities and knowledge is required to gain a level of understanding for marketing practices to take place and yield performance?		
FEATURE	**KEY THEMES**	**DESCRIPTION**
Understanding	· Skills and resources · Relationships/ People Skills · Internal - How the company operates · Strategic role with senior involvement · Specialised skill · Marketing discipline · Target Market · External environment · Complex industry and business structure: · Takes time to build · Multiple stakeholders and alignment · Knowledge · The business strategy · Planning · Leadership · Change and adapt · Staff turnover	**Understanding has been described as the conceptulisation stage and this involves skills, knowledge and resources. This is the strategic development whereby the external and internal environmnet must be understood along with the target market, relationships, procedures and specialist/ Marketing discpline related skills. Time plays a key role in developing specific skills and experience. The role of senior managers is seen to be high.**

Understanding described

Understanding has been described in Company X as a level of skill and knowledge that is required prior to activity. This is congruent with the STP literature and it is defined as general procedural understandings and knowledge, what to say and do, explicit, discursive knowledge. This is also described as "know how or tactic cultural templates for understanding and action". (Schau, *et al*., 2009, p. 47).

The understanding component is viewed as the conceptualisation stage whereby the strategy and company objectives are set. There are multiple inputs required that provide the 'know how' and knowledge to make decisions and set goals. Most of the documents that were examined in this category fell into the strategic documents grouping.

The findings showed that understanding is 'a given, 'if you are hired for a certain role you have the skills to perform this function'. Observation shows that knowledge takes time and requires a level of experience especially within an organisation operating in a complex

industry. Executive 2 emphasised that Company X is a large organisation and this requires people to understand how the company operates within the external environment. Skills and knowledge about the industry are extremely important. The respondent defined this type of understanding as "a skill that is developed through experience and the more you know the more you learn". The document analysis provides proof of this as the executives and senior managers developed most of the documentation in this section.

At Company X, understanding is relatively high. There is wide understanding of the strategic move towards a more consumer centric approach and the need for this move is in response to the changing marketing dynamics. It is evident that the vision is clearly expressed in the documentation and all respondents noted this strategic change in direction.

General findings and insights

The company legacy: The company legacy has an impact on the type of understanding that is required. However, this tends to be deeply embedded within the organisation and takes a fair amount of understanding prior to understanding 'how the organisation operates'.

The complexity of the environment: The level of knowledge and skill required varies based on the size and type of organisation, the industry complexities and even the level and company maturity.

Target Market: Beyond skill and knowledge it is also important to know who you are engaging with and talking to. For example, the target market is a key aspect as most of the strategic objectives and insights are geared towards satisfying a need and want. Executive 1 noted that the most important aspect of this business is an understanding of the target market. "It's not only about who you are targeting but it's even more important to decide who you are not going to target and committing to that stance".

6.3.2 Procedure: Summary

RESEARCH QUESTION 2: When implementing marketing practices, what explicit rules, principals, instructions and procedures are currently in place?		
QUESTION/ FEATURE	**KEY THEMES**	**SUMMARY**
Procedure	· Driven by the business strategy · Activation and implementation · Size plays a role · Accountability · Limited processes · The way things are done · Senior Management and leadership · Outsourced · Culture has an impact · Communication/ messaging · Requires rigour · Rules and regulations · Legislation and compliance · Change/ company transition has an impact · Process · Repeated activities · Behaviour drives process · Deadlines and quick turnaround · Flexibility and adaptability	**Procedure has been described as Marketing process. This is the implementation stage, whereby the strategy is executed through various channels and mediums. This is the end-to-end process that links strategy and activation. Company culture and leadership play an important role and influence the type, level and operational aspects of processes. This requires repeatable, habitual behaviour to enable performance.**

Procedure described

Schau, *et al*., (2009, p. 47) defines procedure as skills and abilities, tacit, embedded knowledge or how-to. They go on to say that this is made up of explicit rules, principles, precepts and instructions. It is interesting to note that most of the respondents referred to procedures as a 'process' and referred to marketing processes rather than procedures. They also felt that procedures appear to be quite clinical and marketing needs to have a level of flexibility and creativity, even within the processes.

Within Company X, this component is generally seen as the marketing end-to-end process and the multiple activities required for successful implementation. Executor 1 described procedures as 'processes that require action'. This respondent noted that this is based on habitual behaviour and said that they are developed over time. The respondent observed that "a process is when people do the same things".

The document analysis provides relevant insight into the type of documents required within this component as most of the documents examined fell into the internal recording and reporting category. It is also observed that most of the Senior Managers and Executors are focused on procedures. Executor 1 stated that, "85% of our time is spent on governance, ensuring that meetings take place, minutes are recorded and the information is shared". A Senior Manager noted that "the process should be a priority as execution is a key driver of marketing". He also stressed that, "Marketing is actually more scientific than people in the organisation give it credit".

In marketing many things happen at the same time and as a result, they don't necessarily have to be in a particular order. However, processes are important to ensure successful implementation. This shows that there is a need for a universal understanding of the broader aspects that make up marketing practices. Most of the interviews and documents are testaments to this type of thinking. It is apparent that more rigour through discipline and accountability is needed. For example, a Senior Manager commented that "Accountability is especially key because Company X operates in silos and each person needs to take responsibility for each aspect".

At Company X, due to low persistency rations, retention has become the focus for the organisation and marketing practices. A multidisciplinary retention task team has been established in the organisation, Specific champions have been appointed in each Business unit. This task-team reports independently to the Exco. These champions are tasked with ensuring that a more consumer centric approach is applied to the procedures within each business unit.

A two-pronged procedural approach was applied working with the intermediaries. Products were renamed and simplified and fresh marketing collateral was supplied for consumer distribution. A brand campaign with revised consumer centric messages was launched. However, this is a long-term change management process and there are still a few things

lacking, for example there are limited procedures that allows the company to liaise directly with the end consumers and there is still a heavy reliance on the intermediary channel. Remuneration is linked to behaviour change and these models take time to revise and update. The greatest challenge is consistency in application of procedures, practices and activities across the business.

General findings:

Marketing practices are outsourced: Executor 1 believes that there are not that many procedures in marketing at Company X. A lot of the time the intellectual capital is outsourced to suppliers and partners due to the lack of resources and procedures within the organisation. In addition, he noted that this is based on the varying needs of the business units and the leadership.

The role of leadership: "Marketing needs someone to govern procedures and take accountability for this". This respondent went on to say that these processes must be defined and understood prior to commencing any marketing activity. He emphasised that the role of leadership is what drives this".

Culture has an influence on process: There is a strong link between processes in place and the culture of the organisation, and legacy issues have become a stumbling block for new processes to be developed. One Senior Manager emphasised the " need to move with the times and change procedures to facilitate positive change".

6.3.3   Engagement: Summary

FEATURE	KEY THEMES	DESCRIPTION
RESEARCH QUESTION 3: What is type of engagement or emotional commitment expressed through actions/representations that takes place to successfully deploy and embed your marketing practices?		
Engagement	· Commitment · Interaction with people and processes · Driven by the top down · Enduring and replicable · Embedding/engagement go hand in hand · Multiple stakeholders · Relationships · Business/company structure · Measurement · Driven by communication · Integrity/trust · Collaboration · Roles and responsibilities · Remuneration and rewards · Respect · A company in transition · Ambassadors · Alignment · Long-term sustainability · Marketing is the hub of the business · Training and learning · Diversity	**Engagement has been described as commitment and relationship building. It is based on the level of interaction between multiple stakeholders. The role of leadership is key and this is a top down approach whereby buy-in and understanding are needed. Rewards and incentives drive behaviour and measurement is important. Teamwork is essential for enduring engagement. This must be embedded in the organisation and is only realised over time. It is not currently seen as a key marketing practice but to enable performance it must be lasting.**

Engagement defined

Engagement has been defined as 'emotional commitments expressed through actions and representations, such as purposes, beliefs, and emotions. This includes "end and purpose, which are emotionally charged, in a sense that people are attached or committed to them" (Schau, *et al*., 2009, p. 47).

The respondents believe that a high level of commitment is a necessity. 'A high level of commitment is needed from above and below'. This involves measurement and incentives and is based on building relationships. Executive 1 stated that commitment is key to the success of the organisation as it affects the level of interest and engagement and effort applied.

