
Introduction to the Special Issue—Mapping the Boundaries of Marketing: What Needs to Be Known

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Source: *Journal of Marketing*, November 2016, Vol. 80, No. 6, AMA and MSI Special Issue of "Journal of Marketing" | Mapping the Boundaries of Marketing: What Needs to Be Known (November 2016), pp. 1-5

Published by: Sage Publications, Inc. on behalf of American Marketing Association

Stable URL: <https://www.jstor.org/stable/44134971>

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Introduction to the Special Issue—Mapping the Boundaries of Marketing: What Needs to Be Known

The *Journal of Marketing* (*JM*) and the Marketing Science Institute (MSI) share a common purpose—to help develop and disseminate the most rigorous and relevant research possible to inform and engage academics and practitioners alike. To this end, the MSI has enlisted top scholars to take stock of the most managerially important research priorities, as identified by the institute, in a special issue of *JM*.

In 2015, MSI initiated a series of activities organized around the theme of the “frontiers of marketing,” with the objective of assessing the state of the field and identifying future research directions. The MSI Research Priorities served as a backdrop to this initiative. Every two years, MSI asks its member companies to help select the priorities that will drive research initiatives and member activities going forward to ensure that they reflect the member companies’ most pressing needs. To help address members’ stated interests from the most recent 2014–2016 research priority-setting process, MSI collaborated with the American Marketing Association; *JM*; and *JM*’s Editor in Chief, V. Kumar, for this special issue.

Specifically, a select committee of past *JM* and *Journal of Consumer Research* editors and current and past MSI Executive Directors nominated pairs of top academics to collaborate on research articles addressing one of the top seven MSI research priorities. These articles were not intended to be thorough reviews of knowledge in each of the areas. Rather, the purpose of each article was to identify key research findings on a given priority that would be of the

greatest interest and value to a managerial audience and, more importantly, to identify critical areas for further academic research that would not simply be incremental research but would move an area forward in a significant way. Each research priority had a series of five or six questions based on member feedback that provided some indication of the range of topics of interest for MSI member companies. Scholars assigned to a priority were told to view the questions and topics as a guide for their analysis and writing.

The participating scholars, and their assigned research priority, were as follows:

- Developing and Organizing for Marketing Excellence (Christine Moorman and George Day)
- Creating and Communicating Enduring Customer Value (V. Kumar and Werner Reinartz)
- Understanding Customers and the Customer Experience (Katherine N. Lemon and Peter C. Verhoef)
- Developing Marketing Analytics for a Data-Rich Environment (Michel Wedel and P.K. Kannan)
- Developing and Delivering Fully Integrated Marketing Programs (Rajeev Batra and Kevin Lane Keller)
- Leveraging Digital/Social/Mobile Technology (Cait Lamberton and Andrew Stephen)
- Measuring and Communicating the Value of Marketing Activities and Investments (Dominique Hanssens and Koen Pauwels)

Each article reviewed and interpreted key managerially significant research findings for the assigned priority, focusing on generalizations as well as summaries and highlighting gaps in knowledge and areas deserving of greater academic scrutiny. The coeditors of this special issue reviewed initial drafts of these articles and provided the author teams some initial feedback. The papers were then presented at an MSI conference hosted at Boston College’s Carroll School of Management (July 30–31, 2015). Participants from more than 25 MSI member companies as well as academics from more than 20 universities in North America and Europe were in attendance.

After the conference, the authors revised their articles to reflect the feedback gained from the sessions. The revised articles then underwent the standard *JM* peer-review process, in which they received critical feedback that resulted in additional revisions. The coeditors for this special issue, Robert Leone (*JM* Advisory Board member and past *JM* Coeditor) and Don Lehmann (two-time past MSI Executive Director) oversaw this process.

V. Kumar (VK) is the Regents Professor, Richard and Susan Lenny Distinguished Chair, & Professor in Marketing, and Executive Director of the Center for Excellence in Brand and Customer Management, and the Director of the PhD Program in Marketing, J. Mack Robinson College of Business, Georgia State University; V. Kumar is also honored as the Chang Jiang Scholar, Huazhong University of Science and Technology, China; TIAS Fellow, Texas A&M University, College Station, TX; and ISB Senior Fellow, Indian School of Business. (e-mail: vk@gsu.edu). Kevin Lane Keller is the E.B. Osborn Professor of Marketing, Tuck School of Business, Dartmouth College, and was the Executive Director for the Marketing Science Institute (MSI) for 2013–2015 (e-mail: kevin.l.keller@tuck.dartmouth.edu). Katherine (Kay) Lemon is the Accenture Professor and Professor of Marketing, Carroll School of Management, Boston College, and the Executive Director for the Marketing Science Institute (MSI) for 2015–2017 (e-mail: kay.lemon@bc.edu). The authors thank the Guest Editors, Robert Leone and Don Lehmann, for providing valuable feedback.

