

**What happens at the brand interface?**

**A narrative inquiry into the brand management practices of  
small firms in Hertfordshire, UK**

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## Table of Contents

<b>List of Figures.....</b>	<b>7</b>
<b>List of Tables.....</b>	<b>7</b>
<b>Abstract.....</b>	<b>8</b>
<b>Acknowledgements.....</b>	<b>10</b>
<b>Chapter 1. Introduction.....</b>	<b>11</b>
1.1 Chapter Overview .....	11
1.2 Reflection, reflexivity, and the use of appendices.....	12
1.3 Chapter Summaries.....	13
Abstract.....	13
Chapter 1. Introduction .....	13
Chapter 2. The context for this research .....	13
Chapter 3. Review of the Literature.....	14
Chapter 4. Research Methodology .....	14
Chapter 5. Narrative Cases .....	14
Chapter 6. Critical Discussion.....	15
Chapter 7. Conclusion .....	15
<b>Chapter 2. The context for this research .....</b>	<b>16</b>
2.1 Chapter Overview .....	16
2.2 ‘Small firms’ and SMEs.....	16
2.3 Are EOMs different from owner managers in general?.....	18
2.4 Brands and branding in practice .....	20
2.5 My interest and experience as a basis for inquiry: a personal reflection.....	23
2.5.1 My experiences in business .....	23
2.5.2 Drawing on practice .....	28
2.5.3 Identifying an academic perspective .....	29
2.5.4 My initial research questions.....	29
2.6 Relevance of this study to the UK and its regional economies.....	30
<b>Chapter 3. Review of the literature.....</b>	<b>33</b>
3.1 Chapter overview.....	33
3.2 Branding and brand management in the SF .....	34
3.2.1 Perspectives of brand management in Small Firms.....	35
3.2.2 The entrepreneurial owner manager as brand leader .....	43
3.2.3 Branding as a capability in small firms.....	47
3.3 The Service Dominant Logic (SDL) Lens as a foundation for the co-creation paradigm.....	48
3.3.1 The two inter-connected SDL positions .....	49

3.4 Towards a theory of brand co-creation .....	50
3.4.1 The implications of SDL for branding and brand management .....	50
3.4.2 Defining co-creation in the context of brand management practices of small firms .....	51
3.4.3 How relevant are corporate and service branding concepts for SFs? .....	53
3.4.4 A model for brand value co-creation .....	61
3.4.5 The co-creative brand management system .....	63
3.5 A 'live' brand: brand orientation as a business strategy.....	64
3.5.1 Market orientation as an antecedent to brand orientation .....	64
3.5.2 Market orientation as a source of competitive advantage for small firms .....	65
3.5.3 Defining brand orientation .....	66
3.5.4 The organisational requirements of brand orientation .....	67
3.5.5 The performance benefits of brand orientation.....	69
3.5.6 The BO typologies of small firms .....	70
3.5.7 The concept of "living" BO: the impact of co-creation .....	71
3.5.8 The brand defined as a single organising principle.....	75
3.6 Internal branding as a route to co-creation of brand value .....	76
3.6.1 Defining internal branding .....	76
3.6.2 Employee brand-oriented behaviour.....	77
3.6.3 Perceived outcomes of internal branding.....	78
3.7 Leadership and management for brand value co-creation .....	81
3.7.1 Loss of control and a shift to brand governance .....	81
3.7.2 Transactional versus transformational brand leadership.....	82
3.7.3 Management behaviours to support brand co-creation .....	84
3.7.4 The potential importance of organisational learning .....	84
3.8 Brand Equity.....	88
3.8.1 Defining brand equity .....	88
3.8.2 The challenges of measuring brand equity.....	89
3.9 The conceptual framework for this study.....	91
3.9.1 Summary of key themes and gaps arising from the literature .....	91
3.9.2 Research questions relating to the themes and critical gaps .....	94
3.9.3 Research aim and objectives.....	95
3.9.3 Justifying the use of a longitudinal exploratory inductive inquiry.....	95
3.9.4 A synthesis of concepts as a framework to support this inquiry .....	96
<b>Chapter 4. Research Methodology.....</b>	<b>98</b>
4.1 Chapter Overview .....	98
4.2 The case for an inductive and exploratory research design .....	99

4.2.1 The adoption of a conceptual rather than theoretical framework .....	101
4.2.2 The resultant methodology .....	102
4.2.3 Drawing on the ‘marketing/entrepreneurship interface’ research tradition .....	102
4.2.4 The importance of longitudinal design .....	104
4.3 The framework for this research .....	105
4.3.1 Contemplating Positionality.....	106
4.3.2 Rationale for an interpretivist perspective .....	107
4.3.3 My research strategy .....	109
4.4 Data Collection.....	116
4.4.1 Interviews as the data collection instrument .....	116
4.4.2 Sampling.....	118
4.4.3 Data Analysis.....	119
4.5 The Art, Practice and Politics of Interpretation and Evaluation .....	121
4.5.1 Ensuring adequacy .....	124
4.5.2 The role of reflexive practice in this study.....	125
4.5.3. Writing as interpretation: the use of narrative.....	128
4.6 Chapter Notes .....	130
4A Self as a multi-cultural subject. (Epistemological reflection, Willig, 2001) .....	130
4B Ethical Statement.....	139
<b>Chapter 5. Narrative Cases .....</b>	<b>140</b>
5.1 Chapter Overview .....	140
5.2 “It is very vulgar to talk about one’s business. Only people like stockbrokers do that and then merely at dinner parties” .....	141
5.2.1 The recruitment of Participant P .....	141
5.2.2 Business fact file.....	141
5.2.3 Personal profile .....	142
5.2.4 “To me, I am the brand and that’s why I am loath to give it to someone else” (Participant P) .....	144
5.2.5 Feedback from Participant P .....	148
5.3 “Success without hard work is like trying to harvest where you haven’t planted” .....	149
5.3.1 The recruitment of Participant N.....	149
5.3.2 Business fact file.....	150
5.3.4 “The trick is to make it so they cannot stand the thought of going anywhere else” (Participant N) .....	153
5.3.5 Feedback from Participant N .....	159
5.4 “To be successful you have to be out there - you have to hit the ground running” .....	159
5.4.1 The recruitment of Participant M .....	159

5.4.2 Business fact file.....	159
5.4.3 Personal profile.....	160
5.4.4 “I want my company to be like Apple...a kind of global awareness but only in Hertfordshire” (Participant M).....	163
5.4.5 Feedback from M.....	170
5.5 Themes emerging from the narratives.....	171
5.6 Chapter 5 Notes.....	176
<b>Chapter 6: Critical discussion.....</b>	<b>185</b>
6.1 Chapter overview.....	185
6.2 The EOM’s relationship with their brand.....	185
6.2.1 Three vignettes of EOMs and their brands.....	185
6.2.2 EOMs’ relationships with brands moderates their brand-management practices.....	186
6.2.3 A brand leadership continuum.....	190
6.3 The adoption of brand management practices.....	191
6.3.1 Do small firms differ from large organisations, and if so, how?.....	191
6.4 Dialogue and co-creation: the brand’s conversational space is a place of interaction.....	205
6.5. The brand as a single organising principle for a small firm.....	209
6.6 Service matters: internal branding creates competitive advantages.....	211
<b>7. Chapter &amp; Conclusions.....</b>	<b>213</b>
7.1 Chapter Overview.....	213
7.2 Synopsis.....	213
7.3 Research contributions.....	216
7.3.1 Academic.....	216
7.3.2 Methodological.....	217
7.3.3 Practical.....	218
7.4 Research limitations.....	218
7.4.1 Generalisability.....	218
7.4.2 Synthesis of key concepts.....	219
7.4.3 The impact of the longitudinal design.....	219
7.5 Future research.....	220
7.6 A personal reflection on the experience of undertaking doctoral research.....	221
7.7 Concluding Summary.....	222
<b>References.....</b>	<b>224</b>
<b>Appendices.....</b>	<b>254</b>
A. Documents relating to ethics.....	254
A.1 Ethics Approval Notifications.....	254

A2. Participant Consent Forms .....	258
<b>B. Data collection .....</b>	<b>262</b>
B1. Phase 1 data collection instrument .....	262
B2. Phase 2 Semi Structured Interview to explore the meaning of brand .....	263
B3. Phase 3 Semi Structured interview to explore brand management practices.....	264
<b>C. Interview Transcripts.....</b>	<b>265</b>
C1. Phase 1.....	265
C2. Phase 2.....	278
C3. Phase 3.....	285
C4. Phase 4.....	294
<b>D. Data analysis .....</b>	<b>298</b>
D1. Initial analysis (Phase 1).....	298
D2. Open coding: co-creation .....	302
D3. Open coding: brand management practices .....	308
D4. Longitudinal data summary matrices .....	317
D4.1 From Sept 2015 – April 2016 (From 1 <sup>st</sup> to 2 <sup>nd</sup> cycle of data collection).....	317
D4.2 From April 2016 – Jan 2018 (From 2 <sup>nd</sup> to 3 <sup>rd</sup> cycle of data collection) .....	321
D4.3 From Nov 2018 – Mar 2020 (From 3 <sup>rd</sup> to 4 <sup>th</sup> cycle of data collection).....	324
<b>E Reflexive practice .....</b>	<b>326</b>
E1 Developing reflexive practice as a researcher .....	326
E2 Participant portraits .....	330
E3 The efficacy of semi structured interviews.....	339
E4 Change of supervisor .....	347
<b>F Planning for research impact .....</b>	<b>353</b>
<b>Glossary of Terms .....</b>	<b>361</b>

## List of Figures

<b>Title</b>	<b>Section</b>	<b>Number</b>
The Service Brand Relationship Value Triangle	3.4.3.2	3.1
The organic view of the brand	3.4.4	3.2
Co-creation in the conversational space	3.4.4	3.3
The co-creative brand management system	3.4.5	3.4
The branding archetypes ladder	3.5.6	3.5
Model of brand orientation	3.5.7	3.6
Brand behaviour funnel	3.5.7	3.7
The living brand orientation framework	3.5.7	3.8
Pathway to employee brand co-creative behaviour	3.6.2	3.9
Attitudinal and behavioural outcomes of internal branding efforts	3.6.3	3.10
Conceptual framework	3.9.4	3.11
The case study research approach	4.3.3.2	4.1
Continuum of approaches to interpretation	4.5	4.2
Researcher Development Framework	4.6	4.3
Brand leadership continuum	6.2.2	6.1

## List of Tables

<b>Title</b>	<b>Section</b>	<b>Number</b>
Brand management practices by item and dimension	3.2.1	3.1
The corporate brand building functions of SFs	3.4.3.1	3.2
Summary of key themes and gaps emerging from the literature	3.9.1	3.3
Denzin and Lincoln (2011) framework for the research process	4.3	4.1
Profiles of participating firms (anonymised)	4.4.2	4.2
Mezirow's seven types of reflection for qualitative researchers	4.5.2	4.3
Types of reflexivity	4.5.2	4.4
Summary of themes emerging from the narratives	5.5	5.1

## Abstract

The focus of the inquiry reported in this thesis was to explore the brand management practices put into practice by small firms (defined here as those having between 10 and 49 employees) from the perspective of an 'entrepreneurial owner-manager' as the brand owner. My study evaluated the extent to which the personal brand-leadership style of such individuals affects the brand's interactions with consumers in general, customers specifically, external stakeholders, and its own employees to determine whether those interactions resulted in a dynamic branding strategy capable of delivering sustainable competitive advantage.

An exploratory and inductive inquiry based on a qualitative methodology, specifically involving personal, conversational open interviewing, generated a set of narrative cases. The participants were owner-managers of small firms providing services to the consumer market in a single local enterprise area: essentially the county of Hertfordshire. The adoption of a longitudinal design was chosen to address a critical gap in the relevant existing literature, which has so far concentrated on large organisations rather than small firms.

This interpretive study of how small firms and their entrepreneurial owner-managers view and exploit a key marketing asset generated a typology of entrepreneurial brand-leadership styles. It furthermore delivers insights into the brand management strategies and tactics put into practice by owner-managers by exploring how and why they are chosen and executed in those real-life cases.

I conclude from my inquiry that there is a continuum of brand leadership styles and initiatives, which are determined by the personality, motivation and business aims of given individuals, and on the extent to which they see the opportunities that marketing and branding present for their business. That continuum defines the brand management practices that are adopted and implemented at varying levels of sophistication. The brand is consistently used as a 'relational asset', although the extent to which a firm's staff are enabled and encouraged to engage with the brand through 'internal branding', external dialogue and co-creation with consumers at the brand interface is moderated by the marketing capabilities within the firm. All three entrepreneurial owner-managers in the sample were found to be using their brand as a 'single organising principle', allowing them to deliver their brand promises and minimise reputational damage to the firm. None of the firms could be said to exhibit a 'minimalist' brand orientation.



My thesis contributes to the state of academic knowledge and the existing literature by being the first longitudinal study (to the best of my knowledge) to contextualise the brand management practices of small firms, the others having been cross-sectional, as confirmed by Odoom et al. (2017). It shows how the brand management leadership of their entrepreneurial owner-managers is implemented in practice. In so doing, I adopted the seminal Service Dominant Logic lens proposed by Vargo and Lusch (2017). The existence of the research gap it thereby plugs is confirmed by Frow et al. (2015) and Kazadiki et al. (2016). The findings in turn point the way for less exploratory research in future.

My study also makes a significant potential contribution to the curricula of undergraduate and postgraduate marketing education, until now dominated by theoretical frameworks and models applicable to branding and brand management of large organisations, by presenting case-based evidence of those strategies and tactics in the small firms that make up a significant proportion of UK economic activity. By the same token, my findings can contribute to the work of policymakers and business advisors to (for example) Local Enterprise Partnerships, in which, according to the Institute of Directors, the quality of available advice for small businesses is highly variable.

Returning to the academic implications of my study, future researchers can potentially use this formative research to develop hypotheses for a more definitive investigation focused on developing and testing a new conceptual framework for co-created brand management practices in the 'post-digital world', thereby updating the widely used model of Berthon et al. (2008). Future studies could also usefully link brand management in small firms to the existing 'branding archetypes model' of Wong and Merrilees (2005). Opportunities also exist to develop midrange and micro-level theory that would allow the metatheory of Service Dominant Logic to be further tested, verified, and adapted to the small firm setting.

Technical terms and abbreviations used throughout the thesis are described and defined in the Glossary of Terms at the end of the whole document, after the Appendices.

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During this inquiry, I have lost two people that I cherished. My Tante M, who always championed my corner, and Mike Smith, a dear friend who wore his knowledge lightly and had a big heart. This work is dedicated to them both, with my love:

*And ever has it been known that love knows not its own depth*

*until the hour of separation*

(From *The Prophet* by Khalil Gibran)

# Chapter 1. Introduction

## 1.1 Chapter Overview

The purpose of this chapter is to present an overview of the thesis. My personal interest in brand management led to an inquiry that seeks to explore an under-researched gap concerning the brand management practices of small firms (Odoom and Mensah, 2019; Berthon et al., 2008).

I adopt a Service Dominant Logic (SDL) perspective (Vargo and Lusch, 2004) because, in practice, it is observed that technology has moved branding outside of the direct control of the firm, but little empirical evidence is presented in support of brand co-creation, particularly from the managerial perspective. Linked to this, and given my work experience, I was specifically interested in exploring the extent to which entrepreneurial owner managers (EOMS) are willing to collaborate because existing literature often characterises them as being ‘all controlling’ of their brands.

The SDL lens required me to accept two fundamental ideas: that co-creation and the realisation of value happens in the connections between all the actors in a network (Vargo and Lusch, 2017) and that organisational processes provide the mechanisms for value co-creation. I therefore adopt the organic view of the brand (Iglesias et al., 2013) to enable me to see the brand as a conversational space where interactions take place between front line employees, consumers, and customers across the brand touchpoints. This suggested that brand management must be dynamic, so applying the brand management practices, as defined by Berthon et al. (2008) to explore the organisational processes and mechanisms that were supporting the brand interface – but qualitatively - was intended to help me understand how and why EOMs make specific choices about their brand management activities. The use of a longitudinal design to achieve familiarity with the phenomenon in practice also addresses a methodological gap relating to SF brand research (Odoom et al., 2017). McGivern (2013) asserts that an exploratory research study can form a sound basis for more conclusive subsequent research. Future researchers in this field can therefore use my formative inquiry to develop hypotheses for a more definitive investigation into the brand management practices of small firms (SFs). Developing this research stream could enable such firms to fully build and exploit the intangible asset value of their firms, as “existing marketing theories offer little of practical use in day-to-day marketing activities” for most SFs (McCartan Quinn and Carson, 2003: 210; Gilmore et al., 2001). Educators and business-support organisations also need to better understand the needs of SFs. The Institute of Directors for example has criticised current business-support networks on the grounds that the “quality of available advice for small businesses is highly variable” (Parikh, 2018:14).

This chapter next explains how reflexivity is employed and presented in this work, before summarising each chapter to preview the main content.

## 1.2 Reflection, reflexivity, and the use of appendices

Adopting the research approach often referred to as interpretivist epistemology requires me to understand and explore my role as the 'instrument of inquiry' (Piantanida and Garman, 2009: 59). It thus permits me to account for the ways in which I have constructed and imposed meaning throughout the process of my inquiry (Savin-Baden and Major, 2013; Eisner, 1991; May, 1975).

Alvesson and Sköldberg (2009) propose that researchers should work at four levels of reflexive methodology: empirical, where the emphasis is on using data diligently to do justice to social reality and guarantee reliability; hermeneutic, at which material is deeply searched for meaning; critical, where the aim is to be more sceptical about the findings; and at the level of writing to consider how findings are being communicated, with the aim of providing credible and coherent delivery of these. However, qualitative approaches are often criticised for being formulaic in that the concept and process of reflection is "trivialised to the point of cliché" (Piantanida and Garman, 2009:62). Similarly, reflection and reflexivity are often conflated, possibly because the concepts are under-theorised (Chinn, 2007). My aim must therefore be to provide a proper opportunity for more critical and socially aware practice, which is essential if I am to gain insight into my positionality (Savin-Baden and Major, 2013) and its impact upon what can be known (Alvesson and Sköldberg, 2009; Chinn, 2007). In striving also for objectivity, defined by Ratner (2002: 2) as "active, sophisticated subjective processes – such as perception, analytical reasoning, synthetic reasoning, logical deduction and the distinction of essences from appearances", I need to demonstrate and account for my processes of reflection and reflexivity so they can be understood, as the same author advocates.

However, I am mindful that my thesis must present a continuously advancing argument, informed by the result of applying my chosen analytical research methods rather than allowing them to divert the reader from the central discussion. I therefore decided on the following approach:

- Reflective and reflexive work that is core to my inquiry is italicised within the relevant chapters.

- Reflexive exercises that relate directly to the argument I am developing appear as Chapter Notes, so the reader can follow my reasoning.
- Supplementary information that may include a reflexive element, such as data analysis, appears in an appendix in line with standard academic practice. Thus, the Appendices contain some reflective and reflexive work connected with the management of the research process.

In organising my thesis in this way my aim was to help like-minded researchers and practitioners follow my process of interpretation: the analytical process connected with reflexivity is linked to the material considered as a problem to be solved. Accordingly, others can decide whether the reconstruction of the social reality I present is understandable and reasonable, or whether they wish to construct alternative interpretations from the empirical material I offer, depending on their own positionality and process of reasoning.

### 1.3 Chapter Summaries

#### Abstract

This synopsis of the thesis explains the focus of the study, the genesis of the research question in the literature and my personal professional experience. It defines the inquiry firmly as exploratory, interpretive, qualitative, case-based, and located in a single local enterprise area, before explaining how its findings plug a demonstrable gap in the state of knowledge regarding the application of brand management in small firms managed by entrepreneurial owner-managers, as distinct from the large organisations on which published studies have dominantly concentrated. It concludes by identifying the contributions of my inquiry and its findings to current conceptual frameworks, future academic research, and the practice of brand management in a hitherto neglected sector.

#### Chapter 1. Introduction

Here, I have provided an overview of my thesis by introducing its focus and overall research design, explaining the role of reflexivity and how the reflexive content is organised within the study. Lastly, I offer the summaries below of each succeeding chapter, to act as a synopsis of the full work.

#### Chapter 2. The context for this research

To provide context for my study, this Chapter begins by defining ‘small firms’, the focus of my inquiry, and ‘entrepreneurial owner-managers’, the participants in the personal conversations from

which the real-life cases presented in Chapter 5 are derived, before examining the nature of brands and branding in practice. It next offers a personal account of my pre-research interests and experiences, which eventually informed the design and structure of my inquiry. This Chapter lastly evaluates the relevance of my study to the national, regional, and local economies of the UK.

### Chapter 3. Review of the Literature

This review explores and analyses themes relating to branding and brand management in SFs, co-creation, brand orientation (BO) and brand equity. In finding that the existing research, particularly about brands and brand management, generally relates to large organisations (LOs) I refine my research questions, aims and objectives to address that perceived gap in the literature and the state of knowledge. This leads to the synthesis of a conceptual framework by drawing on critical gaps in the existing work, thereby supporting an exploratory inductive inquiry into the brand management practices of SFs and how they are put into operation. The conceptual framework provides the basis for the methodology discussion in Chapter 4.

### Chapter 4. Research Methodology

This Chapter explains that the framework of Denzin and Lincoln (2011: 12) was applied to the development of an exploratory and inductive phenomenological study. It also demonstrates that my inquiry adopts best practice at the Marketing and Entrepreneurship Interface (MEI). The need for a longitudinal study is presented as a critical gap in existing research into brand management in SFs, and the use of narrative cases based on in-depth interviews to close that gap is justified. Finally, the chapter explores the use of a reflexive approach as a way of supporting “transparent and honest” reasoning (Reiter, 2017: 131) that aims to achieve validity and insight from the data.

### Chapter 5. Narrative Cases

Three ‘stories’ are presented. I adopt the notions of five features of a narrative (Clandinin and Connelly, 2000) and the qualities of a good story (Sikes and Gales, 2006) to describe practice systematically, rigorously, and accessibly. Accordingly, the narrative stories merge content narrative (data) and meta-narrative (a research report) as, following the methodological lead of Bold (2012), I develop the cases to make sense of the social phenomenon and settings shared with my participants through discussion and observation. In summarising the experiences of the EOMs regarding their brands as ‘cases’ I thus provide a foundation for the critical discussion in Chapter 6.

## Chapter 6. Critical Discussion

Here, through the reflexive lens explained in proceeding chapters, I explore the relationship between the findings of my inquiry and the conceptual framework outlined in Chapter 3.

## Chapter 7. Conclusion

The description of my research journey concludes with a synopsis of the study, and its aim and objectives. The potential contribution of my research is demonstrated and evaluated as it applies to academia, business practice and policymaking. The limitations of my study are discussed before I outline the opportunities for future research. I provide a final reflection about my experiences as a Doctoral student before my concluding remarks which summarise the key findings from this inquiry.

## Chapter 2. The context for this research

### 2.1 Chapter Overview

This chapter first discusses the definitions of ‘small and medium enterprises (SMEs)’, ‘micro-businesses’, ‘micro-enterprises’ and ‘small firms’, before settling on the last of those (‘SFs’) as the best description of the firms within which I carried out my case research. It then examines the concept of the ‘entrepreneurial owner-manager’, as typified by the participants in my inquiry (‘EOMs’).

It next moves on to a discussion of the concept of branding and the process of brand management, both generally and more specifically in the small-firm setting. That section highlights the trend in what is often referred to as the ‘post-digital world’ towards more informed and discerning consumers, who ‘co-create’ brand value with the brand owner. Such a brand has been described as a ‘living business asset’ that must evolve continuously if it is to deliver mutual value to the firm and its customers, creating a ‘clear leadership narrative’ and becoming ‘a vehicle for ensuring consistent customer experiences’.

I then give a personal account of my interests and experience before the inception of the research study reported in this thesis and explain how that background led to a deep interest in brand management in small firms and subsequently informed the design and structure of my inquiry into brand management by EOMs in their SFs. Lastly, this Chapter evaluates the relevance of my study to the national and regional economies of the UK, with particular reference to the area embraced by the Hertfordshire Local Enterprise Partnership, which is where the study was undertaken.

### 2.2 ‘Small firms’ and SMEs

The title of this thesis specifies that my research has been focused on brand management in ‘small firms’, which is not in itself a precise description of the companies concerned.

The concept ‘small firm’ is clearly close to that of a ‘small and medium enterprise’, the familiar ‘SME’. Certain sources also recognise a category ‘micro business’ or ‘micro-enterprise’, a term coined by Nobel Prize winner Muhammad Yunus and first applied in the context of Bangladesh and other economies in which such firms prevail; it simply signifies a total number of employees below ten. The inconsistent application of terminology was thus a challenge in undertaking research in the context of ‘small firms.’ Pragmatically, I decided to use the description small firm (‘SF’) throughout



this thesis, even when discussing work that references SMEs (unless that description occurs within a direct quotation from a cited text).

The OECD (2017) classifies SMEs by size. An 'enterprise' is considered 'small' or 'medium sized' if it has fewer than 250 employees and a turnover of less than 50 million euros, and if less than a quarter of its shares are owned by another enterprise. It is intuitively reasonable to suggest, however, that there will be significant cultural and management differences between medium-sized firms with 250 employees and the 'small' firms encompassed within the umbrella description.

The UK Government defines two types of SME: a *micro firm* with up to nine employees (adopting the Yunus terminology), of which there were 5.6 million at the end of 2019, collectively accounting for 96% of all UK businesses; and a *small firm*, with 10 to 49 employees, of which there were 211,000 at the same date. Most businesses in the UK thus employ fewer than 10 people. Three quarters (76%) are furthermore operated by the owner alone: the 'entrepreneurial owner-managers' ('EOMs') who were interviewed in the course of my inquiry. Three quarters is also the proportion of all UK businesses operating in the service sector, a trend which is reflected among small firms, according to Rhodes (2019). The firms managed by my EOM respondents all delivered consumer services.

Together, micro, and small firms account for just less than half (47%) of total UK employment and well over a third (37%) of the total turnover of the UK Private Sector. Between 2018 and 2019, the national business population grew by 69%, with 'non-employing businesses' (those run by an EOM alone) accounting for 88% of that growth (Department for Business, Energy, and Industrial Strategy, 2019).

However, given the importance attributed in the existing literature to owner-managers, whether entrepreneurial or not, I considered size less important for the purposes of this research than the role played by an EOM in determining marketing and brand strategies. My research accordingly focused on SFs with 10 to 49 employees, although it should be noted that one of the firms within the purposive sample had less than 10 full time employees but was included because it scaled up to deliver events using a team of regular casual staff. Within that frame of 10 – 49 employees, my main criterion for selecting the firms to participate in my fieldwork therefore adopted a specification from McCartan-Quinn and Carson (2003: 202): "an independent owner/managed business organisation of limited significance within the industry, employing less than one hundred employees, where the owner/manager's omnipresence creates a highly personalised management style [which] impacts upon the type and nature of marketing activity [and] is different in a variety of characteristics to large company marketing".

The basis for my methodological decision to use purposive sampling to recruit my participants was the significant presence of micro and small firms within the UK Private Sector already noted above.

### 2.3 Are EOMs different from owner managers in general?

There was an implicit assumption in the previous Section that owner-managers will by definition be 'entrepreneurial', which needs to be further examined. The motivation for undertaking research with EOMs was that I am personally attracted to new opportunities, innovation and the ability to add value to a business. I therefore saw my inquiry as an opportunity to learn both by experiencing vicariously what the entrepreneur is experiencing and as a means of developing new understandings and insights by sense-making through reference to my own past activities, a process discussed by Bold (2012). A key challenge facing me before identifying participants was the absence of a universally accepted definition of entrepreneurship remarked upon by Davidsson (2004) and Gartner (1990).

Entrepreneurship is defined either as an ability to pursue innovation (Churchill and Muzyka, 1994) or being able to pursue opportunities (Stevenson and Jarillo, 1990). These two concepts are combined by Shane & Venkataraman (2000: 218) to define entrepreneurship as "the presence of lucrative opportunities and the presence of enterprising individuals" while Davidsson (2004:16) defines it as a "competitive behaviour that drives the market process." I find this helpful in that it aligns with the concept of market orientation as an organisational culture (Jaworski and Kohli, 1993).

Market orientation is associated with performance advantages that are perceived to arise from its adoption, especially its "competitor orientation dimension" (Noble et al., 2002; Narver and Slater, 1990). This implies that entrepreneurs may be proactive in the marketing management process and will therefore have something of interest to share, given the focus of my inquiry. Similarly, Reijonen et al. (2014) find that SFs with growth intentions can be differentiated by the extent to which they adopt market orientation and brand orientation. It therefore appears that entrepreneurs who start new ventures and successfully grow their SFs may have understood how to manage marketing and done that effectively, using their brands as a strategic focus for their organisation. That said, it is not always clear what 'growth' means in a SF context, with Allinson et al. (2015:2) finding that only 15% of SFs have a "substantive growth ambition" which they define as "seeking to grow sales by more than 20 per cent over the next three years, growing income significantly after the next three years and a strong personal desire of the owner to grow".

Meanwhile, the extent to which it is possible to differentiate between an entrepreneur and a small business owner has long been a matter for debate (Gartner, 1988; Carland et al., 1984). Generally,

the focus of these discussions appears to be on whether entrepreneurs can be differentiated from owners on the basis of their traits and/or behaviours. Accordingly, the 'Big-5' model – a multidimensional approach towards defining personality through the measurement of openness, conscientiousness, extraversion, agreeableness, and neuroticism (Gartner, 1988) – has been adopted as the predominant model for personality traits since the 1980s, which have been found to influence career choice and work performance (Rauch, 2014; John et al., 2008). The model has been criticised, however, for its gender specificity and apparent sexism. Thus, it may not reflect the position and representation of women in SFs (Goldhill, 2018). Moreover, whilst research in this area indicates differences between entrepreneurs and managers, differences are also found across entrepreneurial populations. This is despite efforts to 'prove' those differences in large-sample studies and meta-analyses. Kerr et al. (2017: 12) attribute observed variations to the "influence of environment on each entrepreneurial population's traits, such that generalizations across populations, industry, and culture are an impossible task", rendering it risky to generalise about what makes an entrepreneur.

By contrast, another stream in the literature suggests that entrepreneurs possess a strong sense of 'self-efficacy', defined as being a composite of five tasks: innovation, risk-taking, marketing, management, and financial control (Chen et al., 1998). When this concept is linked with the literature focused on locus of control (Rotter, 1954), it appears that people in whom the latter is internal believe that their lives are controlled by their own decisions rather than by fate, with the likelihood of engaging in entrepreneurial activity linked to that belief (Shaver and Scott, 1991; Gartner, 1985). If innovativeness is taken to mean how individuals respond to new things (Goldsmith and Foxall, 2003), there seems to be consensus that entrepreneurs must be risk-tolerant and able to create or recognise business opportunities (Kerr et al., 2017). This supposition is borne out by industry trends indicating that sectors characterised by high rates of entry by small firms also have high rates of innovation and growth in productivity (Parker, 2009).

Meanwhile, Hayton (2015:8) suggests that across the UK SME sector there are "long tails of businesses with poorly developed (leadership and management) skills and which do not use management best practices." He is also able to demonstrate that variations in leadership and management skills are connected to variations in performance – both "directly and indirectly through an increased propensity to adopt management best practices" – although his research does not go below the level of strategy and is not specifically focused on marketing and/or branding as functional disciplines. This suggests that perhaps entrepreneurs are less common than owner-managers, a phenomenon that may be linked with the growth of non-employed businesses that represent life-style choices (Department for Business, Energy, and Industrial Strategy, 2019). Linked

to this argument, the literature appears to distinguish between growth-driven entrepreneurs, who seek opportunity and innovation, and necessity-driven entrepreneurs, who start new businesses when alternative options are limited (Hurst and Pugsley, 2011). However, it is also suggested that entrepreneurial motivations are often complex and “not so binary in nature” (Kerr et al. 2017:34).

My research aims were to explore the brand management practices adopted by SFs from the managerial perspective of the brand owner and to evaluate if and how co-creation is used to develop a branding strategy that delivers value for the firm. I therefore believed I would learn more from owner-managers who were competitive (Davidsson, 2004), had growth intentions (Reijonen et al. 2014), were innovative (Kerr et al., 2017; Goldsmith and Foxall, 2003), and exhibited self-efficacy (Chen et al., 1998) than from those who maintained a static or life-style business. Accordingly, I thought it likely that my participants would have a strong locus of control (Shaver and Scott, 1991; Rotter, 1954). For this inquiry, I therefore linked those specific characteristics with the concept of the owner-manager as someone with a highly personalised and idiosyncratic management style that impacts on decision making within the firm, particularly marketing activity (McCartan-Quinn and Carson, 2003). I was guided by that interpretation of the profile of an EOM in recruiting my participants. Linked to this, in terms of ‘growth intention’ I recognise that focusing on SFs with 10 – 49 employees understates growth because it excludes those businesses which have grown to have 50 or more employees. I also accept that each EOM may define ‘growth’ differently based on their overall business goals but anticipated that they would focus on one or more of the following metrics: revenue, sales, company value, profits, number of employees and number of customers.

#### 2.4 Brands and branding in practice

Following the global economic recession of 2008, brands re-emerged as a key source of competitive advantage, with the claim that they offer powerful and sustainable attributes despite their intangibility (Kapferer, 2012; De Chernatony et al., 2011). Brands are regarded as “axiomatic in all economies”, and it is generally considered that competition occurs due to the added attributes brands represent (Ambimbola, 2010: 177; Simões and Dibb, 2001). This is because the brand adds value for consumers by supplying meaning and communicating the competences, standards, and image of the firm. Thus, branding enables companies to influence the plasticity of demand as consumers seek out specific brands, which become connected with a firm in the customer’s mind (Hamel and Prahalad, 1994).

A consumer’s personal identification with a brand is therefore regarded as the ultimate differential response and leads to a brand relationship through attitudinal attachment and loyalty (Wong and

Merrilees, 2005; Keller, 2001). A strong brand is thus difficult to imitate, enabling the owning firm to develop, protect and leverage its market-based assets, such as customer relationships (Abimbola, 2001). In this way, companies can create value through acceleration and enhancement of cash flow, reducing its volatility, and protecting themselves from financial vulnerability. Evidence suggests that, in increasingly dynamic and uncertain markets, those firms able to develop and leverage their brands will gain competitive advantage (Noble et al., 2002). This is achieved by using the brand as a strategic resource to organise and develop the firm's capabilities and competences (Simões and Dibb, 2001; Berthon et al., 1999; Keller, 1998; Urde, 1994). Correspondingly, it appears that the balance sheets of such large organisations as for example Vodafone, HSBC and Shell, the UK's current top three most valuable brands, do not fully explain a firm's value (Kantar, 2019). That value must therefore arise from the brand, combined with the competences and capabilities derived from the organization's networks.

Contemporary published work suggests that the competitive advantages delivered by brands exist irrespective of firm size in the form of brand orientation (Reijonen et al., 2012; Wong and Merrilees, 2007). This means it should be possible for SFs to imitate large organisations by creating asset value through their brands. However, the extant literature also indicates that most do not understand the principles of brand management (Krake, 2005; Wong and Merrilees, 2005). Little is known about their specific brand management practices (Odoom et al., 2017; Berthon et al., 2008). It has been found by Anees-ur-Rehman et al. (2016) that the literature of brand orientation does not explain how its relationship with a firm's capabilities can affect performance. It is further claimed that the brand orientation literature "also appears equivocal, given that empirical evidence from SMEs [is] largely ignored" (Odoom and Mensah, 2019: 156).

Such Small and Medium Enterprises account for most organisations in developed economies, making their performance critical to a nation's gross domestic product, employment, and export performance. Accordingly, whilst the brand value of the top 150 British brands rose by 10% in 2018-19 to £369.11 billion, businesses with less than 49 employees accounted for 37% of total turnover in the UK Private Sector (Brand Finance, 2019). It is, however, much harder to estimate the brand value of these firms because relatively little is known about how they approach brand management (Odoom et al., 2017; Berthon et al., 2008). That said, it is documented that the management style and operations of SFs differ from those of LOs due, in part, to the dominance of the EOM, but also because of resource constraints and marketing competence (Knight, 2000).

Meanwhile, it is claimed that the trend in the 'post-digital world' is one of more informed and discerning consumers wanting to co-create value (Vargo and Lusch, 2017; 2004). This suggests a brand is a "living business asset" that must continuously evolve if it is going to deliver mutual value to the firm and its consumers (Frampton, 2012: 2). In turn, this implies that firms that successfully develop their brands as assets must have processes in place to support dialogue and interaction with their consumers (Merz et al., 2009). Moreover, it is suggested that the phenomenon of 'digital exponential' (Sable, 2012: 1) has fundamentally changed the relationships between businesses and their consumers, and therefore the practice of marketing. This process of change is ongoing as both providers and consumers experiment with ways to develop seamless paths between their offline and online worlds, raising the question whether SFs are adopting new practices that may be changing their understanding and practice of brand management as a result of innovation through technology. However, it appears that some remain challenged regarding the use of technology and its integration into their management practices (Odoom and Mensah, 2019).

Certainly, consumers are considered more informed, discerning, and proactive, with significant differences being observed in their attitudes and behaviours (VanBoskirk et al., 2016). Generally, the "purchase funnel model" proposed by Strong (1925) appears to have been replaced with more dynamic and non-linear decision-making processes that involve seeking the views of other consumers. As this trend continues, brands have become "a way to engage consistently in the conversation and to define and deliver the seamless experience" sought by customers throughout their purchase journey (Frampton, 2012:17). Hence the emerging paradigm shift in the marketing literature relating to "co-creation" in different contexts (Vargo and Lusch, 2017, 2008, 20004; Prahalad and Ramaswamy, 2004). However, whilst brand co-creation is an "emerging area of significance" (France et al., 2015:848) within this literature, most of the published sources focus on conceptual research, leaving only limited empirical work available to date. Moreover, the majority of what is available considers brand co-creation in the context of LOs rather than SFs (Odoom et al., 2017).

Using the brand as a single organising principle develops intangible asset value for the company (Bean, 2009). So, the question is: are SFs exploiting the fundamental changes in the post-digital environment to work with their consumers to co-create a brand orientation that can deliver sustainable competitive advantages? Or, as the existing literature suggests, do they remain focused on using their brands to differentiate themselves in their markets because branding is not a central or critical function, meaning they fail to take it seriously (Wan et al., 2013)? Accordingly, the

definition of brand supporting this inquiry is that of a “single organising principle, brought to life coherently, continuously and consistently” to align a business and consistently meet brand promises, even while recognising that it will be the result of reciprocal dialogue that unites the endeavours of many actors within the brand network (Bean 2009:16).

## 2.5 My interest and experience as a basis for inquiry: a personal reflection

In the sub-sections that follow, italicised font identifies reflective and reflexive material that was a core input to the nature of my inquiry.

The roles I played before entering academia as a Visiting Lecturer in 2004 have driven my research interests. The three phases of my work experience pre-academia resemble small business management experiences in their specific contexts and requirements, although two were within large organisations.