The document analysis and observations have shown that even though the respondents talk about the importance of engagement and embedding, this aspect is not necessarily viewed as part of the marketing process. It was however noted that the activities involved in the engagement process consist of remuneration, incentives and rewards, which are behaviour based.

In company X, there is acknowledgement that engagement is essential. There is a high correlation between the levels of engagement and commitment. It was observed that there is a distinct lack of follow through from understanding of procedures to engagement when moving towards the strategic goal of becoming a consumer centric organisation. This is evidenced by low personal efficiencies, high staff turn over and intermediary churn. There is a perception that contact with the customer is still the 'right' of the intermediary'.

General findings:

The role of senior management: The respondents reinforced the fact that senior management should set the engagement processes. Following on from this point, the role of ambassadorship, mentorship and support play an important part in the level of engagement and commitment.

Engagement through embedding: Engagement should be enduring and as a result the marketing practices are embedded over time to become 'the way things are done' within the company. Marketing processes must be entrenched through various levels of engagement, in a replicable way. Executive 1 said that "Embedding is key to successful marketing practices at Company X and this is the aspect that can lead to increased revenue generation. The problem is that this is not the focus and no embedding leads to limited engagement, commitment and accountability".

It is observed from the document analysis and interviews that the embedding process happens in isolation from the rest of the marketing functions. In order for practices to be

embedded they need to be understood and accepted. The embedding process requires for practices to be repeatable and reproducible.

Respect and pride: A positive environment tends to foster successful practice management. Respect and pride came through as interesting points and Executor 1 commented that, "your personal values need to be aligned".

6.4   Additional observations:

OBSERVATION: Do these components link/work together?		
FEATURE	**KEY THEMES**	**DESCRIPTION**
Do they work together?	· They work together · A focused direction · Business alignment · Knowledge and engagement · Understanding and communication · Reinforcement over time · Clarify definitions · Strong link to culture and understanding · Commitment from the top	**The components must work together. However no specific order is required. Understanding and engagement play an important role as does process. It should be noted that there was no ranking or order of importance.**

Schau, *et al*., (2009), notes that the practices that work together lead to increased performance. Practices need to be reproducible and enduring in order to become habitual and tacit (Reckwitz, 2002, Schatzki, 1996), It is observed that all components are present within marketing at Company X. All the respondents believe that they should work together. However they need to be guided by senior management. "A focused direction from the top is what is required prior to commencing".

All three components within the marketing practices definition need to be aligned and work together. There was also a comment about the role of the company culture and the need to clarify the definitions of each component. This is a reinforcement of the 'loose definitions' within marketing as highlighted within literature. Some respondents believe that these components should be reinforced over time and aligned to the long-term business strategy in order to have any impetus.

It is clear that each component is observed within the marketing discipline although a distinct definition and defined interlinking structure is lacking. The need for a comprehensive framework to identify and describe the relevant marketing practices within an organisation is implied.

6.5   Summary of key themes

The following provides a summarised view of the key components from the interviews, document analysis and observations within Company X (see table 13). This is then linked back to the research questions and uses the findings to provide a high-level outline of the marketing practices using the STP framework. This not only identifies the various types of marketing practices, it describes how they are defined, explains the components and describes how they work together. These themes are based on the literature reviewed in chapter 2.

Table 13: Summary of key themes

MARKETING SCOPE AND OVERVIEW: Marketing scope and spontaneous definition of marketing practices in the organisation		
QUESTION FEATURE	**KEY THEMES: DESCRIPTION SUMMARY**	**FREQ**
Marketing at Company X	Marketing at Company X is predominately relationship Marketing based. There is a focus on the intermediated channel and the Financial Adviser.	NA
Spontaneous Definition of Marketing Practices (Description)	There is no clear definition of marketing practices. The description ranges from being seen as the marketing process, activities and best practice.	NA
RESEARCH QUESTIONS: Understanding, procedure and engagement		
RESEARCH Q1: **Understanding**	**Understanding** has been described as the conceptulisation stage and this involves skills, knowledge and resources. This is the strategic development whereby the external and internal environmnet must be understood along with the target market, relationships, procedures and specialist/ marketing discpline related skills. Time plays a key role in developing specific skills and experience. The role understanding amongst senior managers is seen to be high.	MEDIUM
RESEARCH Q2: **Procedure:**	**Procedure** has been described as Marketing process. This is the implementation stage, whereby the strategy is executed through various channels and mediums. This is the end-to-end process that links strategy and activation. Company culture and leadership play an important role and influence the type, level and operational aspects of processes. This requires repeatable, habitual behaviour to enable performance.	HIGH
RESEARCH Q3: **Engagement:**	**Engagement** has been described as commitment and relationship building. It is based on the level of interaction between multiple stakeholders. The role of leadership is key and this is a top down approach whereby buy-in and understanding are needed. Rewards and incentives drive behaviour and measurement is important. Teamwork is essential for enduring engagement. This must be embedded in the organisation and is only realised over time. It is not currently seen as a key marketing practice but to enable performance it must be lasting.	LOW
ADDITIONAL OBSERVATIONS: Do these components link/work together?		
Do they link together	The components must work together. However no specific order is required. Understanding and engagement play an important role as does process. It should be noted that there was no ranking or order of importance.	NA

6.6 Key Learnings

Within Company X, the components of marketing practices as defined by STP have been described. The level of understanding and processes has been identified as key marketing practices. In addition, it was noted that engagement and levels of commitment are limited and this need to reinforced using embedding mechanisms. Looking through a 'practices lens', provides a comprehensive view of the marketing practices and a rich description of how the components can work together to enhance company performance.

Figure 5: Marketing practices defined within STP framework

Understanding is the conceptualization stage and this involves skills, knowledge and resources. This is the strategic development whereby the external and internal environment must be understood along with the target market, relationships, procedures and specialist/ Marketing discipline related skills.

UNDERSTANDING

Social Theory of Practice (STP)

(Source: Schau, Muniz, & Arnould, 2009, Reckwitz, 2002, Schatzki 1996)

PROCEDURE

ENGAGEMENT

This is the implementation stage, whereby the strategy is executed through various channels and mediums. The end-to-end process that links strategy and activation. Company culture and leadership play an important role and influence the processes. This requires repeatable, habitual behaviour to enable performance.

Engagement is commitment and relationship building, the level of interaction between multiple stakeholders, The role of leadership is key, a top down approach - buy in and understanding is key. Rewards and incentives drive behaviour and measurement is important. teamwork is essential for engagement. Must be embedded and is only evident over time, to enable performance must be long term.

This model provides a deep rich description of marketing practices and depicts a framework that helps to organise the practices and provide a holistic structure that includes all the key components. This aims to ensure that if all aspects are at play, it will ultimately lead to a greater level of understanding, streamlined processes and enduring engagement (figure 5 above).

CHAPTER 7: CONCLUSION

7.1 Introduction

The aim of this study was to gain a deeper understanding of marketing practices, the STP definitions have provided rich descriptions and a relevant theory base to develop a comprehensive framework to explore the definitions and application within a Marketing based organisation in more detail.

The research questions which were in line with the three components of STP (understanding, procedure and engagement), provided a framework to explore and describe marketing practices in more depth.

The issue outlined in Chapter One described the Challenges facing the marketing discipline. The role of marketing is changing and many authors have been calling for a new definition of marketing (Wind Y. , 2008) and even cited the decline and dispersion of the marketing discipline. (Webster, 2003; Webster, *et al*., 2005a; Webster, *et al*., 2005b).

Webster (2005), stated that "we need ways to bring Marketing closer to the boardroom table" and one of the ways to facilitate this, is to provide a framework to assist with re-examining the marketing, as we know it. As the environment is rapidly changing, the marketing discipline needs to adapt and change with it. This will enable all marketers and business people alike to speak the same language. It is clear that Marketing Practices are loosely defined and a tighter definition is needed.

7.2   Summary of findings

The research explored marketing practices using the STP framework, an applicable proven model that is adapted from the field of sociology, it has practical application and potential to add value. This provided an in-depth understanding of the etymology for the term 'practices' in an attempt to explore the components in more depth. This 'anatomy of practices' (Schau, *et al*., 2009) was used as a base to provide a comprehensive framework and it included understanding, procedure and engagement.