We believe that the resulting seven articles provide a strong foundation for both scholars and managers to understand key insights in each of these areas. Marketing is changing so quickly in today's technology-driven environment; executives and managers on the frontline and cutting edge of marketing practice need new forms of synthesis to enable them to quickly gain insight into what is coming next. We have spoken about this initiative with marketing executives, and they are eagerly awaiting the finished products. In addition, MSI members are excited to read these articles because they provide access to usable frameworks, ideas, and tools that can identify new opportunities for strategy and action as well as support for existing successful approaches. Overall, this special issue explores the value of marketing as a discipline, and we are pleased that the submitted articles cumulatively reinforce this value.

While the articles presented in this issue directly address the research priorities identified by MSI, they also present a broader narrative about achieving superior firm performance. Readers can identify a natural connection between the articles as highlighted by the research insights of each article. Furthermore, the managerial implications and research directions identified by the articles (also reflected in the proposed framework) are designed to provide a perspective on the critical areas on which to focus research as well as comprehensive coverage of the marketing landscape thus far. Figure 1 presents a framework that integrates the articles in this special issue.

The framework begins with recognizing the dynamism in the marketing discipline and the marketplace and reimagining how the marketing function can be viewed differently. This insight then leads to the exploration of how the vital marketing elements contribute to the creation and communication of value both to and from the customers. Next, it is important to explore the importance of customers in marketing and examine how customers and the customer experience have changed as a result of technology and other forces. This understanding feeds into the data environment, in which marketing analytics can be used to design and deliver marketing programs that offer increasingly higher levels of satisfaction to customers. Subsequently, integrated marketing communications can highlight how all the aforementioned elements contribute to marketing integration that includes firm activities, marketing communication programs, customers, and firm offerings. In addition, social and digital media marketing aids in harnessing the interest and importance of the

emerging technologies in organizations and the marketing discipline. All these steps and the respective insights gained will help demonstrate the value of marketing by reviewing the attitudinal, behavioral, and financial metrics under one umbrella to justify marketing's place in the organization. The following sections contain brief summaries of the articles in this special issue.

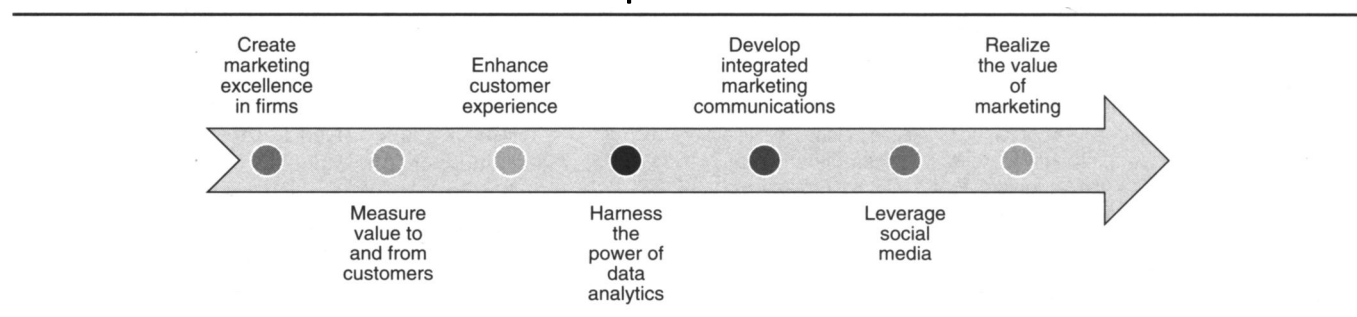
Organizing for Marketing Excellence

In "Organizing for Marketing Excellence," Moorman and Day (2016) contend that advances in knowledge regarding the sources and benefits of marketing excellence are not sufficiently keeping pace with the needs of marketing practice. The authors direct their attention to four elements of firm marketing organization—capabilities, configuration (structure, metrics use, and incentives), human capital (marketing leaders and employees), and culture, collectively known as MARKORG—and develop a theoretically rigorous framework detailing how MARKORG is mobilized across seven activities that occur in the marketing strategy process. This approach illuminates a new frontier for the study of marketing excellence while paving the way for future advancements in marketing practice.