### 2.5.1 My experiences in business

#### *1986-89 Food for thought*

*As a graduate of Norwich Hotel School, I began my career at Gardner Merchant (which became part of Sodexo in 1995). With a Distinction in HND in Hotel, Catering and Industrial Management, I remember feeling confident that I was professionally qualified and could easily manage the demands of a role as an Assistant Manager. At the time, I aspired to run my own contract or perhaps become a regional or senior manager – which was after all what I had spent three years training to do.*

*Gardner Merchant was a large contract catering company with a diverse range of contracts in the corporate and public sectors. It had standardised procedures for its key functions such as operations management, finance, and human resources. What I had not anticipated was that each unit had a high degree of autonomy: as managers, we had total responsibility for the staff team and day-to-day management of the business.*

*Industrial catering is a high-pressure business that focuses on feeding large numbers of people within tight timeframes and on small margins. Professional kitchens are also dangerous, hot, noisy, smelly and – often – cramped spaces that require people to work in close proximity to one another. It is easy to imagine some of the challenges relating to delivering meals at the expected time, to cost of production, and to standards.*

*I recall that the biggest challenges related to the staff team. Recruiting and retaining the right calibre of staff is difficult in a sector that does not pay high wages but demands discipline and focus, accuracy, creativity, and the ability to manage physically demanding work. Competition for staff is*

*consistently high due to demand and supply. At this unit of the parent company (Bolton and Paul, Norwich), the staff team of nine was divided between such younger, ambitious, skilled workers as chefs, who saw the job as a step in their journey to something better; and mature women, unskilled and doing a service job to earn additional family income, who happened to constitute most of the staff of that unit. The team attitude became divisive when there were problems or criticism. This is not unusual in catering: the front-of-house team and the kitchen staff will blame one another when customers are unhappy with any aspect of service.*

*The general manager was a former chef. The unit ran well in terms of food and beverage operations, purchasing and waste management, but he disliked the burden of exercising people-management skills. While I was required to cook daily it became my responsibility to develop a more cohesive and effective team. There were struggles. For example, two of the younger female staff closest to me in age, resigned acrimoniously because they resented the fact that they no longer reported to a person they perceived to have authority over them. A junior chef we recruited drank, had a drug habit, behaved erratically, and engaged in petty theft. When his behaviour became wholly unacceptable, we had to sack him quickly. However, by spending time working alongside colleagues, noticing where the problems occurred and helping them to resolve these, we all started to pull together. One of the most significant things I feel I achieved was to create a simple, informal training programme that enabled some of the unskilled staff to develop new skills. This was done by rotating people in the different kitchen and service roles so they could experience the whole business; but with mentoring and support so they did not feel threatened. That cost the firm nothing, but collectively we learned a lot, improved productivity and standards, and everyone felt part of something bigger than their own role.*

*This result was noticed by Gardner Merchant's senior management, and I was offered my own contract managing the catering for the Bally Shoes factory in Norwich, just over a year after starting. Having been an in-house operation that was transitioning to an outsourced supplier, this resembled a new start up: everything operational and brand-related was changing, but I inherited Bally's internal staff team. Unlike the established contract with its experienced manager to show me the ropes and with systems and processes that had already bedded down, I had to create everything from scratch. I was given two weeks from the day the ink dried on the contract in which to have everything ready but, apart from a team of eight staff and a functional kitchen, I was given no help: the outsourcing was part of a cost-cutting exercise in a heavily unionised company and the staff, both my team and our 'customers', the users of the Bally staff canteen, were all opposed to the direction my client was taking. The atmosphere was sour, and it was a very solitary experience with no one with whom to share decision-making. I had to be assertive about the 'new' company's vision and how it differed*



*from what it had been historically. Since everyone was at least 20 years older than me, changing ingrained habits and attitudes was challenging.*

*My unit at Bally, got under way on time, as an out-sourced operation, with the staff having had some basic training, essential systems having been set up and a food production schedule established for month one, but the operational challenges had been significant, and I was exhausted by working long hours. Three or four weeks into the contract, I called all the team into my office and – for the first time ever in a work situation – lost my temper over their attitude to customers and the business. I think they were surprised that someone only 23 years old at the time could feel so passionately yet also be so clear about expectations and what would happen if they did not ‘up their game’. It was almost as if they had decided to treat me as if I were on trial because, after some straight talking, an amnesty was established, and we started to work better together.*

*The staff team became a success story, and I was proud of them, but the contract between Gardner Merchant and Bally had been poorly negotiated. Even with a tight rein on finances and food production, it was a daily challenge to meet targets. Although the team would make suggestions and did their best to help with some of the problems, we did not have the resources or the freedom to instigate strategic changes that could have turned the business around. This was part of a bigger picture: Bally Shoes closed its operations in Norwich shortly after I had decided to change my career path.*

*1989 – 2003 Altruism is a serious business*

*By this stage I felt I could be innovative, had shown myself to be a problem solver, and could handle hard work with a high degree of personal responsibility. I had a good all-round view of a whole business, having been responsible for all the key functional areas and liked working with people. Above everything else, I enjoyed being customer-facing. On that basis, I decided to change career completely and entered the voluntary sector as a community fundraiser, partly because that role seemed to offer similar autonomy but with better rewards and opportunities.*

*I worked briefly for the organisation now known as Scope before spending 12 years with Save The Children UK, a non-governmental organisation and international charity, starting as an area fundraiser, becoming a regional manager, and finally filling the post of Central Support and Development Manager based in Head Office but with national responsibility for all communications and support to the volunteer network, then comprising about 23,000 people. At this point I had a team of 12 multi-disciplinary staff, who worked in a variety of marketing, communications, and people-management roles. My income budget was £2.1 million, so I was effectively running a significant strategic business unit within the overall organisation.*

*Area or regional fundraising, with its requirement to network, build relationships, and support those with appropriate and targeted communications, seems to me to have been like working in a small business environment. In acquiring responsibility as a manager, I was effectively running a small business in that the community fundraising sections of most charities at that time were highly devolved. Although there were branding guidelines, systems for accounting and processes for managing staff, there was autonomy around key aspects of decision-making, especially that linked to marketing. It was a requirement that I devised, implemented, and evaluated the most suitable activities to generate funds.*

*I would observe that a key difference in this role was working with many colleagues, which made it a less isolating experience than my days in catering, though that was not always true. The area fundraiser role often involved the designing and running of large events with volunteer support. Though I had a team to work with, the overall responsibility ultimately lay with me as the contracted employee. Then, as manager of the Central Support and Development Unit, I was based at headquarters but worked with regional teams – and so was neither part of head office nor the regions. I was often caught in the crossfire between the two and had to learn to be a diplomat and tactician in order to negotiate and move the business on.*

*I next applied for the more senior role of Head of Regional Fundraising but was unsuccessful on account of my perceived lack of budgetary experience. A colleague and friend in the Staff Development Team suggested that I could start an MBA with a view to moving to a smaller charity in a more senior role.*

#### *2003-05 The 'real McCoy'*

*However, while doing my MBA, I decided that I had spent enough time in the voluntary sector, with its specific characteristics, and wanted to broaden my experience in a commercial setting. I was clear that this had to be in a small firm setting because I wanted to be in a more flexible and adaptive working environment. Although I had consistently been in roles that gave me a high degree of responsibility and autonomy, it was difficult to effect real change due to the wider business or organisational context.*

*I was recruited by a small company, the Cawdor Stone Group, to launch and manage a retail premises. The company's core business is stone installations for large construction projects such as Hong Kong airport and Paternoster Square in London, but the Managing Director saw a business opportunity to leverage their special expertise by supplying a range of tiles, worktops, and fittings to the domestic market. As General Manager of the store's gallery, I would take responsibility for*

*opening it on time and within budget, and for managing the staff, finance and operations to deliver his three-year sales forecast and budget.*

*There were several areas of conflict within the business. First, the Managing Director was unable to delegate and regularly countermanded me. Second, this industry has a very male culture, making it hard to establish any authority as a woman. Finally, the business model that had been set up was to import cut stone from Italy. At an early stage in my role, I carried out a cost/benefit analysis of cutting stone on site because of the high wastage experienced, but the Managing Director would not change the business model. Combined with an unrealistic revenue forecast, it was evident that the business could not succeed as planned, not least because of the impact on its reputation when customers were frequently disappointed by delays resulting from stone being broken on arrival.*

*I resigned from Cawdor Stone once I had graduated from the MBA programme, mainly on account of frustration at not being able to control key aspects of the business. I nevertheless kept in touch with the Managing Director, who was gracious enough to tell me about 18 months later that he had modified the business model in line with my proposal and that the firm was making a profit – almost to the exact date I predicted it would.*

#### *2005-09: A new venture: 'Re:Solution'*

*I left Cawdor Stone without a job to go to but was keen to start my own company. I felt there was a gap in the small business market for an interim manager with all-round business experience, combined with a marketing focus. It was clear to me that SFs often lack the resources to be dedicated to marketing, and that my ability to combine this specialism with responsibility for other business functions seemed to be a differentiator: firms would receive professional marketing guidance and support whilst a second senior role would be undertaken simultaneously without additional cost. I wanted to be an interim manager rather than a consultant because I would get more satisfaction from being 'hands on'.*

*Within three months, I had two contracts: one for a small clothing designer and manufacturer located near my own base; the other for a London-based supplier of recruiters to the recruitment industry. The challenges in the two firms were quite different.*

*The clothing firm had been set up by four school friends who had design flair but no business experience. One, who had become the Managing Director, was an excellent salesman and they had grown the business steadily, operating through distributors and retailers in the UK and Europe. Further expansion of the business was restricted by the seasonal nature of the clothing industry and the pressures placed on cash-flow by the buying/selling cycle. I was brought in to manage their finances, but my role developed to cover HR and marketing. We brought cash under control through*

*strict debt control and continued to grow the business, simultaneously developing a strong brand identity in a competitive market.*

*The second firm had an established market presence in the recruitment industry, with high customer awareness and a good reputation. They wanted to develop a new dimension to the business, recruiting in-house recruiters for large organisations such as Sky. I was asked to project manage this expansion, requiring me to network with HR managers and senior staff in a range of corporate clients, as well as to headhunt suitable candidates.*

*I started to seek new opportunities as these projects matured but a period of illness which left me with vertigo impaired my ability to travel, making commuting into London impossible. A post became available at the University, where I had worked as a Visiting Lecturer, which gave me the opportunity to transfer my skills into a professional role allowing for personal development as well as being manageable given my health constraints.*

#### 2.5.2 Drawing on practice

*Having held leadership roles in business settings that required me to assess situations rapidly and design alternatives to seek new routes forward, I feel I have an entrepreneurial mind-set. The 12 factors of an entrepreneurial mindset proposed by Turner (2015) are:*

*Taking action, being scared, being resourceful, obsessing over cash flow, not asking for permission, being fearless, welcoming change, loving a challenge, being an outsider, recovering quickly, listening, and focusing on what matters (having worked out what that is).*

*Turner's model suggested to me that I could understand the contextual influences of my participants and their lived experiences because I would be able to relate to their actions through reference to my own past activities, following the general precedent set by Atkinson and Delamont (2006) and Bold (2012). I therefore knew before starting my inquiry that it was likely to be narrative based, sharing common interests with EOMs.*

*Similarly, my interest in brands and brand management developed as a practitioner. It was gained by learning 'on the job' from diverse experience that spanned a range of sectors. Nearly twenty years before, my MBA dissertation had arisen as a direct result of leading a project team responsible for re-branding an international non-governmental organisation and subsequently developing a corporate brand for a small firm. That study aimed to assess when a small firm has a brand as opposed to simply owning a logo, but I remain surprised by the lack of research into branding and brand management in such firms when they are well known to be critical to our economy.*

### 2.5.3 Identifying an academic perspective

*At the outset of this journey, I therefore knew I wanted to combine my experience with my interest in brands. However, this inquiry only started to take shape academically when I took responsibility for developing a new module at Hertfordshire Business School in 2010. At that time, there was criticism of marketing leadership and a perceived lack of accountability within the marketing function - specifically the inability to define the return on investment of activities such as brand development, as pointed out by Shaw and Merrick (2005). This seemed paradoxical when the importance of brands was simultaneously being re-emphasised in the business media (The Guardian, 2009) after the 2008 'great recession', which was a 'double dip' phenomenon for the Eurozone, with correspondingly low or negative growth and rising unemployment. The paradox was that, while marketing management was being criticised as generally weak, brands were being identified as one of the few remaining sources of competitive advantage, successfully contributing to the intangible asset value of a firm, and thus the economy (Saad et al, 2010).*

*At this point, my preparation for teaching introduced me to concepts that made me wonder how brand management was being operationalised. Vargo and Lusch (2004) had introduced Service Dominant Logic as a new paradigm for marketing, which refocuses the basis of exchange on the application of competences rather than units of output. The argument was that, in a knowledge economy, intangibles such as skills and information – or services - are more important as a unit of exchange than goods. Generally, the related literature adopted an authoritative tone, but I was struck by an absence of evidence to support its key principles. Whilst the extant work clearly draws on literature streams relating to service and 'servitisation' (for example Gummesson, 2002; Achrol and Kotler, 1999; Grönroos, 1994), and is a robust attempt to respond to changes that are being seen in the way that consumers and markets operate, much of the literature remains conceptual and generally unsubstantiated since I originally embarked on this journey.*

### 2.5.4 My initial research questions

The different strands described so far crystallised into a series of research questions grounded in my personal interest and experience, a process advocated by Bryman and Bell (2007):

Those questions were:

- What is the perceived value of a brand for a small firm?
- How do such firms understand and develop their brands?
- How do they manage their brands?

- Do they consciously plan their brand management activities?
- Are there specific brand development and management procedures for small firms?
- Do brands add value to the small-firm business model and, if so, in what ways?
- Can small firms that do have brand management activities measure the impact of these on company value?
- Do they engage with their consumers and partners to co-create value through brands? If so, how?

## 2.6 Relevance of this study to the UK and its regional economies

Within the UK economy the total business population grew by 69% to 2.4 million between 2018 and 2019, but there has been a significant shift towards ‘non-employing businesses’, with as many as 88% having just one self-employed owner (Department for Business, Energy, and Industrial Strategy, 2019). There thus appears to be increasing fragmentation in the business environment, with a corresponding proliferation of SF brands. This development is linked to the dynamics of the business population: there were 381,000 business births in 2018, roughly the same number as the previous year, but 56% more compared to 2000. There were also 336,000 business deaths in 2018, which represents 26,000 fewer than in the previous year and is the biggest fall in that metric since 2010, when the UK emerged from the global recession. In 2018, the overall business birth rate and death rate were respectively 13% and 11% (Rhodes, 2019).

That said, the volume of business births and deaths is proportionate to the total business population and, as this thesis is completed, it is unclear what the longer-term impact of Brexit and the Coronavirus will be in the UK. Thus, it may be reasonable to accept the trend that SF survival rates are 91% after one year of trading, but within five years only four in ten remain in business – despite the precise reasons for this being unspecified in the available data (Ormsby Street Research, 2016).

However, a White Paper on Industrial Strategy states that it is “not enough just to look at the economy we have” and we must prepare “for the economy we need to become” (White Paper, 2017:23). Clearly, this was released in a post-Brexit UK, which will have affected its tone and content. However, on that basis, the government proposes to work with the Office of National Statistics, academics, and other stakeholders to “identify gaps in our evidence base” in order to plan for new markets and continue building the UK’s competitive advantage (White Paper, 2017:28). Greater understanding of what SFs do and how to create successful brands (not to mention what

success means and how it might be measured) is therefore critical, given the prevalence of SFs within the UK economy.

My local region, the East of England, is characterised by a predominantly rural landscape, with a high number of market towns and only four large urban areas: Norwich, Luton, Peterborough, and Cambridge. The southern part of this diverse region, specifically Hertfordshire, is densely populated while the rest typically contains stand-alone cities and expansive rural areas. The regional economy is heavily dependent on services although there are concentrated areas of manufacturing. In 2015, its GDP per capita was the third highest in the UK and unemployment was below the national average due to the proximity of part of the region to London (European Commission, undated). According to the Local Enterprise Partnership (2018:7) Hertfordshire “performs well on measures of entrepreneurship and high growth businesses.” However, “productivity in Hertfordshire is just above the national average, and below most competitor LEP areas” while “economic performance has not kept pace with other competing local economies” (Local Enterprise Partnership, 2018:6). This is despite Hertfordshire’s business survival rates being “consistently above the national average, 90.6% compared to 89.7%” (Local Enterprise Partnership, 2018:29).

Existing research suggests that, given limited resources, EOMs benefit most significantly from developing their entrepreneurship and leadership skills because those are the skills directly connected to revenues and growth (Hayton, 2015). Support for developing good practices in these areas is readily accessible from Local Enterprise Partnerships and schemes such as the Growth Accelerator programme. However, it seems that, within this skill set, marketing leadership is often the EOM’s Achilles heel, and many SFs are “unnecessarily vulnerable through inadequacies in their marketing practice” (McCartan Quinn and Carson, 2003: 210). Whilst ‘text-book’ marketing may be of interest, “existing marketing theories offer little of practical use in day-to-day marketing activities” for most SFs (McCartan Quinn and Carson, 2003: 210; Gilmore et al., 2001). Nevertheless, it seems that “educators and owner-managers view this situation from very different and often incompatible perspectives” (McCartan Quinn and Carson, 2003: 210). Business advisors, investors and business support organisations therefore need to better understand what SFs need from marketing and how this is best delivered (McCartan Quinn and Carson, 2003). This conclusion is echoed in a report from the Institute of Directors by Parikh (2018:14) which found that the “quality of available advice for small businesses is highly variable” and was critical of the “plethora of existing initiatives which provide business improvement and skills support [which] exist in a fragmented state

and need to be better resourced and integrated” to provide a “more formalised national business support network” (Parikh, 2018:20).

The focus of that 2018 report is productivity, however, as measured in terms of the rate of output per unit of input. Thus, whilst it highlights operational management and strategic leadership as the first obstacle to boosting productivity, it does not consider marketing or branding specifically, even though it recognises that organisational culture is another key factor affecting the ability of SFs to adopt best practice as a means to increase productivity. Given the role of branding as a strategic organising principle for a firm, and the performance benefits associated with brand orientation – particularly in terms of internal branding – this seems to be a critical gap (Saleem and Iglesias, 2017). Meanwhile, Parikh (2018:8) recognises that “lifting the long tail [of poor productivity] requires a firmer understanding of the various challenges smaller businesses face in the journey of adopting and absorbing performance enhancing measures into their organisation.”

I believe that a clearer understanding of if and how SFs use their brands as a strategic orientation could enable some of these gaps in our understanding of marketing leadership and management within SFs to be addressed, not least because “it appears challenging for management to ascertain how to blend organisational capabilities with the broader chosen firm orientations” (Odoom and Mensah, 2019: 156). Greater knowledge and understanding could therefore enable business support organisations to provide more ‘joined up’ support, tailored to the specific needs of small firms, helping them to emulate large firms in developing asset value from their brands and to improve organisational culture and hence productivity.

Moreover, if brands have become integrative processes that involve a range of stakeholders, then SFs have an opportunity to access ‘operant resources’ (Vargo and Lusch, 2017), which may help them to develop their branding capabilities and create sustainable competitive advantages through their brand (Frampton, 2012; Merz et al., 2009). Thus, understanding how successful SFs engage in dialogue and deliver brand experiences that build purchase and loyalty would enable marketers, policy makers and educators to develop more specific and appropriate marketing support, campaigns and activities for other SFs seeking to build their brands.



## Chapter 3. Review of the literature

### 3.1 Chapter overview

My exploration of the contemporary context for brand management in Chapter 2 concluded that brands have become integrative processes involving a range of stakeholders. This Chapter accordingly begins with a focus on branding and brand management from the perspective of small firms (SFs). Odoom et al. (2017) and Berthon et al. (2008) note the limited scope of the literature dealing specifically with branding in SFs, the former calling for a proper longitudinal study. However, it is generally suggested that the marketing behaviour of such firms follows different patterns from those of large organisations (LOs), with the key factors being resource constraints and the direct influence of the entrepreneurial owner manager (EOM). Accordingly, I suggest that the brand management behaviour of SFs will also differ from that of LOs for the same reasons. I link this perspective on the literature with an analysis of the theory of co-creation and its relevance to brand management, evaluating the organic view of the brand (Iglesias et al., 2013) as a model for brand value co-creation and considering brand management as a co-creative system, as explored for instance by Ind (2015) and Ind et al. (2013) before analysing the concept of brand orientation (BO).

Market orientation (MO) is considered by members of the 'Nordic school' of thought - such as Reijonen et al. (2012), Gromark & Melin (2011) and Baumgarth (2009) – as an antecedent to BO before analysis of the latter as an organisation-centric view of the brand and consideration of its relationship with a range of positive benefits for the performance of the SF. I posit that, if the firm is gaining performance benefits, the phenomenon is primarily driven by consumers, who are also benefiting, but that employees are equally central to the creation of the customer experience. Having thus reinforced the proposition that brand value is co-created, I consider more recent models of BO that present it as a negotiated and dynamic process (Schmidt, 2017; Schmidt and Baumgarth, 2014). These highlight the role that employees play in delivering the appropriate brand experience across all interfaces with the brand. I therefore next analyse ideas relating to internal branding as a route to value co-creation, leading me to consider the importance of brand leadership and management style, both of which I critically evaluate in the SF context.

Finally, I discuss the fact that the extant literature sees growth-oriented SFs are more likely to adopt both BO and MO: for example, Reijonen et al. (2014, 2012). Because my aim is to better understand the intentions of EOMs and their attitudes to their brands, I review the concept of equity from the three perspectives suggested by Baalbaki (2012): financial, customer and employee.

By adopting a 'problematizing approach' throughout the literature review, I was able to consider new perspectives relating to the phenomena, behaviour and processes I was considering (Foucault, trans. Murphy and Khalifa, 2006). Hence, I propose a conceptual framework to support an inductive and exploratory longitudinal study into the brand management practices undertaken by SFs within the "conversational space" of the brand (Iglesias et al., 2013:677). In the process, I propose to explore brand co-creation from the managerial perspective of the EOM. I will be interested to know whether EOMs are "all controlling and all deciding" (Krake, 2005: 230) or if they have adopted managerial styles suited to facilitating co-creation (Ind and Schmidt, 2019). I will also hope to discover if and how EOMs adopt a dynamic form of BO, based on co-creation to leverage their brands, as a single organising principle for the firm.

### 3.2 Branding and brand management in the SF

Brand management is defined as "the process of creating, co-ordinating and monitoring interactions between an organization and its stakeholders" (Berthon et al., 2008:30). A company that undertakes brand management therefore acknowledges that designing, realising, and executing a brand strategy is a regular element of its marketing activities (Kapferer, 2012; Keller, 1998).

The extant literature broadly suggests that brand management has a low priority within SFs (Spence and Hamzaoui Essoussi, 2010; Berthon et al., 2008; Krake, 2005). This is possibly because they tend to adopt a short-term sales orientation to survive hostile business environments (Gilmore et al., 2001). Certainly, the prevailing view is that SFs employ push strategies to shift consumers from awareness to purchase, rather than pull strategies aiming to develop ongoing relationships between the consumer and the brand. Given the need to invest in building these relationships, pull is considered more expensive than push, which may explain why SFs are less likely to adopt pull strategies, although that fails to consider the potential advantages of digital marketing for an SF (Fill, 2013). It is evident that marketing practice has changed significantly in response to technology (Kane, 2015). Capabilities such as an ability to use social media to complement and improve traditional brand marketing and communications activities are therefore seen as means to strengthen the brand (Kohli et al., 2015; Bruhn et al., 2012).

It still seems, however, that many SFs prioritise tactical marketing mix decisions, relating for example to brand identity, company name and logo, over such long-term strategic marketing decisions such as segmentation and positioning with their corresponding investment in branding strategy (Reijonen et al., 2012; Berthon et al., 2008; Wong and Merrilees, 2005). Thus, if customer loyalty is an intrinsic factor for brand development, this mindset will limit opportunities to develop brand equity (Aaker,

1991). It therefore seems that most SFs are not seeking to develop a BO by shifting from a product/service perspective to one that focuses the company on the brand. Accordingly, they do not create, develop, and protect their brands as a planned resource, or consciously manage the processes that give the brand value and meaning (Urde, 1994).

However, given that different views exist with regard to precisely what brand management consists of and what it means within SF contexts, it is hard to establish any basis for determining what SFs actually do, not least because it is accepted that the impact of the EOM on marketing and branding decisions is significant, resulting in marked variability between firms (Juntunen et al., 2010; Spence and Hamzaoui Essoussi, 2010; Krake, 2005; Rode and Vallaster, 2005). Depending on their marketing competence and capability, EOMs may therefore select the brand management practices and activities that they like, as opposed to those that are appropriate (Juntunen, 2014; Berthon et al., 2008). This contrasts with the situation in LOs, where the CEO is typically distant from the marketing functions and will delegate to a range of professionals (Kornberger, 2010).

For those reasons, definitions are confusing in this context and discrepancies clearly exist between SFs and LOs with respect to brands and branding (Spence and Hamzaoui Essoussi, 2010; Berthon et al., 2008; Ahonen, 2008). Linked to this, it seems likely that brand building models familiar in the LO setting, for example the Customer Based Brand Equity Model (Keller, 2001), may not be applicable in the context of SFs (Hirvonen et al., 2013). Moreover, authors who have sought to understand the brand management practices of SFs draw on the 'brand report card', designed to be used by LOs with developed brands (Berthon et al., 2008; Keller, 2000), which may not be transferable to the SF context.

### 3.2.1 Perspectives of brand management in Small Firms

The 'Guidelines for the creation of a strong SME Brand' proposed by Krake (2005:232) revised LO-focused guidelines previously suggested by Keller (1998) and weighted these in a qualitative study with SMEs. The resulting "SME guidelines" appear to align with other studies as follows:

- Abimbola and Vallaster (2007) found that that a corporate brand offers specific advantages (Guideline 1: concentrate on building one (or two) strong brands).
- Horan et al. (2011) identified the advantages of a corporate brand being linked to the EOM (Guideline 5: Ensure there is a clear link between the character of the entrepreneur and that of the brand).

- Brodie et al. (2006b: 368) discussed the notion of the service brand as a “relational asset”. (Guideline 4; be logical in your policy and consistent in your communications and Guideline 6: cultivate a passion for the brand within the company).

However, these SME Guidelines have two significant limitations:

First, they intimate that the brand is a strategic asset that can form the basis of BO to deliver sustainable competitive advantage but are not specific about the implications of managing this successfully. For example, Guideline 2 (focus a creatively developed marketing programme on one or two important brand associations to serve as the source of brand equity) aligns with perceived wisdom about the role brand associations play in creating loyalty (Keller, 2013; Krake, 2005; Aaker, 1991). It fails to point out, however, that SFs must consider brand associations that are beyond their control and the impact that those might have for the firm’s reputation, despite guidelines 4 and 5 asserting that the brand is a relational asset. Similarly, the ensuing brand development model focuses on awareness and recognition, both of which relate to differentiating the product in a market rather than building brand loyalty as a process of mutual value exchange.

Second, the ‘funnel model’ proposed by Krake (2005; 233) links the brand with revenue generation, asserting that the way in which brand management is positioned within the firm is a variable affecting income. This relationship between the brand, its management and revenue, is evidenced in various streams of literature, for example by Hirvonen et al. (2013) and Reijonen et al. (2012). However, the findings reported by Krake (2005:232) are based on a sample of “middle sized” companies with “high marketing budgets”, which suggests that their organisational structures, marketing, and – most particularly – branding capability and competence, will differ from those of most SFs.

Elsewhere, Horan et al. (2011) consider brand management from the perspective of a SF “service brand” (Brodie et al., 2009; Brodie et al., 2006a; Gilmore, 2003; De Chernatony and Segal-Horn, 2003). In a qualitative study, they found that four variables had an impact on how the brand is developed: the characteristics of the SF; the role of the customer; the role of management and staff; and brand equity. Those findings support the view that budget and resources such as time and competence are key factors influencing whether a SF can develop a branding strategy. On this basis, management and staff play a pivotal role because they provide the service offered by the SF and therefore its branding (Wong and Merrilees, 2005). Hence, there are overlaps with ideas relating to co-creation, (Vargo and Lusch, 2004) and the concept of internal branding (Ind and Schmidt, 2019).

In a key contrast with the findings of Krake (2005), those of Horan et al. (2011) identify the dichotomous role of the brand as a relationship builder, finding that customers are integral to service branding, and that the firms studied sought ongoing and loyal relationships based on dialogue. However, whilst the SFs recognised the importance of communicating with their customers to create awareness of their service, that activity did not translate into branding activities. It therefore appears that these SFs did not fully understand the value of brand equity, despite some informal and semi-formal approaches to the measurement of customer brand equity (Keller, 2003; Aaker, 1991). A paradox therefore seems to exist, in which SFs have the desire to succeed and understand that their brand can support them in this, but EOMs procrastinate, often because they are unable to commit the necessary resources to make branding decisions. Horan et al. (2011) demonstrate that branding adds value to SFs and suggest that budget restrictions are the key factor contributing to a lack of branding. They do not, however, explore what SFs do in terms of their brand management practices, where 'practices' is defined as how branding is carried out strategically and tactically (Aaker, 2004).

Both Krake (2005) and Centeno et al. (2013) highlight the idiosyncratic way that SFs approach the job of building a brand, if indeed they do at all. The latter find that SF brands are built in a non-traditional way when compared to those belonging to LOs, with EOMs and their employees engaging in a kind of 'exploration' process, involving experimentation plus trial and error. The five-phase model of brand building they propose, based on the pre-existent branding guidelines offered by Keller (1993), is presented as an actionable framework for EOMs but does not provide detail of the specific brand management practices required at each stage (Berthon et al., 2008). The authors of the five-phase model assert that the overall brand develops from a product brand with a narrow message to a corporate brand with a clear identity, which acts as a basis for credibility and trust among consumers and other stakeholders, a process which they suggest is "contrary to large firm brand building, with minimum brand planning and limited resources" (Centeno et al. 2013: 445). They thus add to the consensus that brand building is different in SFs and LOs. As a qualitative study, theirs also offers insights from brand owners in SFs; as a cross-sectional study, however, I feel it does not identify the practices required over time to deliver their brand-building model. It also does not consider the role of the relationships among the firm, its employees, and other stakeholders in developing and supporting the brand.

Bresciani and Eppler (2010) also propose a sequence of brand creation through which companies may progress when starting up a business or developing a brand. They identify the need for the company to measure the outcomes of that process, but not how those might be achieved,

nevertheless arguing that evaluation is critical to the support of organisational learning and the development of appropriate branding strategies to sustain the business long term.

The conceptual model for new venture development proposed by Merrilees (2007:409) describes branding actions as a “pivotal catalyst.” His study reinforces the notion that the EOM must take responsibility for winning stakeholder commitment to the corporate brand, as also suggested by Spence and Hamzaoui Essoussi (2010), whilst implying that branding sharpens the formulation of the business model and increases the acquisition of customers. As an example of case-based research, however, it is based on a purposive sample of firms that have successfully grown to become LOs, such as Easy Group and Cobra Beer. Furthermore, the brand management practices that differentiate the successful firms from others are not identified, although later studies recognise that significant differences exist between SFs and LOs and also between high-performing and low-performing SFs (Reijonen et al., 2012; Berthon et al., 2008).

The ‘brand report card’ devised by Keller (2000) was later used as the basis for a quantitative survey, the conclusion of which was that there were “significant differences between small and large organisations along 9 of the 10 brand management dimensions” (Berthon et al., 2008:27). Table 3.1 summarises the ‘brand management practices’ identified and discussed in that paper, arranged by item and dimension.

**Table 3. 1: Brand Management Practices by item and dimension**

**(Adapted from Berthon et al., 2008: 33-35)**

Brand management practice	‘Dimensions’
1.Brand delivers benefits customers truly desire	<ul style="list-style-type: none"> <li>a. Attempt to uncover unmet consumer needs and wants</li> <li>b. Focus on maximizing customers’ product and service experiences</li> <li>c. Have a system in place for getting customers’ comments to those who can effect/implement change</li> </ul>
2. Brand stays relevant	<ul style="list-style-type: none"> <li>a. Invest adequate resources in product improvements that provide better value to customers</li> <li>b. Keep ‘in touch’ with customers’ tastes</li> <li>c. Keep ‘in touch’ with current market conditions</li> <li>d. Base marketing decisions on knowledge of the current market conditions, customers’ tastes and new trends</li> </ul>
3. Pricing strategies are based on perceptions of value	<ul style="list-style-type: none"> <li>a. Optimise the price, cost and quality of the product/service offering to meet or exceed customers’ expectations</li> <li>b. Have a system in place to monitor customers’ perceptions of brand value</li> <li>c. Estimate how much value customers believe the brand adds to our product</li> </ul>

4. Brand is properly positioned	<ul style="list-style-type: none"> <li>a. Establish 'points of parity' for brands that are necessary simply to compete in the product/service category</li> <li>b. Establish 'points of parity' for brands that negate the advantages our competitors achieve in the product/service category</li> <li>c. Establish unique "points of difference" for brands that provide a competitive advantage in the product/service category</li> </ul>
5. Brand is consistent	<ul style="list-style-type: none"> <li>a. Develop marketing programmes that do not send conflicting messages about brands to target audiences</li> <li>b. Adjust the brand's marketing programme to keep current and abreast with changes in consumer tastes</li> </ul>
6. Brand portfolio and hierarchy make sense	<ul style="list-style-type: none"> <li>a. Have a corporate brand that creates a seamless umbrella for all the brands in a portfolio</li> <li>b. Ensure that brands in the portfolio target specific, well defined segments, which do not overlap with each other</li> <li>c. Ensure that brands in the portfolio fully maximise market coverage</li> <li>d. Create a brand hierarchy that is well thought out and well understood by our staff</li> </ul>
7. Brand uses full repertoire of marketing activities to build equity	<ul style="list-style-type: none"> <li>a. Design the brand name, logo, symbol, slogan, packaging, signage etc. for products/services to maximise brand awareness and image</li> <li>b. Implement integrated 'push' and 'pull' marketing activities to target both distributors and customers</li> <li>c. Ensure that brand managers are aware of all marketing activities involving their brands</li> <li>d. Ensure that everyone involved in managing the marketing activities for a brand is aware of the actions of one another</li> <li>e. Capitalise on the unique capabilities of each communication tool while ensuring that the meaning of the brand is consistently represented</li> </ul>
8. Brand managers understand what the brand means to consumers	<ul style="list-style-type: none"> <li>a. Develop detailed knowledge of what customers dislike about brands</li> <li>b. Develop knowledge of the core associations that people make with brands, whether intentionally created by company or not</li> <li>c. Create detailed, research-driven 'portraits' of target customers</li> <li>d. Outline customer-driven boundaries for brand extensions and guidelines for marketing programmes and activities</li> </ul>
9. Brand is given proper support and it is sustained over the long run	<ul style="list-style-type: none"> <li>a. Develop a good understanding of the success and failures of the brand's marketing programme before it is changed</li> <li>b. Provide brands with sufficient research and development support</li> <li>c. Resist the temptation to cut back marketing support for the brand in reaction to a downturn in the market or a slump in sales</li> </ul>
10. Company monitors sources of brand equity	<ul style="list-style-type: none"> <li>a. Create a brand charter that defines the meaning and equity of the brand and how it should be treated</li> <li>b. Conduct periodic brand audits to assess the 'health' of brands</li> <li>c. Conduct routine tracking studies to evaluate current market performance of brands</li> </ul>

	<ul style="list-style-type: none"> <li>d. Regularly distribute brand equity reports which summarise all relevant research and information to marketers to assist them in making decisions</li> <li>e. Assign explicit responsibility to an individual within the organization for monitoring and preserving brand equity</li> </ul>
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First, three of those brand management practices were found to differentiate SFs from LOs: monitoring sources of brand equity (no. 10); ensuring the brand is consistent (no. 5); and using a full repertoire of marketing activities to build equity (no. 7). That finding is borne out by Centeno et al. (2013), who report that SFs have minimal brand planning processes and a more informal approach than LOs.

Second, it was found that high-performing SFs differed from their low-performing counterparts with respect to seven of the ten brand management practices. The former “place relatively more emphasis than low-performing ones on: “brand benefits (no. 1); relevancy (no. 2); consistency (no.5); portfolio (no.6); activities (no. 7); meaning (no. 8) and support (no. 9).

It is thus confirmed that SFs do vary from LOs in the extent to which they engage in brand management practices. I find this unsurprising from my practitioner’s perspective: the 36 items generated from the brand report card on the basis that they “measure organisational brand management practices and philosophies” (Berthon et al., 2008:300) require a firm to possess considerable resources and marketing capability (Keller, 2000). Meanwhile, it seems clear from the literature and from my professional experience that the lack of resources and budget are key factors limiting the development of branding strategy in SFs, as suggested by Horan et al. (2011). Moreover, Centeno et al. (2013:454) remark that SF brands develop through experimentation, with EOMs engaging in “brand exploration phases” where trial and error, innovation, creativity, and a commitment to learning are all influences on brand building. This raises the fundamental question whether a research design based on the ‘brand report card’ is even appropriate in the context of SFs, given that, compared to LOs, they are more flexible and reactive regarding decision making and learn informally rather than adopting formal guidelines or strategies (Ellinger and Cseh, 2007; Marsick, 2006; Hills and Hultman, 2005; Ellinger, 2005).

For example, I believe the measures used to define brand management practice no. 10, monitoring sources of brand equity, will not be adopted by most SFs. The measures would require SFs to create a ‘brand charter’ that: defined the meaning and equity of the brand and the ways in which it should be treated; conducted periodic brand audits to assess the health of its brands; regularly carried out routine tracking studies to evaluate the current market performance of brands; distributed brand equity reports summarising all relevant research and information to assist marketers in making



decisions; and assigned explicit responsibility to an individual within the organization for monitoring and preserving brand equity (Berthon et al., 2008). However, these measures are of doubtful relevance in the SF context, in which the EOM and the employees may all be amateur part-time marketers (Gummesson, 1991).

This is because entrepreneurial marketing behaviour is characterised by informality and flexibility, and SFs are known to be more opportunistic in their information-seeking activities (Reijonen et al., 2012). There is a corresponding lack of formal market research, customer knowledge being based on market immersion and interaction rather than on formal feedback mechanisms. Moreover, when planning is carried out it tends to happen incrementally, with decisions often linked to the EOM's personal goals rather than market conditions (Hills and Hultman, 2005). It therefore seems unlikely that most SFs will adopt or even partially adopt brand management practice no. 10. This does not mean, however, that they are not monitoring brand equity. Given that marketing is a fundamentally different organisational process in SFs and LOs, it is simply the wrong kind of measure or at least one that cannot be applied on account of lack of resources and expertise (Grönroos, 2000:302; Gummesson, 1991).

In the same way, it is possible to work through all 36 measures and critique the extent to which they are relevant and valid in the SF context, where marketing is less likely to be a specialist business function and to take a "non-traditional" approach when compared to LOs (Centeno et al, 2013: 454). Moreover, since those items and dimensions were developed, compelling arguments have emerged to suggest that brands are co-created with customers (Ramaswamy and Ozcan, 2016; Payne et al. 2009; Merz et al., 2009). Brand owners and their employees are therefore required to interact with their consumers and other stakeholders to develop mutual value. This shift makes the brand management practices above appear too organisation-centric in an operating environment where brand owners cannot easily maintain control. Kohli et al. (2015) argue that the flow of communication is multi-directional, meaning consumers are users of brand messages as well as recipients. As set out in Table 3.1 on the other hand, the items and dimensions of brand management practices do not identify a role for social media. It is therefore unclear what the split is between traditional and digital marketing within the marketing mix. This is despite evidence suggesting that growing firms use digital technologies both to strengthen brand messages and to gain insight into their customers and markets (Habibi et al., 2014; Kim and Ko, 2012). It is therefore suggested by Singh and Sonnenburg (2012) that the corresponding effect of BO on brand performance should be amplified.

Like LOs, SFs are found to be using social media in practice (Odoom et al., 2017) but its mediating effects on BO are not clear (Odoom and Mensah, 2019). It nonetheless appears that brand-focused SFs can “achieve a distinct performance advantage over rivals by essentially getting back to the branding basics” (Berthon et al, 2008: 40), an assertion supported by Reijonen et al. (2012). These firms may therefore be those that have an “integrated brand orientation” (Wong and Merrilees, 2005: 158) with a clear understanding of the competitive advantage of the firm and its overall distinctiveness versus competitors, thus making their brands integral to their marketing strategy. There is no explicit link between the different studies, however, so this is not evidenced.

Furthermore, whilst Berthon et al. (2008) investigate whether the brand management practices exist in SFs, they do not explore how they operationalise. Accordingly, little is known about what these firms actually “do” in terms of using their resources to support the process of brand management. Thus, whilst it seems that there is potential for SFs to mirror LOs by “adapting the brand management activities of their larger counterparts to their specific needs and circumstances” it remains unclear how the 10 brand management practices are being executed or evaluated (Berthon et al., 2008:40). Furthermore, only 9% of the SFs surveyed had fewer than 25 staff and it is likely that larger SMEs will behave differently to SFs, possibly because they have access to a wider range of resources and capabilities.

Realistically therefore, in the absence of research that seeks to examine the impact of branding on the development of SFs over time, little is known about how SFs approach brand management in terms of the activities they carry out or how they use the marketing mix (Odoom et al., 2017; Berthon et al., 2008). When linked with the literature on BO, it is correspondingly unclear how a SF with an integrated BO differs in terms of its brand management practices to one with a minimal or embryonic orientation (Wong and Merrilees, 2005). These gaps in how SFs view and manage their brands necessitate a qualitative research design to explore what happens, how and why, especially if brand management needs to develop strategies to build relationships over time that are flexible and dynamic, as suggested by theory relating to brand co-creation. A specific gap in the existing literature is therefore a case based longitudinal study that enables exploration of contextual complexities and explores how brand management decisions in SFs evolve and impact on the firm (Odoom et al., 2017; Berthon et al., 2008).

### 3.2.2 The entrepreneurial owner manager as brand leader

In Section 2.3, I explained that my interest is in working with brand owners who are competitive (Davidsson, 2004); have growth intentions (Reijonen et al. 2014), are innovative (Kerr et al., 2017; Goldsmith and Foxall, 2003), and possess the quality of 'self-efficacy' (Chen et al., 1998), because I believe they are more likely to engage with branding and brand management. I link these characteristics associated with entrepreneurship to the representation offered by McCartan-Quinn and Carson (2003) as an individual with a highly personalised management style that impacts on decision making within the firm, particularly marketing activity, to define what I mean by 'entrepreneurial owner manager' (EOM).

There is a general acceptance that the marketing activity of SFs relates directly to the owner-manager's experience, expertise, and attitude to marketing (McCartan-Quinn and Carson, 2003). Their decision making and marketing capabilities thus determine the marketing practices that are adopted (O'Dwyer et al., 2009). Moreover, their identity as a 'marketer' will also decide the extent to which the continuous creation of superior customer value is adopted as a core value of their organisation through the adoption of MO and, potentially, BO, as strategic orientations (Spence and Hamzaoui Essoussi, 2010). That said, the limited ability of SFs to develop sustainable advantage through branding is also attributable to a lack of marketing capability related to their size and, therefore, an inability to affect their market in the conventional sense (Gilmore et al., 2001).

Empirical evidence suggests that both marketing and entrepreneurial competence are requisites for firm performance (O'Dwyer et al., 2009; Atuahene-Gima, 2005; Slotegraaf et al., 2003). MO therefore needs to be prioritised by senior managers, with the leadership team giving "continual reminders to employees that it is critical for them to be sensitive and respond to market development" (Jaworski and Kohli, 1993:64). In the context of my inquiry, however, the leadership team will invariably consist only of the EOM, meaning that she or he will need to be able to adopt a marketing leadership role, take risks and accept occasional failures, if the firm is going to achieve MO as a strategic orientation (Centeno et al., 2013; Jaworski and Kohli, 1993). It also seems that such an orientation is most likely to develop in an organisational culture that includes decentralised decision making, meaning EOMs as marketing leaders must simultaneously create an "environment in which change can occur without specifically decreeing what that change will be" (Slater and Narver 1994:25). This initiative requires a facilitative style of management, which is at odds with the classic view of EOMs as dominating their businesses by being "omnipresent in every function of the small firm" (Reijonen et al., 2012:702). Moreover, the fact that most staff in SFs will be amateur,

part-time marketers may also limit an EOM's willingness to delegate decisions relating to marketing, branding and brand management decisions (Gummesson, 2007).

Opportunity recognition is perceived to be a link between marketing and entrepreneurship, because "understanding how to recognize value-creating opportunities becomes a marketing capability essential for a sustained relationship with customers" (Kasouf et al. 2008: 58). SFs are considered opportunistic with their information seeking activities, but there is evidence that their level of competitor orientation is low (Reijonen et al., 2012). This is an important factor when positioning a firm in a market and may explain why many SFs have a correspondingly low BO even if they adopt MO (Wong and Merrilees, 2005). The consequent need to generate brand related insight to maintain BO is one that SFs do not appear to engage with, or at least not formally.

Given the potential of BO to improve firm performance, this seemingly blinkered approach may relate to the fact that the EOM will usually be the locus of the personification of the brand (Spence and Essoussi, 2010; Krake, 2005; Wong and Merrilees, 2005). The organisational identity of the firm often reflects the EOM's characteristics and personality, meaning that the entrepreneurial personality has an impact which "augments the sustainable value of both the company and its products and services, supporting the creation of differentiation and the generation of growth" (Horan et al. 2011:114; Rode and Vallaster, 2005; Olins, 1978). It is therefore the EOM who dictates the extent to which a SF will adapt its brand, with corresponding implications for the co-creation of brand value (Odoom, 2016).

In this connection, I see some differences emerging between an EOM, who is more likely to be competitive and be orientated towards growth, and an owner manager who may be restricting firm growth for lifestyle or personal reasons. Various studies have shown that the owners of small firms pursue diverse business goals. The boundaries between owner managers who choose to limit their firm's operations and EOMs who seek growth are sometimes indistinct, although a critical behavioural difference can be perceived between EOMs who are pursuing their own goals and those seeking to make profit and expand the business (Reijonen et al. 2014; Davidsson, 2004; Proudlove, 2004; Walker and Brown, 2004; McCartan Quinn and Carson, 2003; Greenbank 2001). This raises the possibility that EOMs might even engage in 'co-destructive' branding behaviours, depending on their overall business strategy (Plé and Cacades, 2010).

In this respect, a range of studies have emphasised the importance of the role of the founder or entrepreneur in the branding process (Spence and Hamzaoui Essoussi, 2010; Krake, 2005; Wong and Merrilees, 2005; Doyle, 2003; Abimbola, 2001). EOMs are specifically perceived as "role models who

characterise the organisational culture, approach to business and day to day decision making in their firms” (Spence and Hamzaoui Essoussi, 2010: 1049). A linked finding in the literature is that visionary leadership is the starting point for strategic brand building. Typically, the “founder’s values are the main source of brand associations used to develop core brand identity” (Spence and Hamzaoui Essoussi, 2010: 1049), which suggests that there may be conflict if EOMs are required to adapt or change their market/brand orientations in response to reactions from their consumers or stakeholders (De Chernatony, 2001).