The case study methodology was used to gain insight into Company X. Multiple methods were used to triangulate the data and provide in-depth insights into the marketing practices within a large, long standing financial services company. It was observed that Company X places a large amount of emphasis on marketing, but has a lack of focus on the marketing discipline, as it is difficult to measure the value that it adds. This is a result of the major shifts within the financial services industry over the last few years and Company X has had to respond to this change.

The aim of this research was to provide a rich description and a deep understanding of the marketing practices within Company X. Three key research questions explored these objectives and identified the current marketing practices, using the STP framework.

The scope of marketing within Company X was initially explored to ascertain if there was a known definition of marketing practices. However, it was observed that there was no clear spontaneous definition of marketing practices and the general view was a focus on process, which is only one aspect of the STP anatomy.

The findings showed that the three components of STP were in place within Company X. Research question two probed for deeper descriptions and insights into the various components. An example of how Company X responded to a shift in the industry to become more consumer-centric was pursued to depict the practices in action. The marketing practices components were described as the following:

· Understanding was described as the conceptualization stage and this involves skills, knowledge and resources. This is the strategic development whereby the external and internal environment must be understood along with the target market, relationships, procedures and specialist/ marketing discipline related skills.

· Procedure was described as the marketing process. This is the implementation stage, whereby the strategy is executed through various channels and mediums. The end-to-end process that links strategy and activation. Company culture and leadership play an important role and influence the processes. This requires repeatable, habitual behaviour to enable performance.

· Engagement is based on commitment and relationship building. It was described as the level of interaction between multiple stakeholders, The role of leadership is key and this is a top down approach whereby buy-in and understanding are key. Rewards and incentives drive behaviour and measurement is important. However the key issue was that the engagement aspects within Company X were poor and needed to be embedded in the organisation to enable performance to be long term.

The additional observations explored whether these components work in isolation of if they are interlinked. The findings showed that there is no specific order of importance, and all the respondents acknowledged that the components should work together. The better the integration and the more they are interlinked, the better the results. Therefore STP provides a suitable framework that gives a holistic view of the marketing practices.

7.3   Recommendation

The framework has been applied to Company X within the and the STP model has been used to optimize marketing practices. This model proposes that the practices should be scoped within the conceptualization phase to allow for better understanding and planning. The key activities should then be identified to enable more precise, single-minded executional processes that map the strategy to the implementation. A high level of engagement should follow this as this is the stage whereby both people and processes are measured and incentivized based on their performance and relationship development. Commitment should become self-fulfilling as behaviour that is rewarded, is repeated. However, embedding mechanisms must be put in place to foster and inculcate the practices into the culture of the organisation. This will allow for repeatable, reproducible behaviour and enduring engagement (see figure 6).

Figure 6: Optimising marketing practices

OPTIMISING MARKETING PRACTICES			
Scope the practices CONCEPTUALISATION	**Identify key activities within the practices** IMPLEMENTATION	**Monitor/ measure the success of the practices** PERFORMANCE	**Embedding Mechanisms** COMMITMENT
• Identify and scope of the practice • Define the boundaries, where does it stop and start • Set the rules that will govern the practice • What are you going to do and why • Know how, understanding • Mission, strategy, objectives	• The specific actions to reach objectives • Practical activity – saying and doing • Multiple coordinated practices or disciplines • Routine, habit, practical consciousness • Procedures – following the rules that govern the practice • Engaging stakeholders • Execution	• Monitor and measure the output • Practice management • What is the level of performance achieved • Key performance indicators (KPI/KRA) • Research, evidence • Adapt, improve and experiment • Role of senior management	• Foster an array of practices – link to culture (top down) • Making actions reproducible and repeatable • Feedback loop from measurement – learning and knowledge e.g. training • Reward positive behaviour e.g. compensation structure
Examples			
• Financial adviser who sells a specific 'Advice proposition' • Building long term relationships • Get clients, keep clients over time – acquisition and retention	• Identify and segment client needs – based on life stage • service, sales, administration, relationship development • CRM – govern exchange and relationship management	• Referrals • Feedback from customers • Repeat purchase and sales increase • Improves client lifestyle • Product performance • Client satisfaction	• Common purpose - vision • Training & development • Learning and education e.g. roadshows • Reward and Compensation management • Incentives • Process design & management

7.4 Future research

The research focuses on understanding marketing practices within one in-depth case study, using qualitative research methodology. With regard to future research in respect of understanding Marketing practices within a South African context it is proposed that the following studies are implemented to provide further exploration and rigour:

In order to provide statistical significance to this study, a Quantitative methodology is proposed. This should focus on quantifying the key components identified and measuring them accordingly. Some of the aspects that should be researched include which practices are implemented more often and which components within the STP model add value to the business. The STP framework could also be implemented within an organisation and the results monitored.

It would entail a cross section of companies and additional case studies to test the relevance of this framework per case. Differing company sizes could also be considered. A comparison of this framework within different industries would provide another dimension and an in-depth understanding of the framework within different types of businesses such as FMCG (goods) vs Financial Services (Services).

Taking this one step further, these components could be analysed based on the ability to add value to company performance. Further development of this framework would entail developing new definitions of marketing practices. The CMP model was outlined as a limitation and by redefining marketing practices outside of this theory would provide further relevance to the companies or disciplines researched.

7.5   Conclusion

The objectives for this research were to examine the CMP theory within the context of the STP principles to develop a framework to describe marketing practices in more detail. This study has successfully provided a fresh perspective to the way that marketing practices are defined, viewing marketing through a 'practice lens'.

The findings show that there are many ways to conceptualise and define marketing and this framework provides a comprehensive overview of the key aspects within the marketing function, providing clear responsibilities and specific tasks that add value to the organisation. STP provides deeper insight and renders a richer description of the practices using both theory and practical application. This helps to answer the challenges facing the broadening gap between academics and practitioners alike by building on the CMP gap identified.

The aim was to build rich descriptions of Marketing Practices using the literature within a complex organisational setting. Not only does this study provide a deep understanding of practices within a marketing context, but it also provides a thorough description of the practices that are observed within a South African financial services organisation.

This simple, concise framework has the ability to define marketing as a cluster of practices that eliminates ambiguity but yet still has the freedom for marketers to create and market effectively. This ultimately provides, greater accountability for marketers, increased confidence in the marketing discipline and eventually increased company performance.

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Appendix A: CMP methodology and evolution

CMP's methodological approach:

The CMP research focuses on integrating a number of marketing theories and embraced a multidimensional perspective. The study uses a multi-method research approach to investigate the complexity of marketing practices within various organizations and countries (Brodie, *et al*, 2008, p. 88). A Series of standard questionnaires have been developed along with structured questionnaires. The respondents are asked to "reflect on practices within the organisations and provide qualitative assessments of their marketing practices, changes to marketing practices and influences on practices" (Brodie, *et al*., 2008, p. 88). As the research evolved, the methodology evolved with it (Little, *et al*., 2008). Initially qualitative methods were predominately used, however as the research progressed quantitative methods were taken into consideration. The qualitative approach moved beyond traditional case method and an example of this is an action research with live cases (Little, 2005).

A comparison of practices within different contexts (take out):

This study has evolved from defining what the practices are to providing a "comparison of practices across different contexts" (Brodie, *et al*., 2008). The first stage compares marketing practices in business and consumer markets. Some of the findings depicted that different companies practices tend to use more Transactional Marketing within a consumer environment and those within business and service companies focused on Relational Marketing (Brodie, *et al*., 2008). The multi-dimensional approach of the CMP study shows the variety of practices within different contexts.

How firms relate to their Markets

The robustness of the CMP research is shown as the same framework has been applied within different countries and markets to depict the relationship between practices within

different environments. This research has been undertaken within many different countries, including both developing and emerging markets such as Russia, China, USA, Argentina and New Zealand to name a few (Coviello, *et al.,* 2002). Firm size was also taken into consideration in another study to assess whether marketing practices differ between smaller and larger companies (Coviello, *et al*., 2000). Sector influences added another layer to this research as certain studies considered industry context such as wine (Lindgreen, Davis, & Buchanan-Oliver, 2000). The findings show that the theory behind the CMP framework has remained the same throughout most of its evolution, however the many aspects within context have changed.