The authors offer a 25-year review of the literature for each MARKORG element and identify key research questions. They offer a set of future research priorities for each element and discuss their integration and impact on the key marketing strategy activities. These research directions include investigations into how superior marketing capabilities are developed and changed; how outsourcing marketing affects firm performance; what influences the use of metrics within firms; how marketing leaders improve firm performance; the impact of marketing training; and how firms can build and sustain a market-oriented culture.

The authors argue that the effect of MARKORG on firm performance is often indirect and difficult to observe. As a result, these elements are often undervalued. To resolve this gap, they describe seven activities (7As) that perform the translational work of marketing organization on firm performance. These include marketing contributions to anticipating marketplace changes; adapting the firm to such changes; aligning processes, structures, and people; activating efficient and effective individual and organizational behaviors; creating accountability for marketing performance; attracting important

FIGURE 1
The Path to Superior Firm Performance



resources; and having asset management that develops and deploys marketing assets.

The authors conclude by emphasizing the importance of bridging the gap between the literature and the needs of marketing managers on this important topic. This insightful consolidation of existing research, coupled with the various proposals they have set forth for future research, will spark further advancements in the field.

Creating Enduring Customer Value

In “Creating Enduring Customer Value,” Kumar and Reinartz (2016) analyze customer value as a dual concept comprising both customer-perceived value and customer-generated value. Providing an extensive historical and theoretical overview of customer value, the authors aim to align these dual aspects, demonstrate the best practices of implementation, and lay out a set of future research guidelines.

The authors explore the process by which customer value is measured by (1) measuring overall perceived value, (2) measuring the associated underlying attributes and benefits, and (3) determining the relative weights that link attributes/benefits to overall perceived value. Of paramount importance here is the concept of product utility, for which researchers have created proxy measures. For firms, these measures are usually limited to tangible product attributes, but brand name dimensions and aesthetic design aspects have been shown to factor in from time to time.

For firms to effectively communicate value to customers, it is important for perceived value to align with resource allocation. This article addresses this aspect by recommending the use of forward-looking (vs. backward-looking) metrics to account for the variable nature of customer behavior. What follows, then, is an overview of methods that can be employed to identify the drivers of customer lifetime value (CLV) and implement CLV-based strategies. Not only is CLV crucial for determining future value, but it also stands as a disaggregate measure of customer profitability; once the total number of CLV measures are aggregated, it is possible to measure customer equity.

Finally, the authors propose three specific directions for future research. First, they predict that the Internet of Things is likely to provide pathways to further research and help maximize value creation. Second, fitness studios have provided customization options to suit customer needs and thus serve as a model that can be replicated across other industries. Finally, household purchase decisions have become increasingly studied by researchers and inspire intriguing questions regarding the computation of customer value in such a context. In addition, the authors identify some broad areas that require attention and highlight the key insights gained thus far.

Understanding Customer Experience Throughout the Customer Journey

In the article titled “Understanding Customer Experience Throughout the Customer Journey,” Lemon and Verhoef (2016) focus on identifying important research gaps in the

customer experience literature and pave the way for future insights. The authors consolidate existing theories into three distinct research areas: (1) research on process, behavior, and resulting value; (2) research on process outcomes; and (3) customer-centricity research on the internal organizational aspects of customer experience. The authors use these research domains and formulate their discussion of customer experience in terms of conceptual, empirical, and managerial relevance.

In this article, the authors review the customer experience, the conceptualization of the customer journey, and the influence of past experience on customer experience at each stage of the customer journey, particularly with regard to expectation formation and the stickiness of experience evaluations across brand-owned, partner-owned, customer-owned, and social/external touch points. In addition, they highlight many external drivers of customer experience that firms should keep in mind as they work to engender positive experience.

The authors contend that while customer experience measure plays a critical role in firms, it remains contested in current research. Some researchers have attempted to develop a scale measuring different attributes of the customer brand experience, while others have formulated a scale for measuring the customer experience quality through a multi-dimensional approach. However, these measures are not yet widely used by practitioners and do not capture the richness of touch points across the entire customer journey. The authors also provide evidence to suggest that the literature on customer experience management is still in its infancy.