Moreover, given that the entrepreneurial marketing style is generally considered to be personal and idiosyncratic, EOMs are likely to be motivated by a desire for independence and intuitive decision making. This implies that if ‘co-creation’ is integral to developing and sustaining a relevant MO/BO in the so-called post-digital world, EOMs may find it challenging to lose control to other stakeholders, especially those they perceive to be outside the firm, such as customers. This situation may be exacerbated by the informal nature of communication within many SFs, which tends to be focused on maintaining cohesion within the team rather than sharing decision making (Jones and Rowley 2011; Dalley and Hamilton, 2000). However, if the ‘organic view of the brand’ is an accurate representation of brand-value co-creation, what happens in the conversational space in terms of the specific brand management practices adopted (Iglesias et al., 2013)? Will the EOM be willing to lose control by adopting a suitably participatory management style (Ind and Schmidt, 2019; Ind et al., 2013)? Likewise, if BO becomes dynamic and constantly re-negotiated, how do EOMs respond to ideas that move them away from their own vision and values? If the ‘service brand relationship value triangle’ proposed by Brodie et al. (2006a) correctly reflects the relationships involved in brand co-creation, is it necessary for SFs to be learning organisations if they are to succeed (Payne et al., 2008; Nonaka and Takeuchi, 1995, Kim, 1993; Senge, 1990; Argyris and Schon, 1978). In that case, the inference is that they must evaluate what they do in terms of their branding, which reinforces my own belief that the items and ‘dimensions’ of the brand management practices (the latter, shown in Table 3.1, in fact a set of suggested actions to be taken by a manager) are irrelevant in the SF context that is less formal and structured than that of LOs (Centeno et al., 2013, Berthon et al., 2008).

Despite these questions evoked by the literature, it seems that limited success with marketing and branding activities is most probably the result of EOMs exhibiting low levels of marketing capability or competence (McCartan Quinn and Carson, 2003; Barnes, 2001). Moreover, as the founder, owner and manager of the firm are often likely to be the same person, considerable responsibility rests with that single individual, who has many other calls on her or his time, both strategically and operationally. It should perhaps therefore be of interest to EOMs that research suggests that, when

SFs manage their brands properly, the costs of sales fall, profits increase and the owner/manager's workload may be reduced (Calabro, 2005). However, evidence also exists that procrastination with respect to brand management on the part of SFs is "evident across all branding related activities and practices" even when the importance of brand building is acknowledged by the EOM (Horan et al. 2011:118). I find this overall lack of focus with marketing and branding interesting, since existing research studies suggests that knowledge and 'self-efficacy' are important traits associated with entrepreneurship; and individuals are more likely to pursue entrepreneurial activities if they believe they have the skills to be successful (Chen et al., 1998; Krueger and Brazeal, 1994; Boyd and Vozikis, 1994; Bandura, 1978, 1977). It therefore seems that EOMs lack confidence with branding, emphasising the need for better understanding across the business community of those brand management practices that provide tangible benefits.

If success is indeed achieved through MO as a business philosophy, then it appears that many EOMs fail to develop appropriate marketing practices to achieve their goals because they fail to use that philosophy as a foundation for an integrated BO (Wong and Merrilees, 2005). We have already seen that Berthon et al. (2008) found SFs to be unlikely to monitor sources of brand equity or ensure that the branding is consistent, which suggests they are unlikely to be evaluating their brand management decisions, albeit that the reason could be their adoption of an informal approach not reflected in the metrics used. That said, failure to monitor and control branding decisions may be a limiting factor preventing SFs from achieving an integrated orientation and thereby leveraging maximum value from their brands (Wong and Merrilees, 2005).

Accepting that the management style of the owner is the basis of the strategic orientation of the firm reinforces the idea that it is EOMs who lacks the marketing knowledge and/or skills to reach its goals if an integrated BO is not achieved (Barnes, 2001), or lack the management style to achieve the same end through the actions of their staff and other stakeholders (O'Dwyer et al., 2009). However, since entrepreneurs are a "heterogeneous bunch" (Kerr et al., 2017: 36), there will be differences in terms of their personalities and the psychological traits that affect their decision making. There is moreover heterogeneity in terms of the type of SF, making it unrealistic to think that the young chief of a hi-tech SF will operate in the same way as a middle-aged operator of a café (Kerr et al., 2017). From the experience of observing and supporting some of my students in their efforts to establish their own companies, and from my previous work in practice, young entrepreneurs have grown up participating actively in branding and expecting to be influencers of brands. They are correspondingly accepting of on-line influencers as participants in the co-creation of their brands (Vargo and Lusch, 2017) and ready to use metrics and digital interaction as elements of brand

creation and brand control, both as consumers and entrepreneurs, with software packages that are readily available from, for example, Facebook.

Thus, the uniqueness and individuality of EOMs as the managers of SFs makes it difficult to pinpoint the reasons why SFs typically have either a minimal or embryonic BO (Wong and Merrilees, 2005). It seems clear that the existing literature has not determined causality between psychological traits and entrepreneurial outcomes (Kerr et al. 2017). It nonetheless does indicate that SF branding and brand management are dominated by the role of the EOM (Horan et al., 2011; Spence and Hamzaoui Essoussi, 2010), so it is unquestionably of further interest to explore how and why EOMs undertake specific brand management practices (Berthon et al., 2008). Such an inquiry could also enable exploration of the extent to which EOMs are comfortable with losing control of their brands.

### 3.2.3 Branding as a capability in small firms

Capabilities are defined by Amit and Schoemaker (1993: 35) as “information-based, tangible or intangible processes that are firm-specific and are developed over time through complex interactions among the firm’s resources”. They therefore represent a firm’s ability to utilise its resources to achieve specific aims. The concept of a ‘dynamic capability’, implying a temporal dimension to the core competence, is further described by Teece et al. (1997: 516) as a firm’s ability to “integrate, build, and reconfigure internal and external competences to address rapidly changing environments”. That characteristic thus rests on competence, or an ability to do something successfully over time, and is based on how a set of activities or processes are undertaken. Thus, dynamic capabilities can “continuously create, extend, upgrade, protect, and keep relevant the enterprise’s unique asset base in a changing environment”, according to Teece (2007: 1319).

Various conceptualisations of branding capability have been offered. Merrilees et al. (2011) say it requires four approaches: identifying brand meaning, using branding as an operational tool, communicating consistent brand meaning, and encouraging staff to support the brand. It has also been conceived as a firm’s ability to organise interrelated organisational routines to perform activities, such as communication and marketing programmes, which deliver consistent brand meaning to customers (O’Cass and Ngo, 2011).

Ni and Wan (2008) suggest that branding capability has two dimensions. Internal capabilities consist of asset-related and knowledge-related elements; external capabilities comprise market and institutional factors. The former thus enable the firm to develop its product/service competences (Gausmann and Keupp, 2007). Viewed from a ‘service brand’ perspective, that would entail the development of competitive advantage. Such capability related to services would support co-

creation by delivering enhanced customer experiences at the brand's interfaces with stakeholders, in turn realising further competencies for the firm from other actors in its network (Iglesias et al., 2013; Brodie et al., 2009; Brodie et al., 2006a, 2006b; Grönroos, 1996; Bitner, 1995).

However, Wong and Merrilees (2007) suggest that the existence of internal resources and capabilities is insufficient alone to optimise firm performance, which demands the deployment of external capabilities. What the latter include seems less clear in this case, although they possibly describe beneficial collaboration with stakeholders, aligning with the concept of 'value co-creation' in the context of branding (Altshuler and Tarnovskaya, 2010). The notion of the SF as a network suggests opportunities for it to improve and extend its operant resources, thus offering the potential for growth and/or enhanced performance by co-opting the competences and capabilities within its network (Zeng et al., 2010; Fyrberg and Jürriado 2009). It has been argued by Brodie et al., (2017) that branding has become a dynamic capability, requiring a brand owner to manage brand identity whilst facilitating integration with the social processes that co-create brand meaning for all stakeholders.

The literature further asserts that branding capabilities are crucial for a firm's performance (Morgan et al., 2009; Krasnikov and Jayachandran, 2008) because they can protect it from imitation by competitors by means of enhanced awareness, positive relationships and, therefore, loyalty. However, although Odoom et al. (2017) demonstrate the existence of a relationship between branding capabilities and firm performance in the SF context, most of the extant literature draws on data relating to LOs or mid-sized SMEs. Moreover, whilst SFs are exhorted to "leverage external sources for enhancing their brand performance" (Odoom et al., 2017: 483), much of the research into brand value co-creation is either conceptual or focuses on LOs, leaving only limited exploration of how SFs might use their networks to develop their branding capability and competence.

### 3.3 The Service Dominant Logic (SDL) Lens as a foundation for the co-creation paradigm

The SDL paradigm views value as being derived and determined in use rather than simply in exchange (Vargo and Lusch, 2017; 2016; 2008; 2004). It arose from an increasing emphasis on the exchange of intangibles in markets, as had already been understood in the services context, where market offerings arise out of the 'service encounter' (Bitner et al., 2000). It has since been argued that the notion of service provides a "transcending perspective for all marketing" (Vargo and Lusch, 2017: 46) although not all authors necessarily accept this view.



SDL therefore focuses on the role of human and intangible operant resources such as knowledge and skills, proposing that competitive advantage resides there as opposed to being in such operant resources as raw materials and products (Vargo and Lusch, 2017). It is further argued that consumers are no longer passive recipients of a firm's offer, but possess expertise, skills and knowledge that can be co-opted in the co-creation of new products, services, or meanings (Prahalad and Ramaswamy, 2004; 2000). Companies and consumers thus create value "materially and symbolically" together through various interactions (Galvagno and Dalli, 2014: 644). As a more relational and customer-oriented model for marketing, this implies greater connectivity between the firm offering a value proposition and the consumer. That in turn suggests that brands are no longer under the control of the owning firm but must be co-created with consumers and other stakeholders (Ind and Schmidt, 2019). This more inclusive view of branding as a relationship experience over time is developed by such authors as, for example, Merz et al. (2009), Payne et al. (2009) and Ballantyne and Aitken (2007).

### 3.3.1 The two inter-connected SDL positions

Vargo and Lusch (2017: 48) state that individual interactions between organisations and consumers take place "within networks of actors" who integrate "resources from many sources." Thus, they assert that the co-creation and realisation of value happen in the connections between these actors through service-for-service exchange. Hence the proposition that "the network has a purpose", which implies that it must also be dynamic in order to maintain "collective wellbeing" (Vargo and Lusch, 2017: 49).

It is further argued that it is the role of organisational processes to provide the mechanisms for value co-creation. Hence the existence of service ecosystems that are defined as "relatively self-contained, self-adjusting systems of resource integrating actors connected by shared institutional arrangements and mutual value creation through service exchange" (Vargo and Lusch, 2016: 161).

Applying these two positions to the branding context means that brand management is no longer an internal activity owned by the firm. Instead, meaning will arise from the mindset of all the actors involved in the network (Kornum et al., 2017; Von Wallpach et al., 2017; Vallaster and Von Wallpach, 2013). Moreover, if the network is dynamic, BO can no longer follow a linear direction set out by the brand owner.

However, it is acknowledged that these are "bridging concepts" for SDL that have been more "introduced than fully explored" (Vargo and Lusch, 2017: 50). Opportunities thus exist for further research aimed at exploring how these service ecosystems are operationalised in practice and

thereby supporting the development of both metatheoretical and mid-range theory. Although it has been argued that it is possible to move on to metatheory without directly addressing lower-level theory, there are calls for the development of mid-range and micro-level theory that would allow the metatheory to be tested, verified, and applied (Vargo and Lusch, 2017; Brodie et al., 2006b). In applying the 'lens' of SDL to the examination of brand management practices in SFs, I therefore align my inquiry with the definition of midrange theory development as part of a "systematic effort to explain all the observed uniformities of social behaviour, social organisation and social change" by Merton (2012: 448)

### 3.4 Towards a theory of brand co-creation

The notion of co-creation as a central tenet of the service-dominant logic paradigm implies a firm can only offer value propositions to consumers; they are always unique co-creators of a brand's value through their perceptions of value-in-use (Ind and Schmidt, 2019; Vargo and Lusch; 2017). This means in turn that the practice of branding has shifted from an organisation-centred approach, where meaning is defined by the brand owner, to a dynamic and social process involving interactions and negotiations between the organisation and its stakeholders (Ind and Schmidt, 2019). Obviously, the consumer does not 'own' the brand, but the performance of the brand creates value through service, as a fundamental basis of exchange for each actor and between actors (Vargo and Lusch, 2004).

#### 3.4.1 The implications of SDL for branding and brand management

This shift of emphasis from owner-centredness to customer-centredness has several practical implications that firms will need to manage if they are to maintain a relevant brand that delivers competitive advantage.

First, the traditional boundary between the firm and its consumers is blurred, to support an exchange of skills, expertise, and ideas (Kornberger, 2010). As Ind and Schmidt (2019: 42) and Ind (2017) argue, "heightened participation externally fosters a need for participation internally" and the recognition that employees are integral to enhancing the consumer's brand experiences through their interactions with them. Consequently, such concepts as the "service brand" have been developed by, for example, Brodie et al. (2006a).

Second, brand owners cannot impose meaning but only offer a proposition to consumers that will give them a 'sense of direction' towards the firm's intended meaning (Iglesias et al., 2013). However, if they do not want to lose the brand's competitive advantages, they will also need to

ensure that co-creation does not push it in unintended directions (Kristal et al., 2018). Such a potential loss of control by the brand owner calls into question traditional assumptions about brand management, favouring a new, more open managerial style (Iglesias et al., 2013). In turn, this implies that successful firms will be those who listen and can learn from their experiences (Ind and Schmidt, 2019) and that management style must therefore become “more humble, open and participatory” (Iglesias et al., 2013: 671), emphasising a need for brand owners to engage in dialogue.

Section 3.2.1 has highlighted the fact that the existing literature of firms’ brand management practices is organisation-centred: the firm instigates an activity to which the consumer responds (Berthon et al., 2008). In a ‘post digital’ society, however, these practices must embrace co-creation if brands are to realise a variety of organisational benefits. Those might include: customer insight, closer relationships with consumers; reduced revenue risk, thanks to understanding customers better than the competition and responding more appropriately; competitive advantage gained through consumers’ trust and preferences (Frampton, 2012; Hatch and Schultz, 2010). I therefore believe that how brand management practices are operationalised must have changed, particularly as many firms have adopted digital marketing practices (Odoom and Mensah, 2019). However, the nature of this change is difficult to evaluate by reference to the existing literature because the brand management practices of SFs represent an under-researched gap (Odoom et al., 2017; Berthon et al., 2008).

In addition to this, the literature contains only limited research exploring co-creation from the managerial perspective (Kazadiki et al., 2016; Frow et al., 2015;). Generally, the focus is on customer motivations, resources, and experiences (Ind et al., 2017). Although those authors did undertake a qualitative study of the ways in which managers ‘use’ co-creation, their sample comprised “managers that have led co-creation initiatives for 20 well-known brands”, meaning that they were LOs. Thus, it is unclear if and how SFs are availing themselves of co-creation as a management practice to achieve specific outcomes for their brands and their firms – or how this affects their brand management practices and branding capabilities.

### 3.4.2 Defining co-creation in the context of brand management practices of small firms

To date, research into co-creation has focused mainly on the interactions between brands and consumers from the perspective of the consumer (Ind et al., 2013; Hatch and Schultz, 2010). The former authors state that an increase in both the research into and practice of co-creation means that the term has become blurred, being used to describe the co-creation of value (e.g., Grönroos

2012), or brand meaning (e.g. Vallaster and von Wallpach, 2013), or innovations (e.g. Füller, 2010). It is therefore important to clarify how I have defined co-creation in my inquiry because I want to explore the brand management practices of SFs from the managerial perspective of the EOM.

Prior to the emergence of the concept, it was proposed that brands create possibilities for relationships because they offer consumers functional and emotional benefits combined with opportunities for self-expression (Aaker, 1996). Even in the absence of ideas relating to co-creation, this implied that consumers constructed their own meanings through engaging with a brand and therefore derived value from that relationship. Prahalad and Ramaswamy (2000: 80) identified the transition of consumers from being a passive audience targeted by mass one-way communication to “co-developers of personalised experiences” who engaged with firms through “active dialogue” and were part of “an emergent and social fabric.” At that point in the development of the concept, they argued that companies needed to work with consumers to educate them in such a way as to “shape expectations and co-create market acceptance for products and services” but did not suggest how this might be operationalised in branding practice. However, it is now accepted that brands have become “social processes that involve multiple stakeholders” (Iglesias et al., 2013: 670), although it remains unclear how co-creation is put into practice in the context of brands (Merz, 2009).

I want to explore whether SFs use their brand as a single organising principle for the firm, and if they correspondingly emulate LOs by developing their brands as intangible assets. I am therefore interested in understanding whether their brand management practices use co-creation to enhance brand visibility, brand associations and customer loyalty to deliver equity for the firm (Aaker, 2016). Existing research does not appear to have explored or even described the relationships between the actors involved in building a brand, meaning it is unclear whether brands are built mainly internally, externally or through cooperation (Vallaster and Lindgreen, 2011). Given that marketing strategy texts generally define value creation as a set of interdependent activities that add customer value to a company’s products or services, leading in turn to enhanced relationships, loyalty, and revenue for the firm, uncertainty concerning how that works in branding in practice represents a significant gap in our knowledge of the process. For the purpose of my inquiry, I have therefore adopted the definition offered by Ind et al. (2013: 9), of co-creation as “an active, creative and social process based on collaboration between organisations and participants that generates benefits for all and creates value for stakeholders.” In this way, I have been able to link co-creation to the brand management practices, in order to explore the extent to which brand management in SFs has become a collaborative process (Berthon et al., 2008).

Various authors have explored the brand-value co-creation processes of different stakeholders to develop models of brand co-creation: for example, Frow and Payne (2011), Hatch and Schultz (2010), Brodie et al. (2009), and Payne et al. (2009). However, the focus is generally on consumers and co-creation is not explored as a management activity from the perspective of the firm; for instance, Payne et al. (2009) integrate branding and co-creation in an exploration of customer relationship experiences. Moreover, much published research is conceptual, so further empirical work is required to demonstrate how co-creation is operationalised in different branding contexts (Pillai, 2012; Wallström et al., 2008).

### 3.4.3 How relevant are corporate and service branding concepts for SFs?

We have seen that SFs are less likely to possess the marketing competences and capabilities of LOs. They are also more likely to take a short-term focus driven by the need to make sales than to adopt the mid to long-term focus of a BO (Reijonen et al., 2012; Wong and Merrilees, 2005). However, my personal experiences in business lead me to doubt that this means they ignore branding altogether – even if growth and/or equity are not explicit organisational goals (Krake, 2005).

Brands are increasingly recognised as symbolic devices, which possess personalities that offer consumers value beyond functional utility (Keller, 2013). As a result, strong brands can make an emotional connection with their intended audience and thereby create “feelings of closeness, affection and trust” (Berry, 2000: 134). An effective brand therefore develops through consistent and positive customer experiences over time. These are achieved through marketing activities relating to the brand – the product/service, environment, staff behaviour and communication – which all contribute to making the brand tangible for consumers and other stakeholders (Olins, 2000).

The culture, people and organisation within a firm can therefore provide a basis for differentiation in a market by creating a distinct value proposition and specific type of consumer relationship. This correspondingly develops the concept of brand beyond it being simply a name, word, logo, or symbol relating to a product/service or a whole organisation (Kapferer, 2012; Aaker and Joachimsthaler, 2002; Aaker, 1996).

#### 3.4.3.1 *The SF as a corporate brand*

We thus see that the organisation’s identity is used to make a relevant and distinct promise to stakeholders. This single relationship with a ‘corporate brand’ affects all the touchpoints between an individual consumer and a firm (De Chernatony, 2001) and the products or services offered by the firm become an extension of the corporate personality. Such brands are therefore perceived as

central to the existence of a market orientation and the ability to build the internal and external relationships that will deliver the company's goals via the adoption of a brand orientation (Berry, 2000; Gummesson, 1991; Grönroos, 1990). A corporate brand can thus be defined as "a systematically planned and implemented process of creating and maintaining a favourable image and consequently favourable reputation for the company as a whole by sending signals to all stakeholders and by managing behaviour, communication and symbolism" (Van Riel, 2001: 12).

This is consistent with the notion of a brand as a single organising principle in that it addresses the idea of culture, product/service and reputation being interlinked across business functions (Bean, 2009). However, Van Riel is not explicit about the roles staff may play, such as 'brand citizens' (Saleem and Iglesias, 2017), a concept that implies a more top-down structure in which they will be guided by the 'brand leader', who is also usually the EOM in a SF context, about how to behave and respond. The concept of the corporate brand therefore suggests an overlap with the notion of 'brand compliance' (Saleem and Iglesias, 2017) as an element of internal branding.

Corporate brands offer specific advantages to SFs because they can be clearly differentiated in an "increasingly fragmented and value-laden world" (Abimbola and Vallaster, 2007:342). Those advantages are found to be particularly true when there is a close alignment to the personality of an EOM, and management and staff play a pivotal role in delivering the brand (Horan et al., 2011). In turn, corporate brands of SFs are seen to drive value and support growth (Mowle and Merrilees, 2005). The work on the corporate brand by both Abimbola and Vallaster and Mowle and Merrilees does not specifically mention co-creation (Vargo and Lusch, 2004). Research by Horan et al. (2011) was based on service SFs, however, and service branding has historically been perceived as a distinct concept when compared to product branding due to the inherent characteristics of services and their impact on the service encounter (Palmer, 2005; Gilmore, 2003; De Chernatony and Segal-Horn, 2003; McDonald et al., 2001; Kasper et al., 1999; Dibb and Simkin, 1993). This reflects the fact that the intangibility of services requires such brands to increase the level of trust among customers making an 'invisible' purchase (Berry and Parasuraman, 2001; Berry, 2000). This means that a "service company becomes its own brand [because] the source of the experience is the locus of brand formation" (Berry, 2000: 130).

It follows that the nature of the brand must be dynamic: an 'augmented' brand differentiates products through its associated services, but service-dominated contexts demand brands that are "inter-active, relationship and experience based" (Klaus and Maklan, 2007:116). Whilst awareness of the brand as presented by the company continues to influence brand equity, it is the consumers' experience of the organisation in delivering the service offer that becomes the determinant of brand

meaning (Berry, 2000). It is thus possible to see that service brands in the 'post-digital' world have shifted from being identifiers in a market to relationship builders between a firm and its customers (Christodoulides, 2009; Krake, 2005).

The UK is a service economy. In 2013, 79% of UK GDP came from the service sector, the highest for any G7 country. There are regional variations: in the South East of England, the figure rises to 81% and 91% in London (ONS, 2016). Combining those statistics with the fact that 96% of all firms in the UK have fewer than nine employees, it is clear that the UK economy is dominated by SFs whose value propositions are complex and delivered in the context of long-term service relationships, which reinforces the importance of the concept of the corporate brand.

However, despite that importance in markets where it is increasingly difficult to differentiate on product or service superiority, EOMs often find it hard to translate their vision into branding that has relevance to stakeholders and is therefore able to deliver sustainable competitive advantage (Inskip, 2004). This may be because corporate branding is a more sophisticated process than simply translating a vision, if the brand is to act as a single organising principle to focus the firm's operations (Bean, 2009).

According to Juntunen et al. (2010: 117) corporate brand building is a complex process, involving the six different functions shown in Table 3.2 below: defining the corporate personality, brand-oriented strategic planning, creating, and maintaining corporate identity, creating consistent brand communication, assuring employees' involvement, and creating a corporate image. The brand building functions are linked to different brand building activities and simultaneously mapped against three growth stages – pre-establishment, early growth, and effective growth – to identify when the activities happen, and which actors are involved.

The study by Juntunen et al. suggests that the corporate branding processes adopted by SFs can evolve into something akin to BO (Urde, 1999). They progress from an early strategic planning process to one of brand maintenance and revision, with BO therefore developing through distinct phases of a branding life cycle (Juntunen et al., 2010).

**Table 3.2: Classification of the corporate brand building functions of SFs**

**Source: Juntunen et al., 2010: 117**

<b>Corporate brand building function</b>	<b>Corporate brand building activity</b>
Defining the corporate personality	<ul style="list-style-type: none"> <li>• Developing a company idea</li> <li>• Brand planning: e.g., company structure and characteristics</li> <li>• Deciding on the company name</li> <li>• Defining core values</li> </ul>
Brand-oriented strategic planning	<ul style="list-style-type: none"> <li>• Generating brand vision</li> <li>• Linking strategic vision, organizational culture and corporate images</li> <li>• Living up to a clearly defined business concept, values, and philosophy</li> </ul>
Creating and maintaining corporate identity	<ul style="list-style-type: none"> <li>• Corporate culture</li> <li>• Corporate behaviour</li> <li>• Corporate internal communications</li> <li>• Corporate design</li> </ul>
Creating consistent brand communications	<ul style="list-style-type: none"> <li>• Management, organization, and marketing communications</li> <li>• Finding a distinctive message and enhancing the brand among the key stakeholder groups</li> <li>• Establishing clear positioning</li> <li>• Web communications</li> <li>• Participating in shows and events</li> <li>• Arranging seminars</li> <li>• Shaping corporate image</li> <li>• Conveying image of quality products</li> <li>• Producing a premium product</li> <li>• Providing experience</li> <li>• Writing articles in professional magazines</li> </ul>
Assuring employees' involvement	<ul style="list-style-type: none"> <li>• Providing friendly service</li> <li>• Employees contributing to the meaning of the brand</li> </ul>
Creating a corporate image	<ul style="list-style-type: none"> <li>• Corporate communication and corporate identity as indirect influences on corporate image</li> </ul>

This suggests that SFs positioned at the minimalist or embryonic position in the typology of BO could, given the right conditions and leadership, shift to an integrated orientation (Wong and Merrilees, 2005), in which the brand not treated as an optional extra but rather as an integral part of the marketing strategy. However, it implies in turn that the role of the EOM as the brand owner will need to change over time. In the early stages of brand development, corporate identity is said to be an extension of the EOM's personal identity (Horan et al., 2011; Juntunen et al., 2010). As the firm grows, the EOM's image becomes separated from the company's and, by the time the "effective growth stage" is reached the EOM will have staff who are involved in marketing activities (Juntunen et al., 2010: 127). This presents several unexplored implications, including whether the firm evaluates its experiences, can learn from them, and will understand what employees could



undertake to contribute. Neither of these factors is addressed in the inquiry into brand management practices by Berthon et al. (2008). Research should furthermore investigate the extent to which EOMs transition into a marketing and brand leadership role, enabling them to empower their staff to identify with and implement the corporate brand.

Juntunen et al. (2010) suggest that corporate identity – with its elements of culture, behaviour, internal communications, and corporate design – is a function of the branding process (Rode and Vallaster 2005; Witt and Rode, 2005; Aaker, 1992). Those elements must be consistent if external stakeholders are to understand the brand promise (Brodie et al., 2009). The corporate brand-building process thus emphasises the role of staff in delivering brand experiences that are consistent with the intended brand meaning.

Even if staff seem to play a more passive role than is acknowledged by co-creation, that is consistent with the finding of Gill-Simmen et al. (2018) that the intended and enacted identities of a brand must successfully overlap if the brand is to create value for different groups of stakeholders. Their study also emphasizes the need for proactive communication with stakeholders and the importance of consistent communication.

However, Juntunen et al. (2010) also say that corporate identity “emerges on its own”, thus appearing to suggest that brand awareness is an unconscious goal of SFs rather than a deliberate strategy, as does Krake (2005). This seems to contradict their claim that employees are integral to the branding process as touchpoints for corporate identity (Juntunen et al., 2010; Hatch and Schultz, 2003): if there is little or no marketing leadership from the EOM as part of a deliberate strategy, it is hard to see how brand management will be embedded into the organisational culture and prioritised by staff (O’Dwyer et al., 2009; McCartan-Quinn and Carson, 2003). Moreover, Juntunen et al. (2010) do not explore the roles that any of the actors play in co-creating the brand, or what happens and why in terms of the specific brand management practices required at each stage of the brand building process (Berthon et al., 2008). Juntunen et al. studied two business-to-business SFs in Finland, raising questions about the transferability of their findings, not least because stakeholder relationships vary between B2B and B2C firms. This highlights the need to collect further qualitative data about brand building and management “in different countries, contexts and industries” (Juntunen et al., 2010: 131).

#### *3.4.3.2 The ‘service brand’ and the ‘relationship triangle framework’*

The ‘service brand’ builds on the concept of a corporate brand by increasing the focus on its relational aspects (Brodie et al., 2006a; Berry, 2000). The construct develops the idea of the corporate brand being a three-way relationship-builder between the firm, its employees, and its

stakeholders. This shifts the concept of the service brand closer to the notions of co-creation and service, as defined by the SDL 'lens', although the definitions originate from the services marketing literature, which emphasises the special role of "strong brands [which] increase customers' trust of the invisible purchase". A strong services brand is thus a "promise of future satisfaction" (Berry, 2000: 128-129).

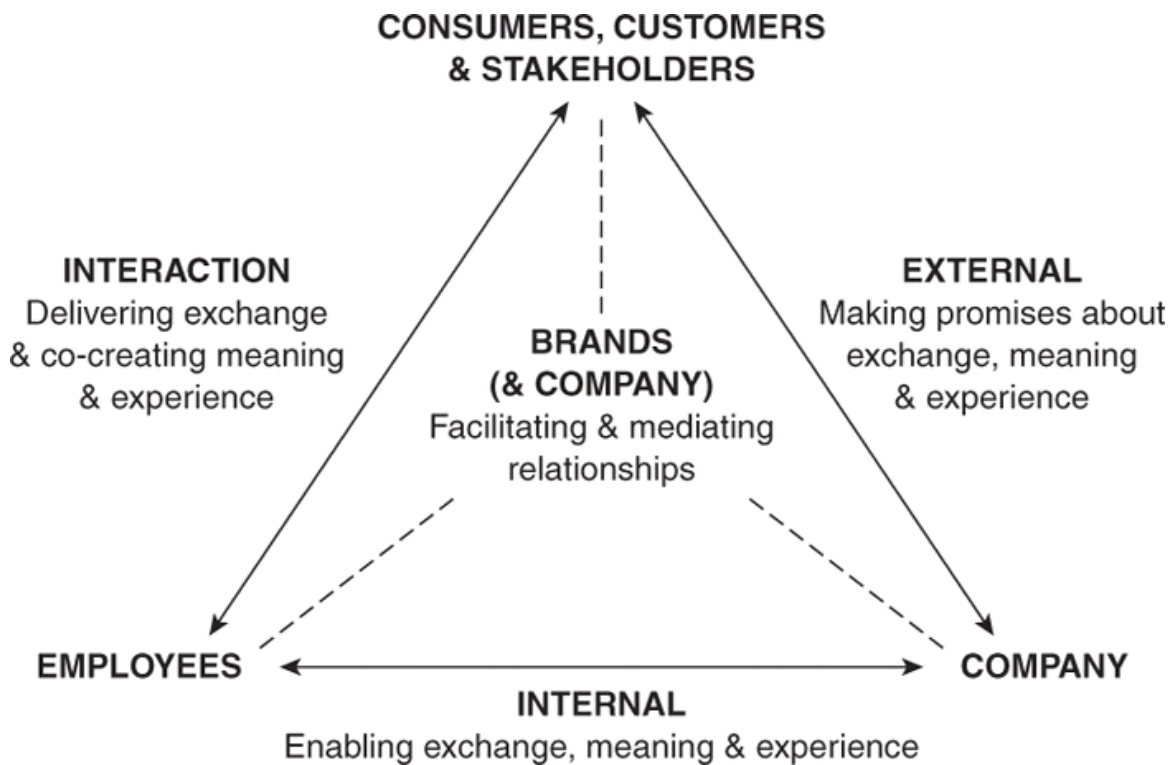
A visible brand may encourage customers to try a product or service, but its ability to reinforce and strengthen brand meaning with existing customers will depend on their experiences. This is because brand meaning develops from experience-based beliefs (Berry, 2000). Whilst brand awareness and brand meaning both contribute to brand equity in this context, the latter has the greater impact (Keller, 1993). As a result, firms must ensure that the total experiences of their customers are congruent with any external communications used to present their brand. Hence, in a services marketing context, success relates to a "company-wide commitment to ensuring a consistent emotional relationship with the consumer across all points of contact" (De Chernatony and Segal-Horn, 2003: 1112) which must, in turn, arise from the staff's understanding of the brand.

Through the SDL lens, however, service becomes a firm's primary offer. The 'service brand' thus fulfils the role that a product brand would deliver in a goods-centric marketing context, because of the emphasis on operant resources and co-creation of value (Vargo and Lusch, 2008, 2004). As with the idea of a corporate brand, the notion of service becomes superordinate to the idea of branding goods and services (Brodie et al., 2006a). It follows that the brand is no longer an entity, but a process that takes on other meanings (Brodie, 2009). The service brand is therefore defined as a "holistic process which provides focus to the internal relationship between the service company and the employees and comes alive in the external relationship (encounter) between consumer and service provider (employees)" (Dall'Olmo Riley and De Chernatony, 2000:148).

The service brand is thus a 'relational asset' (Brodie et al., 2006a, 2006b; Dall'Olmo Riley and De Chernatony, 2000). It creates value from a financial perspective because brand equity becomes part of the overall value creation associated with the brand (Brodie et al., 2006; Doyle, 2001). Given that brand experiences and brand meanings are co-created through interactions with consumers, suppliers and other partners, the brand becomes both a source of customer and firm brand equity (Prahalad and Ramaswamy, 2004).

Some existing research suggests that a service brand relationship value triangle or 'three promises framework' is central to understanding how service brands enable firms to co-create value (Brodie et al., 2009; Brodie et al. 2006a; Grönroos, 1996; Bitner, 1995). By integrating customer, employee

and organisational perceptions of the brand, the framework, as shown in Figure 3.1, proposes that three types of marketing are required to influence customer perceptions: external marketing (making promises), interactive marketing (delivering them) and internal marketing (enabling them to be fulfilled).



**Figure 3.1 The Service Brand Relationship Value Triangle**

**(Source: Brodie et al., 2006a: 372)**

Customer value is proposed as the realisation of these processes as outputs from an investment in marketing that simultaneously delivers financial value for the firm. Webster (2000) had already argued that the co-created value spreads beyond the end consumer to develop a network of marketing relationships between a firm and its actors, which happens because of those different actors combining their resources within an integrated system (Fyrberg and Jürriado 2009). Thus, interaction becomes essential to hold the firm’s network together, requiring communication and dialogue (Payne et al., 2009). In this way, the notion of the service brand overlaps with the theory of co-creation and acts as a precursor to the organic view of the brand, although it does not consider

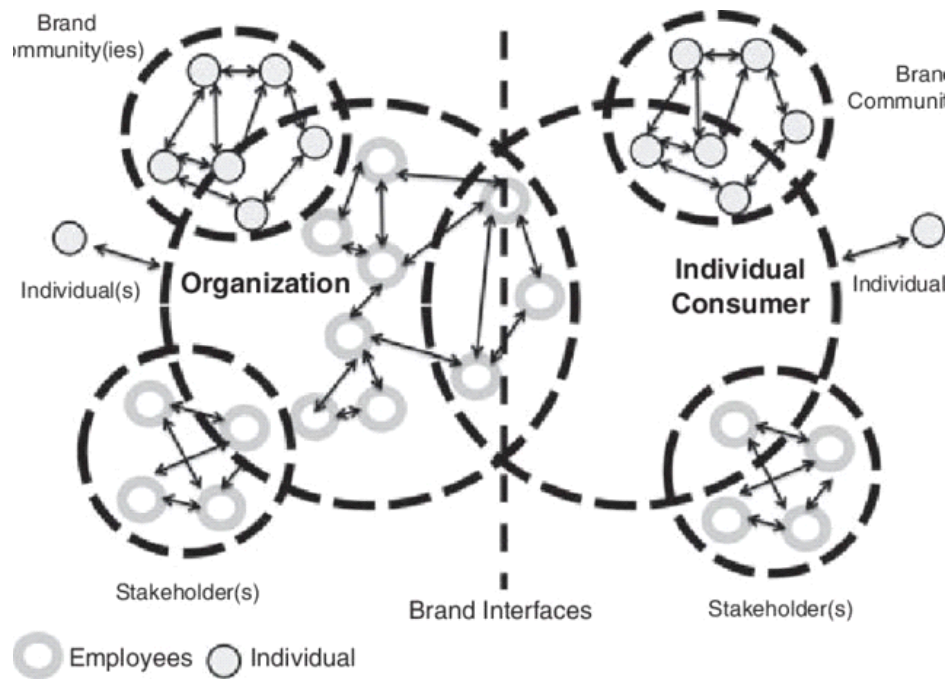
how the intangible market assets of brands, customers, networks, and their associated marketing activities work together to co-create market value (Iglesias et al., 2013). That said, it may offer a mechanism for exploring the brand management practices of SFs: it focuses clearly on the trio of relationships among customers and other stakeholders, the company, and its staff. It does not consider, however, how these are operationalised in such a way as to deliver sustainable competitive advantage.

King et al. (2013) assert that the service brand and BO are co-existing concepts because they share the objective of maintaining high levels of customer service while developing an organisation-wide commitment to protecting brand values and identity. However, while they propose that the service brand has four dimensions (brand leadership, brand standards, HR practices, and brand empowerment), they do not suggest the brand management practices required to deliver them. Moreover, no connection is made between the delivery of a service brand by deployment of these 'dimensions' and how the outcome positions a firm in terms of its branding archetype (Wong and Merrilees, 2005). Brodie et al. (2006b) subsequently argued that the service and relationship marketing literature should focus more on the role that brands play in customer relationships and business networks. They proposed that further exploration of the ways in which networks, customers and brands bring about the co-creation of value could enable further development of such concepts as brand and customer equity (Rust et al., 2004; Reinartz and Kumar, 2000; Ambler, 2000; Aaker, 1991). This could in turn encourage firms to focus on the core business processes that co-create brands and deliver customer and financial value in a way that incorporates the intellectual aspects of marketing.

Whilst the theory of brand co-creation has been further developed conceptually, the empirical evidence that does exist is based on the experiences of LOs such as Lego (Ind, 2015). Despite a growing body of literature exploring brand co-creation, little is currently known about how brands co-create value in practice, according to France et al. (2018, 2015), Merz et al. (2018), Tajvidi et al. (2018), Ramasawmy and Ozcan (2016), and Hatch and Schultz (2010). Specifically unexplored, are the brand management practices of SFs and how the ways those are operationalised facilitate and support the co-creation of brand value (Odoom et al., 2017; Berthon et al., 2008) There is also a dearth of longitudinal research related to branding issues in SFs or research considering the moderating factors that affect BO in SFs – such as brand leadership (Odoom et al., 2017).

### 3.4.4 A model for brand value co-creation

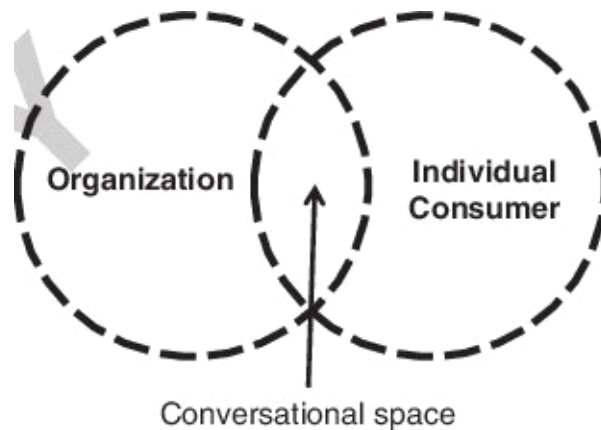
Based on their qualitative and exploratory study, Iglesias et al (2013: 677) propose a model for the co-creation of brand value: the “organic view of the brand”, which is reproduced in Figure 3.2 below.



**Figure 3.2: The organic view of the brand**

**Source: Iglesias et al. (2013: 678)**

This model posits that the co-creation of brand value happens primarily in the conversational space between the organisation and individual consumers, as depicted in Figure 3.3 below. This means that brand value depends on “the interactions established between consumers and the organisation that manages the brand – through frontline employees and brand interfaces” (Iglesias et al., 2013: 677). Each consumer therefore has a unique perception of the brand, driven by their personal experiences. As a result, the meaning and value of the brand is fluid and subject to negotiation.



**Figure 3.3: Co-creation in the 'conversational space'**

**Source: Iglesias et al. (2013: 677)**

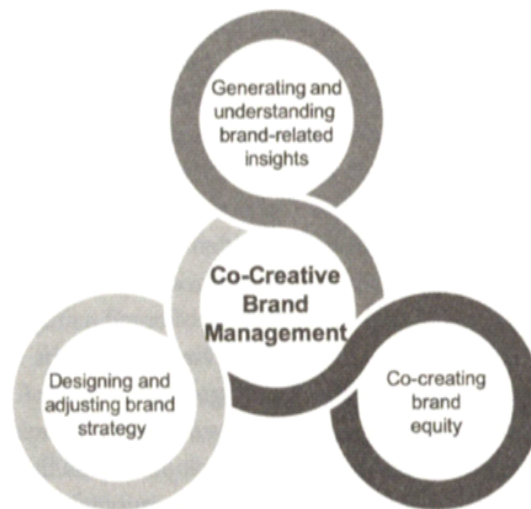
It follows, then, that brand managers must ensure consistent control across all the brand interfaces - human and non-human (the latter including, for example, visual identity and brand image) - to make the brand promise tangible and contribute to the co-creation of brand value. Thus, the model challenges the traditional concept that a value proposition can be defined exclusively from the organisational perspective (Iglesias et al., 2013).

By being based in practice, it further provides empirical evidence of how co-creation happens, but does not go as far as identifying the brand management practices that are required to support consistent management across the brand interfaces. In other words, the management dimension of brand co-creation is not considered.

The model was derived from a study of a small sample of marketing managers and directors from global brand consultancies. Consequently, it adopts the particular perspective of advisors to LOs, which relates to arguments I made in Chapter 2 about the advice given to SFs being inappropriate. Consultancies base their advice on a range of competences, expertise and resources that are available to execute it. There is almost a sense of self-fulfilling prophecy in that this model presumes success built on knowledge and resources, while SFs will take a more informal and less data-driven course, rather than mimic the approach of LOs to brand management (Odoom et al., 2017; Berthon et al., 2008). This offers scope for further research to explore whether or not the processes and actors involved in brand co-creation in SFs are the same as or differ from those in LOs, and also the potential to explore the leadership style of EOMs as brand leaders in order to see if it is open and participatory, as is required for the generation and interpretation of appropriate brand-related insights in order to ensure that the brand maintains an appropriate orientation (Ind and Schmidt, 2019).

### 3.4.5 The co-creative brand management system

The 'organic' view of the brand suggests that its management is an "enduring brand related negotiation" (Ind and Schmidt, 2019: 113) and has led to the development of the co-creative brand management system depicted in Figure 3.4 below. The proposition is that brand equity arises from three simultaneously occurring and inter-connected brand-related activities. First, an open and participatory management style is required to generate and interpret appropriate brand-related insights, transforming them into a brand strategy that is continuously adjusted and implemented to create brand meaning. This process includes analysing the brand-related views of stakeholders, scanning the activity of competitors, and understanding consumers' motivations to purchase. Accordingly, the brand management process is monitored and can be controlled. Second, brand identity is perceived as a continuously evolving process involving all stakeholders, for which reason the second building block of the model focuses on brand strategy. Third, brand strategy is implemented with the help of various stakeholders (Ind and Schmidt, 2019).



**Figure 3.4: The Co-Creative Brand Management System**

**Source: Ind and Schmidt (2019: 115)**

The model thus further develops the argument that brands are co-created by emphasising that the intended and enacted brand identities must overlap to achieve the brand equity which is the subject of Section 3.8. Whilst a range of inherent co-creation practices is proposed within the model (for example: crowdsourcing, storytelling, and the use of social media influencers), the examples relate to LOs rather than SFs. Moreover, the facilitative management style the model rests on is potentially

feasible only in a LO, where the CEO is not personally invested in the brand. Again, no empirical evidence is presented to demonstrate that this is how brand management is operationalised in SFs.