The development of information technology

Brooks (2001) and Brodie et al (2000) identified key trends impacting marketing practice. These trends complemented the study as they were based on consumer behavior, market shifts and new channels albeit still within the macro environment. This added a level of relevance based on the external shifts impacting Marketing as a whole and not specifically the practices. The CMP study seemed to evolve along with the changes within the environment and as the nature of marketing changes and developed so did the CMP research. For example the next wave of CMP research focused on the development within the information technology environment and the framework then included the 5th practice called 'e-Marketing'. The practices were not changed until Coviello *et al*., (2003) saw the relevance of adding a technology-based practice. This was defined as "using the internet and other interactive technologies to create and mediate dialogue between the companies and identified customers" (Coviello, Milley, & Marcolin, 2001).

The link between practice and performance:

As the programme became established the focus extended to provide linkages between practice and performance (Coviello, *et al*., 2002). The authors began to question how "different practices would impact on company performance" (Brodie, *et al.*, 2008, p. 87). This included a new methodology and enabled a view that "linked various marketing practice constructs to relevant performance measures" (Brodie, *et al.,* 2008). The focus is still on researching what marketers do and the implementation thereof based on the "consequences and effectiveness of the practices" (Brodie, *et al.*, 2008; Palmer & Wilson 2009).

Appendix B: Interviews

Executive 1:

<u>Position</u>: Divisional Director - Marketing: Strategy and implementation for the divisional business units & group. Campaign development, operational aspects

<u>Demographics</u>: White male, 35-49   <u>Tenure:</u> 10 years

<u>Marketing at Company X</u>

Executive 1 described the type of marketing at Company X to be focused on' traditional, classic marketing' to a broad audience. This entails the use of big media, brand building to generate trust and credibility. Company X was described as an intermediated business and the marketing as based on relationships. The target market is evenly split between consumers with a personal income of R3000+ and the Intermediaries or brokers who drive the sales.

<u>Spontaneous description of marketing practices:</u>

Executive 1 stated that marketing practices consist of general marketing activities and this is based on developing marketing strategies and implementation thereof. He said that because Company X is a big corporate, they are generally not marketing orientated and the practices are not a big focus.

"Most big companies in financial services pay lip service to marketing, especially if there is no representation of a marketing person on a board level". He went on to say that "the focus is on business as usual which is selling policies and Company X is not focused on marketing per say and marketing is lipstick on the bulldog".

<u>Practices: Understanding</u>

Executive 1 stated that skills are needed for understanding to take place. He said that there are a small number of people who are highly skilled at Company X. They have a

good understanding of marketing and the business as they have been at the company for many years. "Skill and ability is not the problem it is the lack of resources, the issue is that there is limited resource allocation with a few people doing larger jobs".

Executive 1 emphasised that Insurance is a complex environment as there are three key areas that need to be understood – Company X, The adviser and consumer. "If they are not understood or aligned, the marketing efforts will not be effective as they are not pulling in the same direction and working together".

He noted that the most important aspect of this business is an understanding of the target market. "It's not only about who you are targeting but its even more important to decide who you are not going to target and committing to that stance". There tends to be confusion between consumers and intermediaries and defining who is the customer is. "The problem comes in when marketers flip flopping between two different facets – the intermediary and consumer but they seem to be counterintuitive and require a different set of skills. Sometimes its as if there are two companies".

There are two distinct jobs that need to be understood. The first is relationship building and the second is classic brand building. "Without the brand, you can't sell policies and without the intermediaries you have no distribution force. The key is to match the intermediaries to target consumers".

Transactional Marketing and the 4 P's were outlined as the fundamentals to marketing successfully. This includes understanding the product, price, place and promotions. Understanding the competitor strategy and activity forms an imperative part of marketing as this forms part of the external landscape. Executive 1 noted that "Coordination of all these activities is an important aspect to marketing practices, it's about having one single minded view".

Practices: Procedure

Executive 1 described procedure as the process that links strategy to Marketing. He stated that the company philosophy drives strategy development and then procedures follow. He referred to Company X as 'a large organisation' and as a result all processes must be linked to strategy and company direction. "Processes provide control in large companies – if you have a company over 1000 people this is essential". He said, "it's the accountability that is important when dealing with processes, but you need one person to be accountable and responsible".

He noted that at Company X nothing is documented and that there are very few procedures that people follow. "The obvious processes are in place, but no practices are really documented to drive the way we do marketing here". "It's just the way things are done and they seem to get done". He went on to say that " there are no corporate manuals on how to do things and not much corporate procedure in marketing". The Type of processes depends on the organisationss appetite and the level of commitment from senior management. "By the time it filters down to marketing its worse. For example the budget processes is just based on getting the numbers in or on what you can get approved - it's a scrabbled mess to say the least", executive 1 said.

Executive 1 referred to the 'administration processes' as being in place first and this then aligns to corporate governance. He said that, "its how any company operates, but at Company X marketing is the last on the list".

However, within the marketing department the brand procedures are followed at all times. Executive 1 stated, "Brand footprints, Brand DNA and Corporate Identity documents are developed and policed". He believes that process is important in all companies and said "no process leads to rework, specifically when executing campaigns and this leads to brand schizophrenia".

Observation shows that there is a reliance on third party providers and they run most of the processes and procedures. Executor 1 stated, "Third party partners add an extra layer of credibility". He went on to say, "we have always relied on third party partners, as they are not part of the fabric of the company and it is much easier to change the output or even the supplier – the not invented here syndrome"

He referred to "a culture of sales" at Company X and based on the intermediary focus this leads processes relating directly to 'the way things are done here'. "There is a strong link of processes to the company culture. The problem is that at Company X there is a culture of inertia which is based on historical and legacy issues – the company is 50 years old".

Executive 1 believes that 'marketers need to add rigor to the practices. "Marketers should not be seen as marketing on a wing and a prayer – there need to be specific processes". He said that there is no formalised body to govern what marketers do and how they do it. He said that "there is so much freedom for people to talk rubbish and it is just accepted".

<u>Practices: Engagement</u>

Executive 1 defined engagement as a high level of interaction and commitment between people and processes. He went on to say that at Company X, it is fundamental for marketing to be seen as a key discipline within the organisation. "The outcome of greater engagement will lead to more income for the organisation because the philosophical view of the chief executive can be pulled through from the staff and intermediaries to the end user".

Executive 1 believes engagement to be a top down approach and the senior management dictates who will engage in what mechanism. He said, " If you want people to engage you need buy in from the top and if there is representation on a board level this will dictate the level of engagement". He reiterated that marketing "can't operate as an island and if there is no exco representation you are doomed from the start".

Executive 1 stated that commitment is key to the success of the organisation as it is the level of interest, engagement and effort applied. A high level of commitment is needed from above and below. "A high level of commitment and sufficient resources are what drives this".

Engagement should be enduring and the processes help to embed 'the way things are done' within the company. Marketing processes must be entrenched in a replicable way. "Embedding is key to successful marketing practices at Company X and this is the aspect that can lead to increased revenue generation. The problem is that this is not the focus and no embedding leads to limited commitment and accountability".

<u>To what extent, if any, do they work together?</u>

Executive 1 believes that commitment from the top should come first, followed by understanding and skills and then engagement. He stated that "if you get the first two right engagement becomes self fulfilling". However a balance is important, "they all rolled up into one, generally intellect is needed for this".

Executive 2:

<u>Position</u>: Managing Director: Marketing - Marketing & communication, group marketing and business units

<u>Demographics</u>: Asian, male, 35-49   <u>Tenure:</u> 4 years

<u>Marketing at Company X</u>

Executive 2 described Marketing practices at Company X to be focused on brand, product and market proposition development generally targeted to the financial advisers. The target market is mainly comprised of the financial advisers, which are the intermediaries, with 85% of the budget allocated to target them. The other 15% is aimed to the end consumer. The staff was also identified as a core target market in financial services

companies. He asserted that " the staff are the ambassadors of the brand and they live the brand, they are the drivers of the business strategy and enable the business to operate effectively".

<u>Spontaneous description of marketing practices:</u>

Marketing practices were defined spontaneously as the "Marketing processes within the organisation to market the business and its offerings to the advisers and the end consumers". Some of the activities described include specialised skills and disciplines such as brand development and management, advertising and events, brand internalization, product marketing, design and market research. Executive 2 noted that these have recently been implemented at Company X but they need to work together for effective marketing to take place.