Finally, the authors propose a research agenda for customer experience, returning to the key topics discussed thus far and laying out a set of clear objectives for each. Among their many identified research gaps are the need for better linkages to marketing outcomes, the need for a better understanding of the interaction between experiences and expectations, the need for an enriched understanding of the customer journey, and the need for improved data collection methods in the development of customer experience measures. Ultimately, the authors emphasize the rich potential of customer experience management as a wellspring of new research advances. It is hoped that other researchers will follow suit by pooling together various strains of the existing literature.

Marketing Analytics for Data-Rich Environments

Academics and practitioners alike have observed the criticality of understanding the current state of marketing practice with respect to big data analytics. In “Marketing Analytics for Data-Rich Environments,” Wedel and Kannan (2016) provide a multifaceted, historically comprehensive overview of marketing data and analytics. Developing a conceptual framework that examines data analytics within marketing mix, personalization to individual customers, and privacy and security, the authors fashion a narrative explaining how customer data has been captured and analyzed since the beginning of the twentieth century. Finally, the authors arrive at a multifaceted appraisal of big data application in the present day, from which they extrapolate a set of future research directions.

The authors predict future solutions to the present gaps in big data analytics through (1) developments in high-performance computing; (2) simpler descriptive modeling approaches; (3) speed improvements in algorithms; and (4) application of aggregation, data fusion, selection, and sampling methods that reduce data dimensionality. Although work in practice tends to deploy a combination of points 1 and 2, future solutions are likely to incorporate all four approaches.

The article provides an overview of the models used to measure and optimize the performance of a firm's marketing mix. Although big data has been greatly beneficial to the development of these new models, many challenges in analytics and computation still persist. The authors also examine big data analytics in the domain of privacy and security. As a result of the increase in both collected customer data and pervasive personalization in marketing, concerns over privacy and security are now at the forefront of big data analytics in marketing. Security breaches have become commonplace, and privacy laws and security technology have not kept pace with the rapid advancements in customer data collection. This creates an opening for federal regulations to limit big data analytics in favor of protecting citizens' privacy and serves as a call for data minimization and anonymization, which will influence big data analytics in the future.

The authors synthesize these ongoing issues in big data analytics into a set of guidelines for further research. The future of marketing research will likely involve a greater emphasis on the interpretation of text and images in predictive models and the development of large-scale time-series models that can account for multiple levels of granularity and multitudes of direct and indirect effects. There remain many practical hurdles to implementing big data analytics within organizational structures, and increasingly decentralized and hybridized analytics structures are likely to become more commonplace.

Integrating Marketing Communications: New Findings, New Lessons, and New Ideas

In the era of new media, integrated marketing communication (IMC) has become a top priority for marketing practitioners. In this article, Batra and Keller (2016) address the present-day challenges of IMC, arguing that they can be met more effectively through "a conceptual framework that analytically considers consumers' most pressing brand-related information needs at different points in their decision journeys and then matches the particular media and messages that are strongest in their ability to meet each of those specific needs" (p. 123). The authors also introduce two models: a "bottom-up" communications matching model and a "top-down" communications optimization model.

Few articles have examined the macro-level interaction effects across various media, but a great deal of helpful smaller-scale research exists that has mainly focused on traditional media synergies, sales force and personal selling interactions, and online and offline synergies. Clearly, significant cross-effects are abundant across media, but extant research has many limitations—for example, the full range of

outcomes at different stages of the customer journey has yet to be accounted for, lagged and downstream effects are all but neglected, and the multiplicity of customer elasticities is ignored. To address these gaps, the authors propose two models that address (1) the effects or outcomes created by different types of communication options or platforms and (2) the requirements to integrate the available options to maximize the communication effects.

The authors conclude by presenting a list of managerial implications that practitioners can derive from their research. First, our understanding of possible consumer paths to purchase must be as comprehensive as possible. Second, marketers must assess the direct effects, unique contribution, and cross-channel interaction of any given communication method. Third, any proposed communication program must be evaluated on the quality of its integration. Several outstanding research problems remain, but in amassing the key theoretical takeaways from the extant IMC literature, the authors discuss crucial insights that can provide impetus for further research.

A Thematic Exploration of Digital, Social Media, and Mobile Marketing: Research Evolution from 2000 to 2015 and an Agenda for Future Research

In this article, Lamberton and Stephen (2016) chart a 15-year history from 2000 to 2015 of the growth of digital, social media, and mobile marketing (DSMM), parallel innovations in technology, and the ensuing changes in customer behavior. However, instead of a literature review, the authors present a broad thematic discussion of DSMM topics and their respective evolutions over the 15-year time span from which new research guidelines can be derived. What follows is a brief methodological overview detailing the process for identifying relevant articles, classifying articles, and collecting data. The authors divide the time frame into three five-year intervals, or "eras." The authors outline their objectives as follows: (1) to explore of the groundwork of DSMM laid during era 1, (2) to study the evolution of the discourse surrounding DSMM concepts in eras 2 and 3, and (3) to provide a present-day overview of these topics in the currently emerging era 4.