### 3.5 A 'live' brand: brand orientation as a business strategy

Through the SDL lens, with its adoption of co-creation theory, branding becomes a dynamic capability that can “continuously create, extend, upgrade, protect, and keep relevant the enterprise’s unique asset base in a changing environment.” (Teece, 2007: 1319). The Brand Co-Creation model devised by Ind and Schmidt (2019) is useful in understanding how brand orientation (BO) since an ‘inside out’ view of branding must involve collaboration (Ind, 2017). However, to analyse how literature has arrived at a perspective of BO as a dynamic and negotiated strategy, it will be useful to review the literature dealing with the relationship between market orientation (MO) and BO.

#### 3.5.1 Market orientation as an antecedent to brand orientation

Gonzalez-Benito and Gonzalez-Benito (2005: 799) have asserted that the “notion of market orientation is related to the adoption of the marketing concept as a business philosophy”. MO, describing the identifying and meeting of customer needs and wants, is said to be relevant in every market environment; its adoption and implementation as an organisational culture is widely held to deliver superior corporate performance (Appiah Adu and Singh, 1998; Kohli and Jaworski, 1990; Narver and Slater, 1990). However, the concept is of a continuum, with those businesses that develop it fully believed to possess higher levels of profitability, irrespective of firm size (Reijonen et al., 2012).

The cultural perspective on MO sees it as being composed of three behavioural elements: customer orientation, competitor orientation and inter-functional co-ordination. The firm will gather information about its customers and its competitors and share that effectively throughout the organization. Customer value is then created as a co-ordinated and organisation-wide response (Hult et al., 2005; Narver and Slater, 1990). The alternative behavioural view of MO conceives of it as a set of information-processing activities which include the generation of market intelligence concerning current and future customer needs, the dissemination of this information organizationally, and the organisation-wide task of responding to the intelligence by formulating and implementing plans based on it (Kohli and Jaworski, 1990). It may therefore be said that the behavioural perspective focuses on action, and the cultural perspective on the norms and values of the organisation, although behaviours are still emphasised (Helfert et al., 2002). In fact, the two approaches appear to



overlap, a symbiotic relationship being identified between them, because the development of a market-oriented culture can lead to consistent behaviour and, conversely, market-oriented behaviour leads to a constant organisational culture (Gonzalez-Benito and Gonzalez-Benito, 2005).

Both perspectives of MO call for dynamism on the firm's part, meaning that it adheres to the first building block of the Brand Co-Creation Model by emphasising the need to understand consumers. However, the suggestion of 'emergent' or feedback correction strategies to ensure congruence between the firm, its offer, consumers, and other stakeholders (Narver et al., 1998) falls short of defining a role for consumers or other stakeholders as co-creators of value. Thus, while the need to collect 'market intelligence' and 'customer information' are defined as clear stages, direct involvement by consumers or other stakeholders in the culture or activities of the company is not taken into account (Jaworski and Kohli, 1993; Narver and Slater, 1990). This is incongruent with the concept of resource-integrating actors who create mutual value (Vargo and Lusch, 2017).

### 3.5.2 Market orientation as a source of competitive advantage for small firms

Keskin (2006) suggests that MO confers potential competitive advantages for SFs over their larger competitors. Because they are typically closer to their customers; with less organizational bureaucracy than LOs, they can adapt and respond more quickly to customer needs. Studies examining the impact of MO on SF performance generally find it to be positive (Li et al., 2008; Kara et al., 2005). Specifically, SFs that are growing are seen to adopt MO and BO to a greater extent than stable or declining counterparts. Although they typically lean more towards MO than BO, it is the latter that delivers greater competitive advantages (Reijonen et al., 2012). However, only a limited number of studies specifically focus on MO in SFs (Blankson and Cheng, 2005). The relationship between MO, BO and a firm's performance needs further investigation as evidence is inconclusive (Reijonen et al., 2012).

That said, it has been suggested that firms practising MO will have a clearer vision than otherwise and can develop a correspondingly stronger organisational culture. That will deliver such associated benefits as greater cohesiveness within a staff team, and improved customer satisfaction (Jaworski and Kohli, 1993). MO is in this sense a precursor to the concept of "internal branding", which requires employees to "live the brand" so they can enhance the customer's brand experience across the interfaces of the organization (Schmidt, 2017). It is thus internal branding that will enable the firm to develop its staff's customer competences in facilitating and supporting, thereby providing stability whilst simultaneously allowing the firm to embrace change (Pralhad and Ramaswamy, 2004).

The implication is that MO demands an organizational culture that incorporates decentralized decision making and market-based reward systems (Jaworski and Kohli, 1993), an argument further extended by Slater and Narver (1994: 25), who say that senior managers must create an “environment in which change can occur without specifically decreeing what that change will be.” At no point, however, is a role identified for consumers or other stakeholders. Moreover, the successful adoption of MO appears to require a facilitative style of management, which is at odds with the classic view of the EOM. It is therefore of interest to investigate if and how EOMs decentralise marketing and the extent to which they adopt a leadership style that facilitates collaboration by all stakeholders.

A significant criticism of MO has been that “brand questions become second order issues or fall entirely outside the scope of the firm’s strategy”, so the brand is seen as an unconditional response to customers’ wants and needs (Urde, 1999: 120). At a high level, this is what the market orientation paradigm maintains, that MO is about customer satisfaction vis-à-vis the competition. BO is also about the appropriate positioning of the brand and, as such, an internal view that may modify the impact of the external environment. Ignoring this in favour of MO alone, could thus risk the brand’s strategic value as the expression of the organisation’s identity and creator of competitive advantage (Wong and Merrilees, 2005).

### 3.5.3 Defining brand orientation

BO has evolved from MO as a means to shift the brand from such an unconditional response to market needs into a strategic platform for interaction (Gromark and Melin, 2013; Simões and Dibb; 2001). MO is a prerequisite for the development of BO because, without information about customers and competitors, it would be impossible to position the brand appropriately.

BO aims to make the brand a strategic resource, transitioning a firm in the process from a product or service perspective to one that links the brand with other assets and competences to deliberately manage the processes that give the brand meaning and value (Urde, 1994). Whilst this does not ignore the consumer, the firm is motivated beyond customer satisfaction to see potential for the brand to create equity (Baumgarth et al., 2013; Urde, 1994). BO is thus formally defined by Urde (1999: 117) as: “an approach in which the processes of the organisation revolve around the creation, development and protection of brand identity in an ongoing interaction with target customers with the aim of achieving lasting competitive advantages in the form of brands”.

This author had earlier suggested that BO is a positive strategic choice for a firm wanting to respond to key business trends: decreasing product divergence, increasing media costs, and the integration

of markets. As such, it draws on a resource-based strategic perspective to link firm resources, competencies, and the development of sustainable competitive advantage (Hamel and Prahalad, 1994; Barney, 1991). What constitutes a competitive advantage will depend upon the profile of the competitors and consumers in a particular market, who are the reference points for what is unique and valuable. Hence, brands have become important assets in volatile markets, offering firms powerful and sustainable attributes despite their intangibility (Kapferer, 2012; Kirk et al., 2012; De Chernatony et al., 2011). They enable companies to deal with a range of environmental factors that add complexity to the firm's business activities, including increased competition, the characteristics of diverse publics and stakeholders, and the power of the media – all of which can make it difficult to maintain an effective dialogue with consumers (Simões and Dibb, 2001).

However, to achieve sustainable advantage through its brand, a firm must align its resources and business practices in such a way as to use the brand as part of a corporate marketing approach embedded within the organisational culture (Balmer and Greyser, 2006). Concepts such as internal branding accordingly become important as a way of aligning MO and BO (Ind, 2017). Furthermore, if the brand is to maintain differentiation within a market, enhance business performance and support growth, there is a corresponding need for appropriate leadership (Centeno et al., 2013; Horan et al. 2011).

The concept of brand co-creation highlights this need further. The notion that competencies such as knowledge and skills are applied for mutual benefit between actors in a network means these operant resources become a key source of competitive advantage. The co-creative brand management system (Ind and Schmidt, 2019) and the organic view of the brand (Iglesias et al., 2013) both imply that brands must be co-created. This raises questions about how the contributions of actors in networks beyond the traditional boundaries of the firm can be supported and managed to ensure that BO does not lose strategic direction and hence competitive advantage. Specifically, I am uncertain if the adoption of a co-creative brand management system can necessarily enable EOMs to mitigate the challenges in SFs typically associated with marketing competence and capability by harnessing the operant resources of their consumers and staff.

#### 3.5.4 The organisational requirements of brand orientation

BO enables a firm to link its brand with the other assets and competencies it owns and to strategically manage “the processes that give the brand value and meaning” (Urde, 1994: 122). The brand becomes an expression of the company's core values and beliefs and correspondingly acts as a strategic organising principle for the firm (Bean, 2009). Brand oriented companies therefore have

well defined brand identities and focus on activities such as brand-related marketing communications and market research about their brands.

Logically, successful adoption of a BO must therefore affect how a firm operates. First, the way staff respond to a brand is a critical element in the organization of the branding function (De Chernatony and Harris, 2000). Accordingly, it has been argued by Keller (1999) that a 'brand mantra' is valuable for conveying the meaning of a brand, while Macrae (1999) used the term 'brand reality' to describe how branding processes and knowledge are interrelated and need to be managed, from the employees' perspective. This internalization of the brand means companies must "involve employees in the care and nurturing of the brand" (Berry and Parasuraman, 1992: 129). This concept has developed into a literature stream dealing with the "service brand" (Brodie et al., 2009; Brodie et al., 2006a, 2006b; Grönroos, 1996; Bitner, 1995) and the importance of internal branding (Ind, 2017). Many of the papers it contains are either conceptual or consider the role of internal branding in LOs (Ind, 2017). Internal branding is also considered important for SFs wanting to develop a strong BO (Wong and Merrilees, 2005). But, given that they often have few employees and may be dominated by the management style and experience of one EOM, the extent to which their brand management practices have an internal as well as an external focus may be reduced. That said, the existing literature offers no insight into this.

Secondly, the theory of brand co-creation considers all the actors in a network as operant resources (Ramaswamy and Ozcan, 2016). This offers EOMs the opportunity to expand SFs' competences and capabilities, should they choose to harness them. So far, however, the available examples of what consumers do to help co-create brand value all relate to LOs, as for example the case of Lego in Ind et al. (2017). Understanding what happens in SFs, and how and why, is therefore a distinct gap in the literature (Odoom et al., 2017; Berthon et al., 2008).

BO is traditionally treated as a continuum (Wong and Merrilees, 2005). A study by Krake (2005) found that the creation of brand awareness is an unconscious goal of SFs, although they are frequently distracted by the immediate need to generate revenue to ensure survival. Similarly, Wong and Merrilees (2005:158) discovered that most SFs have either a minimal or an 'embryonic' BO. Those with a minimal orientation are "crisis or survival oriented", whilst embryonic firms have a branding strategy that is "largely implicit and best described as a de facto branding strategy" (Wong and Merrilees, 2005:160). By contrast, SFs with a more developed, integrated BO have a clear understanding of the firm's competitive advantage and its overall distinctiveness compared to competitors. Such SFs view their brands as an integral part of their marketing strategy and are willing to invest in brand management, despite the cost and risks that minimalist and embryonic SFs

associate with branding activities. Correspondingly, they benefit from having a high brand and market orientation (Reijonen et al., 2012).

Combining BO and MO is said to be a 'hybrid' orientation (Urde, 1999). That integrated strategic approach to BO potentially enables firms to balance the wants and needs of consumers willing to co-create against internal decisions that ensure the brand retains its strategic advantages (Urde et al., 2013). However, it is unclear how this might be achieved, given that the literature does not assess whether brands are mostly built internally, externally or in co-operation (Vallaster and Lindgreen, 2011). Nor does it suggest which brand management practices will deliver a hybrid orientation. Moreover, in the context of SFs, it is unclear whether EOMs are reconciled to losing control of their brands or are willing to practice brand co-creation (Ind, 2017).

Understanding more about the brand management practices SFs undertake and the kind of strategic orientation they adopt is significant, because it appears that more customer-oriented SFs with a strong BO are more profitable (Reijonen et al., 2012; Appiah Adu and Singh, 1998). However, SFs find it particularly hard to develop their strategic brand management abilities (Ahonen, 2008). Therefore, a better understanding of what happens in practice could support more SFs in achieving an integrated BO, with the related performance benefits for the firm (Wong and Merrilees, 2005).

### 3.5.5 The performance benefits of brand orientation

It seems clear there is a relationship between MO and BO but using the brand as a strategic platform is what makes a decisive difference to a firm's performance (Urde, 1999:130). BO appears to build on MO by taking account of the competition in the market – something MO does not achieve by focusing on consumer wants and needs alone. Accordingly, MO is perceived as being more short term and sales-focused, whereas BO is an organisational mindset to ensure that the brand features in marketing strategy. It is claimed, by Urde et al. 2013) that BO offers an additional degree of sophistication: it is "market orientation plus" (Urde, 1999:118).

Firms with a high level of BO derive more from their marketing strategy than those with a low level because of its moderating effect in the marketplace (Wong and Merrilees, 2007). BO is seen to have a positive effect on financial performance (Reijonen et al., 2012; Wong and Merrilees, 2008) because a high level positively affects a market, thereby facilitating the economic success of individual firms (Baumgarth, 2010; Wong and Merrilees, 2008, Napoli, 2006, Bridson and Evans, 2004). This seems to hold true irrespective of the size of a firm, with growing and growth-oriented SFs likely to adopt both BO and MO but found to be more brand oriented (Reijonen et al., 2014; 2012).

### 3.5.6 The BO typologies of small firms

In practice, most SFs seem to exhibit low levels of BO, mainly because of the perceived costs and risks associated with brand management. Improved knowledge and understanding of the brand management practices undertaken by successful SFs could therefore enable more SFs to achieve competitive advantages from successfully developing BO as a key part of their marketing strategy.

To date, work on developing branding archetypes for application to SFs is based on the principles of brand distinctiveness and brand strategy (Kapferer, 2012; Keller, 2003; Aaker, 1996; De Chernatony, 1992). It considers the 'brand barriers' that inhibit SMEs in particular from implementing branding strategy as an explicit feature of SFs and concludes that brands are generally used tactically as vehicles for identity management rather than developed strategically as an intangible asset, because SFs do not adopt an 'integrated approach' to brand management (Wong and Merrilees, 2005:158). It seems that most SFs are not accruing the additional performance benefits associated with BO (Reijonen et al., 2012).

However, there are aspects of the design of the 2005 study (Wong and Merrilees) that need to be taken into consideration; it used four constructs to frame their research: brand orientation, brand barriers, brand distinctiveness, and brand performance. On the basis that those had not been explicit in previous work, they adopted a theory-building approach based on case studies rather than a theory-testing approach. Their study therefore makes a conceptual contribution by refining the four constructs and establishing causal relationships among them. Whilst this would support testing by quantitative research to establish the generalisability of the relationships among the constructs and of the typology, at this stage it remains unclear how the brand management practices vary between 'integrated' and 'unintegrated' firms (Hirvonen et al., 2013; Krake, 2005; Wong and Merrilees, 2005). I am therefore interested to explore further whether the real-world brand management practices of these firms align with those advocated by Berthon et al. (2008).

Wong and Merrilees (2005) developed the 'brand archetypes ladder' in Figure 3.5 below, in which the embryonic brand orientation is largely implicit and the strategy only de facto, while the integrated brand orientation exhibits a clear understanding of the firm's overall competitive advantages and overall distinctiveness in the marketplace.



**Figure 3.5: The Branding Archetypes Ladder**

**Source: Wong and Merrilees (2005: 158)**

Further qualitative research therefore seems appropriate, particularly since exploring the phenomenon of brand management could develop greater understanding of the ways in which co-creation operates in the context of the ‘negotiated brand’ (Iglesias et al., 2013; Merz et al., 2009, Gregory, 2007; Ind and Bjerke, 2007). The literature of BO is thus evolving over time, shifting from an inside-out approach to the creation of a brand towards a more general conceptualisation of branding as a negotiated social process that involves many stakeholders. Moreover, exploring what is happening in the conversational space at the interfaces of the brand would also allow me to evaluate whether brands are mostly built internally, mostly externally, or through cooperation (Vallaster and Lindgreen, 2011).

### 3.5.7 The concept of “living” BO: the impact of co-creation

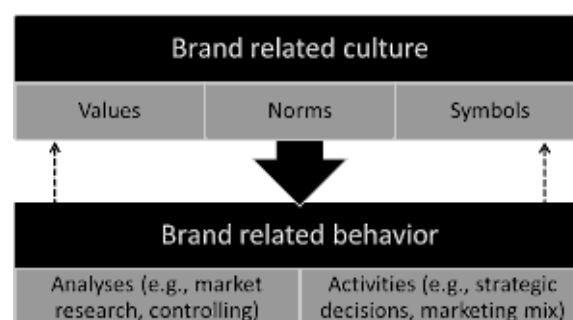
My adoption of the SDL lens assumes that, as a service, brands must create relevant experiences for their customers and other stakeholders (Grönroos and Voima, 2013; Grönroos, 2012; Vargo and Lusch, 2004). All the actors in a brand’s network become ‘resource integrators’, suggesting that the control-based organisation in which managers can make branding decisions internally and implement them externally, no longer exists (Ind, 2017). Hence, the notion of the ‘organic brand’ (Iglesias et al., (2013: 682) has been discussed because it suggests that the brand acts as an interface between the company and its stakeholders.

Interaction therefore becomes a “precondition to maintaining a clear agenda within the network” (Fyrberg and Jürriado 2009: 424). It is also necessary to prevent actors within the network from using

real and perceived power to manipulate what happens, especially given that non-consumers – people who “do not need to own the market offering to admire a brand and help co-create a brand’s value” (Merz et al., 2009: 338) – may become involved in a brand’s community and thus need to be part of the firm’s network if control of its key marketing asset is not to be lost.

The importance of interaction is not fully understood (Brennan, 2006). It can however be described as the “glue that holds a network together by mediating information, fostering joint decision making, exercising power and encouraging trust” (Fyrberg and Jürjaido 2009: 424). Thus, the quality of these interactions is an important factor in the maintenance of the cohesiveness of the network (Fyrberg and Jürjaido, 2009). Moreover, appropriate management of the interactions could enable SFs to extend their branding capability and competences by harnessing the operant resources of their community. However, there is limited empirical evidence to demonstrate how interaction happens in this context.

From the perspective of BO as a corporate strategy, it becomes important that these interactions are “inspired by the overall positioning of the brand” (Schmidt, 2017: 14). Failure to ensure that this does happen will mean that the negotiated brand drifts beyond the strategic aims of the brand owner. Correspondingly, employees and their behaviour become integral to the transfer of a brand’s values and positioning through the conversational space of the brand. The BO model of Urde et al (2013) as updated by Schmidt and Baumgarth (2014) accordingly recognises the importance of developing a brand-oriented culture to drive brand-oriented behaviour, as demonstrated visually in Figure 3.6.



**Figure 3.6: Model of brand orientation**

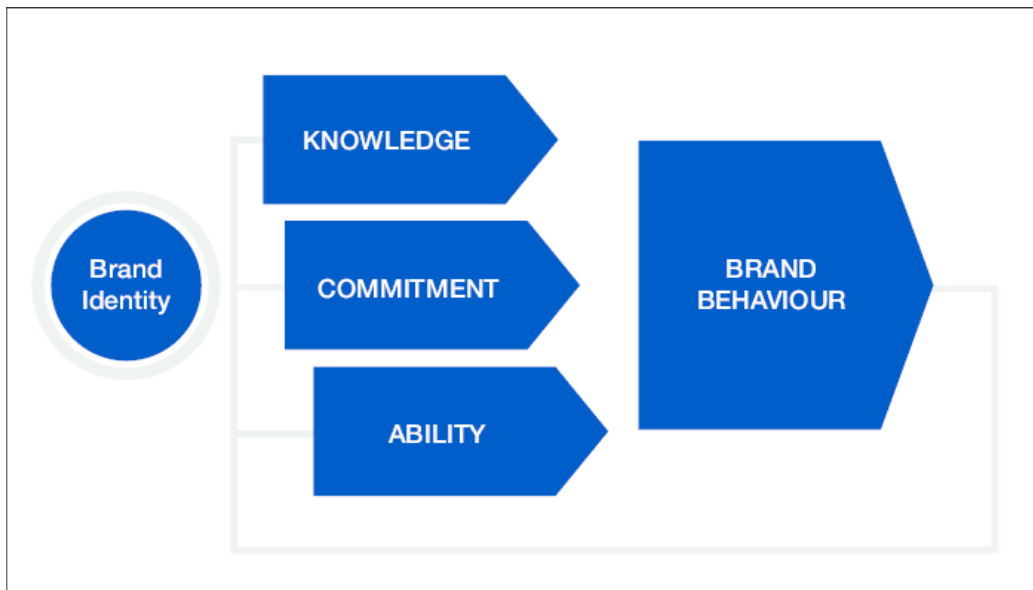
**Source: Schmidt and Baumgarth (2014: 4)**



The first layer of the Schmidt and Baumgarth model represents the brand-oriented culture, which includes the values, norms, and symbols for brand orientation. Values are considered “deeply embedded, taken for granted and largely determine what people think should be done. The norms represent the “explicit and implicit rules” and determine how “members represent the organisation, both to themselves and to others”. Symbols are any “tangible, overt or verbally identifiable element in an organisation” such as dress code or employees’ ‘stories’ about the organisation. The first layer drives the second, which relates to brand-oriented behaviour, including those that involve analysis, such as brand research, measuring brand equity and decisions about the marketing mix (Schmidt, 2017: 17).

Based on personal experience of managing service encounters in practice, I agree that the two layers inter-relate and brand-related behaviour will not happen unless the culture supports and encourages it (Saleem and Iglesias, 2016). However, this model does not consider the extent to which employees also need to be motivated to enact the brand, or whether they have the resources and skills to translate the brand culture into their interactions with customers.







Wentzel et al. (2014) propose a ‘brand behaviour funnel’, shown in Figure 3.7 below, which posits that employee brand behaviour arises from three linked components: knowledge of brand identity and how their behaviour impacts the brand building process; commitment to the brand; and the ability to transmit the brand’s values during interactions with consumers. The funnel model thus recognises that personal behaviour is a function of personal knowledge, skills, resources, and motivation (Campbell and Pritchard, 1976; Vroom, 1964). However, one thing it implies is that even staff who have commitment to the brand may not demonstrate brand-related behaviour because they lack either brand knowledge or suitable brand related skills and resources, or both. The question arises whether the limited marketing competence and capability of typical SFs will prevent them from achieving consistent brand behaviour because they are unable to develop a suitable brand ideology (King and Grace, 2008). Or can management style and organisational learning mediate this?



**Figure 3.7: Brand behaviour funnel**

**Source: Wentzel et al. In Esch et al. (eds.) (2014: 227 – 41)**

Schmidt (2017: 27) attempts to address the need for brand culture, and hence employee behaviour, to involve individual learning and motivation through a ‘living brand orientation framework’, as depicted in Figure 3.8, below. Here he defines the preconditions required if the values, norms, and symbols of the brand are to be implemented through the brand behaviour funnel. These preconditions include “the existence of a brand ideology in terms of a brand’s vision, mission, goals and, most important, values (Saleem and Iglesias, 2016: 48). If those are absent, it seems that internal brand management will be unsuccessful. In a co-created brand context, that suggests that the brand will fail to meet its strategic objectives. However, whilst this model is a useful step forward in that it proposes how the basic rules of individual learning apply to the successful implementation of a brand-oriented culture, it draws only on three cases, two of which were LOs one a large SME with a staff of 130; so, it is unclear how transferable the findings are to the SF setting.

	Precondition		I Know	I can	I want		I act
<b>Values</b>	A well-defined and ideally co-created brand ideology exists.		Within the company everyone knows what the brand stands for.	The brand ideology is understood by everyone within the company (e.g. brand values aren't abstract or exchangeable). Employees intuitively understand which actions are 'on brand'.	Employees think that the brand is a strategic asset of the company and identify themselves with the brand because there is a strong fit between individuals and brand values.		Employee's behaviour supports the brand ideology.
<b>Norms</b>	The brand ideology has been transformed with specific and unambiguous rules that need to be followed.		The rules are known within the company.	Employees have the necessary skills, competences and resources to follow the brand rules.	Employees want to follow the brand rules because it is in their interest.		Brand-specific rules are followed.
<b>Symbols</b>	Values and norms are supported by brand-specific symbols.		Employees know the meaning behind the symbols.	Employees are free to use the symbols within their daily business.	Employees like to use the symbols because they seem attractive.		Brand symbols are proudly used by employees.

**Figure 3.8: The living brand orientation framework**

**Adapted from Schmidt. In Ind (2017: 27)**

### 3.5.8 The brand defined as a single organising principle

Loss of control of a brand by its owner in the process of co-creation has been a pivotal issue in shaping thinking about BO, which has in parallel shifted from a purely 'inside-out' view of the brand, to reflect the "blurring of boundaries between, inside and outside the organisation, the growth of online communities and the speed of change in many industries" (Ind, 2017: 3). I do not believe this loss of control is a negative event, particularly with regard to SFs. Rather, I think it offers brand owners the opportunity to co-opt the competences and skills of their consumers, employees, and other stakeholders to create brand value while retaining influence in terms of defining brand strategy. For SFs with limited marketing capability and competence, this phenomenon could be positive in gaining the performance advantages associated with MO and BO (Reijonen et al., 2012).

It does, however, have consequences for brand management. In becoming 'polyphonic' - that is, involving many voices in its transmission from a firm to consumers in the marketplace - brand strategy is no longer a linear process of creating a brand, offering it to consumers and evaluating it through market research. Instead, the organic view of the brand posits the existence of many interfaces or touchpoints (Iglesias et al., 2013). Maintaining BO must therefore become a process of dialogue, trust, and leadership to create an environment in which this continues to meet the brand owner's overall strategic goals. In SFs, where the brand is often perceived as an extension of the

EOM's personality, the need is clear for a specific management style and mindset if superior performance is to be achieved through the brand (Spence and Essoussi, 2010; Krake, 2005).

With respect to LOs, it is claimed that "brand-driven organisations are flat" which allows them to maximise "their surface level to provide maximum interaction with the environment" (Kornberger, 2010: 21). This permits them to structure operations in such a way as to bring together strategy, people, operations, and marketing. Thus, there is an argument that, instead of operating inside-out, brands operate outside-in as a "perspective that enables organisations to think innovatively about how they can engage with their environment (Kornberger, 2010: 22). On this basis, I am attracted by the definition of a brand offered by Bean (2009: 16): "a single organising principle, brought to life coherently, continuously and consistently." He asserts that consistent application of the brand across an organisation's culture, products or services and reputation will result in a business that is better aligned, more focused and more efficient. To achieve this, Bean (2009) emphasises the need for brand promises to be consistently met, whilst recognising that brands are the result of reciprocal dialogue that unites the endeavours of many actors within the brand network. For me, as a definition of a brand in the post-digital world, this captures the need for brand owners to develop a participatory management style that unites all their stakeholders in developing a flexible branding strategy able to deliver the overall strategic goals of the firm.

### 3.6 Internal branding as a route to co-creation of brand value

#### 3.6.1 Defining internal branding

If we accept the notion of the co-creation of value, brands shift from aiming to achieve homogeneity with a target audience to being vehicles for heterogeneity and "endless diversity" (Askegaard, 2006). Similarly, the concepts of the organic brand and the brand as a single organising principle both recognise that brands operate in a hyper-connected world with multiple interfaces between employees and consumers (Iglesias et al., 2013). Those interfaces are often "public and visible to everyone" which creates a "transparent and risky environment" and "further complexity" (Saleem and Iglesias, 2017: 64). Accordingly, staff who are unable to navigate relationships with consumers through these interfaces successfully will be less able to co-create brand value with stakeholders. Internal stakeholders thus become a "major building block of brand equity" (Ind and Schmidt, 2019: 215).

The growing recognition of the role of internal branding represents an "emerging field" of literature that offers "multiple understandings and definitions" (Saleem and Iglesias, 2017: 64). However, for the purpose of my inquiry, the following definition is adopted because, to me, it captures the

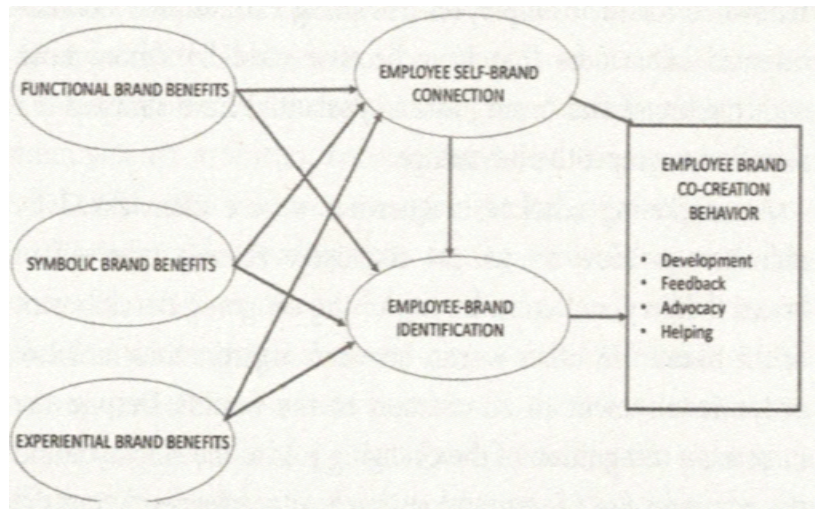
outcomes I think a brand owner would want their internal branding to achieve: “internal branding is the process through which organisations make a company-wide effort within a supportive culture to integrate brand ideologies, leadership, human resource management, internal brand communications and internal brand communities as a strategy to enable employees to consistently co-create brand value with multiple stakeholders” (Saleem and Iglesias, 2016: 50).

Internal branding cannot just ‘happen.’ Earlier, I highlighted the importance of the ‘brand mantra’ (Keller, 1999). Developing this notion further, King and Grace (2008) suggest that a brand ideology, comprising the mission, vision, goals, culture, and shared values of an organisation, must be the starting point for enacting an appropriate brand culture daily. Meanwhile, Ind and Bjerke (2007) suggest that a strong shared ideology that is culturally embedded should guide strategic decision making, employee behaviour and interactions with stakeholders. In practice, a range of internal communication activities is normally deployed to encourage brand commitment and brand-related behaviour by employees. Examples such as brand handbooks, internal communications of various kinds and brand training abound. One of my personal experiences was producing a comprehensive branding toolkit to guide staff and volunteers within an international NGO to develop more consistent brand-related behaviour across all its operations. However, it is unknown to what extent SFs in general adopt these kinds of communication activities internally.

### 3.6.2 Employee brand-oriented behaviour

A line of thinking has asserted that it is not possible to prompt brand related staff behaviour in a specific way because of the characteristics of co-creation in which value is uniquely and individually determined (Vargo and Lusch, 2017; Saleem and Iglesias, 2016). It is suggested that, instead, it might be better to develop an organisational environment in which staff can find their own ways of enacting the brand (Henkel et al., 2007). A powerful example of this in practice is the employee handbook developed by Nordstrom, an upmarket New York department store. It takes the form of a postcard, on one side of which is “our number one goal is to provide outstanding service...our employee handbook is very simple. We only have one rule...” and on the reverse side “Use good judgement in all situations” (Saleem and Iglesias: 2017: 68).

Gill-Simmen et al. (2018) identify that two essential constructs act as the foundation of co-creation behaviour by employees: a sense of personal connection to the brand and identification with it. Employees draw on the benefits they feel a brand offers them and use these to form that ‘self-connection’ with it, enabling them to identify with the brand and deliver brand co-creation behaviours. This notion is set out graphically in Figure 3.9 below.



**Figure 3.9: Pathway to employee brand co-creation behaviour**

**Source: Gill-Simmen. In Ind and Schmidt (2019: 217)**

Their research found that brands can deliver a full range of benefits to employees – functional, symbolic, and experiential. Functional benefits included “career, and life and enhancement opportunities (Gill-Simmen, 2019: 219). In the context of symbolic benefits, the brand was a “vehicle for employees to express themselves, enhance their self-esteem and self-worth and to achieve a sense of pride and status”, whereas experiential benefits were described as “excitement, fun and freedom, empowerment and feeling good and social/affective benefits that arise from the feeling of belonging to or being a part of the brand” (Gill-Simmen, 2019: 220-221).

Accordingly, it seems that employees build relationships with brands in a way that mirrors those built by consumers on the other side of the co-creation interface (France et al., 2015; Escalas, 2004; Aaker, 1999). A sense of “oneness with the brand” develops, possibly reflecting who an employee is or who she or he wants to become “in terms of goals, personal concerns and life projects” Gill-Simmen, (2019: 222). In other words, employees develop a brand connection (Aaker, 1999). Employees correspondingly express how they would respond to public criticism of the brand, suggesting that they experience brand identification (Hughes and Ahearne, 2010). As a result, staff become ‘brand champions’ (Morhart et al., 2009).

### 3.6.3 Perceived outcomes of internal branding

Gill-Simmen et al. (2018) find that the outcomes of internal branding include staff engaging in development, feedback, advocacy, and helping activities linked to the brand. They cite as tangible

examples: staff writing online content about the brand in their spare time, disseminating positive word of mouth, providing advice, and offering ideas. It therefore appears that, to support co-creation by internal and external stakeholders, a brand's intended and enacted identities must successfully overlap for each different group of stakeholders. A limitation of their research is that it does not identify what may happen if they do not: the result in such situations may be the co-destruction of value as observed from the consumer perspective (Farquhar and Robson, 2013; Lusch and Webster, 2011).

I therefore favour the model of the attitudinal and behavioural outcomes demonstrated by staff proposed by Saleem and Iglesias (2017: 73-75), as it represents a continuum of outcomes for internal branding that build an increasingly strong relationship between the firm and its internal stakeholders. This is summarised in Figure 3.10, below.



**Figure 3.10: Attitudinal and behavioural outcomes of internal branding efforts**

**Source: Saleem and Iglesias (2017: 75)**

These authors are here suggesting that the most basic and limited initial outcome from internal branding is 'brand compliance', a phenomenon they equate with a rigid brand structure. At the level of brand identification, this fosters further "positive behavioural and attitudinal outcomes, such as commitment", which can lead to the "willingness to achieve brand goals" and readiness to "go the extra mile" (Saleem and Iglesias, 2017: 75). At the apex of the pyramid is the highest level of attitudinal and behavioural outcomes, the type of employee behaviour that "goes above and beyond what the company requires from an employee and can have a positive impact on other internal and

external stakeholders” (Saleem and Iglesias, 2017: 75). Staff are thus demonstrating ‘brand citizenship’ (Burmam and Zeplin, 2005).

The Gill-Simmen et al. and Saleem and Iglesias models overlap in so much as identification with the brand leads to commitment and advocacy. However, I believe the latter is helpful in showing that the outcome of internal branding may simply be compliance; it is implied that will not result in exceptional experiences for consumers at the interface of the brand and may even have a negative impact on their willingness to co-create. It follows that employees need to be empowered to listen and react on a one-to-one basis, as exemplified by the practice of allowing staff to exercise personal judgment at the Nordstrom department store, mentioned earlier.

A key limitation of both models, however, is that all the research was undertaken within global LOs. Gill -Simmen et al. (2018) worked with such large international organisations as 3M, Nikon, Audi, and ING bank, while Saleem and Iglesias studied examples relating to Ritz-Carlton, NASA and Disney. Given the additional demands of brand management and co-creation in the multi-cultural context of international marketing, it seems evident that identification with the brand is critical to sharing core meanings about identity of the organisation, or co-creation in the wider network will result in a loss of strategic direction. Typically, such LOs as the examples above will have adopted corporate branding as a cross-disciplinary approach driven by a senior management team. The strategy will therefore have a long organisational life cycle in which to support systematic efforts to influence the norms, values, attitudes, and behaviours of internal staff (Hatch and Schultz, 2008; Kärreman and Rylander, 2008; Schultz, 2005). By comparison, SFs are dominated by EOMs who, as brand leaders, may have little time to devote to brand management on account of the demands of running their business. They may indeed not even understand brand management as a concept (Krake, 2005). Accordingly, brand management is less likely to be embedded into their organisational culture and, in the absence of marketing leadership, will not be prioritised by the firm’s staff (O’Dwyer et al., 2009; McCartan-Quinn and Carson, 2003).

This suggests there could be fundamental differences between LOs and SFs with respect to their approaches to internal branding. Accepting that brand co-creation is a given in the post-digital society and consumers want to interact at the interfaces of the organic brand, we must ask to what extent SFs using that fact as an opportunity to create strategic advantage through BO by empowering their staff.



## 3.7 Leadership and management for brand value co-creation

### 3.7.1 Loss of control and a shift to brand governance

Section 3.2 highlighted one of the axioms of SDL: that all actors in a brand network are uniquely co-creating value through their various interactions (Vargo and Lusch, 2017; 2004). This suggests that branding has become a more relational process, with brands no longer fully under the control of the brand owner. In combination with ideas relating to the organic view of the brand and BO as a dynamic strategy the inference is that management and leadership of successful brands must consequently have changed (Ind and Schmidt, 2019; Ind et al., 2017; Iglesias et al., 2013).

There are thus implications for the brand leadership model, which proposes that branding takes the leadership role in organisations (Aaker and Joachimsthaler, 2002). This conceptualisation subsumes organisational structure and processes under the brand leader's responsibility to achieve brand equity through brand awareness, loyalty, perceived quality, and brand associations. However, if we accept the premise of co-creation, none of these assets reside within a product or service but can be achieved only through interactions between brands and consumers (Kornberger, 2010). So, while the strategic aim of an organisation may still be to achieve brand equity, the "brand nurturing structure and culture" of the organisation must by implication have become more facilitative (Aaker and Joachimsthaler, 2002: 25-26). Failure to adopt a participative approach would result in a functionalist approach that overlooks the social construction and consumption of brands (Kärreman and Rylander, 2008).

Schultz et al., (2005: 12) argue that the notion of the corporate brand presents the "idea that the organisation and everything it stands for is mobilised to interact with the stakeholders the organisation wants to reach and engage them in dialogue." The brand is thus still recognised as a single organising principle but becomes a mechanism to manage the organisation from the outside in, recognising the importance of conceiving of branding practice as the "management of meaning" (Kärreman and Rylander, 2008: 108). This emphasises the internal effect of branding, thus recognising that the people who make brand-related choices become critical regarding the way in which the brand is created. For example, Virgin Group is defined by how it does things and not what it does (Kornberger, 2010). However, corporate branding models stop short of considering how consumers co-create the brand by making sense of it. Thus, they still seem to propose that a brand is something that can be controlled by a senior management team, rather than being co-created by its internal and external consumers.

However, corporate branding models stop short of considering how consumers co-create the brand by making sense of it. Instead, they appear to suggest that a brand is something that can be controlled by a senior management team rather than being co-created by its internal and external consumers. Brand 'governance' may therefore be a better description of the role of the brand owner since, when linked to the notion of co-creation, it refers to a process in which actors beyond the brand owner's firm have power, authority, and influence, thereby sharing control with the organisation (Ind and Bjerke, 2007). Hatch and Schultz (2010) adopt the notion of brand governance when applying the four 'building blocks' identified by Prahalad and Ramaswamy (2004) as essential components of co-creation from an innovation perspective, to investigate how brand co-creation may happen from a stakeholder standpoint. Their work suggested that dialogue (interactivity) and access (firms can no longer be opaque about prices, costs, and profit margins) facilitate engagement because managers and employees become partners with their stakeholders. However, the more a company engages in dialogue and gives access to stakeholders, the more "transparent" it will become because of the ways in which networks of stakeholders operate; and "transparency brings risk" as well as rewards (Hatch and Schultz, 2010: 601). The corresponding theoretical framework proposed by those authors was based on a case study of just one organisation, however, so it remains unclear how the model would be operationalised in the SF context.

### 3.7.2 Transactional versus transformational brand leadership

Fundamentally, however, it appears that co-creation requires a brand owner to relinquish control of the brand and empower stakeholders to cooperate in its development, even while accepting that "this freedom needs to be accompanied by order" if they do not want to sustain reputational damage (Ind and Schmidt, 2019: 103). The implication is that successful brand owners will be those who adopt transformational leadership approaches, focusing on the intrinsic motivations of all their stakeholders and the value of emotional engagement, rather than transactional leadership styles that focus on compliance (Ind and Schmidt, 2019; Morhart, 2017; Burkus, 2010;).

Bass (1985) defined transactional leadership as a process that works through 'extrinsic motivation'. Such leaders set goals, define processes, and exert control by benchmarking performance against the standards they have set. I equate this with the notion of brand compliance as a "basic and limited outcome" (Saleem and Iglesias, 2017: 74), although I accept it can deliver positive effects to the brand owner, relating to trust and fairness, which may be of particular relevance in, for example, standardised services (Morhart, 2017). However, I think there are two obvious limitations to this approach to brand leadership. First, it focuses on internal branding, thus disregarding many of the

actors in a brand's network. Second, whilst it will lead to reliable and consistent behaviours by employees at the brand interfaces with consumers, it also restricts spontaneity and flexibility (Morhart, 2017; Yagil and Medler-Liraz: 2014). Accordingly, it will limit opportunities for co-creation by preventing staff from becoming brand champions, although I agree it could be an appropriate approach "in the early stages of a company-wide brand management programme" to develop "brand-supportive behaviour" (Morhart, 2017: 37).

By contrast, transformational leadership is more compatible with the need to release control of a brand and empower all an organisation's stakeholders, even while imposing some order on the ensuing process of co-creation (Ind and Schmidt, 2019). Leaders who adopt a transformational approach aim to engage actors emotionally to "facilitate identification, commitment and trust in their mission" (Morhart, 2017: 37). The transformational approach thus acts on intrinsic motivation – that is, doing something because it is enjoyable or rewarding in a personal way – rather than being linked with an external incentive or pressure. It therefore links with the practice at Nordstrom, described earlier.

Morhart (2017) considers transformational leadership only from the perspective of employees and internal branding, but I believe the behaviours associated with transformational brand leaders can be applied to all the actors in a network. These leaders will articulate a "compelling and differentiating brand vision that rouses personal involvement, enthusiasm and pride;" they will act as a "role model by authentically living the brand values" and they encourage actors to be "brand representatives" by empowering them and helping them to interpret the brand promise (Morhart, 2017: 30). In the staff context, transformational leadership is found to have a positive influence on attitudinal and behavioural criteria, including satisfaction, commitment, identification and 'organisational citizenship' (Kark et al., 2003; Podsakoff et al., 1996). Whilst Morhart's work focuses on employees, in a setting in which firm boundaries no longer exist as they did, I believe it can be applied to other actors in the network who, inspired by internal brand ambassadors, might also adopt brand supportive and brand strengthening behaviours.

However, there appear to be challenges associated with this approach. First, brand leaders will not be able to support and coach aspirant brand ambassadors who are not employees in the same ways as they might staff, through training for instance. This could result in a brand's vision being incorrectly translated and applied. Bass and Steidlmeier (1999) also warn against 'pseudo-transformational' leadership as a dysfunctional approach that results in such leaders misusing their charisma for personal interest, which can lead to indoctrination. Given that the organisational identity of SFs is perceived to reflect EOMs' characteristics and personalities, there is potential for

narcissism, depending on personality and overall goals (Rode and Vallaster, 2005; Olins, 1978). At a less extreme level, if the EOM identifies strongly with their brand, it becomes harder for the actors in a network to differentiate the two, which might lead to dysfunctional dependency on the EOM; although, again, it is easier to see how that may relate more to staff than to the other actors in a brand's network (Kark et al., 2003). Despite such potential challenges, it seems that brand leaders aiming to achieve BO will need to adopt a transformational leadership style to develop the incremental changes that can lead to the actors in a brand network being prepared to participate, thus closing the gap between the firm and consumers at large (Meyassed et al., 2010).