<u>Practices: Understanding</u>

Executive 2 emphasised that Company X is a large organisation and this requires people to understand how the company operates within the external environment. Skills and knowledge about the industry are extremely important. He defined this type of understanding as "a skill that is developed through experience and the more you know the more you learn".

Executive 2 stated that the Insurance industry is complex and the nuances need to be understood. "This is a category where the need is latent and it is a grudge purchase, the challenge is that the benefit is only seen when you die. He referred to this type of marketing as "services marketing and it involves selling the intangible". Because of this consumer behaviour there are many skills needed for these complexities to be understood and benefits marketed appropriately. He believes that "Marketing is the right balance between an art and science when developing and selling the value proposition to the right customer at the right price and right time".

Executive 2 commented that there are many different specializations within the marketing function. It is important to understand systems thinking and view the marketing function from a holistic perspective. "Even though there are various specialisations, all the various skills must be understood to ensure that everyone is on the same page". However, he stated that "a gap exist between what people are capable of and what they know about each specialisation". He went on to say that, "people are very narrow minded and focus on the job at hand and this causes silo thinking".

He believes that there are very competent people at Company X as "they have an understanding of complex markets and the intermediated space drives this". Some of the activities that take place are based on specific knowledge, Executive 2 cited an example of this and said that, "product marketing is one of the key drivers and for this to take place, the products need to be understood and you need to work with various experts such as the actuaries who develop the products and statistical probabilities".

Practices: Procedure

Executive 2 described procedure as marketing processes from strategy to execution. He said that, processes within the marketing discipline enable communication and messaging from the organisation to the advisers and the end consumers. He stated that these processes are inextricably liked to successful implementation and this should be a priority as execution is a key driver of marketing. He stressed that, "Marketing It is actually more scientific than people in the organisation give it credit".

He believes that the company vision and business strategy drive the marketing processes. He goes on to say that processes are the rules and regulations that drive corporate governance. "Governance helps to ensure that the business is run smoothly and the same processes must be implemented in marketing". He commented that, " they must be linked to the business objectives and the problem comes in when these processes don't have any relevance to the executives".

Executive 2 referred to financial services companies as having strict procedures due to legislation and the various regulatory bodies. Marketing plays a key role in compliance "for example, all advertising needs stick to the FAIS (legislative body) regulations and needs to be approved by the legal team prior to execution". He acknowledged that there are many complexities and legalities that need to be adhered to and "have an impact on the way things should be done".

Executive 2 commented on the processes in place at Company X. He noted that the company is in transition and "this does not really allow many processes to stick". There is a diversification strategy in place, which means that the company has to expand first and is growing at a rapid rate. As a result there are not many enduring processes in place. "You can implement processes today but the company will change and new processes will have to be implemented".

Practices: Engagement

Executive 2 stated that communication drives engagement along with the strategic direction that has been set. He did however, note that this needs to be translated into a simple easy to understand executable elements and measurements thereof.

He referred to commitment as the most important aspect and said that, "A high level of is needed from the top, especially when the company is in transition". Senior management seem to set the level of engagement that is required within the organisation and this works hand in hand with aligning all the various disciplines. The executives have to drive this process and it is enforced even further as it is filtered down. "The hard part is ensuring that everyone is engaged and on the same page".

There are many technical systems are in place to ensure that people are engaging. He questioned whether the embedding process was effectively linked to the engagement activities. He stated that the embedding process "helps to freeze the processes and the way marketing is done in the organisation". Engagement drives the enablement of the

processes and leads to long-term sustainability. He specifically referred to engagement with the various stakeholders not only internally but also externally and the consumer was highlighted as one of the most important areas. "The aim at the end of the day is to increase profitability and this is where the rubber hits the road".

<u>To what extent, if any, do they work together?</u>

All these activities are interconnected and one is not more important that the other, however certain business will focus on one element within the practice more than another for example in services marketing. Executive 2 questioned whether marketing practices were understood and commented that these definitions need to be understood before any action takes place. He believes strongly that "marketing practices should actually start with the business strategy".

Senior Manager 1:

<u>Position</u>: Head of Marketing: Company X Life - Strategy and development of consumer, field, product and communication activities

<u>Demographics</u>: Black, female, 24 – 35   <u>Tenure:</u> 3 years

<u>Marketing at Company X</u>

Senior Manager 1 said that marketing at Company X was historically focused on the financial adviser. This involved providing all types of marketing activities and collateral to enable the adviser to sell policies to the consumer. "The business is sales driven but seems to be on a journey to becoming more consumer centric".

There is a relationship marketing focus with many different teams that have different specializations. She noted that the business functions in silos and each divisions have different budgets and objectives and this leads to conflict between each department. "There is no alignment at Company X between the multiple areas of specialty, and we

have outsourced our distribution and have intermediaries who are our customers. She went on to say that, "At times it seems as if we only market to ourselves, I am not sure if anything actually gets out into the market".

Spontaneous description of marketing practices:

Senior Manager 1 stated that marketing practices are the marketing processes from strategy to execution. She commented that the company is in transition and the practices are still being developed, "Company X is moving away from being sales focused to having consumer know how and this is an outside in approach rather than inside out and this is a big change".

Practices: Understanding

Senior Manager 1 referred to understanding as being a 'strategic role'. This involves various activities such as knowing how to develop a strategy based on value propositions and consumer insights. She believes that this capability and expertise forms the foundation of marketing practices.

People skills are necessary when focusing on relationship marketing. The advisers are a key component as they act as the distribution channel. "It is important to understand the power of relationship as they are at the centre of all activities", she says this sales culture permeates through the organisation. Senior Manger 1 strongly emphasised that "Its about who you know and what relationships you have". She commented that Marketing is at the centre of all activities and needs to build relationships amongst the various networks and coordinate each function. "Just knowing how the different pieces fit together is a challenge and requires know how, to ensure one single minded coherent message she said.

Company X is a complex industry and Senior Manager 1 commented that Marketers need technical knowledge to educate the advisers and support them in all their activities. Senior Manager 1 stated that product knowledge must be understood. However she commented

that, "product knowledge takes a long time to build and focuses on multiple product categories ranging from investments to risk". Despite the focus on the intermediaries, she believes that the company is becoming more consumer-centric and there is a level of understanding their needs, driver and behaviour.

Senior Manager 1 stated that Company X operates in a complicated matrix structure with multiple stakeholders that need to be aligned and involved at every step. "Just having an understanding of the company complexity and politics – who's who takes about a year to know". She went on to say that, "you need to get buy in upwards, sideways and downwards – team alignment is the biggest aspect".

Practices: Procedure

Senior Manager 1 defined procedures as the many formal and informal processes that take place within the organisation. She believes that marketing does not really focus on procedures, as this term 'seems too formal'. Her observation was that marketers need a level of freedom to allow for creativity and she says that, "we generally speak about marketing processes and these are change based on the type of activity and the people you are dealing with".

Senior Manager 1 noted that activities that are repeated lead to processes and this requires a number of executions over a period of time. She believes that feedback is an essential component and 'if things don't work you can learn from this, try again and repeat it in a different way'. She also says that this is defined by the roles and responsibilities per division or team. These should be aligned to each other and linked to the business strategy.

Senior Manager 1 referred to Company X as having an "anti-process", She said that "ego runs the process and it all depends on who you are, who you know and who you are friends with". The sales environment governs all processes at Company X and this is

based on the focus on relationship building. She commented that 'this is a result of the sales driven business and relationships drive behaviour not the processes".

The processes help to achieve the objectives and strategy by driving execution. For example the calendar of events that drives the objectives needs to be coordinated and repeated and a process is put in place to ensure that all activities take place according to plan. It is essential to design processes and to have them in pace as it provides a level of clarity. This prevents knee jerk reactions caused by lack of process in place.

Senior Manager 1 stated that deadlines are always tight and quick turnaround is needed at all times. "This drives a negative behaviour and people do what they have to get the job done in anyway possible, they seem to ask for forgiveness rather than permission". "There is so much to be done by too few people which leads to a state of anxiety and then inertia and this is counterintuitive to processes, which should help to facilitate productivity and smooth campaign execution". As a result, suppliers and third party partners play a role within the processes at Company X and they actually are involved from the project commencement. However she believes that "we give away too much of our Intellectual Property and outsource our knowledge".