The article then lists research topics that are currently gaining traction in marketing and that can be reasonably expected to be studied in greater depth in the future. Among these emerging research areas are (1) collective behavior and new business models, which attempts to tie social networks to marketing outcomes; (2) firm use of consumer data and privacy considerations, which delves into the ethics behind collecting marketing data from consumers' online behavior; (3) multichannel and multitasking behavior, which strives to integrate new media into existing marketing-mix models and better understand the omnichannel marketing context; and (4) development of a theory of mobile marketing, which requires a greater conceptual understanding of the mobile domain.

Finally, the authors recommend future approaches for DSMM, highlighting many present shortcomings with the research. The authors also call for a decrease in idiosyncratic, highly concentrated research topics in favor of research that casts a wider conceptual net. Within a 15-year time span, DSMM has progressed from the fringes of marketing research to occupy an important place within the discipline. It is hoped that the aforementioned challenges and guidelines help point the way to an even richer understanding of DSMM concepts and a more dynamic application of its methods in the years to come.

Demonstrating the Value of Marketing

In the article titled “Demonstrating the Value of Marketing,” Hanssens and Pauwels (2016) take a high-level view of marketing, reasserting its importance in the face of pressure and skepticism from those who see little economic value in the discipline. The challenge of demonstrating this value is complicated by the fact that its core metrics—attitudinal, behavioral, and financial—fail to correlate substantially with one another. The authors grapple with these ambiguities while discussing the benefits of improved marketing analytics and pointing to further research gaps that remain to be filled.

The objective of clarifying and assessing the value of marketing is obfuscated by the fluidity of the definition of marketing, which encompasses management philosophy, organizational function, and a set of specific activities. The intended value of marketing—that is, to stimulate customer attitudes and in turn increase profits—is further complicated by the nonlinearity of the marketing effort → market performance relationship and its many attributes. This article calls for more research to integrate different metrics and to clearly demonstrate the causality between specific marketing actions and performance outcomes. The use of marketing analytics remains evidently beneficial, yet challenges include (1) developing good performance metrics, (2) linking those metrics to concrete marketing actions, and (3) effectively communicating the value of marketing.

As organizations grow, marketing tasks take on increasing specialization, resulting in a wide variety of configurations and an increasing likelihood that different departments are compartmentalized, each focused on its own unique objectives. Rather than bemoan this sense of convolution, the authors take the position that the multifunctionality of marketing is positive

and can be combined into singular firm-wide goals. Further research should focus on synthesizing different marketing objectives across functional, geographical, and life cycle boundaries.

Going forward, the authors call for a better integration and synthesis of the multiple dimensions and metrics within the marketing discipline. It is the authors’ opinion that “successful marketing value assessment needs to reconcile the different performance metrics that are available, combine historical data analysis with marketing experiments, and significantly enhance the communication of analytical results to an audience of decision makers who are not analytically oriented” (p. 187).

Conclusion

This special issue details a state of affairs that finds marketing in the throes of accelerated practical developments and theoretical challenges. Taken together, the seven submissions offer a refreshing reminder that the potential for marketing research as a rich, nuanced, and multifunctional discipline has never been greater. With support from *JM*, MSI, and the American Marketing Association, we are able to make these articles accessible to MSI members for a limited time so they can easily access and share them throughout their organizations. We also plan to invite the authors of each article to conduct an MSI webinar—free to MSI member companies and the academic community—to provide overviews of their article and to answer questions that may arise from the practitioner community. We also hope that these articles may fill a need in doctoral, graduate, and undergraduate education as well, providing an in-depth look at seven key areas of marketing and identifying critical questions and topics ripe for further research.

Through this special issue, both MSI and *JM* are delivering on their promises to help academics and practitioners share and work together to stay on the cutting edge of marketing theory and practice as well as to help guide researchers in a direction that focuses on new issues and questions that need to be addressed. It is the joint objective of both *JM* and MSI to foster alignment between academics and practitioners, and it is our privilege to direct this special issue of *JM* in service of that goal. We hope these articles will serve as a benchmark for the discipline of marketing and help drive innovative and compelling research in the years to come.

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