### 3.7.3 Management behaviours to support brand co-creation

Brand leaders need to create an environment in which the actors in a network can feel free to offer their operant resources. For co-creation to happen, there must be a sense of inclusion, and of equality and willingness to share – because it is diversity and differing perspectives that will lead to new ideas or sources of value (Ind and Schmidt, 2019). It is therefore suggested that brand managers and organisations need to adopt these three particular behaviours, adapted from Ind and Schmidt (2019: 50-53):

**Being open** – there must be mechanisms to enable and support participation, and interactions should be managed at the discretion of members of the brand community. This aligns with the notion of 'dialogue' (Hatch and Schultz, 2010)

**Building trust** – organisations need to work with their stakeholders to build a safe environment in which conversations develop because of trust (Ind et al., 2017)

**Becoming humble** – brand leaders need to listen and share rather than directing and telling, which in turn "implies that co-creation moves beyond marketing and communications" (Ind and Schmidt, 2019: 53)

### 3.7.4 The potential importance of organisational learning

Small firms can help themselves to create a competitive advantage by learning faster than the competition, as part of developing a consumer-responsive culture (O'Keefe, 2002). For that to be sustainable, they must "manage knowledge" (Hine et al., 2010), which requires them to understand the environment in which they operate and to develop creative solutions that draw on the knowledge and skills of the organisation. That in turn demands co-operation between individuals and groups, necessitating open communication and a culture of trust (Argyris, 1999).

A 'learning organisation' has been formally defined as a group of people working together collectively to enhance their capacities and to create results they care about (Fulmer and Keys, 1998: 33-42), which is congruent with the idea of a market as a group of actors who play distinct roles in the facilitation of the exchange of goods and services (Van Boskirk et al., 2016; Frampton, 2012). The trend towards co-creation of value (Vargo and Lusch, 2017, 2008, 2004) has simultaneously offered SFs operant resources outside the traditional boundary of the firm in that actors now share their knowledge at interfaces as part of an integrated system (Fyrberg and Jürriado, 2009). Thus, a firm's market is potentially a forum of active consumers who offer "new sources of competence" (Prahalad and Ramaswamy, 2000: 80).

Similarly, the 'service brand relationship value triangle' for the service brand suggests that brands are socially constructed by the firm, its employees, its customers, and the wider network (Brodie et al., 2009; Brodie et al., 2006a; Grönroos, 1996; Bitner, 1995). This implies that dialogue and learning will be necessary to maintain the "balance, clear agenda and strength" required if the process of co-creation is to function (Fyrberg and Jürriado 2009: 427). These ideas are elaborated by the organic view of the brand, which views co-creation as happening at brand interfaces (Iglesias et al., 2013). Thus, a variety of actors from both within and beyond the firm's boundary who previously had little contact, now connect and can share knowledge, even whilst it is acknowledged that 'semantic and pragmatic boundaries' may persist as these interfaces develop (Rau, 2016). In the SF context, more than the LO equivalent, many of the actors within the network will be 'amateur part time marketers' (Gummesson, 1991). Success will therefore be dependent on a high degree of dialogue and interaction to establish understanding and appropriate use of the available operant resources (Vargo and Lusch, 2010; Merz et al., 2009).

It has meanwhile long been acknowledged that "creating a market orientation is all about learning" (Narver et al., 1998: 252). MO is said to involve two strategies: a 'programmatic approach' in which the organisation uses education and organisational change to achieve the "desired norm of creating superior value for customers"; and a 'market-back' experiential approach whereby the firm will continuously learn from its day-to-day experiences (Narver et al., 1998: 241). However, the existing literature is not specific about how either form of learning takes place. Moreover, BO is treated as 'MO plus' and customers as the principal link between the two (Reid et al., 2005; Urde, 1999:118). The related notion of a fluid and constantly negotiated brand implies learning must take place (Ind, 2015). Polanyi (1958) argues that explicit knowledge is not a static phenomenon, and co-creation theory suggests that consumer definitions of value will change continuously (Lusch and Webster, 2011). It therefore seems that SFs will need to be able to distinguish between single-loop

incremental learning and double-loop learning if they want to sustain the revenue streams associated with delivering customer value via BO (Kim, 1993; Argyris and Schon, 1978). This requires them not only to modify activities based on the difference between expected and achieved outcomes (single loop), but also to question the values, assumptions and practices that led to the activities so that they can perform better in the future (double loop).

Successful SF service brands are said to be “more dynamic and responsive to changes, possibly due to their openness to organisational learning” (De Chernatony and Cottam, 2006: 619) and in turn to be influenced by the attitude of the EOM (Odoom et al., 2017). However, the idiosyncratic and individualistic nature of SFs and their owners may also mean that activities are rejected for political or personal reasons, with no organisational learning taking place (Jones and Rowley, 2011; Dalley and Hamilton, 2000; Kim, 1993). Moreover, if the EOM is “all controlling and all deciding”, as Krake (2005: 230) suggests, it is unclear how the other actors in the network, particularly employees, will be able to develop the tacit knowledge with which to solve brand management problems.

Whilst it is held that employees are valued assets in a firm and contribute their knowledge, competences, and capabilities to supporting its efforts to develop competitive advantages, it is also acknowledged that ‘productive knowledge’ is usually acquired and shared through human-resource development efforts such as training and mentoring. This is less likely to be available in SFs on account of resource constraints (Tam and Gray, 2016; Lee, 2003; Drucker, 1999). By contrast, SFs are more likely to adopt informal learning, because it is opportune, practical, and directly meets learners’ needs (Ellinger and Cseh, 2007; Marsick, 2006; Ellinger, 2005). That said, Marsick (2006) asserts that informal learning is becoming more strategic in SFs and connects a model of informal and incidental learning with single and double-loop learning (Argyris and Schon, 1996; 1978).

Jones and Macpherson (2006) suggest that organisational learning manifests itself at four levels in SFs: individual, group, organisational and inter-organisational. This suggests that the acquisition of knowledge and/or skills through experience could be an output of the ‘service brand relationship value triangle’, especially if there is good communication (Brodie et al., 2009; Brodie et al., 2006a; Grönroos, 1996; Bitner, 1995). However, it is possible that other barriers often linked to SFs will prevent this. For instance, a team may not be able to commit the time required for learning due to other priorities (Senge et al., 1999). Even if time is available, it may not have the collective skills or power necessary to effect change or may consider that to be irrelevant to the organisation’s needs. That may also happen if the EOM assumes their personal vision is a shared organisational one (Fillion et al., 2015). Moreover, SFs often lack the resources to focus on personal and professional

development and may be unable to capture the 'tacit knowledge' of individuals to make it 'explicit knowledge' (Wang and Ahmed, 2003; Nonaka and Takeuchi, 1995).

Given that co-creation takes place across the traditional boundary of the firm, these challenges also need to be considered from the perspective of the consumer and the extent to which they are considered part of the team by the brand owner. The capacity of a firm to learn from others is typically referred to as organisational learning within a network, and the knowledge-transfer literature acknowledges the importance of inter-organisational knowledge exchange for performance and innovation (Easterby-Smith et al., 2008). However, in that study, the network appears to be inter-firm and is viewed as "the context in which knowledge transfer occurs rather than being a learning entity itself" (Gibb et al., 2016: 5). The implication is that, although the knowledge is stored at the network level and then made widely available for individual member firms to use in changing their own firm's practices, there is no apparent role for consumers as part of the process of knowledge co-creation (Dyer and Nobeoka, 2000). Moreover, the literature typically associates this phenomenon with LOs that maintain strategic relationships with other firms rather than SFs (Gibb et al., 2016; Dyer and Nobeoka, 2000). It also does not consider participation in local or national professional or commercial networks. In my experience, those are only open to the commercial organisation itself, meaning membership is generally restricted to the EOM, budgets precluding the expense of subscriptions for other employees.

By contrast, the literature relating to co-creating brands acknowledges that both consumers and firms learn from their co-creation experiences. This suggests that knowledge management systems are needed to "enable an understanding of customer co-creation opportunities" and that these require "more information from consumers than the usual managerial metrics deployed" (Payne et al., 2009: 383). However, there is no further discussion of what those could be or how the information translates into organizational learning. We also know that SFs differ from LOs along nine of the ten brand dimensions proposed by Berthon et al. (2008), specified in Table 3.1, which were based on 36 measures developed from the 'brand report card' proposed by Keller (2000). They posit that a successful branding strategy will require significant review and evaluation. However, the informal nature of learning in SFs suggests it will be unlikely that they are consciously or deliberately carrying out many of the activities listed. That said, it could be that SFs defined as 'integrated firms' in BO terms are adopting a more evaluative approach because they have a clear understanding of the competitive advantage over competitors of the firm itself and its overall distinctiveness (Wong and Merrilees, 2005). Causality is not demonstrated in the two different studies, however.

It is generally accepted that any metrics used to evaluate marketing activity should align with overall business strategy; measuring the wrong things will mean that strategy and resources are not aligned (Forbes, 2014; Mauboussin, 2012; Shaw and Merrick, 2005). Given that many SFs lack strong marketing or branding capabilities and competences, they may correspondingly fail to develop the organisational learning capability or characteristics to enable them to learn from appropriate evaluation of marketing and branding initiatives (Prieto and Pérez-Santana, 2014): potentially a downward spiral. Given that organisational knowledge is the output from organisational learning and needs to circulate continuously among individuals, teams, and the firm more widely, support for this process will be affected by the extent to which the firm is able to learn to learn (Turulja and Bajgorić, 2018; Jerez-Gómez et al., 2005).

### 3.8 Brand Equity

The concept of brand equity has arisen in various parts of this critical review because attempts to define the relationship between a brand and its consumers are often presented in terms of 'equity' (Wood, 2000). Brands differentiate organisations within their markets, because they help consumers to process information effectively (Krishnan and Hartline, 2001). They thereby improve confidence in purchase decisions, which in turn affects the quality of the consumer's experience (Aaker, 1991).

As I explain in Chapter 2, brands are also perceived to offer sustainable competitive advantages linked with price premiums, inelastic price sensitivity, market share and cash flow. In so doing, they enable their owners to achieve long term business goals (Chen, 2008; Keller and Lehmann, 2003; Vazquez et al., 2002). Brands therefore become a set of assets and liabilities that either add or subtract value for the organisation (Aaker, 1991). Thus, an early definition of brand equity was "the added value with which a given brand endows a product" (Farquhar, 1989: 24).

Brand equity is relevant to my inquiry as the source of co-created value for both the firm and its stakeholders.

#### 3.8.1 Defining brand equity

Brand equity can be approached from three different perspectives: financial, customer and employee (Baalbaki, 2012).

Financially based brand equity has been described by Atilgan et al. (2005) as the total value of a brand as a separable asset which can be sold or included in a balance sheet. It is therefore possible to put a monetary value on a brand, which enhances a firm's perceived market performance and competitive advantages, thereby benefiting the brand owner in cases of merger, acquisition, or sale



(Wood, 2000). However, the brand valuation systems and processes used in practice are complex and not readily accessible to SFs. Moreover, the existing literature is unclear regarding whether SFs can mimic LOs to develop financial-based brand equity, and if so, how they do (Berthon et al., 2008).

Consumer-based brand equity was defined by Keller (1993: 2) as the “differential effect of brand knowledge on consumer response to the marketing of the brand”. It seems evident that if the brand has no meaning or value to consumers, it will have no value to its owner. Brand management therefore aims to develop positive customer-based brand equity to gain competitive advantages linked to long term revenues, the ability to command higher prices, and effective marketing communications (Keller, 2003). The brand equity model proposed by Aaker (1991) considers it to be a combination of brand awareness, brand loyalty and brand associations made by consumers. However, none of those frameworks explicitly identifies which marketing or brand management practices may achieve such equity in the SF context (Berthon et al., 2008). A range of views also exist regarding whether SFs possess the branding capabilities and brand management skills to develop equity or are more focused on driving sales.

Lastly, employee-based brand equity, as distinct to the consumer-based alternative, is based on the differential effect that brand knowledge has on the overall work culture enacted by an employee (King and Grace, 2009). We have already seen that brands are “multidimensional concepts” that permit consumers to “deeply and uniquely associate, or disassociate” (Baalbaki and Guzman, 2016: 32), implying a process of co-creation between the actors in the brand’s network. Brands thus become an organisational interface, meaning employees are important actors in the process of ensuring customer experiences are consistent with the brand promise (Ind and Schmidt, 2019; Gill-Simmen et al., 2018; Saleem and Iglesias, 2017; King et al., 2013; Iglesias et al., 2013; Brodie et al., 2006a; De Chernatony and Segal-Horn, 2003; Dall’Olmo Riley and De Chernatony, 2000).

### 3.8.2 The challenges of measuring brand equity

The existing literature contains many examples of attempts to measure the different perspectives of brand equity at various levels. For example:

- Consumer level (Christodoulides et al., 2012; Tong and Hawley, 2009; Srinivasan et al., 2005; Baker et al., 2005; Bendixen et al., 2003; Aaker and Joachimsthaler, 2002; Chen, 2001; Berry, 2000; Lassar et al., 1995; Shocker et al., 1994; Keller, 1993; Aaker, 1991)
- Company or firm level (King and Grace, 2009; Kim et al., 2003; Doyle, 2001; Dyson et al., 1996; Cobb-Walgren et al., 1995; Farquhar et al., 1991)

- Financial market level (Barth et al., 1998; Aaker and Jacobson, 1994; Simon and Sullivan, 1993)

Baalbaki and Guzmán (2016: 35) assert that all these attempts adopt “one of two complementary measurement approaches”: a direct approach that “measures customer-based brand equity by assessing the actual impact of brand knowledge on customer response to different marketing elements”; and an indirect approach that “assesses potential sources of customer-based brand equity by identifying and tracking customers’ brand knowledge structure”. Both involve the application of various scales and measures, which are likely to strike SFs as resource-heavy and therefore costly to adopt. It is therefore unsurprising that high-performing SFs place relatively more emphasis than low-performing counterparts on brand management practices that relate to understanding: for example, brand benefits for consumers and brand meaning (Berthon et al., 2008). Moreover, three brand management practices in particular from the list proposed by Berthon et al. (2008) were found to differentiate SFs from LOs: monitoring sources of brand equity (no.10); ensuring the brand is consistent (no. 5) and using a full repertoire of marketing activities to build equity (no. 7).

On the basis that brands are co-created and a brand owner can offer only a value proposition, an absence of meaning or value for consumers will bring about a corresponding absence of value for the brand owner. Clearly, this has serious implications for the survival and success of a firm. Common sense therefore suggests that EOMs must be getting some information or feedback about their consumers’ relationship with their brand, possibly in the “conversational space” of the organic brand or through staff as actors at the brand interface (Ind and Schmidt, 2019; Iglesias et al., 2013). How this is planned or executed as part of the SFs brand management practices remains unclear, however (Berthon et al., 2008).

A key challenge in trying to assess brand equity is finding a way to objectively measure subjective perceptions and associations of the power and strength of the brand (Baalbaki and Guzmán, 2016). Hence, in the world of LOs, the complexity of the task of measuring brand equity has led to practitioners adopting single-item direct measures to “have an approximate indicator of the value of their brands” (Baalbaki and Guzmán, 2016: 44). Accordingly, I believe that SFs will have informal ways of assessing brand equity that have not been found in the existing items and dimensions of brand management proposed by Berthon et al. (2008).

### 3.9 The conceptual framework for this study

Before undertaking an initial literature review, I had defined my research problem as needing to explore the brand management practices of SFs and the ways in which those are operationalised. In critically reviewing the existing literature, I decided that the framework to support this inquiry does not relate to a single theory or idea because several relevant gaps in the existing research are apparent. My own conceptual framework, which follows, synthesises various ideas arising in the literature to provide an ‘integrated way’ to approach the research problem, as advocated by Imenda (2014: 189).

#### 3.9.1 Summary of key themes and gaps arising from the literature

**Table 3.3: Summary of key themes and gaps emerging from the literature**

<b>Theme</b>	<b>Key points</b>	<b>Relevant literature</b>	<b>Critical gaps</b>
<b>Brand management in SFs</b>	Has low priority although growing and growth-oriented SFs are more likely to adopt BO; thus, it is a variable that affects what SFs achieve.	Horan et al., 2011. Spence and Hamzaoui Essoussi, 2010; Berthon et al., 2008; Krake, 2005.	Unclear how brand management is operationalised in SFs; work to date is generally based on quantitative surveys and does not explore EOM attitudes or decision making related to branding; so unclear how and why they do certain things.
	SF brands are not ‘built’ in the same way as LO brands.	Centeno et al., 2013; Bresciani and Eppler, 2010; Juntunen et al., 2010; Krake, 2005.	The brand management practices that an integrated brand-orientated SF adopts compared to other SFs are unknown. High performing SFs differ from low performing counterparts on seven of the ten ‘brand management practices’ identified by Berthon et al. (2008)
	Branding offers SFs performance benefits although SFs do not appear to fully understand or exploit the value of brand equity.	Reijonen et al., 2012; Berthon et al., 2008; Keller, 2003; Aaker, 1991.	The measures used to evaluate brand management, especially for brand equity, seem irrelevant to the context of a SF (Berthon et al., 2008). They are also organisation-centric and do not allow for the apparent shift to the co-created brand (Vargo and Lusch, 2017).
<b>Brand co-creation</b>	Suggests that brands have become networks and that pull-marketing activities to	Vargo and Lusch, 2017.	There is no longitudinal research into branding and brand management in SFs,

	build relationships and loyalty are critical.		but it is not possible to explore brands as relational assets through cross-sectional studies (Odoom et al., 2017; Berthon et al., 2008).
	The concept of dynamic capability suggests branding as a co-created activity has a temporal dimension; branding is an operational tool to align the firm. A potentially significant benefit for SFs is the opportunity to access operant resources to build branding capability, BO and corresponding competitive advantage. However, SFs seem to use their brands as tactical marketing devices rather than as a single organising principle for the firm.	Brodie et al., 2017; Vargo and Lusch, 2016, 2008, 2004; Odoom, 2016; Horan et al., 2011:114; Merrilees et al., 2011; O’Cass and Ngo, 2011; Bean, 2009; Teece 2007; Rode and Vallaster, 2005; Krake, 2005; McCartan Quinn and Carson, 2003; Olins, 1978.	Branding capabilities are important for firm performance because they create equity. However, most of the extant literature draws on data relating to LOs or is conceptual (Odoom et al., 2017; Morgan et al., 2009; Krasnikov and Jayachandran, 2008).
	The organic view of the brand suggests that interfaces exist between the firm and its network. The service brand perspective of brands as a relational asset, suggests co-creation can be supported by delivering enhanced customer experiences at the brand interfaces, in turn realising further competences for the firm from other actors in the network; this dovetails into ideas relating to internal branding and the suggestion that employees have an enhanced role.	Ind and Schmidt, 2019; Vargo and Lusch, 2017; Kornum et al., 2017; Von Wallpach et al., 2017; Ind et al., 2017; Iglesias et al., 2013; Vallaster and Von Wallpach, 2013; Brodie et al., 2006a, 2006b; Berry, 2000; Dall’Olmo Riley and De Chernatony, 2000.	Given branding is no longer an internal activity undertaken by the firm, it is unclear how co-creation happens. What SFs need to do to use these interfaces to develop a dynamic BO that retains relevance is un-researched because there is limited research exploring co-creation from the managerial perspective (Frow et al., 2015; Kazadiki et al., 2016). That which does exist has investigated with managers who have led co-creation for well-known brands - meaning LOs (Ind et al., 2017).
	SF brands are seen to align closely with the EOM, who may not be willing to lose control if the stereotypical image of being all-controlling holds true. By contrast, the brand co-creation model suggests relationships with the brand network are dynamic and require a different form of management more akin to brand governance.	Morhart, 2017; Ind, 2017; Iglesias et al., 2013; Hatch and Schultz, 2010.	It is unclear whether, or how, co-creation is undertaken in SFs, or if branding is dominated by EOMs because of their personality, marketing aptitude, and personal goals. There is insufficient contextual research into EOMs and their attitudes to brands, so stereotypes appear to prevail.

			<p>Little is currently known about how brands co-create value in practice (France et al., 2018, 2015; Merz et al., 2018; Tajvidi et al., 2018; Biraghi and Gambetti, 2017; Ramasawmy and Ozcan, 2016; Cova et al., 2015; Hatch and Schultz, 2010). Fundamentally, it is unclear if brands are mostly built internally, externally or through cooperation (Vallaster and Lindgreen, 2011).</p>
<p><b>BO has become a hybrid and non-linear orientation that is constantly negotiated between all actors in the brand network</b></p>	<p>Most SFs are seen as having minimal or embryonic BO.</p>	<p>Wong and Merrilees, 2005.</p>	<p>It is unclear what brand management practices enable SFs to deliver a hybrid MO/BO or whether they are internal, external, or co-operative activities (Vallaster and Lindgreen, 2011). Brand oriented behaviours relate to activities such as brand research, measuring equity and marketing mix decisions, so there is an overlap with the brand management practices defined by Berthon et al. (2008). However, the differences between integrated and unintegrated firms in the BO typology are not clear (Hirvonen et al., 2013; Krake, 2005; Wong and Merrilees, 2005).</p>
	<p>Interaction is required to maintain cohesion within a brand network making a brand-oriented culture a pre-requisite of brand-oriented behaviour. The extent to which employees will be brand compliant or become brand champions will depend on brand leadership, which is perceived as transactional or transformational. Brand strategy is 'polyphonic' meaning all the actors in the network need 'integrating'.</p>	<p>Schmidt, 2017; Schmidt and Baumgarth, 2014; Wentzel et al. 2014; Fyrberg and Jürriado, 2009.</p>	<p>It is unclear whether interaction needs to be mostly internal or external to drive BO (Vallaster and Lindgreen, 2011). However, if personal behaviour is a function of personal knowledge, skills and resources, and motivation, then different management approaches may be needed to encourage internal and external stakeholders to co-create. There is a shortage of research focusing on managerial perspectives of co-creation.</p>
<p><b>Organisational learning appears to have heightened importance in</b></p>	<p>Brands are socially constructed by the firm with its employees, consumers, and the wider</p>	<p>Brodie et al., 2009; Fyrberg and Jürriado 2009; Brodie et al., 2006a; Grönroos, 1996; Bitner, 1995.</p>	<p>Organisational knowledge, as the output from organisational learning processes, needs to range</p>

<p><b>the context of co-created brands.</b></p>	<p>network. This suggests that dialogue and learning are integral to maintaining the agenda of the brand network, creating appropriate interfaces between internal and external stakeholders, and maintaining a relevant BO</p>		<p>from individual to group or firm level and back again. A firm's ability to support this process will affect the extent to which it is able to learn (Turulja and Bajgorić, 2018; Jerez-Gómez et al., 2005). However, there appears to be no research into whether and how SFs evaluate and learn from the interactions within the network in the context of the brand in practice. This links to the brand management practices being based on LOs: there is no evidence of the measures SFs may be making.</p>
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### 3.9.2 Research questions relating to the themes and critical gaps

The initial research questions that had been developed from my personal interest and experience were revised based on the themes and gaps that arose from the process of reviewing the literature.

The new questions are:

- How do entrepreneurial owner managers perceive their brands?
- How do they aim to develop them?
- Is co-creation put into practice in SFs' branding strategy? If so, how?
- Do EOMs undertake 'internal branding' – that is, work with all their staff teams to develop their knowledge and understanding of the brand?
- To what extent do EOMs recognise the role of operant resources in brand creation and maintenance?
- Do EOMs adopt a brand leadership style that supports and integrates their brand network, to facilitate co-creation?

### 3.9.3 Research aim and objectives

Based on the revised research questions, my corresponding aims are:

#### **Aim 1**

To explore the brand management practices adopted by small firms from the managerial perspective of the entrepreneurial owner manager as the brand owner.

#### **Aim 2**

To evaluate whether and how entrepreneurial owner manager s adopt co-creation with customers, consumers and/or staff to develop a branding strategy that delivers value; and, if so, how they do.

The supporting objectives are to:

#### **From Aim 1**

- Develop a conceptual framework for the inquiry.
- Explore attitudes of entrepreneurial owner manager s to branding and their brand management practices, via a longitudinal study, to assess whether and how they change.

#### **From Aim 2**

- Write up narratives which ‘story’ what is done by participating entrepreneurial owner managers with regard to their brand management practices and reveal how and why they adopt the attitudes they do.
- Critically evaluate whether and how the brand management practices of the participating entrepreneurial owner manager s involve co-creation with customers, consumers and/or staff

### 3.9.3 Justifying the use of a longitudinal exploratory inductive inquiry

In adopting the ‘SDL Lens’ to explore brand management in SFs, I am setting out to explore theoretical ‘bridging concepts’ in practice (Vargo and Lusch, 2017:50). First, these concepts suggest that individual interactions between organisations and consumers happen “within networks of actors” that integrate “resources from many sources” (Vargo and Lusch, 2017:48-49). When applied to brands, my critical review of the literature suggests the conclusion that brand management is no longer an internal activity owned by a branded firm. Instead, meaning and value arise from the mindset of all the actors involved in the process, meaning that branding strategy is negotiated within a network and branding becomes a dynamic capability that draws on operant resources from it

(Vallaster and von Wallpach, 2013; Kornum et al., 2017; Von Wallpach et al., 2017). Second, if it is the role of institutions and institutional arrangements to provide the mechanisms for value co-creation, then interfaces exist between brand owners, their employees and consumers which require appropriate management and support. A brand-oriented culture therefore becomes a prerequisite for brand-oriented behaviour and “mutual value creation through service exchange” (Vargo and Lusch, 2016: 161), which may deliver competitive advantages relating to BO depending on such other variables as the EOM’s overall business goals. If the network is dynamic, then BO can no longer follow a linear direction but must be constantly renegotiated.

My literature review demonstrates that much of the work on branding in the context of co-creation is either based on the experiences of LOs or is conceptual. Developing an exploratory and inductive inquiry into the brand management practices of SFs and their adoption of co-creation therefore aligns with the definition of “midrange theory development [as part of] a systematic effort to explain all the observed uniformities of social behaviour, social organisation and social change” Merton (2012: 448). Thus, a critical gap in the field of knowledge is addressed.

Moreover, the concept of branding as a dynamic capability suggests it has a temporal dimension (Brodie et al. 2017). Branding capability must therefore evolve based on dialogue and learning (Teece 2007: 1319). However, most brand-related research is cross-sectional in design. Specifically, I have not found a longitudinal study that explores brand management in the context of SFs. Thus, my longitudinal research design will address a methodological gap in the literature identified by Odoom et al. (2017).

#### 3.9.4 A synthesis of concepts as a framework to support this inquiry

To support my inquiry, I have adopted the ‘organic’ view of the brand advocated by Iglesias et al. (2013) because it captures the notion of the co-creation of a brand as a series of interactions between the firm, its consumers, actual customers, and other stakeholders across the brand’s various interfaces, or ‘touchpoints’. That allows me to examine brand management in practice through the well-known Service Dominant Logic (‘SDL’) lens developed by Vargo and Lusch (2004).

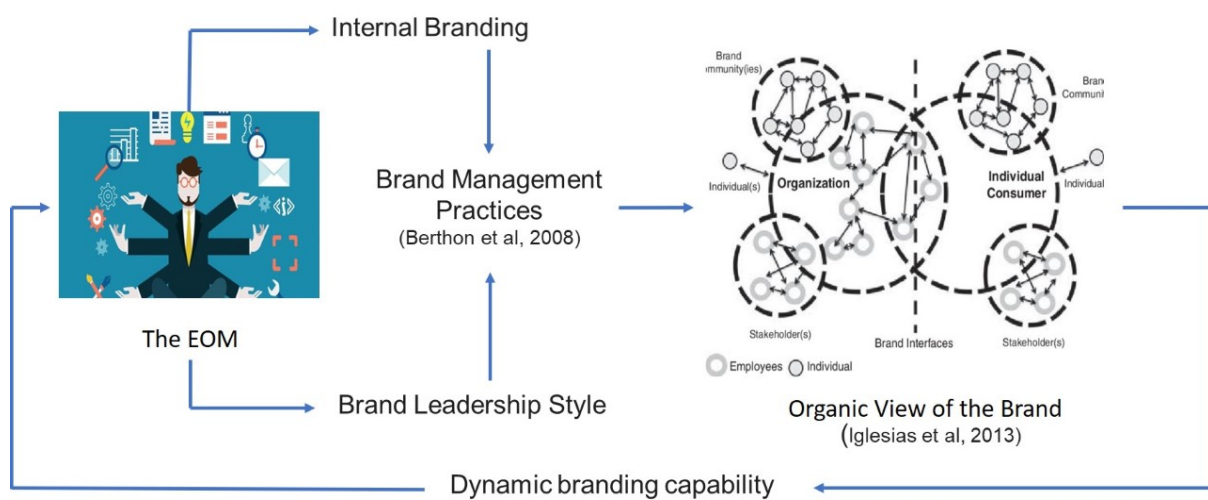
In Figure 3.11 below, the double-headed arrows in the Iglesias model signify the occurrence of dialogue, feedback and learning at a brand’s touchpoints with its own people, consumers in general, its own customers, and the firm’s various stakeholders.

The organic view of the brand clearly recognises the role that frontline employees play in delivering brand experiences, highlighting the importance of ‘internal branding’ as an element of total brand



management. However, the brand-management leadership style of an EOM will determine both the brand management practices the firm implements (Berthon et al, 2008) and the extent to which staff are enabled to exhibit 'brand citizenship' (Saleem and Iglesias, 2017).

The combined effect of brand leadership style, internal branding, brand management practices and interactions at the brand interface will determine the extent to which a small firm is able to develop a dynamic branding strategy, which may be defined as having a fluid and negotiated hybrid orientation (BO/MO) capable of delivering sustainable competitive advantage.



**Figure 3.11: Conceptual Framework**

## Chapter 4. Research Methodology

### 4.1 Chapter Overview

This study does not investigate the application of a single theory to the area of inquiry. Instead, it synthesises related concepts, paradigms, and models into an “integrated way” of looking at a research problem (Imenda, 2014: 189). I thus argue here that the process of developing the conceptual framework presented in Figure 3.11 at the end of Chapter 3 is already an inductive one, with the choices I have made about how to connect concepts and existing findings to “tell a bigger story” linked to my epistemological paradigm (Imenda, 2014: 189).

In this chapter, I posit that all research is “an interpretive process” (Schwandt, 2000: 210) before presenting a rationale for an inductive and exploratory research design that uses the qualitative methodology of phenomenological interviews to develop narrative cases. In doing this, I follow accepted guidelines to ensure reliability (Denzin and Lincoln, 2011: 12) and use ‘reflexive practice’ to support “transparent and honest” processes with the aim of achieving validity and insight (Reiter, 2017: 131). I also discuss why I do not consider the findings of my study to be “true”, but rather that I believe them to present an objective view. In this case, objectivity is defined as the outcome of “active, sophisticated subjective processes – such as perception, analytical reasoning, synthetic reasoning, logical deduction and the distinction of essences from appearances” (Ratner, 2002). In pursuit of objectivity, I seek to demonstrate continued exploration of my ‘positionality’ during my inquiry (Savin-Baden and Major, 2013).

Lastly, I demonstrate that the use of a longitudinal study to explore the phenomenon of brand management in SFs addresses a critical gap in the existing literature, identified by Odoom et al. (2017). Accordingly, I contend that my inquiry contributes methodologically to research at the marketing/entrepreneurship interface.

## 4.2 The case for an inductive and exploratory research design

On the basis that we must be intuitive and think constructively to ‘know’ it can be argued that knowledge is ‘situated’ because it arises from both experience and thought. The activity of thinking does not always equate with knowing but requires the content that comes from intuition. A process of sensibility and understanding, or reasoning, then enables us to develop knowledge (Kant, trans. Müller, 2007). Strawson (2019) concurs that this is an essential process to create empirical knowledge.

Those propositions suggest that research cannot arise from nowhere (Reiter, 2017). There is thus an argument against positivist methodologies, which systematically assess ideas rather than identifying the original basis for the hypotheses they seek to test (Reiter, 2017; Haraway, 1988; Harding, 1993;). It is also argued that flaws exist in traditional quantitative methods, which introduce and conceal bias (Reiter, 2017). Accordingly, it is reasonable to assert that the deductive research process associated with the scientific method does not generate the truth. Though positivists will argue that the process begins with an axiom, it is only possible to show that a prediction is false, and not that a theory is true (Popper, 2002).

Given these shortcomings of positivist approaches, I believe that inductive, exploratory research provides a “reliable and rigorous alternative if performed in a structured, transparent and honest way” (Reiter, 2017: 148). Moreover, my summary of the existing literature in Table 3.3 at 3.9.1 demonstrates that a single, narrow, quantitative approach would have reduced the opportunity to pursue an exploratory research design and arrive at a more informed view by the end of the research process. Exploratory research can be defined as that undertaken to understand the nature of a problem (Dudovskiy, 2018). It does not aim to arrive at conclusive answers to research questions but allows the in-depth study of a problem. I have used that design in my inquiry for two main purposes:

- as a basis for developing more conclusive research at a future date (Saunders et al., 2007)
- to look at new research problems, including those which have previously attracted little research attention (Brown, 2006)

My exploratory research design is therefore appropriate for an inquiry that focuses on the under-researched gap in the brand management practices of SFs commented on by Berthon et al. (2008). Moreover, deductive approaches typically address a research problem by testing a theory (Imenda, 2014). By contrast, inductive research is defined as a process of working from specific observations to broader generalisations and conceptualisations (Trochim, 2006). The ideas derived then supply the evidence to support a conclusion (Copi et al., 2006). Inductive research is thus more exploratory in nature in so far as it requires researchers to develop a series of research questions based on the literature, narrowing the scope of their study on the way to a conceptual framework that draws on related ideas to give a broad understanding of the research problem, thus conferring the “power” to guide the study (Liehr and Smith, 1999: 13). The literature review in Chapter 3 shows that an inductive and exploratory approach has already been adopted by previous researchers. First, it demonstrates the process of identifying a series of gaps and research questions based on critical evaluation. Second, it indicates the wide reading necessary to identify and synthesise a “basket of salient concepts and principles” (Imenda, 2014: 193) before creating a conceptual framework as the basis for my inquiry.

Lastly, the inclusion of ‘paradigmatic ideas’ relating to SDL within the conceptual framework suggests the need to further articulate theory for future research (Winklhofer et al., 2007: 76). SDL is described by Vargo and Lusch (2008; 2004) as a meta-theory that draws on a range of different and often contradictory sources to develop a paradigm for marketing, meaning that research may be approached in a variety of ways using different lenses or perspectives (Johnson and Scholes, 2002). It is asserted by Saren et al. (2006) that the ‘incommensurability’ of the SD Logic paradigm offers varied approaches for meaningful research. Thus, a positivist design is unsuitable because a neutral standard for assessing the new paradigm does not currently exist, meaning that the old standards and nomenclature relating to existing theories cease to apply and new ones need to be developed in line with emerging ideas (Kuhn, 1962).

As I intend to explore several concepts, my inquiry can be categorised as an intensive rather than extensive study (Jacobsen, 2002). This makes case studies, with their ability to consider “how a phenomenon is influenced by the context within it is situated” an appropriate form of data collection (Baxter and Jack, 2008: 556). The case study method is defined by Gerring (2007: 341) as “an in-depth study of a single unit (a relatively bounded phenomenon) where the scholar’s aim is to elucidate features of a large class of similar phenomena” and case studies are commended for their descriptive accuracy (Wikfeldt, 2016; Baxter and Jack, 2008; Jacobsen, 2002). However, criticism of

the case study approach focuses on the issue of generalisability (Woodside, 2010; Sharp, 1998; Firestone, 1993). It is therefore important to emphasise that the purpose of my inquiry is to contextualise. In this connection, Gerring (2007: 248) asserts that a “chosen case must be similar to a larger population. Otherwise, if it is purely idiosyncratic, it is uninformative about anything lying outside the borders of the case itself.” Care was therefore taken to choose cases that were indeed typical of the local business network under study, which is dominated by service industries.

#### 4.2.1 The adoption of a conceptual rather than theoretical framework

Collins and Stockton (2018) observe that the terms theoretical and conceptual framework are often used interchangeably. A key difference, however, is that the former bases itself on pre-existing theory whilst the latter aims to build new theory (Imenda, 2014). Thus, the term ‘conceptual framework’ is better aligned with the ethos of the inductive and exploratory design of my study, which seeks to use theory rather than test it (Reiter, 2017).

Nevertheless, distinguishing between the two terms is not straight forward. Merriam (2009) includes the use of concepts alongside that of terms, definitions, and models in a theoretical framework; Maxwell (2013: 39) defines a conceptual framework as a tentative theory about a phenomenon being explored, noting it “may also be called the theoretical framework or idea context for the study.” Collins and Stockton (2018: 5) note that the terms are frequently combined and may also be confused, with a researcher’s preference for one term over the other often failing to “aid clarity.” Despite this ongoing confusion regarding terminology, it is clear that a “structure, scaffolding or frame” is a prerequisite to focus and organisation in a research study (Merriam, 2009: 66). Without one, it would be difficult to identify the strengths and weaknesses of an inquiry or link it to existing scholarship (Anfara and Metz, 2015).

I therefore find *Designing qualitative research* (Marshall and Rossman (2011: 7) helpful in this regard, in their clarification that a conceptual framework should demonstrate how I am “studying a case in a larger phenomenon”. Imenda (2014: 189) defines a conceptual framework as the outcome of an inductive process, “whereby small individual pieces are joined to tell a bigger story of possible relationships.” Meanwhile, Ravitch and Riggan (2012: 3) say that conceptualising and articulating connections is the “bedrock of a solid empirical study.” Given that my inquiry synthesises a range of perspectives from existing literature, these definitions of conceptual frameworks have been helpful to develop an integrated view of a research problem. They also link to my epistemological paradigm,

as I identify with the view that “all research is interpretive,” simply because researchers make personal choices about research design (Schwandt, 2000: 210).

#### 4.2.2 The resultant methodology

As the intention of my inquiry is to add to an ongoing debate rather than to generalise, a qualitative methodology was developed expressly to correspond with the proposed inductive design. I believe this is the most appropriate approach because of the difficulty of developing meaningful hypotheses for testing in the absence of universal agreements concerning the concepts being used. Moreover, a qualitative approach enables me to develop what Kant called a dialectical practice.

The dialectical notion of *aufhebung* (‘synthesis’, ‘sublimation’, ‘transfiguration’) posited by Hegel (ed. and trans. Giovanni, 2010) suggests to me that I can deliberate ideas from multiple perspectives using reasoned arguments to reconcile contradictory information – thus embracing the notion of ‘theoretical anarchism’ (Feyerabend, 1975). This is potentially helpful when dealing with concepts that emerge from multiple perspectives (Saren et al., 2006). In this way, I hope to be able to allow for the context of the phenomena under scrutiny whilst producing insights which highlight relevance and transferability to other situations. This methodology furthermore aligns with my ontological view that reality is socially and/or individually constructed. It thus removes the restriction of a quantitative methodology which would limit understanding of phenomena that are subjectively experienced (Wellington and Szczerbinski, 2007; Bryman, 2004).

#### 4.2.3 Drawing on the ‘marketing/entrepreneurship interface’ research tradition

Piantanida and Garman, (2009: 7) say the description qualitative research is an “umbrella descriptor” referring to a “wide range of genres”. Each method it embraces offers different ways to conceptualise and conduct a study, in turn affecting the nature of the data collected. I therefore needed to evaluate my options carefully if I was going to develop a suitable and rigorous approach (Reiter, 2017). A systematic framework for planning the research process is provided by Denzin and Lincoln (2011), which I have adopted for this study. I have also used the comparison of epistemological, ontological and research perspectives offered by Savin-Baden and Major (2013) to ensure the validity of my research design.

This approach required me to consider my 'situatedness' before commencing my research, because the historical context for the study could inform subsequent research design choices (Reiter, 2017: 133). I therefore posit that this research sits at the marketing/entrepreneurship Interface. The adoption of case research and in-depth interviews as my data-gathering procedures draws on a specific qualitative research tradition that has evolved to seek in depth understanding of "human action and behaviour within a business context" by adopting (Gilmore et al, 2013: 7).

Research at the marketing/entrepreneurship Interface has historically been dominated by quantitative approaches (McDonald et al., 2015) but a more recent shift to a range of approaches, including an expansion in the use of qualitative methods, benefits both practice and policy makers. A more "complex, multifaceted picture" that relates to the "social norms, practices and contexts of entrepreneurship" has correspondingly developed (McDonald et al., 2015: 21). Thus, a deeper understanding of some of the challenges faced by SFs and their EOMs can potentially be achieved. So, whilst Mercier et al. (2000) argue that policy makers prefer the process and evidence of quantitative research, the field of marketing/entrepreneurship Interface research has seen an increase in the use of interviews as opposed to surveys, albeit the latter still dominate. Other commonly adopted methods include focus groups, small surveys, observational studies, ethnography, and content analysis (Gilmore et al., 2013). It was suggested by McDonald et al. (2015: 22) that, whilst this shift in research practice may seem "counter-intuitive", in that theory testing tends to be considered more appropriate as a field develops, the move to accept a wider variety of methods indicates a maturing of research practice because of an understanding of the complexity of the phenomena within the subject area.

Linked to this shift in research practice, it has long been known that entrepreneurship and marketing practices are not smooth, continuous, or linear processes (Bygrave, 1989). Thus, there is an emphasis on the importance of research taking place within the actual business context (Aldrich, 1992). This meant that I needed to be as close as possible to my participants and their work situation if I wanted to gain meaningful information and insight (Gilmore and Carson, 1996). Moreover, EOMs act intuitively and use a range of seemingly unconnected ways to gather and collate the information they use for decision making (Carson et al., 2001), which emphasises the need for such proximity to provide "genuine understanding" (Gilmore et al., 2013: 7).

#### 4.2.4 The importance of longitudinal design

The importance of this research design is emphasised when the need is to reflect a dynamic and changing situation (Ployhart and Vandenberg, 2010; Bryman and Bell, 2007), such as the complex environments in which EOMs operate. However, there appears to be no evidence that research studies have sought to examine the impact of branding in SFs over time (Odoom et al., 2017). Thus, there is a critical gap in the existing literature and a corresponding methodological gap, as demonstrated by my tabular summary of existing literature at the end of Chapter 3. My inquiry therefore adopts extended qualitative case studies as a longitudinal design, as recommended by Shuttleworth (2009), to explore whether the brand management practices of SFs change over time and, if so, how they do. This is something a cross-sectional study would be unable to achieve (Mitchell and James, 2001).

It has already been established that my own study has an inductive design that does not set out to test variables. An initial challenge in developing a longitudinal design was therefore that the available literature generally assumes its purpose of longitudinal design to be to support deductive research with the aim of testing theory (e.g., Ployhart and Ward, 2011; Ployhart and Vandenberg, 2010; Rindfleisch et al., 2008). However, in defence of the adoption of such a design, the intention of my study is to achieve greater understanding with respect to the question of how brand management develops over time in SFs, if at all. This means I have made an underlying assumption that actions will have consequences (Granger, 1969). Accordingly, it can be argued that time is unidirectional and that “temporal order becomes a key marker of causality, i.e., a cause must precede its effect” (Rindfleisch et al., 2008: 263). It would therefore limit the contribution of this study to overlook the role time plays in the decision-making context of SF brand management (Ployhart and Ward, 2011).