There is a strong link between processes in place and the culture of the organisation and legacy issues provide the stumbling block for new processes to be developed. Senior manager emphasised that "we need to move with the times and change our procedures to facilitate positive change".

Practices: Engagement

Senior Manager 1 defines engagement as the role of relationships. "Because we are selling advice, this is intangible, its the relationship and engagement that people buy into not really the product". However she noted that this involves a high level of commitment from all parties involved, specifically from the executives. Marketing acts as the central hub

within the organisation and must be complimented by top down ratification. She reiterated that engagement is based on 'know who" rather than "know how".

Senior Manager 1 believes that the business structure also drives the level of engagement "it's based on where you fit into the structure and who you report to, your roles and responsibilities also drive this". Because Company X is focused on the advisers, this is where most of the engagement activity takes place. This is the point of purchase and where the real monetary exchange takes place." We need to ensure that the advisers are energised and engaged at all times and we need to help them sell products by providing a support function".

Senior Manager 2 stated that measurement also drives behaviour and positive reinforcement leads to commitment over time and drives performance. However she stated that, there needs to be a single focus area whereby all objectives are aligned. She noted that many people have different measures that are not aligned. "Consistent, single minded key performance indicators and accountability to the strategic objectives is what should drive engagement". She reinforced the fact that engagement practices are not effective if they are not embedded into the marketing function.

<u>To what extent, if any, do they work together?</u>

Senior Manager 1 said that understanding leads to engagement that is underpinned by processes. She believes that practices are habitual and it is the marketing experience that is built over time through reinforcement and consistency. She reiterated, "There is a strong link to the way practices take place at Company X based on the cultural nuances, these are not really known until you have been working there for a while".

Senior Manager 2:

Position: Channel Activation, Communications: Marketing & Distribution - Key link between Company X and the sales force/ distribution

Demographics: White, male, 24 - 35   Tenure: 2 years

Marketing at Company X

Senior Manager 2 describes marketing at Company X to be focused on the adviser. He said that this is based predominately on sales and relationships. "We are focused 100% on the adviser and the product and advice aspect more than anything else". He described the financial adviser to be the consumer and mentioned that the intermediary target market split consists of the tied force, which are the agents and franchise owners, and the untied force, which are the independent financial advisers. He also mentioned the importance of staff specifically in Financial Services.

Spontaneous description of marketing practices:

Senior Manager 2 defines Marketing practices as branding, advertising and marketing. He commented that "this is based on supply and demand of products and the marketing practices need to provide for demand". He went on to say that "the market is commoditized and selling the value of advice which is intangible and makes it harder to define".

Practices: Understanding

Senior Manager 2 defines understanding to be knowledge about the products, experience and service and believes those are paramount to the marketing function. He noted that, the business strategy must be simplified and understood to ensure that all activities are aligned that the advisers are selling products that add to the bottom line. He commented on the fact that there is a misfit and misalignment between the three target markets

(Company X, the consumer and the adviser) and this drives complexity. "It takes a while to understand the lay of the land prior to knowing what is actually required".

Senior Manager 2 stated that, "there is only one area that needs to be understood at Company X and this is understanding the adviser and providing ways for him to sell". He emphasised that all activities are focused around the adviser experience with a single-minded view to drives sales. He gave the example of road shows that provide a level of understanding for the intermediaries and this is based on industry and product knowledge. He went on to say that, "this drives face to face contact and helps to build relationships".

He stated that Company X is a relationship-based business and "you have to know who is who in the zoo". He commented that there are multiple stakeholders and all messaging and activity should be aligned. "Advisers are the face of the relationship, this means that Company X does not really have a face, however they take all the blame should something go wrong".

He reiterated that understanding is important but he felt that a clear vision should be defined first. He noted, " We need to teach people what we stand for and what the key business drivers are first before pushing sales". He mentioned the fact that the Insurance industry is a fast moving environment and the necessary skills must be developed to ensure quick speed to market. He gave an example of recruitment and project management skills that would facilitate this. He went on to say that, "planning drives understanding based on where the business wants to go and who you are targeting".

Practices: Procedure

Senior Manager 2 defined procedure as the marketing value chain with the many process that make things happen along the way. He noted that, "this is how people, products and distribution come together and there are relevant mediums that have an impact on the processes".

He believes that there are not many procedures in marketing at Company X. However he noted that this it is based on the nature of the area and the leadership. "Marketing needs someone to govern procedures and take accountability for this". He went on to say that these processes must be defined and understood prior to commencing any marketing activity. He emphasised that, "Accountability is key, especially because Company X operates in silos and each person needs to take responsibility for each aspect".

Senior Manager 2 described some examples of the Marketing processes and reiterated that the focus is on being "sales, sales, sales driven". He commented that a high volume of output requires processes to ensure quick turnaround. He added that there are multiple diverse target markets, which also need to be taken into consideration as this required process customisation prior to execution.

He said that a "Corporate Identity manual is an example of one of the activities to help facilitate processes but you need buy in from all parties involved and aligned in the process". He went on to say that there are fundamental processes to running the business effectively such as assessing the return on investment and the budgeting processes.

Senior Manager 2 believes that there should be policies and procedures in place but must be aligned to the business. He commented that, " The focus is on sales and not always long term relationships and said that "at some stage Company X paid their advisers to churn their customers and drive up a false sense of commission". The advisers own the consumer and because of this they seem to set the stage for what he referred to as' unwritten rules'. For example he said that the advisers have a direct line to the CEO and that "one call from the adviser to the CEO and they get what they want".

Practices: Engagement

Senior Manager 2 defined engagement to be based on relationships. He said that the advisers own the relationship with the customers. They decide when and where engagement should take place. He refers to engagement as "ambassadorship" and noted

that because "Company X is a sales environment face to face engagement takes pace all the time". He also questioned whether this was with the right people.

He believes that there is a strong emphasis is on commission and he says that this drives the level of commitment and engagement. However, the focus should be on building relationships over a period of time to ensure long-term sustainability. The level of engagement is based on the integrity of the people and the product and services provided. However he believes that "this is based on the heritage and culture of the organisation and this know how and know who is embedded in the company over 50 years".

Training and learning is an important aspect to engagement. Senior Manager 2 stated that "this leads to a level of understanding and commitment but it takes time. For example one of Company X's weaknesses is the fact that they are seen as the trainers in the industry. To teach an adviser to sell and it takes about 18 months". He also noted that, because of this there is a high turnover of staff, which hampers sustainable engagement.

He noted that the rules of engagement have changed particularly in South Africa. He said that, "now we have a rich culturally diverse environment which must be taken into consideration and the industry must engage with these changes and the various people accordingly'. Senior manager 2 stated that for successful engagement, the processes need to includes standardization, particularly within a large organisation and long-term relationships need to be built and nurtured over time. "The role of the emotional connection is key this actually embeds the process along with each personal value and commitment".

<u>To what extent, if any, do they work together?</u>

Senior Manager 2 believes that understanding is important and emphasised knowing who you are talking to. He went on to say that the value is generally placed on the output not the process. He commented that "the level at which one communicates is key and should be aligned and focused".

Executor 1:

<u>Position</u>: Project Manager: Marketing and Communication

<u>Demographics</u>: Black female 35 – 49   <u>Tenure</u>: 8 years

<u>Marketing at Company X</u>

Executor 1 referred to marketing at Company X as 'giving advice and selling it to people". She commented that the focus is on big external mediums that reach consumers, while internal activity is targeted at the internal staff. However, she noted that marketing to the advisers is where most of the concentration is.

She commented that marketing should leverage opportunities between all disciplines and build the brand. She listed some of the functions such as segmentation, sponsorship, corporate social investment and competitor insights and she noted that consumer research is the cornerstone of Marketing practices.

Executor 1 believes that trust and credibility is important in financial services marketing and this is linked to the reputation of the company. She mentioned that the editorial aspects and PR are the key activities that support this.

<u>Spontaneous description of Marketing practices:</u>

Executor 1 referred to Marketing Practices as 'Marketing best practice" and was not sure what this meant or how it is described.

<u>Practices: Understanding</u>

Executor 1 described understanding as knowledge and learning. She commented that knowledge is key for learning and must take place continuously. Knowledge is important and is empowering and should be continuous. She said that, "people learn from shadowing because you learn by watching people and sometimes you are never sure if this is the right way of doing things".

Executor 1 stated that it is the role of leadership to filter down key business knowledge and understanding. She added "this helps to uncomplicate the complexity and stay focused on what the company is striving for". However, she emphasised that senior management must understand people at a deeper level and talk to them about what is happening in the company, because information is powerful".

Executor 1 emphasised that specialised skills are required to gain a good understanding of the many external and internal factors that drive the business. "You have to provide advice to others about their financial matters and knowledge of the economy is one of the aspects that are needed". She went on to say that "people look at you as a thought leader and an expert and you need information to back that up".

She noted that the company is always changing and knowing how to adapt is imperative in marketing. She referred to understanding technology as one of the aspects that drive change and the impact of these trends must be understood to communicate to the various target markets. "We must not be stuck in our old ways of doing things based on old knowledge we must always reinvent ourselves and adapt accordingly".

Practices: Procedure

Executor 1 described procedures as processes that require action, however she noted that this is based on habitual behaviour and said that they are developed over time. She noted that "a process is when people do the same things" and she went on to say that positive behaviour that is rewarded is generally repeated.

Executor 1 stated "85% of our time is spent on governance, ensuring that meetings take place, minutes are recorded and the information is shared". However she questioned whether this information was taken seriously or even actioned. In this regard, Executor 1 said that a "process or procedure must have a purpose otherwise procedures don't make sense". She also emphasised the role of compliance and noted that procurement is

responsible for most of the procedures. She was not convinced that they knew enough about each specialization to set the rules and regulations appropriately.

She believes that, the processes in Marketing should not be too rigid. " In Marketing we need flexibility otherwise people become frustrated. She referred to "the call centre and explained that they have strict procedures and rules that must be followed before they can talk to customers". She said that she was involved in many procedures such as setting up contracts for all suppliers with the legal department, developing business cases for all projects, agency management processes and dashboards to measure and monitor.

Practices: Engagement

Executor 1 described engagement to be all office interactions. However she argued that the term engagement is very broad "because every interaction is an engagement". She noted that this includes networking between staff and colleagues as well as customers and advisers. She went on to say that "this is depending on where you engage with them and if its part of your job description".

She believes that when people engage new ideas are generated and this allows for new thinking and different perspectives. However she questioned whether this is effective when there are multiple parties involved. "The problem comes in when too many experts are put in one room and no-one wants to take accountability or do anything".

In this regard, she mentioned that communication and contact with people drives this. This must filter down to all staff using language that the people can understand. She gave the example of co creation workshops, one on one talks and status meetings as successful mechanisms that lead to engagement. She noted that, "collaboration and team work help to increase commitment and ensure that everyone is on the same page".

Executor 1 stated that, metrics are important to engagement but you need relevant measurement tools. She concluded by saying respect is the most important aspect to

engagement, commitment and performance. She said that this builds long term commitment because it's how you treat people". She noted that "feedback drives and sharing information increases the level of sincerity when engaging and this should be enhanced by mentoring to develop lasting skills".

Marketing at Company X

Advertising executive 1 commented that marketing at Company X is aimed predominately at the adviser with a focus on product and retail based activity. She also said they focus on Brand building aimed at consumers and advisers. She said that the target market split is 30% brand and 70% advisers. However she mentioned that there was a gap between the customers and the intermediaries.

Spontaneous description of Marketing practices:

Advertising Executive 1 said that Marketing practices are governed by the vision of the company followed by the brand and sales. She commented that this involved "what you are selling, to who and why". She believes that marketing practices are based on best

engagement, commitment and performance. She said that this builds long term commitment because it's how you treat people". She noted that "feedback drives and sharing information increases the level of sincerity when engaging and this should be enhanced by mentoring to develop lasting skills".

To what extent, if any, do they work together?

Executor 1 believes that knowledge and engagement are first and then processes are last. She noted that, "even though the processes are how you execute this is the most critical aspect of how you engage".

Executor 1 concluded that, "marketing practices must translate into usable tools and that it should be seen as more than advertising because it adds value to the business as it the voice of the customer".

Advertising Executive 1:

Position: Business Unit Director, Full service advertising agency.

Demographics: White, female, 35-49   Tenure: 2 years

Marketing at Company X

Advertising executive 1 commented that marketing at Company X is aimed predominately at the adviser with a focus on product and retail based activity. She also said they focus on Brand building aimed at consumers and advisers. She said that the target market split is 30% brand and 70% advisers. However she mentioned that there was a gap between the customers and the intermediaries.

Spontaneous description of Marketing practices:

Advertising Executive 1 said that Marketing practices are governed by the vision of the company followed by the brand and sales. She commented that this involved "what you are selling, to who and why". She believes that marketing practices are based on best

practice that follow international standards and best practice. She said that, "we tend to follow certain gurus both local and international, who coin a phrase".

She mentioned a few other practices such as customer segmentation and insights and commented that, "Company X is in the process of developmenting these and they've already made a lot of headway". She added that many of the practices have changed based on Company X having to deal with the issues post the financial crisis and the external environment.

Practices: Understanding

Advertising Executive 1 believes that the Company X business structure is extremely complex. She said that there are so many aspects to understand and various specialised skills that are required to navigate through this complex industry and business. She questioned whether "there is a one size fits all approach in such a complicated business structure". She observed that there is no lack of skill but said that the issue is the high staff and adviser turnover as it takes a long time to understand the complexities.

She commented on the fact that Company X has diversified into many different financial services business such as Health Insurance, Asset management and Property development; competencies across multiple businesses are developed. She said, "that sometimes the focus is too broad and the detail is lost". She believes that a centralized hub would bring all different parts together and allow for economies of scale. She affirmed that "the whole is greater than the sum of its parts". However she mentioned that the business strategy must be understood and communicated first. She also observed the fact that the environment is fast paced and requires capabilities to deal with the speed of delivery. She mentioned that the studio and design capabilities are extremely fast when quick turnaround is needed.

Advertising Executive 1 noted that there is a gap between the consumer and the adviser. This is a result of the previous heritage and sales driven culture. Therefore she believes

that an understanding of the customers is important. She recommended that, "Company X's database should to be cleaned to actually know who is on their book ". She went on to explain that "if this knowledge and data is mined, the customers could be rewarded for their loyalty and this will help retain more of them".

<u>Practices: Procedure</u>

Advertising agency Executive 1 believes that procedures and processes are important aspects within the marketing discipline and noted that 'they help get the job done', she went on to say that if they were absent the business would be in chaos. She referred to Company X as a 'big ship' and argued that the processes particularly in Marketing need to be flexible and adapt and adjust. She observed that the processes at Company X are limited and but said that there are pockets of process that work really well. This is based on the experience and understanding of the marketers directors.

She commented that 'the advertising agency steps in to help guide the process'. She went on to say that "we are an extension of the clients marketing department". She believes that it is better for the agency to institute their processes such as briefing templates in the Marketing department because this helps to facilitate the execution process. She noted that Company X has multiple suppliers and because of this they are not always understood. This way we can standardize the various processes and manage the activities more effectively". She emphasised that without processes everyone that is involved has alternative view and this has an impact on relationships.

Advertising Agency Executive 1 stated that the culture of the organisation determines the processes. She noted that Company X is diversifying and as a result has many disparate companies. She believes that economies of scale would help facilitate the process and allow for increased productivity. She noticed that Company X's heritage is based on an innovative culture from the company founder and said that "I am not sure if this perception from the old regime perpetuates the cowboy behaviour and the need to just get things

done regardless, but now days there is so much red tape and decisions tend to get stuck at an executive level and the whole process is vetoed".

<u>Practices: Engagement</u>

Advertising executive 1 described engagement to be one of the key drivers of the brand and business strategy. This allows all the specialists and external partners to work together. She said that 'clients can get more out of the agency through teamwork and good debates".

She believes that good processes allow for opportunities to engage and the roles and responsibilities must be defined upfront. She stated that the engagement should be meaningful. She noted that at times people engage for the sake of it and there are too many people talking at the same time. Different roles are needed and the level of engagement is different between each party and she gave the example of the agency creative development and the relationship between the client service teams and the creatives". She also observed that egos impact engagement and "sometimes people are too busy looking out for their own turfs and their own needs".