Some authors challenge the assertion that longitudinal data offer “superior evidence of temporal order” (Rindfleisch et al., 2008: 264). Specifically, “temporal erosion” may result in a cause being distant from its outcome, and therefore more difficult to establish, than one that is closer (Bradburn et al., 1987; Einhorn and Hogarth 1987). For this reason, causality may be latent, something specifically noted in connection with marketing phenomena by Chandy and Tellis (1998). Given that my inquiry uses an inductive design, I can only speculate about causality; but there is criticism that most marketing studies fail to consider the time interval in which effects will become apparent and sometimes fail to account for unusual or unique incidents that will have an impact on data



(Rindfleisch et al., 2008). Researchers are accordingly encouraged to consider setting appropriate temporal boundaries based on the concepts they are using and the context in which they are working (Mitchell and James 2001; Marini and Singer 1988).

It is difficult, however, to know *a priori* how time may play out, not least because most existing theory is based on cross-sectional thinking (Ployhart and Ward, 2011). I was thus presented with a specific set of problems. My conceptual framework (Figure 3.11 at the end of Chapter 3) does not draw on a single theory but uses several inter-related concepts that arise from differing perspectives and may therefore play out in different ways over time frames. Combined with the absence of any previous similar studies, it was not possible for me to conceptualise how time boundaries might be relevant and when interviews should therefore take place (the additional practical pressures notwithstanding, arising from undertaking fieldwork with EOMS in SFs and trying to make and keep appointments within prescribed time frames).

Therefore, and on the basis that this is an exploratory study, I decided to maintain an open mind about the impact of time. Instead, for the purposes of the Doctorate (I hope my inquiry will continue), I adopted a rigorous definition of what constitutes a longitudinal study. I hope this might inform future research design regarding meaningful time boundaries for similar studies. Thus, the definition of longitudinal study used for this inquiry is: “the collection of at least three waves of data in order to study change” (Ployhart and Ward, 2011: 414).

### 4.3 The framework for this research

Application of the framework proposed by Denzin and Lincoln (2011:12), which follows below as Table 4.1, supported the development of a relevant and coherent qualitative research design. It was adopted as a means to achieve reliability and validity on the basis that it offers the “most comprehensive connections between paradigm/theory, criteria, form of theory and corresponding method or type of narration” (Collins and Stockton, 2018: 2). I linked this to the comparison of epistemological, ontological and research perspectives by Savin-Baden and Major (2013) in order to consider also my “operating principles and preconceptions” (Collins and Stockton, 2018: 2). I was thereby able to explore the relationship between my subjectivity and reflexivity (Bott, 2010). In line with best practice for qualitative research, this was an ongoing process to ensure rigour and quality (Reiter, 2017; Maxwell, 2013).

**Table 4.1: Denzin and Lincoln’s framework for the research process (2011: 12)**

<b>The Research Process</b>
<b>Phase 1: The Researcher as a Multicultural Subject</b> History and research tradition Conceptions of self and the other The ethics and politics of research
<b>Phase 2: Theoretical Paradigms and Perspectives</b> Positivism, post positivism Interpretivism, constructivism, hermeneutics Feminism Racialised discourses Critical theory and Marxist models Queer theory Postcolonialism
<b>Phase 3: Research Strategies</b> Design Case Study Ethnography, participant observation, performance ethnography Phenomenology, ethnomethodology Grounded theory Life history, testimonio Historical method Action and applied research Clinical research
<b>Phase 4: Methods of Collection and Analysis</b> Interviewing Observing Artifacts, documents, and records Visual methods Autoethnography Data management methods Computer assisted analysis Textual analysis Focus groups Applied ethnography
<b>Phase 5: The Art, Practice and Politics of Interpretation and Evaluation</b> Criteria for judging adequacy Practices and politics of interpretation Writing as interpretation Policy analysis Evaluation traditions Applied research

#### 4.3.1 Contemplating Positionality

According to Piantanida and Garman (2009: 58), interpretivism assumes that “knowledge claims are researcher-dependent and provisional” because researchers engage with participants and develop a unique interpretation of a data set (Johnson, 1999). My personal position therefore influences the study because of my beliefs, values, and world view. However, this ‘personal stance’ is not static: it changes throughout my experiences, becoming something I both possess and construct (Savin-

Baden and Major, 2013: 68). Collins and Stockton (2018: 2) therefore define the “pathway leading back to positionality” as a “net that captures the combination of epistemology, ontology and methodology.” So, it may be said that a relationship develops between my subjectivity (beliefs and interpretations of the world) and my ability to develop reflexive practice – an ability to see, know and consider my subjectivities (Bott, 2010).

My approach to knowledge can be said to be “situated” because “research cannot start from nowhere” (Reiter, 2017: 132). Hence, the notion of “theoretical sensitivity” describes the knowledge that researchers bring to an inquiry (Glaser, 1978; Glaser and Strauss, 1967). Similarly, Eisner (1991) and May (1975) discuss the “aesthetic sensibility” that researchers bring to a study by having the ability to see and interpret significant aspects, which relates to the suggestion of the researcher being “an instrument of inquiry” Piantanida and Garman (2009: 59). This argument is developed further by Keegan (2011), who suggests that research is a process of construction rather than discovery, meaning that the researcher will co-create with others who can contribute to widening knowledge. This has implications in terms of both the techniques employed and the process of analysis and coding: whose voice should be heard, how and why? (Bold, 2012)

Drawing on these perspectives, it is possible to challenge the orthodox scientific model presenting researchers as observers who are neutral. Instead, I believe that researchers are never outside their research situation or truly objective because of the nature of the world, which is full of “shifting relationships, changing perceptions and contextual understanding” (Keegan, 2011: 33; Mason, 1994). I thus started this inquiry by exploring my philosophical and political views (Glesne, 2011). That enabled me to connect the conceptual framework with my epistemology through the application of phase 1 of Denzin and Lincoln’s framework (2011). Thus, as part of a process of social construction which emphasises the importance of the historical and cultural context of my inquiry, I initiated from the outset practices to support creativity and thinking, enabling me to develop processes for “qualitative thinking” (Keegan, 2011: 13).

To read more about my positionality, see 4.6, Chapter Notes.

#### 4.3.2 Rationale for an interpretivist perspective

Specific theoretical paradigms are associated with different methodologies to represent the beliefs and values that guide problem-solving behaviour (Schwandt, 2001; Kuhn, 1962). They are based on

their distinctive assumptions regarding ontology, epistemology, axiology and methodology (Chilisa and Kawulich, 2015; Savin-Baden and Major, 2013; Burrell and Morgan, 1979).

Given that my research aims were to explore the brand management practices of EOMs, there was an imperative to “understand an aspect of the world as others see it” (Chilisa and Kawulich, 2015: 9). That is because each participating EOM will make personal decisions based on their understanding of the business environment, their business model, their marketing competence and, as time progresses, learning gained from their experiences. I therefore believe that ‘reality’ becomes an individual interpretation of personal experience and that knowledge is derived from that process. In other words, multiple socially constructed realities will exist. Likewise, truth will depend on context because it is contained within these human experiences (Chilisa and Kawulich, 2015; Savin-Baden and Major, 2013; Burrell and Morgan, 1979), which in turn means that what represents truth will also be culturally and historically dependent. I acknowledge some truths may be universal, but I could not know at the outset of my study which those might be (Chilisa and Kawulich, 2015).

In adopting an interpretivist perspective, my research challenges the positivist orthodoxy that a common and tangible external reality exists (Chilisa and Kawulich, 2015). Indeed, the increasing complexity of the social world means that the “notion of what constitutes a paradigm” and the question of the extent to which paradigms in general are “incommensurable or commensurable” is considered complex, and should be contested (Cunliffe, 2011: 649; Alvesson, 1987). There is consequently ongoing discussion of ways in which the “metatheoretical assumptions and blurred genres underpinning contemporary research and theorising” might be developed and improved to enable researchers to produce more appropriate and informed research design (Cunliffe, 2011: 666). Suggestions include paradigm interplay (Schultz and Hatch, 1996); multiparadigm research (Clegg, 2005); and working outside the constraints of paradigms (Mir and Mir, 2002).

I therefore feel it is helpful to avoid assuming a “‘purist’ philosophical stance” (Savin-Baden and Major, 2013: 65). Whilst I do not think it possible to conduct research with no reference to existing paradigms (because I do not operate in a philosophical void), I considered that a “blended philosophies orientation” in approaching an exploratory study could offer me greater freedom of action and thought than rigid adherence to one point of view (Savin-Baden and Major, 2013: 66).

That approach allowed me to explore ontology, epistemology, and methodology as different considerations and to mix-and-match them based on my own views in the most appropriate way for

my particular research aims and objectives (Reichardt and Cook, 1979). The adoption of various research strategies and methods during this inquiry is congruent with the notions of qualitative research being multi-paradigmatic (Nelson et al., 1992). My chosen approach thus affords me the opportunity to be a 'bricoleur' (Denzin, 1994: 15) or 'jack of all trades', making it possible to play to my existing strengths and develop new ones during the study.

Any potential avenues for inquiry that may develop from initial findings will not be closed off because I have not restricted myself to preconceived choices. If Keegan (2011) is correct and research is a process of construction that requires researchers to co-create with others, a multi-paradigmatic approach may be valuable to ensure that the research design facilitates contributions that are meaningful for everyone involved.

Being receptive to amending my strategy and methods as the study developed helped me to deal with the "value-bound and value-laden" process of social inquiry it involved (Chilisa and Kawulich, 2015: 10). As an example, I had initially used semi-structured interviews as the basis for data collection, but that process shifted organically to open conversations, a change that was driven by the participants. To ensure that this willingness to be flexible and open minded did not result in research that lacked coherence, I chose to use an interview guide and maintain reflexivity. Initially, the latter was a way of considering my values and biases as a researcher but, as the inquiry progressed it became integral to my sense-making process. I also offered my participants opportunities to reflect as part of the process of co-creating knowledge by inviting them to give their feedback on the narrative output.

#### 4.3.3 My research strategy

This chapter has already argued that a single objective reality does not exist given the context of my inquiry and the fact that that my corresponding epistemological stance is interpretivist. Accordingly, the purpose of the study is to explore human experience in order to understand the nature of that experience in a specific context: the brand management practices of entrepreneurial owner-managers of small firms. As a result, there is a first-person perspective, meaning an approach is needed that will enable me to describe the essential elements of my participants' experience (Savin-Baden and Major, 2013).

I therefore selected a qualitative longitudinal case study based on a hermeneutic phenomenological approach (Heidegger, trans. Stambaugh, 2010) for the following reasons (adapted from Yin, 2014):

- I had little control over behavioural events.
- the study is contemporary, rather than historic.
- there is an explanatory dimension to the study which focuses on an aspect of strategic and operational activities in small firms.
- that being so, it is necessary to consider temporality.
- a case study approach will enable me to explore how the concept of co-creation happens in a real-world context to gain empirical evidence based on the observation of practice.

For those reasons, key features were the interpreting of the data and the use of a process of self-reflection to aid understanding and knowledge construction. Neubauer et al. (2019) describe phenomenological study as ‘intimidating’ because it requires significant time to be spent on reflection and analysis, meaning a corresponding time commitment from me as the researcher. However, given the need for a longitudinal study in this area, I believe this strategy did enable me to make a unique contribution to understanding brand management in the small-firm context.

#### *4.3.3.2 The use of case studies*

A case study design is appropriate for my inquiry because the aim is to understand how behaviour and processes are influenced by, and in turn influence, the context of the phenomenon (Adelman et al. 1980). However, different views of the case study method are to be found in the literature, which appear to be inter-related.

A case study may be the way in which a study is delimited (Stake, 2005). It is also considered to be a research approach that allows investigation into a contemporary phenomenon in a real-world context (Creswell, 1998). Lastly, it can also be the final product, or narrative, resulting from a qualitative study (Yin, 2014). It is asserted by Savin-Baden and Major (2013: 154), that “each is a critical component of the whole” meaning that I would need to consider them all, as set out in Figure 4.1, below. That was another reason for approaching research design in a structured and organised way, by applying the Denzin and Lincoln (2011) framework.

Using an integrated case study approach offers a multi-sided view of a contextualised situation. It further offers depth and richness, which is useful when undertaking inductive research where little is known about the phenomenon and theory is inadequate for testing a hypothesis (Halinen and Törnroos, 2005). Also, a thorough execution of the case-study method contributes to the systematic production of exemplars, which is perceived as the basis of an effective discipline (Kuhn, 1962). I hope its adoption here will enable me to contribute to my field without having to take a deductive

theory-testing approach, which would be difficult for the reasons previously explored, or by having recourse to alternative qualitative approaches such as grounded theory, in using which it is possible to “over conceptualise” (Glaser, 1992: 40; Glaser, 1978; Strauss and Corbin, 1998). Most significantly, however, the use of case studies allowed me to consider the impact of time. This is important because: first, it is supportive of the contribution that can be made by a longitudinal study; and second, it aligns with the adoption of hermeneutic phenomenology, which claims that the experience of ‘being’ (Heidegger, trans. Stambaugh, 2010) is peculiar to humans as a way of being engaged in the world whilst accepting that the self is constantly evolving – a temporal process.

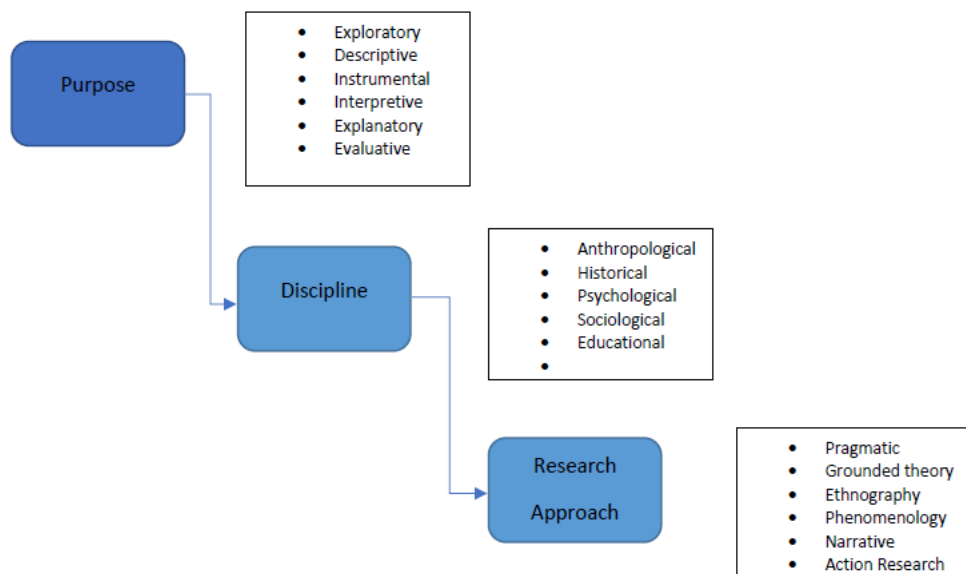
I have therefore defined ‘case study’ in this inquiry as the employment of the eponymous research method, drawing on other approaches (phenomenological interviews), and the presentation of contextualised reports or ‘cases.’ To achieve this, I used narrative to document the lived experience of my participants (Savin-Baden and Major, 2013). Accordingly, the cases are bounded in the sense that they focus on a narrow range of examples and a small number of people (Yin, 2014). As a result, my research is particularistic and not general (Savin-Baden and Major, 2013).

Given that this is an exploratory inductive and interpretive study, the intention is also to achieve holistic descriptions of the whole case as well as the relationships of its parts. In this way, I hope to move beyond description to the translation of key concepts. Hence, my data were collected in such a way as to provide the rich descriptions which can support future inquiries that aim to build theory through examples and as a process for generating future research hypotheses, as knowledge and understanding develop (Flyvbjerg, 2006).

The case study method achieves credibility through prolonged engagement and persistent observation, which is another argument in support of a longitudinal study. Dependability and confirmability can be achieved by providing a transparent audit trail of the decisions made by the researcher and the rationale behind these (Koch, 1994). I attempted to do this by adopting clear processes for data analysis and reflexivity, offering detailed descriptions of my findings to enable readers to make informed decisions about their transferability (Houghton et al., 2013).

**Figure 4.1: The case study research approach**

**Source: Savin-Baden and Major (2013: 161)**



#### *4.3.3.3 The challenges of temporality*

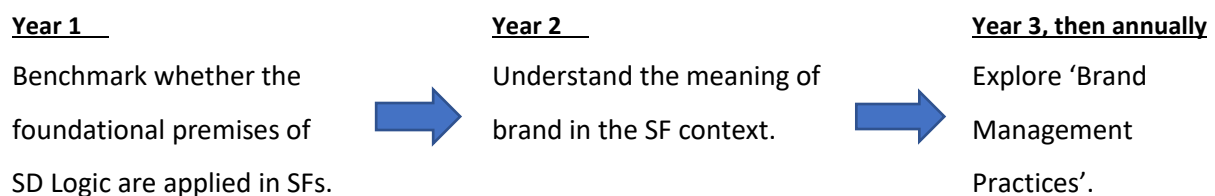
From the practice-based perspective, it is clear that entrepreneurship and marketing practices are not smooth, continuous or linear processes (Bygrave, 1989). It has been argued that a longitudinal study is appropriate to explore how and why the phenomenon of brand management develops in SFs, thus responding to a gap in existing research. A significant difference by comparison with a cross-sectional study is therefore the requirement to consider concepts relating to human existence and time: that is ‘temporality’, the state of existing in time (Hoy, 2009). Temporality is also relevant given the phenomenological approach of the study (Heidegger, trans, Stambaugh, 2010).

A range of philosophical perspectives explore the relationship between human agency and temporality, (for example Hegel, ed. and trans. 2010; Heidegger, trans. Stambaugh, 2010; Kant, trans. Müller, 2003; Schopenhauer, trans. Payne, 1969). However, the notion of time remains problematic. This is partly because it is an abstract concept, but also because its ephemeral nature presents difficulties in accounting for it within the lived experience, even though it governs everything that takes place. Whilst it can be argued that there is only physical time, which is a fundamental feature of the universe, the paradox of time is that it also has a phenomenological dimension, simply because the “everyday usage of temporally inflected concepts” creates “specific meanings” which have “specific implications” (Hammer, 2011: 13).



On that basis and wanting to explore whether EOMs develop brand management practices and, if so, how they do, I have made the underlying assumption that actions will have consequences (Granger, 1969). This does not fit with the notion that time is unidirectional and sequential – a “perpetual occurrence of ‘nows’” (Hammer, 2011: 15), which is problematic because, logically, it seems to imply that there can be no progress: each ‘now’ is of itself and will be the same as previous and succeeding ones. In turn, this suggests that a cause cannot precede its effect and there is no opportunity for change (Rindfleisch et al., 2008). By contrast, the concept of ‘lived time’ is perceived as a series of material objects in time and events that we interconnect. This means that subsequent ‘nows’ are not homogenous but will carry memories, knowledge and anticipation (Hammer, 2011). This view aligns better with mine that meaning is created, adapted, and sustained over time because the actions taken by human agents are structured temporally and are executed based on evidence and reasoning derived from “socially endorsed inferential relations that refer to both past and future” (Hammer, 2011: 28). Accordingly, the longitudinal design of my study had to find ways to understand action but also to present the degree and direction of change over time (Caruana et al., 2015).

The original plan for collecting the minimum of three waves of data considered feasible for the inquiry was as follows:



Collecting the waves at yearly intervals was intended to allow time for data analysis and write up. Once wave three was reached the intention was to have a dialogue with the EOM every 6 – 8 months. In practice a more flexible approach to timing was required due to the many challenges the SFs were managing.

#### *4.3.3.4 Discounting viable alternative strategies*

Alternative qualitative strategies linked to the interpretive philosophy include ethnography, grounded theory, action research, or the more practice-based approach of pragmatic research (Savin-Baden and Major, 2013; Denzin and Lincoln, 2011; Cohen et al., 2007).

Ethnography adopts a broad approach that includes many variations. As one of the first qualitative methods used, it traces its roots to anthropological studies seeking to understand culture and societies. Essentially, “ethnography is the study of people, cultures and values”, and aims to “create an understanding of those being studied” by exploring the individual view and the shared values of a specific culture or group (Savin-Baden and Major, 2013: 196). Given the suitability of ethnography for a longitudinal study and its emphasis on a sample population’s behaviour in the everyday context (in my case, at work) rather than on a period in their life, I was initially drawn to ethnographic approaches. I felt they would enable me to compare views simultaneously, something that appears to be less explicit in a phenomenological approach, despite its similarities to ethnography (Maggs-Rapport, 2000). The work of Bourdieu on transactional sociology, in Grenfell, (2014), in which the universe is composed of complex and fluid fields of transactions that involve interdependent actors, was particularly attractive because it seemed to align to the research context of co-creation (Vargo and Lusch, 2004). The dynamic relationship Bourdieu sees between ‘habitus’ and ‘field’ seemed to me to mirror the dynamic and social process of branding as a relational activity, while his notion of ‘the feel for the game’ fits with the concept of competence and its potential importance if a SF is to succeed in developing effective brand management practices (Grenfell, 2014: 56). However, applying Bourdieu’s methodology would have meant using a trio of interdependent and co-constructed elements. He considers habitus, the field and ‘capital’ to be integral to an understanding of the social world that can only be understood through case-by-case construction. It seems to have become fashionable to focus on habitus without considering the other elements. Maton (in Grenfell, 2014: 60) argues that doing so “fetishises” the approach by abstracting habitus from its context (field) rather than treating it as a relational structure whose significance lies in its relationships with different fields. Moreover, a true methodology based on Bourdieu’s work would also involve significant quantitative work with large samples, which is not relevant to my study, given its exploratory and inductive nature.

By contrast, grounded theory aims to develop theory from the study of cases and the use of an inductive analysis named ‘the constant comparison of data’ (Savin-Baden and Major, 2013). The literature is divided over the extent to which it is a qualitative research method (Savin-Baden and Major, 2013; Denzin and Lincoln, 2011), a theoretical position (Glaser and Strauss, 1967) or a method for data analysis (Lincoln and Guba 1985). It is therefore often described as a general research method that is not owned by any school or discipline. It is of interest to qualitative researchers because it offers the opportunity to use systematic procedures to generate theory through inductive reasoning based on strict processes for data analysis. However, given that my own

study was to be inductive and exploratory, with no intention to generalise, working backwards to theory development seemed less relevant. Notwithstanding that grounded theory has an implicit aim of developing probabilities through examining the relationships between concepts, my research design did not seek to develop hypotheses and theories to explain the phenomenon under scrutiny.

Action research is a framework for inquiry that “seeks to bring together action and reflection, theory and practice, in participation with others, in the pursuit of practical solutions to issues of pressing concern to people” (Reason and Bradbury, 2006: 1). As an approach, it is considered central to changing or improving practice through reflection and innovation and is therefore of value when researchers want to solve real problems. It accordingly offered an attractive approach to my study, particularly given the argument that research is a process of construction (Keegan, 2011). It could also have enabled me to align my research design with the view that qualitative research can benefit from being multi-paradigmatic (Nelson et al., 1992). At the outset of the longitudinal study, however, I decided to wait until some data had been collected before re-evaluating if and how action research would be of value. This decision was taken because, first, the absence of any evidence of research seeking to examine the impact of branding on the development of SFs over time, there is a critical gap in the existing literature (Odoom et al., 2017). Exploration is needed before practice can be understood, as a precursor to change. Secondly, my ‘lens’ relates to service-dominant Logic. How this works within my context of interest has not been evidenced through empirical study, suggesting the need to articulate theory further (Winklhofer et al., 2007: 76). So, my inductive design aimed to provide specific cases which, over time, could be worked back to broader generalisations and theories (Trochim, 2006; Flyvbjerg, 2006). I saw that as the point at which I could engage with practitioners in a meaningful phase of knowledge-creation based on the examination of a practical situation. If this study continues to progress, action research could become a viable way of developing impact from the inquiry.

Lastly, the relatively unacknowledged approach of ‘pragmatic research’ was also attractive, first because it draws upon the “most sensible and practical methods available to answer a given research question” (Savin-Baden and Major, 2013: 171) and secondly because it is also considered more collaborative, thus aligning with the concept of knowledge being co-created as “emergent inquiry” (Keegan, 2011). The aim of pragmatic qualitative research is to describe experiences as interpreted by the researcher (Neergaard et al., 2009). It thus differs from the ‘thick’ descriptions attributed to ethnography, theory development as associated with grounded theory, or the interpretive understanding associated with phenomenology. Instead, it is described as “the meeting

point of description and interpretation” (Savin-Baden and Major, 2013: 172). I found it difficult, however, to discern specific differences between this approach and other interpretivist approaches, other than that it appears to be less abstract and conceptual; and requires less involvement in the data by the researcher because less inference is expected to be developed from the findings (Sandelowski, 2000; Merriam, 1998). Accordingly, I discounted it in favour of case studies based on hermeneutic phenomenology as I felt this approach could be more explicitly defined and would therefore result in a more coherent study, something I considered important in light of the critical gap in the literature relating to the brand management practices of SFs (Odoom et al., 2017).

## 4.4 Data Collection

### 4.4.1 Interviews as the data collection instrument

In line with common practice for phenomenological research, interviews are central to my research design (Savin-Baden and Major, 2013). This is because my aim is to “gather descriptions of the life-world of the interviewee with respect to interpretation of the meaning of the described phenomena” (Kvale, 1983: 174).

The intention was to use face-to-face interviews with open questions throughout the data-collection phases of the research, to develop ‘thick’ descriptions of how owner-managers perceive their brands, the brand management practices they use, why they adopt those in particular, and whether or not those involve co-creating with consumers. In this way, the ensuing conversations are not intended to gain answers to specific questions, but instead to provide an opportunity to gain understanding and ‘interpret’ people and situations (Tierney and Dilley, 2002). I hoped this would enable me to provide compelling examples in the resulting cases (Flyvbjerg, 2006).

Typically, phenomenological research employs unstructured personal interviews, in which the interviewer and participants engage in a dialogue, in so much as they both recognise it as a scheduled time for a discussion based on an interview guide (Cohen and Crabtree, 2006). However, unstructured interviewing requires a researcher to possess significant understanding of both the context and the topic of interest as the basis of a clear agenda for the discussion – a challenge when developing inductive exploratory research based on a conceptual framework. The lack of structure also raises the need for multiple meetings between the researcher and participant as understanding evolves. A common weakness associated with unstructured interviewing is thus the time it takes (Savin Baden and Major, 2013). Although my research design is longitudinal and thus requires at least three waves of data collection, based on the definition I have chosen, it is clear that the

participating EOMs will be hands-on business practitioners, which will limit their availability and potentially constrain the opportunity to maintain discussions over time. Moreover, my intention to adopt a service-dominant logic lens to evaluate the extent to which co-creation may be operationalised in SF brand management practices suggested the need for data and information capable of being compared (Vargo and Lusch, 2004; 2008). In the absence of some structure at least, the challenges associated with the 'incommensurability' of a new paradigm could cause further problems in making comparisons, arising from the differing use of vocabulary and language (Saren et al., 2006; Kuhn; 1962).

For these reasons, a semi-structured approach was initially adopted. However, I felt I would be able to conserve the opportunity to identify new ways of seeing and understanding the topics being discussed by using open-ended questions (Merriam, 1998; Yin, 2014). Over time, as relationships developed with my participants, I hoped that the continued use of such questions would encourage them to offer their personal and unique perspectives (Savin Baden and Major, 2013). I was thus attracted to the notion of using an 'interview guide' (King, 2004: 32), rather than a rigid application of 'structured' or 'semi structured' interviewing, because it conveys a sense that an interview develops not only from the literature, the interviewer's personal knowledge and experience but also from discussions with others who have relevant personal experience. Moreover, the idea of the interview guide being a living document that evolves throughout the data collection process is congruent with my understanding of emergent inquiry (Keegan, 2011; King, 2004). In practice, as the inquiry developed, there was a shift from using a detailed guide in the early phase of data collection to having 'organic' conversations around the topic of interest by the time I reached the third and subsequent waves. In the early stages of the process, I depended upon memory and note-taking to record and store participants' responses, but they were themselves the instigators of subsequent audio-recording of interview conversations.

In other words, I view research as a process of social construction. Thus, the notion of the 'embodied mind' (Lakoff and Johnson, 1999: 16) and the ideas about consciousness advanced by Damasio's (2000) suggest to me that I can achieve only a "partial, situated and contextualised truth" (Keegan, 2011: 89). Though I was comfortable adopting a correspondingly non-prescriptive approach to data collection, I knew that some form of 'scaffolding' would be necessary to ensure that I met my research objectives (Merriam, 2009). I therefore started data collection with a semi-structured interview designed to explore whether the SFs were engaging in activities that mapped against the crucial premises of SD Logic (Vargo and Lusch, 2008, 2004). My intention was to have an open or adaptive strategy that would ensure my narratives were faithful renditions of the EOM's perceptions (Webster and Mertova, 2007). Thus, whilst the interview questions had been mapped to SD Logic as

described, they did not actually mention branding. In this way, it was possible to establish as a baseline whether the SFs were engaging in collaborative or co-creation activities before progressing to discussions intended to explore branding and brand management practices specifically (Berthon et al., 2008). The data collection instruments used are described in Appendix B.

Yin (2014) cautions that prolonged interviewing will create a relationship between the interviewee and interviewer that needs to be monitored so that its impact on the study can be considered. Piantanida and Garman (2009) discuss the sense of action implied by going into the field and a range of strategies that may be employed to stay focused. Janesick (2011: 136) focuses on the value of direct experience, practice and reflection, considering those to be the interviewer's 'strongest assets'. I therefore continued to maintain a process of reflexive practice as an input to the development and refinement of both my field skills (observation, interviewing, writing and analysis) and my self-awareness – all essential in developing competence and capability in the research process (Janesick, 2011; Piantanida and Garman, 2009).

#### 4.4.2 Sampling

According to the UK Government, private sector businesses are unevenly distributed across the UK, with London and the South East accounting for 35% of the private sector (Department for Business, Energy & Industrial Strategy, 2019). Thus, while my interpretive study does not set out to generalise from the sample to all small firms, the intention was to source cases typical of small firms in Hertfordshire. Being already connected with the local SF business community, I had planned to recruit a purposive sample for two reasons. First, because participants would be required to commit to the longitudinal design, it would be necessary to ensure availability and willingness to contribute over an extended period to reduce attrition (Bernard, 2002). Second, it was important that the sample was representative of 'typical' businesses.

Ensuring that the case studies were in that sense typical was important because I wanted to reflect accurately the usual types of small firms to be found in a local economy; including more extreme cases could result in misleading exemplars. I also felt that several cases would be preferable to a single one because, first, a single 'typical' case could not be said to be representative, given the idiosyncratic nature of entrepreneurial marketing (McCartan Quinn and Carson, 2003) and second it was necessary to be able to replicate findings based on having selected participants in a methodical way (Yin, 2014). Also, in view of the phenomenological nature of the study, it would be helpful to have a working knowledge of the market sectors of the SFs involved. So, taking into account also the potential challenge of not being able to compare firms on account of a high degree of variation, I considered it appropriate to restrict the types of firms and industry sectors to be represented with

the aim of reducing contextual variation, thus hoping to make case-by-case comparison more straightforward.

However, these selection criteria had to be offset against the limitations of an interview-based longitudinal design, which included the fact that larger volumes of data are produced for analysis and presentation (Cresswell, 1998; Miles and Huberman, 1994). Thus, I also had to try to identify and select information-rich cases that would make effective use of my limited resources (Patton, 2002).

As a result, five contributors of potential cases were initially selected. One of those dropped out after the first wave of data collection, having sold his business and emigrated. A second became progressively more difficult to commit to being interviewed and was therefore considered to be in abeyance. For the purposes of this thesis, neither of those cases has been reported. Consequently, three cases continue as part of this longitudinal study.

The participating firms are profiled in Table 4.2, below.

**Table 4.2: Profiles of participating firms (anonymised)**

First letter of Participant's name	Age of firm	Size (staff)	Sector
P	Launched 2002	3 including the EOM; 2 part-time.  A rota of regular casual staff to have up to 20 available for a given event.	Catering and hospitality
N	Started in 1997	15 including the EOM; 2 part-time	Gardening and landscaping services
M	Acquired in 2009	Team of 10: a full-time Head of Sales; full-time sales administrator; 2 x Head of Operations to run teams; 6 marquee installers	Leisure and hospitality

#### 4.4.3 Data Analysis

##### 4.4.3.1 'Facing' the data

Savin-Baden and Major (2013) assert that the first step in the data analysis process is for the researcher to choose how to characterise the data. Initially, interviews were not recorded, and I relied on listening and note taking. That was a personal choice which I felt facilitated proximity

better than the use of audio recordings since it built trust at the start of the study (Roller, 2017). Moreover, the literature indicates that the use of such devices can lead to “mindless transcriptions” rather than meaningful engagement with the material (Mueller and Oppenheimer, 2014). Thus, the informal approach to recording responses also presented advantages in that notetaking serves as an immediate resource for reflection and sense-checking, as part of an exploratory research design.

However, once data collection moved into its second and subsequent phases, the participants themselves started to suggest recording our discussions. This seemed positive: I was experiencing several practical challenges with fieldwork, not least that face-to-face interviews tended to have a long duration, as the EOMs covered a lot of material, often talking with enthusiasm and hence at speed. This made it difficult to concentrate and maintain accuracy (Savin-Baden and Major, 2013). The transcripts in Appendix B consequently show that I shifted to using ‘head notes’ or short phrases to act as an aide-mémoire in place of full ‘field notes’ as an interview record could still be developed ‘verbatim’ from a recording without sacrificing the benefits associated with notetaking in real time (Singal and Jeffery, 2008). However, this plan enjoyed mixed success: several sessions did not record well using mobile phones. As a result, I eventually returned to making full field notes and invested in an HD voice recorder for subsequent data collection.

#### *4.4.3.2. The route to analysis*

The literature suggests that most qualitative data analysis typically involves six phases of “characterising, cutting, coding, categorising, converting and creating” (Savin-Baden and Major, 2013: 419). I was therefore faced with numerous options to choose from for achieving this goal, based on my positionality and philosophical stance. Saldaña (2013) profiles no fewer than thirty-two different methods for coding and analysing qualitative data, while Wertz et al (2011) demonstrate how using five different ways of analysing the same data lead to diverse interpretations of the same ‘story’.

It follows then that there is no single right or wrong way to analyse qualitative data. Instead, the specific process of analysis should relate to the research questions, conceptual framework and methodology selected (Savin-Baden and Major, 2013; Saldaña, 2013). Accordingly, and given that I consider the data to be a joint construction between me and my participants, I decided to maintain a simple and transparent approach for analysis, which could be clearly demonstrated to everyone involved (Wertz et al., 2011; Keegan, 2011).

I therefore adopted a process of open (or ‘first cycle’) and axial (or ‘second cycle’) coding (Saldaña, 2013; Strauss and Corbin, 1998). I hoped that the concepts identified in the first cycle could be connected to emerging categories and linked back to the conceptual framework for the study



through use of a 'coding paradigm' (Kelle, 2005) which focused on creating generic relationships (Strauss and Corbin, 1998).

My research objectives required a coding process that could both describe and analyse as part of an interpretive process (Saldaña, 2013; Charmaz, 2006). Thus, the process of data analysis became one of developing hermeneutic understanding (McAuley, 2004); I was not just looking at the experience of my participants, but also considering my positionality during the data interpretation process (Gadamer, 1985). This is described by Alvesson and Sköldbberg (2000: 53) as a 'hermeneutic circle', which the researcher may enter at "one point and then delve further and further into the matter by alternating between part and whole, which brings a progressively deeper understanding of both." Thus, my data analysis process became a process of reading, iteration and working backwards and forwards (Thompson et al., 1990). I decided early in this process that I would not use computer assisted qualitative data analysis software, for example, NVivo, because I wanted to immerse myself in the data to support a process of reflexive working (Alvesson and Sköldbberg, 2009) with the aim of developing understanding and 'interpreting' people and situations (Tierney and Dilley, 2002).

Instead, to support data analysis, I used a variety of techniques, such as 'stretching exercises' (Janesick, 2011), to simultaneously explore my SDL lens and its impact on the study. This entailed a process of questioning (Kvale and Brinkmann, 2009); structuring field notes (Emerson et al., 2011) and coding (Adler and Adler, 1987), whilst working with data to "generate the bones of analysis" and assemble them "into a working skeleton" (Charmaz, 2006: 45).

I therefore consider that data analysis began with the process of writing up my field notes, not least because my positionality would have led me to decide what would be of analytical interest (Bailey, 2008; Roberts, 2004). Similarly, the ensuing process of data reduction and characterisation are affected by the 'adventure' of trying to achieve "rigorous praxis [via] reflective application of qualitative analyses" (Wertz et al. 2011: 1).

#### 4.5 The Art, Practice and Politics of Interpretation and Evaluation

Wolcott (1994: 36) suggests that interpretation is the point at which a researcher "transcends factual data and cautious analysis and begins to probe into what is to be made of them." This suggests that the process of interpretation is linear and follows analysis. However, I have already stated my opinion that the process of developing a conceptual framework is indeed inductive and linked to my epistemological paradigm. I therefore hold that, in my case, interpretation started as part of the process of reading and understanding that helped me to form a conceptual framework (Imenda, 2014: 189, Collins and Stockton, 2018; Chu, 2017). Moreover, given that experience, re-

reading, and new reading will continuously change this framework as a process of constructivism, it seems likely that the process of interpretation will be “unfinished, provisional and incomplete” (Denzin, 1989: 64).

Willig (2014: 276-277) seems to concur, asserting that “qualitative data never speaks for itself and needs to be given meaning by the researcher”. She suggests that a variety of approaches may be used for interpretation, with the continuum she proposes suggesting in turn that those may lack delineation and overlap, as seen clearly in Figure 4.2, below. Denzin (1989) suggests this becomes more challenging when trying to align a process for interpretation with a research approach that similarly lacks clear demarcation. This may be why qualitative researchers are criticised for tending to adopt a positivistic epistemology that focuses on the systematic coding and categorisation of data into themes, presented as ‘findings’, rather than properly undertaking an interpretive process (Alvesson and Sköldbberg, 2002).

When considering how to approach and document the process of interpretation for my own study, I therefore found it helpful to consider the ‘hermeneutic circle’ and ideas such as how empathy and suspicion might act as related forces to support interpretive activity (Ricoeur, 1996; Schmidt, 2006). However, I did not find the interpretation process so straightforward. For example, the wide variety of narrative approaches that focus on different aspects of ‘storytelling’ are difficult to differentiate (Smith and Sparkes, 2006). It was thus during the process of interpretation that I became concerned about what I was doing and whether it still aligned with my research design or not – and, specifically, whether I was following a phenomenological or narrative process. This conflict was resolved by using an ‘analytical memo’ activity to reflect on the relationship between phenomenology and narrative in my inquiry, as presented at 5.6 Chapter Notes.

Meanwhile, I also had to consider the differences between descriptive and interpretive phenomenology. As I do not believe it is possible to exclude my own preconceptions (or those of my participants), I adopted a version of the interpretive phenomenological stance described by Smith et al. (2009). That is why I began by selecting a small, reasonably homogeneous purposive sample so that I could explore the phenomenon of brand management from the perspective of those individuals and used semi-structured interviews to enable me to have flexible conversations with them. Once I had data, I systematically searched my transcripts for themes and attempted to create connections amongst them. At that stage, I started to produce the narratives whilst simultaneously building a master table of themes, both of which documents were supported by verbatim extracts from the interviews. Thus, a process of interpretation ensued as I decided the significance of specific pieces of data and how they could be organised into a story (Bold, 2012).



#### 4.5.1 Ensuring adequacy

Denzin and Lincoln (2011) encourage researchers to define the criteria they will use to judge 'adequacy', which I interpret to mean that a study is satisfactory in terms of quality. However, Sandelowski and Barroso (2002: 2) comment that scholars across social science disciplines are "no closer to establishing a consensus on quality criteria." This may be attributable to the subjective nature of qualitative research, which suggests that there will be fundamentally differing views of what constitutes 'quality' (Savin-Baden and Major, 2013). Accordingly, there is a range of views regarding approaches that may be taken to ensure quality, including ideas relating to verification (Morse et al., 2002; Creswell, 1998), evaluation (Lincoln and Guba, 1985), reflexivity (Calderón, 2009; Malterud, 2001; Yardley, 2000), and methodological integrity (Reiter, 2017; Thorne, 1997).

I am most persuaded by ideas relating to methodological integrity and reflexivity as means of ensuring adequacy. First, given my exploratory and longitudinal research design, the traditional quantitative approaches of ensuring quality of process through validity and reliability are not transferable: 'measurements' are not made and whilst I envisage that ongoing waves of data collected as part of a longitudinal design will be broadly repetitious, they will not be stable or similar over time (Kirk and Miller, 1986). This is because circumstances will change for the SFs under scrutiny and the lived experience of the participants will evolve (Heidegger, trans. Stambaugh, 2010). Then, given that I am the data collection 'instrument' and have developed my own protocols, these terms as applied to quantitative research become irrelevant (Ely et al., 1991). Lastly, it would be paradoxical to attempt the use of objective criteria when I openly acknowledge the subjectivity of my research design (Kuzel and Engel, 2001; Yin, 2014).

It is thus necessary to adopt alternative approaches to achieve validity and reliability (Reiter, 2017). Consequently, I have attempted to embrace such contemporary criteria as criticality, reflexivity, honesty, and integrity in the effort to satisfy the quality criterion quality (Major and Savin -Baden, 2010). I therefore used a range of strategies to 'operationalise quality' throughout my study (Savin-Baden and Major, 2013: 476). These comprise methodological coherence (Reiter, 2017; Denzin and Lincoln, 2011); the use of typical cases in order to contextualise and achieve relevance (Savin-Baden and Major, 2013); developing an audit trail, which would include a focus on my positionality throughout the study (Lincoln and Guba, 1985); a clearly articulated and documented interpretative process and 'member checking' to ensure that my participants had both a voice and the opportunity to correct errors as the cases were developed (Savin-Baden and Major, 2013: 477; Wertz et al., 2011, Riach, 2009). Based on these considerations, readers should find the research plausible.

#### 4.5.2 The role of reflexive practice in this study

Reflection and reflexivity are often conflated as the same concept, but qualitative researchers are expected to move beyond reflection to reflexivity to be able to explore the specifics of their inquiry (Savin Baden and Major, 2013; Piantanida and Garman, 2009). Reflection is said to happen at different times (Boud et al., 1985) and at different levels (Mezirow, 1981). Ultimately, it should include a process of “self-critical sympathetic introspection and self-conscious analytical scrutiny of the self” – which is reflexivity (England, 1994: 244). The purpose is to set up a sense of liminality, that is ambiguity and confusion, thereby allowing the researcher to transition through a process of interpretation and understanding (Savin-Baden, 2004). Thus, researchers can explore how they create meaning as part of their lived experience and, corresponding, organise their subjectivity. This in turn allows them to regard their respondents’ psychological reality as something meaningful and deserving of an objectivised rather than subjective approach (Ratner, 2002).

Numerous authors have categorised different types of reflection. Schön (1984) suggests that it functions in two different ways, ‘reflecting in action’ being the automatic response of an experienced practitioner (the ability to ‘think on your feet’) whilst ‘reflecting on action’ is looking back on an event and considering how a response might have been different. Bold (2012: 3) offers a third function of reflection, ‘reflecting for action’, or the need to consider the next steps that should be taken. Similarly, Boud et al. (1985) describe three ways in which reflection must happen during different phases of qualitative research: ‘prospective reflection’, or deep thinking about design and methods; ‘spective reflection’ during fieldwork and ‘retrospective reflection’, which is often linked to the idea of hindsight. The most useful classification, in my opinion, is that offered by Mezirow (1981), entailing the seven types of reflection shown in Table 4.3 on the next page, in that it demonstrates how reflection becomes progressively deeper, implying a continuum that moves subtly from reflection to reflexivity.

The ability to reflect requires a personal capacity for reflection (Boud et al., 1985). I understood this to mean that I had to be aware of the dynamics between myself and the people I am working with, leading to a ‘personal relationship’ with my research (Finlay and Gough, 2003). That required me to adopt a critical approach to reflection in as much as I had to be able to challenge my underlying beliefs, values, and assumptions in order to question actions and challenge claims when seeking to analyse and interpret situations (Bold, 2012; Savin Badin and Major, 2013).

**Table 4.3:**  
**Mezirow’s seven types of reflection for qualitative researchers**  
**adapted by Savin-Baden and Major**

Mezirow’s Type	Savin-Baden and Major’s example of application
Basic reflection is an awareness of a specific perception, meaning or behaviour	Researcher’s consideration of the meaning of finding to the research
Affective reflection is an awareness of feelings in relation to specific perception, meaning or behaviour	Researcher’s consideration of their feelings about the meaning of the finding
Discriminant reflection seeks to assess the validity of awareness	Researcher’s consideration of whether what they see and feel is accurate
Judgemental reflection is an awareness of the value judgements being made	Researcher’s awareness of the values and biases they bring to the research and how these are influencing their judgements
Conceptual reflection is an assessment of how adequate the concepts are that are being used to make an accurate judgement	Researcher’s consideration of whether, given the weight of evidence, findings fall into the category of a) substantiated, b) likely, c) plausible, d) possible
Psychic reflection is reflection on the way judgements are normally made	Researcher’s consideration of the processes of arriving at judgements
Theoretical reflection is an awareness of the strengths and weaknesses of the approach to perceptions	Researcher’s consideration of the efficacy of the processes of arriving at judgements.

**Sources: Mezirow (1981: 12-13) and Savin-Baden and Major (2013: 76)**

Pollner (1991: 370) has defined reflection as “an ‘unsettling,’ or an insecurity regarding the basic assumptions, discourse and practices used in describing reality”. It therefore becomes a process that enables interpretivist researchers to transform their perspectives as part of an “emancipatory process of becoming critically aware”, thereby connecting with their own philosophical and personal stances (Savin-Baden and Major, 2013: 75). This corresponding shift from reflection to self-reflective awareness suggests that data collection and interpretation is therefore not a detached activity but rather a process in which I could actively construct knowledge (Finlay, 2002). Reflexivity thus becomes a more mature form of reflection (Page, 2015).

Cunliffe, (2004) asserts that reflexivity requires researchers to consider their existence, practice, and relationships, which I understand to mean that the corresponding state of liminality may be ambiguous and disorientating (Savin-Baden and Major, 2013). The suggestion by Turner (1967) that this is normal is therefore reassuring and, in practice, I have found that the use of reflexive practice has helped me to deal with uncertainty and crisis during this inquiry (Alvesson, 2013). That said, knowing when a transition has been made renders it difficult to establish what is being claimed by

the process of being reflexive. Consequently, Lynch (2000: 26) is critical of reflexivity as an “academic virtue and source of privileged knowledge” because it is often unclear what its implications are, if any. Recognising transitions, to my mind, continues to be difficult, but I decided that the process of reflexivity was critical if I wanted to lay claim to objectivity. I thus hope to counter any criticism of failing to adopt rigorous good practice.

However, in the quest for subjective objectivity, I felt that the process of reflexivity should connect with the wider purpose of my research (Ratner, 2002). Without this, it would have been of little value, with a tendency to become self-indulgent (Kobayashi, 2003; Peach, 2002; Lynch 2000). Accordingly, I chose to use ‘think pieces’ (Piantanida and Garman, 2009: 19) and ‘stretching exercises’ (Janesick, 2011) to focus on specific topics, ideas, or questions and to encourage deliberation on key areas as work developed. Included as Chapter Notes or Appendices as appropriate, these replace the more typical ‘reflexive journal’, which I felt might encourage navel gazing. In this way, I hoped that the reflexive practice supporting my study could operate at the four different levels specified by Alvesson and Sköldbberg (2009) – data-near, hermeneutic, critical, and researcher text authority.

Denzin and Lincoln (2011) encourage researchers to consider how they relate to their research based on their culture, values, and beliefs at the initial phase of designing qualitative research. Piantanida and Garman (2009: 59) however, are critical of formulaic approaches to developing a positionality and stress that initial reflexive practice should be given more than “perfunctory attention”. Various other authors (for example, Major and Savin-Baden, 2010; Willig, 2001 and Jensen and Allen, 1996) agree that the process of considering researcher influence needs to be comprehensive but emphasise that it should be an ongoing process. Thus, in line with my argument that interpretation begins with the inception of a study, I began my process of reflexivity at the outset with several exercises, which are presented in the Chapter Notes below. Those were undertaken to support a process of prospective reflection, enabling me to develop a positionality statement (Boud et al., 1985) This process then merged with one of inductively collecting and processing existing data as part of an empirical or ‘data-near’ level of reflexivity, to develop a conceptual framework that could support my inquiry (Alvesson and Sköldbberg, 2009).

Savin-Baden and Major (2013) assert that the process of reflexivity needs to be central to qualitative work. However, given that it may be argued that all research is interpretive, I think it an important aspect of professional research practice, whatever the epistemological and ontological position of

the researcher (Reiter, 2017). Nevertheless, my interpretivist position, based on phenomenological interviews, means by research process become one of (re)constructing the social reality in which my participants and I interacted making reflexive practice necessary to account for my choice among alternative interpretations (Alvesson, 2013).

Accordingly, different kinds of reflexivity were undertaken through the study, as depicted in Table 4.3 above and Table 4.4 below. However, as Smith et al., (2009: 149) caution: “a certain amount of reflection is a helpful and necessary part of phenomenological (and hermeneutic) inquiry...but too much reflection takes us away from the object of inquiry – ‘the thing itself’”.

**Table 4.4: Types of Reflexivity**

**Source: Adapted from Savin-Baden and Major (2013: 77)**

<b>Types of reflexivity</b>	<b>Key features</b>
Personal (Willig, 2001)	The process in which the researcher’s values, experiences and beliefs shape the research. Consideration of how the research has in turn shaped the researcher is critical.
Epistemological (Willig, 2001)	Exploring how the researcher’s belief system has shaped research design as well as the interpretation of findings.
As introspection (Finlay, 2002)	Using personal reflection as a form of self-revelation to gain in-depth meaning and insights.
As inter-subjective reflection (Finlay, 2002)	Examining meaning-making in and through the research relationship, and the ways in which that is negotiated between researcher and researched.
As mutual collaboration (Finlay, 2002)	Seeing participants as co-inquirers and encouraging reflexivity in them.
As social critique (Finlay, 2002)	Managing the power imbalance between the researcher and participants. Acknowledging the importance of changing researcher participants’ positions.
As discursive deconstruction (Finlay, 2002)	Exploring ambiguity and the way language is used, and how that affects presentation.
Endogenous (May, 1998;1999)	Exploring how communities construct their reality and how the researcher might be viewed by participants in the research.
Referential (May, 1998;1999)	Exploring knowledge that is generated as a result of having routines in social life disrupted by sudden changes.

#### 4.5.3. Writing as interpretation: the use of narrative

There are no universally agreed rules regarding the use of narrative in research (Bold, 2012). It is variously defined as a story (Polkingthorne, 1988), a way to describe, understand and explain social contexts and the human condition (Labov and Waletzky, 1997), or a series of tools that enable researchers to develop inspiring writing about social contexts (Czarniawska, 2004). Given the



interpretivist design of my study, narrative is appealing for several reasons. First, it aligns with my hermeneutic phenomenological approach by focusing on what captures the attention of each participant and considering “how they make sense of the event in relation to their own experience” (Bold, 2012: 18). Second, it is appropriate for case study and suits a longitudinal study in that it presents events as having a part, present and future, as well as allowing for people, action, certainty, and context (Yin, 2014; Clandinin and Connelly, 2000). It also helps to establish relevance – important for interpretivist research, which holds that realities are socially constructed – by highlighting the importance of context and the ways in which individuals are affected by contextual influences (Savin-Baden and Major, 2013; Bold, 2012). Lastly, it can express internal interpretations of phenomena externally, thus supporting sense-making by myself and by my participants as part of co-constructing meaning (Keegan, 2011; Squire, 2008).

The process of developing narratives for this study was therefore intended to act as an “interpretive space” which would support me in my exploration of the lived experience of my participants (Barone, 2001: 150). However, I note that, in common with many of the methods linked to interpretivism, different approaches are possible (Bold, 2012). This highlights the need for systematic processes that pay attention to the potentially multi-layered meanings that my participants may express (Reissman, 1993). Given the view expressed by Czarniawska (2004: 5) that individual narratives relate to society through a “repertoire of legitimate stories”, there was clearly an onus on me as the researcher to ensure that my ‘mimesis’ has relevance, but accurate representation is a challenge.

First, it is argued that personal interviews represent nothing but themselves: they are simply interactions that are recorded in some way (Czarniawska, 2004). Nevertheless, they are used in between 70 and 90 per cent of social research projects (Gubrium and Holstein, 2009). It is unlikely that they will decrease in popularity due to the problems associated with gaining access and with ethics that make other personal forms of research challenging (Riach, 2009). Secondly, the inherently social process of the construction of knowledge and power can be challenged, in that it suggests dialogue or a “mutual exchange of views” (Czarniawska, 2004: 47) when the later process of data analysis is typically researcher - dominant (Riach, 2009; Kvale, 1996). However, Keegan (2011) acknowledges that there is a trend towards co-creation, particularly in commercial research, which sees clients, consumers and other parties working together in more interchangeable and fluid relationships. Lastly, many authors raise concerns about whose voice is heard in a narrative. Smythe and Murray (2000) for instance, state that the researcher and the participant have an entitlement to

a story and will give different interpretations. Gready (2008) is concerned that participants have little control over how their stories are interpreted, to whom they are told and in what manner, while Dunaway (2006) suggests that individuals will recall events in different ways and that time therefore has an impact on individual and collective accounts.

Given these various concerns, it is apposite to clarify that, as this study was inductive and exploratory, I adopted the view that the interviews undertaken were not a “window on a social reality” but a “sample of that reality” (Czarniawska, 2004: 49). Given the significant range of definitions of what constitutes ‘narrative’ (for example, Webster and Mertova, 2007; Clandinin and Connelly, 2000; Labov and Waletzky, 1997; Reissman, 1993), I employed narrative in two ways. First, it offered me a way of developing and nurturing critical reflection as part of a process of interpretive phenomenological analysis (Bold, 2012). Second, it enabled me to generate research outputs that shifted the personal interviews from ‘interactions’ to ‘accounts’ (Czarniawska, 2004). Accordingly, my case write-ups strove to avoid lengthy and traditional narratives (Yin, 2014) and resisted ‘dramatizing’ and other features of fiction writing that might lead readers to question the soundness if not the validity of my research and interpretations (Yin, 2014). However, this decision was based on the purpose of this thesis and its intended audience, because there is also a compelling argument for ‘storying’ research as a way of making marketing studies more relevant to practitioners and students (Quinn and Patterson, 2013). As part of the objective of extending the impact of my study, I would therefore be interested to explore a similar approach post-doctorally.

## 4.6 Chapter Notes

These chapter notes explore my positionality, developed through a structured process of reflexivity. Updated content is shown in italics as part of the process of ongoing reflexivity.

### 4A Self as a multi-cultural subject. (Epistemological reflection, Willig, 2001)

#### **What is my race/class/gender/age?**

I am a ‘50-something’ white female. I prefer to say I am English rather than British because it gives me a clearer sense of identity (in the same way as the Scots and Welsh), although this appears to be controversial: Peev (July 2013) suggests I am more likely to be Eurosceptic because of this. However, I was a ‘Remainer’ in the Brexit referendum. As I have benefited from working in a variety of diverse, multi-cultural organisations in a range of sectors, requiring me to work at local, national, and inter-national levels I don’t believe I am insular.

In line with Marxist theory and socialist literature, I claim to be 'working class' in that I have always worked for a salary (although I do have benefits other than those available from the State, such as an employment-based pension). However, according to modern usage I will also be defined as 'middle class' because I have always worked in professional or management roles and possess 'human capital'. I have gained, and continue to gain, from tertiary education in differing roles, hold professional qualifications, and have some 'bourgeois' values e.g., aiming for job security and owning my own house. It has been important to me, during periods of significant poor health, to adapt in such a way that I could maintain a professional role that afforded me opportunities for personal development.

### **What are the issues I find most important?**

Injustice, inequality, and discrimination. Most of my career has been spent in an international NGO and in education. I have also been a trustee for a large charity based in Hertfordshire and proactively support other causes. A close friend once said, "you always wanted to change the world whilst I always wanted to have it". I feel this reflects my sense of self, even though my career has therefore been considered more vocational, which has required me to be more altruistic regarding rewards. *Reviewing this recently, and in view of current world events (Covid-19 being the latest concern), I am glad my career has left me with an easy conscience, and I remain optimistic that society can change for the general good.*

I think it is important that people have access to opportunity – socially, culturally and in business. Linked to this I have a desire for open-mindedness and tolerance. I feel that knowledge, experience, and resources, including money as a distributor of ownership, should benefit society as widely as possible. I also think rights carry responsibilities and that we have a moral obligation to contribute as best able.

As a manager for most of my career, I find solving problems is often central to making progress. I therefore like to understand how people make sense of situations and on what basis they make their decisions. I am fascinated by the way an individual's values and beliefs will affect thinking and decision making through processes such as hermeneutics and 'bounded rationality (Simon, 1991).

### **How do these issues influence my view of research?**

I am interested in the ethical dimensions of research: one of my workload commitments during this study has been reviewing applications for ethics approval. I am also interested in the academic/applied research debate – what is knowledge/truth, and can it help to solve business problems? I often question the political, personal, and resourcing issues that prevent us from

accessing knowledge. How do people make sense of their environments and how can we use an understanding of this to create better opportunities for all?

### **How has my education and work experience affected the way I think about research?**

My experience of work and life suggests that people have multiple realities – both that they will relate and interpret the same experience in different ways depending on their circumstances at a given point in time, but also that two people experiencing the same situation will process it differently. The decisions they may subsequently make are therefore based on different interpretations. *As a real-world example, my husband (who retired from the Police during this study) and I have often reflected on how witnesses to an event will give different accounts of what happened.*

I have often had responsibility for making key decisions and am interested in phenomena such as ‘bounded rationality’. I do not believe that individuals are entirely rational and think that emotions play a more significant role in decision making processes than is often acknowledged. I believe that our tendency in the UK to adopt a masculine culture in the workplace has exacerbated this in strange ways. For example, women are emotional if they cry or show care, but men are not regarded as such if they express anger or criticism.

Given my work and life experiences I think it impossible to undertake an experiment based on a positivist approach; there are too many nuances involved in the context of the topic I want to explore. Burrell and Morgan (1979) suggest that all social science approaches depend on inter-related assumptions about ontology, human nature, and epistemology, and define the researcher’s options as being either functional or interpretative. This requires deliberation in terms of appropriate choices and feels slightly restrictive, although I am comfortable saying I am an interpretivist because that orientation “rests on the assumption that social reality is in our minds and is subjective and multiple” (Collis and Hussey, 2014: 342). In terms of ontology, I feel attracted to realism because “reality exists, and humans may (at times imperfectly) know it” (Savin-Baden and Major 2013: 56). However, I feel my position on the continuum is where “reality is mentally and subjectively constructed” (Savin-Baden and Major 2013: 56). This also aligns more closely with the interpretivist view that research is value-bound and the researcher and researched cannot be separated.

I find it harder to define a corresponding epistemological view. My paradigm is constructionist/constructivist in that I feel knowledge is socially constructed and reality and knowledge reside in the minds of individuals (Creswell, 2013). *At the outset of the study, I was*

*unsure whether this meant my philosophical stance was Experientialism, Structuralism or Existentialism (As defined by Savin-Baden and Major 2013: 56). I felt I might be a combination of all of these and liked the idea of not committing to one philosophy. I wondered at the time if this might make me a pragmatist (Cherryhomes, 1992). This is something I continue to wrestle with, although a more recent introduction to the notion of phenomenology of practice (Van Manen, 2011), with its suggestion that an 'eclectic approach' is feasible, has made me feel more comfortable.*

**My conceptions of self and the other**

This relates to my individual perceptions of myself and others; it is my mental picture of who I am (Bailey, 2003). Crisp and Turner (2010) suggest we each have an individual self, consisting of attributes and personality traits, a relational self, and a collective self. Using this as a basis for self-reflection:

**Individual self**

The 'five big personality traits' are extraversion, agreeableness, openness, conscientiousness and neuroticism. McCrae and Costa (1987) find that these are universal irrespective of culture, so I have applied them to summarise my view of my individual self:

Trait	High	Low
Openness	I like trying new things and taking on new challenges; I enjoy working with abstract concepts.	I do not always like change and find it unsettling.
Conscientiousness	I pay attention to detail and usually prepare carefully.	I procrastinate and do not like too much structure.
Extraversion	I have a wide social circle and find it easy to make new friends; I enjoy meeting new people and starting conversations; I don't mind being the centre of attention as long as I am comfortable in the role that is giving me the attention e.g., in my job.	I usually think carefully before speaking; I do not like small talk; I am happy in my own company.
Agreeableness	I am interested in people and care about others; I am empathetic; I like to help/volunteer.	I am sometimes mean about people by homing in on their shortcomings.
Neuroticism	I get upset easily and often feel anxious.	I usually manage stress well.

As each of the traits represents a continuum, I would like to think I am a balanced person.

*Since the Covid-19 outbreak has put us all into lockdown, I realise that I am perhaps less extrovert than I had originally thought. I am comfortable in a more restricted social/work environment, but this is probably because I have a stable home life and the option to use technology for work and to maintain personal relationships.*

### **Relational self**

This refers to aspects of the self that are linked to significant others, such as family and friends. Chen et al. (2006) described it as self-knowledge that is linked in memory to knowledge about our significant others. It therefore exists at different levels of specificity and can be contextually or chronically activated. In terms of behaviour, it involves our motives and self-regulatory strategies when we relate to significant others.

In brief, I feel my high score for agreeableness has often led to me being in situations where I feel dominated. At worst this has led to bullying or abusive relationships. As I have matured, I have developed strategies to help me maintain assertiveness. These have included thinking carefully before I speak and preparation (see personality traits, above). *Work is not immune from these challenges, and I had to change principal supervisor during my doctorate.*

### **Collective self**

This refers to a perception of self as a member of a social category and is based on impersonal relationships that derive from a shared identification with a social group (Ashmore et al, 2004). I belong to many groups. I am white, middle class; I am a student and an academic; I am a volunteer; I belong to a drama group; I am a paid-up supporter of several different charities.

### **Locating myself to my subject and to my participants**

As both a novice academic researcher and someone who is new to some of the concepts and ideas I am working with, it is not clear to me at this point precisely where my boundaries will be drawn. I am also mindful that my participants may, consciously or unconsciously, move my boundaries depending on how they engage with the research process. *As anticipated, my experience with this interpretivist, inductive study has been one of constantly analysing and reflecting on choices and reviewing these continuously as the inquiry has developed. Thus, the conceptual framework has subtly shifted over time.*

I also need to evaluate how my involvement with my selected inquiry influences, acts upon and informs the research (Nightingale and Cromby, 1999). I am the person entering the arena and interacting with participants to develop a unique interpretation of a specific data set (Johnson, 1999). I am working with a purposive sample that has been recruited through my personal networks: I know all my participants but some at a more personal, social level than others. I need to consider how this may influence what I see/hear and how I interpret it. This seems to be especially important given that I am intending to use a narrative approach.

## **The ethics and politics relating to this research**

### **Ethical dimensions**

Savin-Baden and Major (2013: 319) state that “ethical approval and ethical conduct of research are inter-related concepts.” Bogdan and Biklen (1992) define ethics in the research context as being a set of principles of right and wrong that a particular group accepts, but this does not allow for the possibility of an imbalance of power in the relationships that I am constructing, as a researcher, with my research participants. I therefore like definition of ethics offered by Hoy’ (2004: 103):

“obligations that present themselves as necessary to be fulfilled but are neither forced on one nor are enforceable”. For me, this summarises what is meant by behaving ethically in the broadest sense: obligations that can be enforced are no longer ethical as they cease to be freely undertaken and do not, therefore, require researchers to focus on complex questions of morality, or what constitutes good and evil.

de Laine (2000: 2) observes that the trend in qualitative research is for “more participation and less observation.” She therefore considers that the gap between researchers and their subjects must be closed, meaning our relationships are necessarily more intimate. This requires us, as researchers, to demonstrate greater “authenticity, sensitivity, integrity and maturity (Lincoln, 1995 in de Laine, 2002: 2).” I believe this raises two direct challenges for me, given my research strategy:

First, I am using a purposive sample recruited through business networks, which include friends. These friendships are facilitating access to situations where personal, private, or confidential issues may be disclosed during my research. I feel this is particularly likely given the longitudinal design, which suggests that relationships with my participants are going to develop over time. This could mean a need to balance my ethical and professional obligations to disclose information and publish my findings, alongside the need to protect secrets that may be shared and not betray trust. It will also influence how I write about my research: I have already noted, in developing an initial set of profiles for my participants, how personal familiarity affects how you define someone. de Laine (2002: 2) refers to this as the ‘ethics of relationships’ and makes the salutary point that “the researcher that demonstrates empathy and care and engages on an emotional level with subjects can enter the ground of the therapist, but without the same training or back up support.” Reflecting on this I conclude that I must be clear I cannot ‘fix’ issues.

Then, the notion of “ethics of relationships” also raises the question of balancing the situational and contextual elements of my research: for example, my values, my ability to empathise and the use of intuition and interpretation – especially when developing narratives - alongside the ethical codes

maintained by the university. de Laine (2002: 3) suggests that these codes are “general and absolute” and make no allowance for “cultural, social, personal and emotional variations.” Certainly, the University complies with the Missenden Code (Daly, 2002: 35) which sets out a comprehensive code of practice. However, I do not perceive this as restrictive given my context and topic. Possibly, if I was working in a multi-cultural scenario, the points I have raised above linked with the need for ethics in relationships might give me more cause for concern. For example, I might be more easily misunderstood by someone from a different culture. However, I feel confident that it will be possible to work effectively with my participants.

Obtaining ethics approval for my study has included the necessity of obtaining informed consent from my participants, demonstrating respect for people (Savin- Baden and Major 2013). However, it raises an important set of questions, again, given the longitudinal nature of my study, regarding whether this consent has been fully informed and is actually given for the duration of the project (Savin- Baden and Major 2013). If I am to be a socially responsible researcher, I believe it would be appropriate therefore to check, on a regular basis, that my respondents are willing to continue to participate in the study. I also feel that my fieldwork has the potential to develop into ‘participatory action research’ (Whyte, 1991) and, as such, may move me from being a participant observer to finding ways of contributing that may be accepted once I understand the organisational culture and work systems of the different participatory organisations. At this point, I could start to develop the “full partnerships represented by participatory action research” (Whyte, 1991: 240). For obvious reasons, this would require me to seek revised informed consent from my participants and a correspondingly updated ethics approval.

*Whilst I have not so far pursued participatory action research as part of my research strategy I have – at least annually – checked with my participants by email or phone that they are willing to continue with the inquiry. I was embarrassed to discover, that my ethics approval from the university, which I had updated in line with changes to supervisors and the extended timeframe for my study, had expired in January 2020. Fortunately, I was writing up and no data had been collected during this period. I immediately contacted my ethics committee and successfully extended the permission for my study without penalty for this oversight.*

Guillemin and Gillam (2004) go beyond the ethical review process to propose the ‘daily practice’ of ethics. I interpret this as being transparent and open in all my dealings with my research participants. This will be a particular challenge as I intend using narrative as part of my process of collection and analysis, meaning I must consider the challenge of hearing what is being relayed and interpreting it faithfully (Andrews et al, 2013). There is a spectrum of opinion concerning narrative



approaches: Clandinin and Huber (2010) insist on the need to justify the approach; others feel that a reflexive or psychotherapeutic approach is acceptable, although this raises critical questions about the relationship between the researcher and the participants, particularly in terms of the power balance (Savin- Baden and Major 2013). The solution to this would appear to be emphasising respect for individuals and transparency of process in line with the suggestion made by Madill et al. (2000: 17) that “qualitative researchers have a responsibility to make their epistemological position clear, conduct their research in a manner consistent with that position and present their findings in a way that allows them to be evaluated properly.” This idea is further endorsed by the research organisation Vitae (see Figure 4.3 below), who suggest a range of ethical considerations from the treatment of individuals to transparency of process and efficacy of design, in order to ensure both a contribution to knowledge a sound methodological basis, and suitably qualified researchers.

It is suggested that a useful tool to guide researchers and clarify their ethical stance may be the production of an ethical statement (Savin- Baden and Major 2013: 335). Producing such a statement should enable a qualitative researcher to demonstrate an awareness of the power relationships within their research, lead them to strive for clarity of meaning whilst acknowledging the role of co-creation and consider data ownership and use: my statement is available as chapter note 4B in these Chapter Notes.

### **Political considerations**

The public sphere can be viewed as a social space that mediates between the political and private spheres by providing an arena for discussion and negotiation (Habermas, 1989). The political public sphere constrains and influences the political sphere through unrestricted and open public discussion about government and legislative issues and is therefore perceived as a characteristic of democracy. It allows for “discursive processes in a complex network of persons, institutionalised associations and organisations” and is therefore characterised by disagreement and discourse in which academia plays a significant role as a generator of information (Jensen, 2001: 136). By definition, research could therefore be seen to be political. It may sound naïve, but I had not really considered this up until now. However, in thinking about it, and having worked briefly in PR, it makes sense.



**Figure 4.3: Researcher Development Framework (Vitaefl: online, undated)**

Specifically, it is the evaluation of qualitative data that is viewed as a political and ethical activity (House, 1980; MacDonald, 1971; Stake, 1978). Evaluation is considered “something from which to learn and make changes” but as it is only a small part of the data that is considered when coming to a decision, there has been a shift from its being seen as an act of judgement to an assessment of what can be understood, improved, or changed about a specific situation or organisation (Savin Baden and Major, 2013: 273). It is suggested that, because values and beliefs are explicit and clear in evaluation to a greater extent than in other forms of research, questions of judgement and power within the research process become more critical (Savin Baden and Major, 2013). It is argued by Weiss (1991) that, by its nature, evaluation is political because evaluation reports form the basis for decision making and the programmes and policies that are evaluated result from political decisions. This makes sense when considered in terms of the view of Vestman and Connor (2007: 227) that “politics takes place at every level of social interaction” [and] “at its broadest concerns the production, distribution and use of resources in the course of social existence.”

In being mindful of this, I could argue that, realistically, few people are ever likely to read my work. However, as the process of academia is building knowledge step by step, I believe there is an onus on us all to either declare our hand or strive to be apolitical. Otherwise, readers who are unacquainted with the perspective of an author may repeat or use information out of context - or

worse -misuse of misrepresent that information unknowingly. Given the importance of citation to the academic community, this could result in the widespread adoption of information that lacks integrity.

## 4B Ethical Statement

I have made the following decisions based on Savin Baden and Major (2013: 335/6):

### **Ethics in efficacy of research design**

- I will acknowledge existing knowledge in my attempt to move the field forward.
- I will learn more about case studies and the use of narrative to improve my research activity.
- I will continue to reflect on what I am doing, how and why.

### **Treatment of individuals**

- I will communicate regularly, honestly, and openly with my participants. I will keep them informed of my progress and, if changes are necessary to the research design as I learn from my data, I will revisit our relationships to ensure that they continue to give informed consent to participate in my study.
- As I am using a narrative approach, I will ensure that my data analysis processes are rigorous and clear so that the presentation of my data has integrity.
- I will invite my participants to review and give feedback on their narratives so that their voice is heard.

### **Ethics in transparency of process**

- I include a positionality statement to define my perspective as a researcher (4A in these Chapter Notes).
- I commit to revisiting and reviewing my positionality as my study develops.

### **Ethics in plausibility**

- I will work with my colleagues and peers to develop a credible presentation of my findings and interpretations.
- I will endeavour to disseminate my work to a wide audience within the academic and business communities.

## Chapter 5. Narrative Cases

### 5.1 Chapter Overview

The three case studies resulting from the research conducted are presented in this chapter as narrative accounts, where ‘narrative’ is considered as a tentative ‘story’ (Polkingthorne, 1988). They should be viewed as personal interpretations, merging the content narrative (interview data) with a meta-narrative (report) as a way of making sense of the phenomenon being explored. Their content reflects my personal interest in the topic and my experiences with the participants (Reissman, 1993). The narratives are thus not exact records of what was and is happening in the small firms and do not necessarily reflect the wider world. They may nevertheless resonate with individuals who are witnessing or experiencing similar phenomena within their own business situations (Bold, 2012).

Whilst narrative is “central to human experience and existence” and provides the “opportunity to share the nature and order of events at particular times in history” (Bold 2012: 17-18), a wide range of approaches and views co-exist regarding what constitutes narrative (for example: Patterson, 2008; Labov and Waletzky, 1997; Reissman, 1993). Because my study adopts a phenomenological design to explore a specific social context, I have chosen to follow the five features of narratives identified by Clandinin and Connelly (2000) – namely temporality, people, action, certainty, and context – as a basis to guide the development of my stories in a systematic and rigorous way, and to allow readers to compare the three cases presented by this inquiry. The ‘qualities of a good story’ described by Sikes and Gale (2006) also fed into the development of the content narrative into meta-narrative, as part of the process of reflection and reflexivity required to generate meaning from the data (Clandinin and Connelly, 2000). In undertaking this process, I was conscious of a relationship between myself as a storyteller and my potential readers, who might further shape these narratives based on their own sense-making and experiences. Accordingly, I acknowledge that narrative is linked with human agency and that I have made specific choices in the retelling of those recorded here (Andrews et al, 2008; Squire 2008), which re-present experience rather than presenting reality (Bold, 2012).

Chapter 6 will critically explore the three meta-narratives presented here in the context of the contextual framework presented in Chapter 3.

5.2 “It is very vulgar to talk about one’s business. Only people like stockbrokers do that and then merely at dinner parties” (Oscar Wilde, *The Importance of Being Earnest*)

### 5.2.1 The recruitment of Participant P

I know Participant P through an acquaintance who is his life partner, although I first met him through business networking when I was working in a small firm in Hertfordshire between 2003 and 2005. Later, between 2012 and 2017, he delivered three catering events on my behalf, provided help with a family occasion at no charge, and provided the catering for a celebration on a food-only cost basis. I further worked a few ad hoc paid shifts for his business when extra help was needed. All this means that I have experienced his business from several perspectives.

P was first interviewed formally in July 2013.

### 5.2.2 Business fact file

<b>Sector</b>	Event catering
<b>Timeline</b>	Launched 2002 from home to supply upmarket ready meals 2003: 70 regular customers; free delivery within a 15-mile radius on minimum spend 2004: started full-scale event catering 2005: moved into first business premises 2007: relocated to larger, shared premises 2010: occupied own unit on a business estate 2018: sold business as a going concern
<b>Staffing</b>	Three, two of whom part-time; up to 20 regular casual staff Outsourced book-keeping and accounts Marketing support from fiancée, a freelance marketing consultant
<b>Overt branding</b>	Company logo; liveried van; website; business cards and stationery; aprons with logo

### 5.2.3 Personal profile

Passionate about food, P left the City and life in the fast lane in 2000, to set up his own business. He started out with a concept for upmarket ready meals but spent several hours sitting at Liverpool Street Station watching 2,000 people go past with no idea of how to turn his idea into a reality. It took another five years to start a cottage industry using just eight recipes. Given that stockbrokers risk missing a deal if they reflect for too long over a decision, that time-lag suggests that P felt the need to build his confidence and give himself the permission to make a significant career change that also coincided with a period of personal upheaval.

Since making the move, P has extensively developed and repositioned his company. He has expanded to provide upmarket catering for events and functions. Although he stopped producing exclusive ready meals for a period, as he shifted focus, he has since decided to resume them because that was his first passion and the kick-start for his business. This decision has been encouraged by shopping visits to Waitrose, so whilst there is a personal attachment to the concept, it appears that he has also recognised the existence of an available local market for this kind of product.

P has never shared what finally convinced him to launch his business but knowing that brokers are characteristically driven high-achievers, I wonder if he was simply unable to let go of his idea. He has spoken of personal challenges, which may have been the catalyst. Perhaps the commuting and frenetic pace of working in the City had burnt him out, encouraging him to shift to a role that would offer satisfaction and motivation while facilitating a better work-life balance. Whatever finally prompted him to act, it seems to me to have been a significant personal decision. Although he clearly values the freedom of a small, modish service business and has a passion for what he does, he does also show signs of missing the money and lifestyle associated with being a stockbroker.

When I see P socially, he is always the immaculately groomed man in our friendship group. Something of a clothes horse, he likes fashionable and expensive shirts and shoes and is always well co-ordinated. Similarly, in a work setting, he is always in clean, matching chef's outfits, and takes spare aprons and shirts to functions in case of getting hot and dirty. I have never noticed the smell of the kitchen, only of aftershave. When we talk about his business, he applies the same assiduous standards to his catering operation.

Appearances are clearly important to P. He serves only *"very special food"* and is *"not a white van man"* but uses *"a silver Mercedes as it is synonymous with quality"*. He is meticulous with all aspects of his service and, having witnessed him operating from both sides of a function, he pays close

attention to detail from planning the event through to its delivery. There is clear satisfaction in his sense that *“potential clients wouldn’t consider going anywhere else”*. However, the reality of maintaining standards sometimes seems to make P stressed during service. If a weakness is a strength overplayed, he does not always handle this well in real time and can become pedantic and sometimes irritable under pressure. My own experience as a catering manager teaches that it is normal for chefs to be exacting; they see what they do as an expression of themselves and do not readily tolerate deviation from what they perceive as their signature approach. As P puts it, *“the brand says who I am”*. However, I have long thought this is, in part, an act that chefs develop as part of an overall performance, a view consolidated in the process of teaching services marketing, with references to theatre as a metaphor for service processes. It therefore was not entirely surprising to find that the unit P occupied when he sold the business in 2018 was tucked away on an industrial estate and didn’t feel a particularly safe or pleasant location when I visited. To me, this was not congruent with the concept of *“very special food”* as a brand idea, even though it fitted with the notion of being ‘backstage’.

Despite the references to times when he had more money, P takes evident pride in his company and enjoys talking about it. It therefore seems natural for him to belong to a local chapter of a well-known networking organisation as a way of promoting what he does. However, he is also aware of his reliance on other service providers to be able to meet his customers’ needs and is selective about who he joins forces with. He partners only with SFs he believes to have a similar quality dimension to their business because he understands the need for his *“particular brand to make a statement that reflects what [a] business is”*.

P readily lays claim to being a ‘people person’. He clearly enjoys engaging with his customers, suppliers, and partners, but dislikes the paperwork and financial management. He also acknowledges that marketing *“doesn’t interest me really”*. Thanks to his social skills, P quickly became an integral part of my own social group and is considerate of other friends in that social setting. For example, he once rustled up a birthday meal for me and some friends on an occasion when I was too ill to cook myself. It is easy to see how he has successfully transferred his interpersonal skills into his business as a key strength, with his clients going away *“thinking I like this person, they listen to me, I can work with them”*. However, his friends also know, when he becomes a little nippy, that he is often over-tired or over-stressed, suggesting his basic character is quite consistent with his work persona.

P is open about starting a business when his marriage was failing, but as his business has taken off and his life has settled, he has successfully maintained a close relationship with his two sons, now

adults in their twenties. He clearly enjoys the social dimension and fun offered by activities shared with them, although I sense that an underlying tendency to focus on detail can also play out in his home life, meaning he can manage personal relationships closely. Clearly, this pattern of behaviour is well-intentioned and stems from a caring rather than suspicious nature, but it seems to make it hard for him to step back instead of being hands-on. This is a personal challenge that he recognises in a business context, where he acknowledges the need to delegate to his staff because *“they don’t do it just for the money, they enjoy it and I need to cut them some slack and have some fun”*. I believe this behaviour is partly a manifestation of low confidence, as P admits *“I’ve always approached things with a half-empty glass, but that’s just my way. I’ve seen turnover improve, but still do the glass half-empty thing ... can I retain turnover?”* I wonder to what extent this has made him risk-averse, in an unfamiliar setting, as demonstrated by taking a cautious and painstaking approach to the development and growth of his business.

Given his tendency to be meticulous and pay attention to detail, it is initially surprising that P’s exacting standards seemed to falter when he sold his business in December 2018. Close friends observed that he lacked focus, and he clearly relied on his partner to do much of the detailed work connected with selling the business. In his dealings with the buyer, he sometimes seemed to overlook his brand values of *“professionalism, quality, and sustainability”* and did not always seem able to follow through on negotiations. However, I believe this may have been a symptom of his confessed dislike of business administration. Moreover, everything was changing quickly, when his natural tendency seemed to have been to take his time in making business-related decisions until this point. Selling the business as a going concern was also a highly significant personal event because it enabled him to fulfil a long-held ambition of retiring to Spain, suggesting his attention was more focused on something of personal importance than on the detail of his exit strategy. I think that he was probably boldly looking to the future rather than being in the present. Moreover, if he is the brand and is departing, then that brand no longer exists as far as he is concerned.

#### 5.2.4 “To me, I am the brand and that’s why I am loath to give it to someone else” (Participant P)

##### 5.2.4.1 *What the brand means to P*

P states that his *“brand says who I am”*, making it clear he sees it as an extension of himself. It is also a way for him to make *“a statement that reflects what my business is”* and, given his exacting standards with his own appearance, it is therefore unsurprising that his corporate brand reflects *“the style, the package”* rather than focusing on catering services. In that connection, he is critical of branding in his sector, which he feels lacks distinctiveness, with *“many people doing similar branding*



*e.g., using the knife and fork logo*". He recognises that this may be due to the need to appeal to a wide target audience, spanning an age range of 30 to 80+ years, but seems to have tried to differentiate by selecting something *"quite simple and clean"* yet *"modern"*, which is where I think his own personality starts to emerge.

P feels his brand positioning has *"evolved and is not conscious"*. However, in admitting that he does not like *"complicated"* and has a preference for *"precise and simple"*, I think sub-conscious consideration has gone into the logo and strapline, and they have been influenced by personal choice and a sense of self. It also seems true that the brand positioning has developed organically over the lifespan of the business: P initially chose his company name because it was the house where he started his business, and as he *"wanted to be a cottage industry, so the clock at five past eight meant time to eat"* from the kitchen of the original home-based business. Subsequently, the logo and strapline have been *"tweaked"* and given a *"slightly different format with the knives and forks"*, allowing him to develop a *"simple and very clear logo"* that represents how he likes to think of his business: as *"smooth running"*. He seems confident that his positioning is appropriate because the logo and strapline have been *"the same for eight years and it works"*.

It is unclear when P's strategic mindset shifted to wanting a brand that portrayed a *"style, the package"*, but it seems to date from the move to his first business premises and has continued developing since. It appears that, as he has matured as an EOM, branding has become more of a priority, due both to its ability to differentiate the business for consumers – *"the more you have it the more recognisable it becomes, the more it stays in your mind"* –and for its positive impact on the business because of its ability to *"equate price with quality"*. P did not say when or how he created a set of brand values, which he says are *"professionalism, quality, sustainability"*, but acknowledges that *"you need a guide (and) it doesn't have to be a big brand"*, suggesting that the brand has some relevance as a strategic organising principle for his business. In this way, his *"excellent"* staff team are integral to the brand's ability to offer superior value propositions in that they give clients *"trust and confidence"*. However, whilst P appears to recognise that customer loyalty and positive brand associations come from the overall experience people have with his brand because staff are *"very customer focused"* and *"enjoy what they are doing"*, he maintains a sense that brand visibility is solely connected with him as the EOM - *"it's all me, isn't it?"*

Our research conversations suggest P recognises the importance of elements of brand equity and understands how those can generate increased revenue through brand recognition. And yet he does not believe that brand equity is an appropriate business strategy for his SF: *"it is certainly relevant for Vauxhall, I can see how it would work for them ... For small business, I don't see how it is*

*relevant*". I believe that P uses his brand as a tactical device to drive sales through differentiation, rather than as a business strategy to add long-term value to his company, a view confirmed by his telling me that, to him, a brand "portrays a statement of what the company is, the status of that company. It's a bit like having a vista business card and a professional one where the company is trying to say something about itself. If I like the statement, I'll be attracted to the company".

#### 5.2.4.2 What P does and how, to manage his brand

P admits that he does not do much research into branding in his sector despite having "noticed ... it is quite stereotyped" when he started developing his own brand. More recently, "as the business has grown", he has been considering ways to extend his overt branding by introducing new items such as "black bar cloths with '[Company Name], very special catering' embroidered on them". He does not have a company uniform, but his team use company aprons with his logo during service.

Asked about product or service changes, P describes himself as "not proactive, more reactive" and says he is more likely to see something and copy it than consciously plan changes. That said, he does "research other caterer's websites occasionally" and reads "magazines for the catering industry", activities that enable him to decide on the points of parity or differentiation that he wants to develop with reference to his competitors. He gives an example of "bowl food" being a trend for several years but stresses the need to apply ideas selectively since they may not appeal to all segments of his audience.

It seems that P's focus is on the food and service his company provides, and that he is less interested in such management activities as evaluating and improving his marketing. He says marketing "doesn't interest me really" and he "gets told" what should happen by his life partner, who is a marketing consultant. However, he takes responsibility for decisions such as pricing, and defines his approach as "random", not having a "fixed price because of what we do". However, in saying this, he is recognising that "food is the cheapest part" of his cost base and he must price flexibly based on staffing levels and his customers' expectations of the type of event he is staging.

P is confident that his customers always derive value from his services, stressing that they "get 150%", irrespective of "whether it is a small event for ten, a funeral for 20 or a wedding for 200". He has an informal system in place to monitor feedback and is "quite disappointed if we don't get a testimonial now". He links this sense of pride he feels in a job well done to the fact that he owns the business, which makes it "personal" for him. This seems to constrain his desire to grow the business further, however, even though he could increase his share of the local market: "my accountant says I could easily grow the business by 40% [but] I don't want to expand it further".

Having had the same logo and strapline for eight years, P has a consistent brand. He thinks it is important to focus on a simple and clear brand message that does not confuse potential customers, using the phrase 'private catering' to cover a range of event types from *"weddings to bar mitzvahs"*. Whilst his brand has evolved alongside his business from cottage industry to event catering, he feels it *"shouldn't be over complicated"* and *"likes it to be contemporary"* in line with current consumer trends, while simultaneously not making *"the older generation feel left out"*. In practice, that is *"quite hard"* to achieve with a single corporate brand because he targets *"lots of different audiences"*.