Advertising Executive 1 emphasised that trust facilitates meaningful engagement. She noted that 'people trust that Company X is solid and reputable and the processes and engagement with consumers must mirror that'. She went on to describe the negative perceptions that surround the insurance industry and refers to the advisers who are seen as 'bad car salesmen'. She recommends building up the brand credibility to mitigate the negativity and align the brand values to the consumer.

Advertising executive 1 believes that planning ahead facilitates the engagement process. She noted that "once the everyday functional process stuff is out of the way such as budget allocation and contact reports the relationship building can start". She commented that a high level of commitment and involvement is needed from the key decision makers. She said that training sessions and workshops help people to engage. However she went

on to say that engagement should not be a once off exercise and that clients should be engaging with suppliers and partners on an ongoing basis.

<u>To what extent, if any, do they work together?</u>

Advertising Executive 1 stated that, "business alignment is the value added". She went on to say that they all lead into each other. She noted that. "Agencies should not make assumptions about what is going on or what should be happening. They need guidance from the client and clarity to allow for a smooth relationship".

Advertising Executive 2:

<u>Position</u>: Account Director: Below the line marketing and advertising agency

<u>Demographics</u>: White, female, 35-49   <u>Tenure</u>: 2 years

<u>Marketing at Company X</u>

Advertising Executive 2 defined marketing at Company X as " Relationship marketing". This is based on the strong focus on sales through building the internal intermediary networks. She commented that integrated campaigns were developed using above the line and below the line channels being utilised. However she stated that most of the activities are geared towards the financial adviser and activations in the intermediary channel.

<u>Spontaneous description of marketing practices:</u>

Advertising Executive 2 does not really know how marketing practices are described but noted that they are so broad and involve all the general marketing activities, strategy and implementation. She commented that practices are learned on the job and differ based on the client and scope of work.

She believes that marketing is not consistent at Company X and said that the brand is not top of mind. She noted that the reason for this is probably due to the constant change of people and business objectives.

Practices: Understanding

Advertising Executive 2 defined understanding as the level of skill, knowledge 'know how".
She referred to Company X as being 'sales driven and intermediated' and this results in
the need to have a thorough understanding of relationship marketing. She went on to say
that the stakeholders and the performance drivers are very different to traditional
marketing.

She stated that 'resources are needed prior to understanding' and observed that Company
X has "too few people doing too much". Therefore, advertising Executive 2 comments that
some of the marketing practices are outsourced. She gave an example of her Advertising
Agency employing a 'dedicated copywriter just to work on the Company X account. She
said that the copywriter has learned the products and can write all the brochures without a
blink of an eye'. She has also observed a high rate of staff turnover and noted that " a lot
of knowledge has left Company X and this takes a long time to build up as it is very
complex and technical".

She gave some examples of some of the aspects at Company X that require
understanding. These included, copywriting to simplify the products to benefits, technical
product knowledge in multiple categories such as insurance and Investments and the
brand corporate identity. She stated that they know this business inside and out and have
a good understanding of how to deal with the various decision makers in the various
departments.

Practices: Procedure

Advertising Executive 2 stated that procedures provide the guidelines for what people are
supposed to be doing. She said that this is based on the executional aspects of marketing.
The planning and strategising needs to happen before hand so that the processes are
single minded. She noted that this gives direction and focus. She believes that the

structure dictates the processes. However she went on to say that, "at Company X the structure is always changing which makes it hard to maintain the same processes".

Advertising Executive 2 observed the internal procedures and commented that they need to run smoothly because it is such a large organisation. She believes that the staff is important and stated that "it is one thing getting the administration aspects in order, but communication is one of the key aspects to bringing people along the journey". He agreed that this takes a long time to establish but argued that once the processes are in place it is a systematic approach which can be developed".

Advertising Executive 2 believes that it is important for the client to understand how the agency processes work, especially the lead times from brief to execution. She said that some of the clients " don't know how this works and briefs are phoned in on the way to work and then expected to be delivered the following day". She noted that planning in advance and knowing what is needed will help to prevent last minute deadlines.

Practices: Engagement

Advertising Executive 2 believes that low morale is a detractor and this is spurred on by change fatigue. She has observed there to be "so much change at Company X and the staff are too scared to put in effort and commit because this will all change in a few months". She noted that good communication and change management systems must be implemented.

She believes that engagement is based on the people and she said that, "you need buy in". She went on to say that "pride, integrity and trust all add to how people and engage and will dictate whether this process is enduring". She went on to say that "successful engagement is based on how people are treated and valued".

Advertising Executive 2 noted that remuneration and rewards also drives how people behave and engage. However, she pointed out that you need to know who you are talking

to. She gave an example of understanding the customers intimately and suggested that,

She also noted that the Insurance claim statistics of how much Company X has actually paid out to their customers provides a reason to engage and instils trust and credibility.

She continued to discuss the role of the executives in the engagement process and she went on to say that marketing needs a seat at boardroom level before it can be taken seriously. She believes that once this is in place people will engage accordingly, however she also stated that the engagement process must be continuous and consistent and not sporadic.

<u>To what extent, if any, do they work together?</u>

Advertising Executive 2 believes that a balance of all three aspects is important. She commented that the company vision provides the northern star and guides the practices accordingly. She went on to say that, "this will add value and help people to focus on one activity at a time instead of trying to get everything done at the same time".

Appendix C: Proposed Interviewer Questionnaire

Qualitative Interviewer Schedule

Confidentiality and Consent

Dear Sir/Madame

I am conducting a study on marketing practices in Company X as part of my degree at the University of Pretoria. Company X have granted their permission for this study. This research will be focused on identifying the definition of marketing practices with an aim to gain a deeper understanding of how and why they are adopted within the marketing department in your company. This information will be used for academic purposes only.

This interview won't take longer than 2 ½ hours, and will involve a discussion whereby your opinions and views will be kept confidential. This conversation will be recorded which will enable me to transcribe the information at a later stage.

All the information you give me will be confidential and you will not be identified by name. You can withdraw from this interview at any time without penalty. If you have any concerns you can contact me or my supervisor. Our details are:

Researchers: Jade Maletsky   Supervisor: Nicola Kleyn

Phone: 0832993133   Phone: 011 771 4000

E-mail: Jade.Maletsky@gmail.com   E-Mail: kleynn@gibs.co.za

C.1.1 Respondent Details and Demographics:

· Name, Age, Gender

· Job title, income,

C.1.2 Discussion Introduction

· Please can you briefly take me through your educational and professional background

· Position in the company and number of years employed

· What does your job entail?

C.1.3 General Marketing Questions

· What is the current view of the definition of marketing and the components thereof?

  o What marketing practices are currently being adopted in South African companies?

· How would you define marketing practices?

  o What are the components that make up marketing practices?

  o What is currently in place within the organisation

C.1.4 Exploration of constructs and research questions

1: Understanding

When conceptualizing marketing practices, what type of skills, abilities and knowledge of what to say and do, are required to gain a level of understanding for marketing practices to take place and yield performance?

· What elements do Marketers consider when conceptualizing marketing practices or compiling a marketing strategy?

· What are the activities involved, which aspects lead to company performance?

2: Procedures

When implementing marketing practices, what explicit rules, principles, instructions and procedures are currently in place and how are they executed?

- What are the activities involved, which aspects lead to company performance?

- How long have they been a part of the company culture?

- Do you believe they add value to the marketing discipline?

3: Engagement

What is the level of engagement or emotional commitment expressed through actions/representations that takes place to successfully conceptualize, deploy and embed your marketing practices?

- How and why are they adopted and implemented with the organisation?

- What is the level of commitment required?

4. Other: Marketing practices for performance

- Have you thought about the theory behind the definition, why the relevant decisions are made?

- Do you think that a new way of looking at marketing practices is needed, what is your view/thoughts of this?

- Do you think that a tighter definition of marketing practices will help marketers evaluate and increase their accountability?

- What are the critical elements within marketing practices that add value to company performance?

C.1.5   Conclusion and Thanks

Thanks for your participation, should you have any further questions, please feel free to contact me on: 083 299 3133 or jade.maletsky@gmail.com. Should you request a copy of this research, I will ensure that you get a copy delivered post completion.