P believes that one of the most valuable marketing initiatives for his firm is his van. This displays the corporate logo, *"and is recognized"*, gaining him *"business from it being seen driving around"*. Beyond this, he says he would *"get an E"* for marketing because *"apart from cards and some flyers"*, he does not use a full range of "push" and "pull" marketing strategies. When talking about marketing, he made no mention of his website or the fact that he regularly attends business networking events but outlined plans to make further use of social media. He has *"a FB page, but it's not live"*. His plans to include *"sunny skies and swimming pools"* in its content did not seem congruent with his existing brand. P argues that his product is *"not like a machine"*, suggesting that branding for food demands careful attention because *"food is like art: you taste it, you get pleasure. Like art"*. In that connection, his claim that *"I am the artist"* might help to explain why he prefers face-to-face communication activities that enable him to be in control and be his brand in person. He feels this is a sustainable area of competitive advantage as it is the *"part"* of marketing he enjoys and *"wants to do"* when *"most caterers don't"*. He clearly feels strongly that creating a personal brand experience from the outset with potential clients enables him to have a *"successful hit rate with inquiries"*, which is a *"unique point"* that has enabled him to grow the business. However, the paradox is that this also limits his opportunities to grow the business as *"someone else"* can't be the brand – which is *"why the business is where it is"*.

The close relationships P develops with his customers allow him to understand what they do and do not like about his brand. He believes that *"for 60-75% of the work"* his company carries out, they *"get a testimonial back"*, which is key in telling him he is *"doing something right in terms of the food or quality"*. He has also *"had compliments"* about his website, even though he *"wasn't happy with the copy"* but clearly takes less interest in this dimension of his brand since he wants *"other people to do it"*, even while recognising that attitude is *"not always helpful"* because the brand is an extension of himself. While P does not have formal processes in place for monitoring his brand, he informally evaluates whether he needs to change anything based on learning from doing: *"at the end of each event"* he reflects on *"what went right/wrong and how we could have done better"*.

#### 5.2.4.3 The extent to which P 'markets with' his customers

When working with customers, P likes to be *"interactive, enthusiastic about what they want, not what I provide"* and works hard early in the relationship to establish trust, which is *"very important"*. He stresses that he wants his clients to *"go away at the end of a meeting thinking I like this person, they listen to me, I can work with them"*, indicating that he is using service as the basis for exchange, which is to be expected given the industry sector he operates in. However, P also seems to recognise that service provides a basis for sustainable competitive advantage, observing *"in the last six months six large companies have gone bust. The reason is because they took for granted the business that was out there"* and stressing the consequent need to work closely with the client: *"I've found that by talking with the client, getting the quote out within 24 hours and following up by e-mail that they will work with you"*.

There is a sense that value is co-created by multiple actors, including the beneficiary, as P refers to the need to get clients to *"talk about what they want"* and treats *"every client differently"*. His staff team are *"brilliant"* and very *"customer focused"*, enabling events to run like a *"well-oiled machine"*. His clients also *"offer their services"* to pass on business cards and to endorse his firm through word-of-mouth marketing, suggesting that they are part of a network of resource integrators co-creating value with P and his team. It also seems clear that P's clients derive unique value from their exchanges with his firm, since a high number of testimonials are received after events – something P acknowledges that *"people don't have to do"* yet *"they do because it's how they feel"*. This process seems integral to P's value proposition and is something he *"wants to keep"*, even though that compromises his ability to grow the firm in the longer term because of his fundamental belief that he is the personification of his brand, and therefore acts as the instrument through which value co-creation is co-ordinated. I wonder if this may have had an influence on his perceived lack of interest about the exit strategy: once the sale was agreed the brand was perhaps no longer of interest because it was no longer his?

#### 5.2.5 Feedback from Participant P

*"After selling the business some 16 months ago I can concur with the following:*

*I treated my business as a means to live in that as long as I earned enough to fulfil my lifestyle that would be sufficient. I never had the courage to expand the business, even at its height of success, the last three years of owning it, [which] came from the fear of being let down by staff, and frankly not being able to manage the stress that came with this type of business. BUT the pleasure I got out of it far exceeded the pleasure of earning six figure salaries. I think this was due to the fact I trained myself, started something from nothing, and ended up exceeding my personal expectations. Many felt I should have expanded; to this day I am glad I did not.*

I was a control freak in many ways, sometimes detrimental to my staff and myself. I found it hard to let go and wanted to do everything myself clearly not possible in the latter years.

I never had an exit strategy, and even to the last six months of ownership did not put a value on it...

My eventual price level on what the business was sold for was about 50% less than the recommendation derived from talking to an acquisition specialist and an online rough valuation. I didn't want to be moving abroad still owning a business, despite some thoughts of managing it from overseas (only a cursory thought though).

*Further feedback received by e-mail in February 2020 and reported here verbatim:*

I was lucky enough to have a website from day one. In 2003, a friend built one for me, which gave me a huge amount of confidence, which was shortly followed by an online shop, though this was for orders only 2003-2006-ish, additional website around 2014, new website 2018. 2014 website was around the time the business started to become more successful ... though at all times I never really interacted with the website and left it to J ... I think I was subconsciously afraid of it, not technically but that perhaps I wasn't confident of the image it was portraying. I also used the Yellow Pages from day one.

5.3 “Success without hard work is like trying to harvest where you haven't planted”  
(David Bly, US Democrat Congressman)

#### 5.3.1 The recruitment of Participant N

I met Participant N at a local business networking organisation in May 2015, when I had been asked by Participant P to represent the business of one of his friends in absentia. My motivation to accept the invitation was the opportunity to ask those present to take part in my PhD research. N alone volunteered out of a room of about 30 people, saying he hoped to learn something useful about branding in the context of his business.

As a result, N is the practitioner I know the least well. Although I feel we have developed a rapport, we have not yet met socially beyond our interview conversations – a key difference when compared with both my other participants. This has affected me in two ways: I am concerned about being a

nuisance because there is not an existing friendship to trade on and I therefore probably communicate with N less than I should to maintain a meaningful dialogue.

N was first interviewed formally in July 2015.

### 5.3.2 Business fact file

<b>Sector</b>	Landscaping and garden services
<b>Timeline</b>	1989: working in his father's shrub nursery; Team Leader, garden maintenance  1990: Launched as a one-man band with one customer; grew business to 80 customers  1991: Bought first van which broke down beyond repair; had to sell possessions and use credit card to raise enough money for deposit on a new van  2004: Employing a full-time team of 12  2007: Moved to first commercial premises  2017: Constructed a new office on a local trading estate from which to serve over 200 regular customers
<b>Staffing</b>	12 full time staff; 7 of whom are full time gardeners
<b>Overt Branding</b>	Company logo; liveried vans; staff uniforms; website; business cards and stationery; advertising signs at completed projects

### 5.3.3 Personal profile

I arranged my first meeting with Participant N by telephone and e-mail, as a result of which we agreed to use his business premises after work on a summer evening. Throughout our initial communications, I was struck by how courteous he is. As I have got to know him better, it is clear he has deeply held principles driven by core values which include a strong work ethic, honesty, and reliability. He admits to considering "*integrity a way of life and not something just to do when someone is looking*". Although this gives him professional gravitas, it is also apt to make him seem serious. I had a sense that he weighed up carefully every decision he made. As an example, he is the only participant who asked me questions about the ethics approval process before agreeing to take part – although this may be due to not knowing me beforehand, which puts our relationship on a more formal footing than those with my other two participants.

At our first interview, N had evidently been working since early morning but was clean and smart in the company livery which he designed. Details like this seem important to him and he works *“very hard to see myself and my company from the eyes of other people”*. He went on to wash his hands before making me a welcoming cup of tea, but I noticed that his nails and hands were already clean and in good condition. This struck a chord with me: my grandfather, a professional gardener, was painstaking about keeping his hands presentable because he said no-one wanted to shake a dirty hand. It gave me a strong sense that appearances matter to N as indicators of his professional standards and quality. This translates into his view of a *“top quality job”* and he gave examples of how his standards permeated all aspects of his business operations from employing *“nice men”* and using *“top equipment”* through to having *“standardised letters”* and an *“infrastructure in place”* that allowed him to document his business activities meticulously.

N clearly strives to achieve professionalism in a sector that is often perceived as having significant numbers of ‘cowboy’ traders. He is critical of the *“one-man bands”* that undermine his sector’s overall reputation and strives to stand out by creating *“a culture of care and pride for the job”*. As part of this approach, he places emphasis on good manners, recruiting *“intelligent men. The sort you can invite in and leave alone in your lounge for a minute while you pop upstairs”*. He admits the culture must be *“continually driven”* and clearly takes responsibility for leading by example. Accordingly, when I sent a small thank-you gift after the interview, I was not surprised to receive a pleasant and humorous e-mail message of thanks in return. Maintaining such an approach in a *“tough business”* did not seem to be easy, however, and N confides that he *“wouldn’t employ someone I wouldn’t stand a chance against in a physical fight”*. He goes on to explain that an actual fight would never happen but it *“wouldn’t be pretty”* if there were disagreements with members of his staff team. That said, he clearly values good staff, also saying one should *“always pay your men a little bit more than anyone else would”*. Nonetheless, I get a sense that his strong principles create high expectations, which may sometimes lead to friction or frustration when trying to find staff who can meet his standards in a sector where pay levels probably limit his recruitment pool. I also wonder if he finds it hard to manage disappointment, and that his honesty may perhaps create inflexibility. His conversation was peppered with such comments as *“she is straight as an arrow”* (referring to his office administrator), but he also feels he works in an industry in which the *“participants or the protagonists are their own worst enemies”*, reinforcing my notion that people who meet his standards are hard to find, with the knock-on effects this has on maintaining his business operations.

Whilst an admirable quality, N’s high level of personal integrity seems to translate into an inherent need to control all dimensions of his business, although that may also be linked to being in a *“tough*

*business*” and aiming to do better than the competition. He has systems and processes in place that enable him to track everything that happens, and his attention to detail is remarkable: he was able to tell me what any gardener was doing, anywhere, on a specific date. This suggests he is quite autocratic and, whilst he laughed about giving his team regular *“pep talks like they do in the army”*, I wonder how challenging he would find it to receive suggestions for alternative ways of doing things.

N is scrupulous in his dealings with his customers, telling me that he has a *“unique time management system which is not used by other companies because basically I invented it”*. He wants his customer service to be *“beyond reproach”* and sounds stern when talking about enforcing company policies. He gives the example of staff using company mobile phones and tells me *“chatting to your friends while booked onto a customer’s clock is stealing their money”*. He links these policies directly to being able to charge a premium for his services and takes evident pride in the fact that he retains *“probably 80%”* of his customers as repeat business. This is significant because there are *“a hundred garden firms in [a certain Hertfordshire town] alone”*. He is unequivocal that the only reason people may not choose his is price and says that a decision not to employ his firm *“genuinely confuses”* him, likening it to making a choice between a Ford and a BMW.

I believe N is a slow and deliberative thinker. He likes to write in his spare time and seems both creative and analytical. He read me a couple of passages from his writing that he thinks might, at some point, turn into a *“how to run a business”* type of book. He also shared the information that he often enjoys working late at night on his writing, sometimes with a glass of wine or a whisky, a respite from the challenges of running his business. He talks about not being a *“genius but a pragmatist”* and the value of *“experience”* which helps him adapt his business operations and procedures as *“knowledge evolves”*. It occurred to me that he finds running a business a solitary endeavour and, despite being customer focused and *“listening to people”*, likes time apart to sense-make, and maybe even practice catharsis.

Despite entrepreneurship being a family trait (his father ran his own business, and his brother is a sole trader in a different sector), I have a sense that N feels burdened at times by the responsibilities of small business ownership. He talks about *“man management”* [being] *“exhausting”* and the elation of *“serendipitously”* replacing a senior member of staff who decided to leave. He feels *“for the first time that I am not alone”* since the new person has successfully taken on the responsibilities of a foreman. This has enabled N to focus on *“business development and sales and brand development”* and, as he talks about moving his business to new premises being *“equivalent to moving your car from 2nd to 4th gear”*, I sense excitement and optimism about the future. Here is an



EOM who clearly wants to *“up his game”* and felt like a *“pot-bound plant trying to run a big company from a broom cupboard”*.

As we continue to work together, I wonder what role his business plays in N’s life. He has family to whom he is committed and for whom he goes the extra mile. He also enjoys occasional high adrenaline holidays - yet seems to work over-long hours. N genuinely appears to be 100% dedicated to the needs of his business and it strikes me that he possibly finds it difficult to be casual about anything he cares about.

5.3.4 *“The trick is to make it so they cannot stand the thought of going anywhere else”*  
(Participant N)

#### *5.3.4.1 What the brand means to N*

N says his brand prompts people to think *“it’s a good company”*. He notices a *“lot of mistrust”* in his sector, and I think his high personal standards are firmly at the heart of a corporate brand that he wants to appear *“more professional than everyone else”*. Linked to this, he is critical of competitors who do shoddy work, wanting his brand to suggest *“reliability”*. He also wants to help his customers *“distinguish between value for money and cheap”* because he wants to be *“taken seriously by serious customers”*.

N feels his brand positioning gives his firm *“recognisability”* in the *“same way that you know what you’re going to get when you walk into a McDonald’s anywhere in the world”*. He takes *“pride”* in seeing his *“vans driving down the road”*, and feels the *“outward image and ... self-image”* his brand creates are important for two reasons. First, he wants his customers to be *“well looked after”* and suggests this starts with their seeing his firm *“over and over again”* and believing *“it’s a good company”*. Then he believes his team need to be part of a *“well organised, branded firm”*, suggesting that his brand supports him in creating a consistent and productive culture, unified around brand values. It is therefore no surprise that he believes the presence of a team in staff uniform is *“one of the most important parts of branding”*, or that he reinforced that by asking me *“when was the last postman you saw not in uniform?”*

The brand allows N to differentiate his business. A *“direct quote that (I) hear every day”* from customers relates to his *“wonderful website”* and he is often told *“when you guys turn up it really looks like a professional outfit”*. This has a positive impact on the business to counter the hourly rate being *“generally higher than other people’s and yet (customers) keep coming back .... because they think it’s worth it”*. However, in a market that is price sensitive, strong branding does not enable N to achieve as high a price point as he would like because *“even the higher end of the market is*

*competing with an army of amateurs who seem to be willing to work for nothing except a 'daily wage'."*

N says his brand values are *"reliability"* and *"value for money"*. He makes a clear distinction between value for money and *"cheap"*, explaining that his firm is *"a problem-solving company and people come to us when other people don't know how to solve their problems"*. The principles underpinning N's approach to business – a strong work ethic, honesty, reliability – shine through. He aims to *"always do a top-quality job"* and has a visible brand presence that includes *"a fleet of well maintained, good-looking vehicles"*, a *"very, very heavy internet presence"* and *"quality paperwork"*. He stresses that everything is of the *"sort of quality you don't get from one-man bands"* but is also critical of big companies that allow standards to slip, saying *"we keep our vans neat and clean...I can't believe the top brands driving around looking filthy"*. Appearances are clearly important in delivering a professional service, where *"people buy from people"*, but the brand also seems to be a thread that runs through the business, allowing N to make continuous small improvements to his business operations by introducing *"policies when things go wrong"* or developing *"Ts and Cs"* that enable his firm to *"learn from mistakes"*.

N believes his *"entire firm"* is involved in developing superior value propositions for consumers through a *"culture of care and pride in the job"*. Accordingly, he adopts a *"zero tolerance"* approach to ensuring that his brand is consistent. He leads from the top by *"wearing the uniform myself"* because *"it's very hard to tell a member of staff to do something that his own manager is failing to do"*. However, rather than take sole responsibility for brand management, he believes in *"instilling the passion for the brand in the management team so I don't have to monitor it day in and day out"*.

Our conversations led to the conclusion that N recognises the need for *"constant management and monitoring"* of branding strategy, which is therefore used by the firm to organise its operations and support marketing communications. Although he clearly wants his entire team to take some responsibility for the process of brand management, N prefers to undertake business-critical activities himself. For instance, he explains that he manages the firm's relationship with job agencies that contract-out work to ensure *"there is a pattern of response every single time. I am the person doing that. That is our branding. It's why the agency sends me two or three jobs a week – they know what they will get"*. So, it seems that the brand is bigger than N himself. Even though it reflects his personality and personal values, it also helps to organise his staff team, creating a culture that supports the firm to offer a value proposition that communicates quality and trust. This differentiates it in their market. However, the brand is also the basis for organising their business practice, making it a single organising principle.

In that connection, N is aware of the elements of brand equity and understands that those allow him to generate more revenue, even in a price sensitive market. He is actively using his brand to add long term value to his company by ensuring his consumers *“cannot stand the thought of going anywhere else. And if they do, and they happen to be disappointed, you will be the next point of call”*. This enables him to achieve approximately 80% repeat business and to have expanded his firm’s working capacity to more than 2,000 jobs per year in a strongly competitive local market.

#### *5.3.4.2 What N does and how, to manage his brand*

N believes that delivering the benefits his customers truly need takes *“constant management and monitoring”*. In that connection, he says he is *“usually fairly in touch”* and *“knows all his customers”*. If he has not met someone face to face, he talks to them *“on the phone or by e-mail”*, using dialogue to explore and understand their needs. He believes this is crucial to being *“a problem-solving company”* that can help customers when *“other”* firms cannot, implying he also knows what his competitors do and how he can differentiate his service. On that basis, he appears to make conscious decisions about the services he offers, in order to ensure appropriate points of parity and differentiation in his sector. He believes *“you can’t please all people all the time, but you can please some people some of the time”* and gives examples of how he has developed *“policies when things go wrong”* that enable him to reinforce his brand values of *“reliability”* and *“value for money”*. The cultural ethos of the firm is to *“be the best, because you are what you do - and if you don’t do it well then you are nothing”*. This seems to be a strong differentiator in a price sensitive market, since *“customers keep coming back...I get e-mails...This one just says “N?” There are a hundred garden firms in [the town in question] alone, so why is he still chasing after me to go?”*

As his business grows, N continues to use customer feedback to support branding-related decisions. As an example, he outlined how *“just listening to people”* had enabled his business to improve its website, which he felt was *“a bit amateurish”* as a brand touchpoint. In the past he has experimented with customer surveys but found them to be *“very, very time intensive”*, so now he *“just asks”* customers for their views. Despite this informal approach, there is a clear sense of continuous improvement because of these exchanges, with N acknowledging that *“things I would have said five years ago I wouldn’t dream of saying now”*. Whilst there is no *“specific system in place”*, dialogue seems to have enabled the business to develop various operating procedures that do the *“job of remembering all the dozens of niggling things people would never remember”* about which customers might nevertheless *“get upset”*.

The firm makes a significant investment in overt branding. N spends *“about 2K per year on uniform”*. The vehicle fleet is *“all branded”* as is *“outgoing paperwork”*. He has also adopted the use of *“small placards”* at locations where work has been completed and feels that to be a successful advertising

initiative. *"Lots of firms put big placards up and they get taken down because they are obnoxious"* whereas his remain in situ *"because they are big enough to read only if someone is interested"*. However, N also uses his brand internally as the basis for supporting a corporate culture *"of care and pride for the job"* with his *"entire firm"* involved in delivering the value proposition to the customer. N has a *"hands on attitude"* to his business and is focused on a range of management activities including customer service, business operations and marketing. He has *"high-tech communications"* in place, which enable him to catch customer calls when *"most garden firms miss calls"*. He also has an *"infrastructure"* that enables him to *"find anything from any point in ... the history of my company"* and uses his own *"unique time management system"* to manage his teams. Over time, he has developed a standardised *"quoting structure"*. These changes seem highly integrated with his understanding of his brand and its value proposition. Linked to this, there is a clear sense that N exhibits overall marketing leadership qualities. He talks of giving his team *"pep talks"* and recognises that the firm's *"culture of care and pride in the job"* must be *"continually driven"*. However, this is not a solo responsibility, and he expects his management team to have a *"passion for the brand"* to help ensure all the company's activities align with the brand, *"day in and day out"*. More recently, N has been able to recruit a foreman, freeing time in which to focus on *"business development"*. I felt it significant that, as a result, N included *"brand development"* as something he would be able to focus on more as an EOM in the future.

N told me: *"if I never get another phone call, I will still have a business due to high retention"*, indicating that his customers are able to derive value from his proposition. He estimated that *"80%...keep coming back"* and attributed that success to his *"attention to detail"* allowing him to *"pick up when things go wrong"*. He believed that gaining repeat business rests on doing *"whatever it takes to keep the customer happy, even if that means costing money"* but added the caveat *"within reason"*, from which I deduce that he expects integrity and honesty to be a two-way process as part of being *"taken seriously by serious customers"*. Admitting that *"it is a cliché"* he quoted the adage that *"people buy from people"* and seemed to take pride in saying his customers regularly fed back that his business was *"more professional than everyone else"*. He attributed that to ensuring that customers were *"well looked after"* by his team adding that *"we had to up our game"* to sustain business expansion in 2018. Growing the business has not been straightforward and it is clear there have been financial and staffing challenges, but N believes that *"in the long run, the turn of events will actually be for the better"*.

N has a consistent brand with a clear and simple message that focuses on quality. His brand has evolved alongside his business, targeting both B-to-B and B-to-C consumers. He believes that his

“very heavy” internet presence” is one of his most valuable marketing activities and one that he regularly updates. To develop his latest website, he used an external service, something he admitted to being a “bit scared” about because the first version was “built from the love I have for my business and this time it will be someone who doesn’t have the love”. At this point in the firm’s life, it seems that N frets about losing influence over his brand, or its essence being diluted, telling me its “*je ne sais quoi*” comes from the love of the business”.

In addition to the website, he uses networking as a “pull” marketing activity and believes his fleet of vehicles creates a useful brand presence because “people see you over and over again and then people think about you”. He emphasises that this is particularly useful when working with commercial customers, because security is important and “they expect you to arrive in a branded vehicle whether it’s schools, factories or data sites”. Like many smaller firms, he makes limited use of “push” marketing beyond the placards in potential consumers’ line of sight at locations where work has been done. Meanwhile, N believes personal contact and a swift response to inquiries is a critical part of his total marketing activity, stressing the importance of a “response e-mail” and delivering a quote “within 24 hours”. He stresses that there is a pattern of response “every single time” and that he is “the person doing that – that is our branding”. However, there is a clear sense that whilst his input may be critical in creating the initial brand experience for consumers, he is not the only person involved in this process during a customer’s relationship with the firm. He has a clear expectation that the staff team are involved and that, if they do not get it right, he will “change it”. He holds “the occasional tool-box meeting about these kind of things” and will “pursue the deviation – not the right word – or the person creating the deviation to [the point of] disciplining them sometimes”.

Maintaining close contact with his customers enables N to understand what they like about his brand. He feels that “the sheer length of time” he has been in business allows him to “spot problems coming where we used to walk into them” but makes it clear that he is “very much involved with all customers”. Communication is clearly two-way: “I just listen, and people say things”. Finding the management time to do that enables him to make such branding-related decisions as changing the website or developing new business processes. So, whilst there is no formal or “specific system in place” for monitoring his brand, he informally evaluates whether he needs to change anything based on continuous dialogue with consumers and staff and takes explicit responsibility for monitoring his brand.

#### 5.3.4.3 *The extent to which N 'markets with' his customers*

N believes that one of the most important things relevant to repeat business is to “do whatever it takes to keep the customer happy [and] ask them [about their experiences]”, suggesting ongoing dialogue is maintained throughout the relationship.

N works hard to establish trust from the start of a new client relationship because there is a “*lot of mistrust in our business*”. It is a continuing process in that he is “*very much involved with all of my customers*” and “*always assumes you are being scrutinised because sometimes you are*”. Positioning his firm as a “*problem-solving company*”, he wants to be taken “*seriously by serious customers*”, implying that he is using service as the basis of exchange, as one would expect in the sector in which he operates. However, he asserts that this is unusual, highlighting a general lack of reliability among competitor firms, which leads to the “*biggest complaint we hear: people just don't come back*”. Thus, competing on service provides his firm with a strong basis for competitive advantage. He finds that “*every time an agency tries us out, before we know it, they are ringing every day*” and attributes this to having standard procedures in place that ensure a prompt and professional follow-up to inquiries. Typically, he was retaining 80% of his customers in 2015 despite the many opportunities for them to go elsewhere at a lower cost.

I formed the impression that value was co-created by a variety of actors, including his customers who must clearly define their needs if a “*problem solving*” company is to be successful. The staff team were identified as making a significant contribution, in that they were all involved in developing value for the customer, and there was “*zero tolerance*” of any deviation from the corporate culture. N did not explicitly say whether his customers were part of a network of ‘resource integrators’ by generating, for example, word of mouth, but some of them did allow him to place what he described as ‘placards’ in their gardens as promotion for the firm that had done that good job. It was clear that business networking also played a role in creating value for the firm, suggesting that N saw it as part of a wider supportive network in its hinterland.

The level of repeat business and the sustained relationships with the agencies that could generate multiple leads both suggest that N’s clients derive unique value from their exchanges with his firm. In relocating his business in 2017 to support further growth – an undertaking N later described to me as “*equivalent to moving your car from 2nd to 4th gear*” – he has been able as an EOM to concentrate more on business and brand development. The move was specifically intended to “*evolve the business.... further*” and I therefore believe he will continue to develop brand management practices that can support long-term value co-creation.

### 5.3.5 Feedback from Participant N

In a post-hoc de-briefing meeting on 30th September 2020, Participant N provided the following feedback about the narrative case above, which is reported verbatim:

“It was a most interesting read – in a positive sense. I don’t remember saying all the things you have quoted, but they are definitely the kind of things I say and topics I talk about, so it is probably pretty accurate. Reflecting on being in business as a result of reading this, I think the thing that has changed most is my ability to think more clearly. When I was younger, my Dad used to say I had woolly thinking. Now I believe I am a clear thinker and make better decisions as a result”.

N and I also discussed the Covid lockdown. He was positive about both the furlough scheme and his ability to borrow money from the government as a small business. This has enabled him to pay off debts and significantly reduce his interest payments. He feels the business has been in a good position since the original lockdown as a result of managing to maintain all his significant contract work, by virtue of working 14-hour days with one staff member. He has also used the time to reposition his business and is focusing on major contracts in future, having relinquished domestic work that was less profitable.

## 5.4 “To be successful you have to be out there - you have to hit the ground running” (Richard Branson, serial entrepreneur)

### 5.4.1 The recruitment of Participant M

Participant M was recommended to me in connection with the hosting of a social event, which called for a small marquee. Since then, M and I have collaborated on two more events, which demanded distinct themes and treatments. M proved to be an excellent partner in delivering both, having expanded his business proposition to be a ‘one stop hire’ for all the necessary extras. Subsequently, M generously supplied a marquee at almost no charge for a celebration hosted by me in June 2017.

My first interview with participant M took place on 21st September 2015.

### 5.4.2 Business fact file

<b>Sector</b>	Marquee and party equipment hire
<b>Timeline</b>	2010 Launched business working with his grandfather

2012 Finalist, Hertfordshire Business Awards

2013 Finalist, Hertfordshire Business Awards; bought first van and independent storage unit

2014 Won Hertfordshire Business Awards; bought a second vehicle

2016 Bought a third vehicle; extended team to cope with demand; moved to larger storage unit

2017 Finalist, Hertfordshire Business Awards; repositioned business

2018 Grandfather 'retired'

2019 Started to develop second corporate brand

**Staffing** Head count of ten: full-time Head of Sales; full-time sales assistant/administrator; two Heads of Operations to run teams; six marquee installers

**Overt Branding** Company Logo; Liveried vans; Staff Uniforms; Website; Business cards and stationery

#### 5.4.3 Personal profile

Still in his twenties, M was the youngest participant in this study by about twenty years. He says he is not a *"classically clever guy"* and didn't *"aspire to go to university or college"*. Instead, his father set him up in business at the age of 18 with the minimum of equipment to start a small marquee-hire business, encouraging him to *"see what he could achieve"*. Since this modest start, M has consistently grown his business and has *"doubled every year in terms of customers and turnover and it's that way again"* (in 2015). As his revenue increased, he consistently re-invested to expand the business, and is *"always buying new things, which is why I kicked my Dad out of his storage unit"*. In doing so, he re-positioned the business from *"where Dad started with marquees to a one-stop shop where you can get anything for any kind of event"*. He is also not afraid to change his mind about opportunities that previously did not seem appropriate for his business: in March 2017 he explained how he *"was looking into venturing into large marquees...(to) do weddings and large functions"*, something he had previously written off because of the level of competition in that segment of the market. M had also been short listed three times for the Hertfordshire Business Awards Young Entrepreneur award since his start-up, winning the prestigious award in 2015, the judges recognising that his firm *"has its customer service as the heart of the business. It is their core value"*.



The business trajectory and awards successes suggest to me that M has tenacity and takes setbacks in his stride, which was evident in 2017-18 as the business went through a spell he defined as *“puberty”*. He is also not afraid to be ambitious and proactively seeks opportunities to develop the business, telling me: *“I want my company to be like Apple. If you want an iPhone, you go to them. If someone wants a marquee, I want them to come to me”*. His business focus can sometimes make him appear to have an old head on young shoulders, yet he clearly draws on family support, suggesting that he is amenable to listening to others whose opinions he respects. In turn, this suggests he is not isolated as an EOM but can access support from people to whom he feels close. In fact, on the day of our first interview, M texted his mother so she knew he was OK and at what time he would be home for dinner. I have the impression that his is a close-knit family: he is clearly respectful of his mother, his father set him up in business, and his grandfather used to work with him. I got the sense of a strong support base, willing to put time and effort into helping him to make his way. This may be one of the reasons M comes across as a genuine and reliable person.

Although M likes the occasional holiday or night out, for someone who has experienced success whilst still young he does not seem to have a reckless or fast-paced lifestyle. He bought himself smarter cars during the period of our collaboration but confided that this was partly because *“my insurance has gone down since I’ve been driving for a while!”* Generally, he seems more interested in helping his business to grow than on spending money on himself, as evidenced by the *“12K pay-cut”* he took in 2018 because he was *“backed into a corner financially”*. He was similarly matter of fact on the phone in April 2020 when we talked about the impact Covid-19 was having on his business, telling me had put his *“first house purchase on hold”* because *“now isn’t the time to spend the money”*.

M is confident but not arrogant. I have teased him about the company’s branding, including the uniform shirt being pink, which a friend of mine says only a confident man can wear. M is suitably nonchalant, telling me *“most of our customers are women, even if it is the husband’s fiftieth or the son’s birthday. Pink stands out”*. It seems he is happy to do what is best for his business, without ego, and will make decisions based on evidence balanced with intuition. I suspect he tries to approach problems with a fresh perspective rather than slipping into a comfortable way of thinking as an EOM, as demonstrated by his swiftly trying to reposition his business from B-to-C to B-to-B during the pandemic to maintain a revenue stream. He is clearly not easily deterred by external factors and even admits to being *“stubborn”* in pursuit of business goals.

M talks with authority and knowledge about his business but without sounding cocky. I have the impression that he can self-regulate his behaviour, even if unconsciously, thereby avoiding his

personal strengths becoming weaknesses. This view is borne out by observing M in practice: for example, his listening skills are highly developed. In my experience, he seems to become part of an event, not taking over from the host, but actively listening to get a real feel for what could be done better. This enables him to make constructive suggestions. He then has the business 'savvy' to make his ideas easy to execute. That enables him to upsell, but the results are so positive there seems to be no resentment from his customers about their increased spend. Throughout such negotiations, he is enthusiastic but politely assertive, exhibiting his 'can do' attitude. However, he does not assume he has all the answers and readily acknowledges that he learns from customer experiences through *"feedback, feedback, feedback"*, which he solicits *"in multiple ways to appeal to different sorts of customers"*.

As I got to know M better, it became clear that his personal good manners and values translated into his rating customer service very highly as a critical factor for his business. He wants his brand to convey *"reliability"* and offers *"a 100% money back guarantee"* to *"enforce"* that. He aspires to be *"fun but professional"* and explains friendliness is not being *"jokey"*, which risks losing the *"professional edge"*. This is clearly an aspect of business management he takes seriously, as demonstrated when he explained about producing *"a handbook"* which is *"mainly about how to deal with customers"* so he can *"create the wow factor"*. He talks with passion about this, explaining that he wants his customers to think *"wow, I didn't expect that. I expect it from Disney but not from a local company"*, and clearly understanding that delighting customers makes it harder for them to go elsewhere. He has an admirable ability to sound upbeat and positive even in challenging business situations.

That is not to suggest that M is unrealistic in his outlook: he is no Pollyanna. On the contrary, my sense is that he is very disciplined about his business. During the summer months, he works long hours, dictated by the nature of the service. At an age when many individuals would be distracted by socialising, he seems able to retain his focus. That said, he clearly juggles work with activities he enjoys, telling me of an occasion when he received *"half a dozen"* testimonials in response to an e-mail while *"going to the gym, which is only a seven-minute journey"*. I think his highly developed capabilities with social media and information technology have been central to growing his business, enabling him to exploit opportunities even as he has stepped back from the day-to-day operations to a more strategic management role. In this sense, he is typical of his age group, and that technological aptitude facilitates dialogue with his customers as part of a deliberate set of business initiatives. I was therefore not surprised to receive a request to upload a video clip which told the judges of the Hertfordshire Business Awards, why he should win: in M's view it made more sense for his customers to sell his firm than for him to do it.

During this study, M changed his mind about entering a new segment of the market. In September 2015, he told me: *“there isn’t much competition out there in the small marquee market. In the big football pitch sized one there is loads, which is why I don’t want to go into that market”*. By March 2017, however, he was *“looking into venturing into large marquees so I can do weddings and large functions”*. I believe this decision has come about as M has developed his confidence as an EOM, but also as he has evaluated and learned from his business operations. It is clear he has initiated and developed business activities that have enabled him to reach that point, and it will be interesting to see what impact this has on brand management within the business. He clearly still aims to become the market leader, telling me that *“within ten years”* he wants consumers to be saying *“that must be a [name of his firm] marquee”* making him the *“go-to person in Hertfordshire for our part of the industry”*.

5.4.4 “I want my company to be like Apple...a kind of global awareness but only in Hertfordshire” (Participant M)

#### 5.4.4.1 What the brand means to M

M wants to be *“like a sniper”* with his brand. He aims to focus on *“reputation rather than brand awareness”* because he is *“geographically restricted”* and believes that means branding is *“not as important as it would be to a company like Apple, which needs to get its brand to everyone”*. Accordingly, rather than *“trying to be all things to all people”*, he has a clearly defined target market segment, typically women who are organising family events. He accordingly chose pink branding because the colour *“stands out”* to that audience. Beyond that, he takes the view that he does not need to differentiate strongly against competitors because there is *“not much competition out there in the small marquee market”*. He also feels he is *“incomparable”* through his product and service because consumers have *“all the event services under one roof and only one contact for it”* and that this is a more effective tactic than advertising heavily.

M has therefore positioned his brand to appeal strongly to the sort of individual in a network who will *“tell five of her friends how great we are, and this will really have a snowball growth effect on our business”*. As the EOM, he therefore seems relatively detached from his corporate brand. It does not seem to be explicitly linked to his personality, apart from a light-hearted touch that he defines as *“fun but professional”* and which relates to the enthusiasm and passion he feels for what he does.

He wants his brand to represent *“recognition to the customer of the service we gave them”*, by which I believe he means that he wants it to be associated with reliability and the *“wow”* factor – the two brand values he identified. M defines the latter the *“way we communicate before, during and after an event”*. In saying this, he clearly understands the need to align his business operations with his

brand, saying *“every marquee is there not for one customer but like an open day – it’s an experience for 50-60 people”*. Accordingly, M’s brand appears to be a single organising principle; for instance, to emphasise the *“reliability thing”*, he does a *“100% money back guarantee, so all the risk is on me”*. He finds that this converts the *“sit-on- the- fence customers as there is no risk to them”* and thinks that is important because *“people are spending upwards of six figures”*.

By 2017, M had decided to reposition his business to include large marquees as he was *“turning away a lot of business”* and larger marquees were more profitable in that they *“require the same vehicles and labour but the charge cost is up to ten times greater”*. He has accordingly been developing a new website because he gets *“90% of the business”* that way. Part of this work would include repositioning his brand to appeal to *“weddings, Indian weddings etc., and attract wider audiences without repelling anyone and without trying to be all things to all people”*. M therefore recognised the need to start differentiating his business to appeal to different segments of the market. Without trying to be *“all things to all people”*, he would aim to appear as *“experts in birthday parties, anniversaries or Indian weddings”* by using *“different landing pages”*. In this way, he uses technology to enable his firm to respond to search-engine optimised search results and online advertisements. This gives me a sense that his brand is being used as a single organising principle to support the customer journey, a process that starts with his response to sales leads and threads through the entire customer experience.

M’s staff are critical in delivering the right value proposition. He generally has a *“high retention rate”* and believes that if they *“enjoy what they are doing and agree the values and direction of the brand”*, that will have a *“positive impact”*. He also believes his suppliers help to create his value proposition, telling me: *“we have people with experience in every field”*. He is unequivocal that his network of staff and suppliers helps to *“position us as experts and helps with trust”*. However, he goes further to speak of proactively engaging with his customers to co-create his brand, clearly seeing them as part of a value network. He sends at least three or four automated e-mails after events to invite *“ideas or constructive criticisms about what we can do to help or improve”* and makes it *“clear that this is the only way I can think of to improve the business and that to have constructive criticism helps me learn”*. This reinforces my sense that his brand is used as a single organising principle for the firm. In similar vein, he developed a referral scheme that encouraged and rewarded his customers for providing leads that converted into business. He also created a mechanism somewhat like a *“trade agreement”* to develop a *“two-way relationship”* with companies supplying large marquees as a way of transitioning into this part of the market.

When talking about brand equity, M defined it as *“everyone calls a vacuum cleaner a Hoover”*. Similarly, he wants everyone to *“define a marquee with a party in it as a [the name of the firm] party”*. He says that his *“prices are 20% more than others...because our service is far higher”* and recognises that he creates higher revenue because of the elements of brand equity, linking the high levels of testimonials he gets to creating a ‘wow factor’ and driving word-of-mouth marketing. Given that he is focused on achieving *“recognition within the whole county”* it seems paradoxical for him to tell me that *“there isn’t really anyone”* managing his brand. Not least because M clearly has the knowledge to recognise that achieving brand awareness through *“reputation”* and *“word of mouth”* is cheaper than advertising; and understands that the ability to be in the *“back of people’s minds and come to the forefront”* creates competitive advantage. I suspect, as the youngest entrepreneur in the study, he may be a ‘digital native’ who does much of his marketing online. As he is hands-on with his business operations, he perhaps does not appreciate the role he plays in brand leadership.

#### *5.4.4.2 What M does and how, to manage his brand*

In 2017, M explained that he had *“done a lot of market research locally recently as I wanted to know who’s out there, what we are up against, pricing etc.”*, so he could develop and expand his business. That did not appear to have been a one-off activity and he *“probably”* does some research *“two or three times a year”*. Last year that had taken up *“about twenty days last time”*, suggesting a comprehensive effort, as confirmed by his description of a mystery shopping exercise in which he pretended *“to be having a wedding and, out of 20 –not three or four – quotes[received], there wasn’t one I would trust with 10k”*.

Since starting the business, M appears to have consistently looked for ways to develop his branding. These have not all been overt or communications-oriented but have also included the buying of equipment and creating of partnerships with suppliers, to gain competitive advantage. In terms of overt branding, he had *“got rid of the print ads and gone online”* when he took over the business, because *“dad was quite old-school with marketing”*. His staff team wear a pink uniform consistent with his brand identity, and he has continued to build his online presence as part of developing his business and brand, rebuilding the website to reflect changes in his business model.

Regarding product and service changes, I had the sense that M was continually developing and improving what he did, as evidenced by steadily developing from marquee hire to *“a one-stop shop, where you can get anything for any kind of event”*. He saw this as a strong point of differentiation, because the *“small marquee firms don’t have all the complimentary things I have – carpets, furniture, third party contact”*. More recently, he has decided to venture into larger marquees because he has been *“turning away a lot of business”*. This represents a change of market strategy, as he had previously said that *“in the [market for] big football pitch sized ones, there is loads”* of

competition. *“which is why I don’t want to go into that market”*. In terms of parity or differentiation against his competition, M observed that *“people are doing similar things to us, but they are pretty poor”*. Whilst he thought his firm *“could be better”*, he was clear that they are in fact better than the competition, emphasising that his is the *“only award-winning company”* in his category as well as the *“only one with a full money-back guarantee”*. His ability to perform better than competitors gave him the confidence to take on a new challenge and he seemed excited about entering a new market, telling me he needed to *“let people know we are the new guys come to stir the pot a bit”*. That creates a mental image of M as a boxer playing by Queensberry Rules – a fair fight, even while he slips, bobs, counters, and weaves to gain a strategic advantage.

To achieve such an advantage, M spends regular management time reviewing and refining his marketing, aiming to *“evaluate and modify things on a weekly basis”*. He also prioritises what he focuses on, highlighting marketing such activities as Adwords [now Google Ads, an online pay-per-click platform for short-form advertising], because it is his *“best performing marketing”*; though *“expensive”*, it is his *“main source of business”*. Overall, he chooses to concentrate on online marketing, such as *“Adwords and Facebook”*, because he can thereby be *“more focused on who I am targeting, rather than newspaper, radio etc. that would usually be used for brand building”*. He is clear that his communications strategy is to increase word-of-mouth promotion because going *“down this route”* should make it *“cheaper to run the business”*. He seems to know instinctively that his marketing spend for such activities is *“12-15k per annum on just Google”* and says he would like to cut *“that down to 12-15k in total”*. He also recognises that *“people who are referred [by word of mouth] spend about 20% more on additional items”*. To maximise this opportunity, he has organised his marketing efforts around encouraging repeat business through a *“big referral scheme”* with a *“prize-pot giveaway”*.

In our interview conversations, M talked of the need to *“show value”* and how this is *“quite difficult”* in his market. He recognised that price is *“important even to people who are not price related”* but didn’t *“want to be a commodity”*. He therefore understood that what he had to do was to create *“experiences and memories and occasional hangovers”* for his clients rather than be perceived as putting up *“a tent in their back garden”*. He was accordingly *“very stubborn”* on price, saying his prices *“don’t really move - well only one way”*. That was because he was clear about offering a *“full service”* which his competitors do not, so customers who did not want to pay could *“make someone else bankrupt”*. Accordingly, his prices were set at a level *“20% more than others”*.

This stance appears to have been successful. M’s customers derive value from his service, as demonstrated by the *“testimonials backing up our service”*. The business was receiving so many of

those that they *“had to take some down as they were slowing the loading of the web page”*. However, dialogue and interaction have been ongoing. He uses an *“automated service”* that *“manages feedback and makes us seem listening and attentive”*. Beyond the website, M solicits feedback in *“multiple ways to appeal to different sorts of customers”*. He has a Facebook page which is aimed at the *“younger section”* of his market and uses Instagram. Within *“several days”* after an event, customers *“get an automated email asking more detailed questions about the whole process from initial inquiry to setting up the marquee ... If they don’t open the first one, they get another”*.

Despite extensive use of pink as a corporate colour, M observed that brand consistency was his *“biggest weakness”* and it *“could be three different companies”* sending a quote, on the website or in emails. He feels his *“product is our image”* and he therefore doesn’t *“focus on brand awareness as such”*. However, as he moved into a new market with the larger marquees, he could profile quite distinct segments. He recognised the need to have different content on his landing pages for dealing with different audiences, for instance Asian weddings and corporate events, because *“they need to be treated a bit differently”*. Accordingly, he has found that a single brand is *“confusing”* for his prospective customers and has *“created two brands”* that are distinct. What was once the core business has been joined by a new brand and the existing one has been repositioned to attract the new audience for large marquees.

The branding of the new brand *“has been designed to be linked [to the existing brand]”* because M feels that being seen to be *“part of [his firm’s name] is important for reputation”*. He sees his new brand as a *“better kind of Ryanair”* and has set up the quoting system to be online via a *“webform that gives all the detail needed to produce a quote”*, making it *“minimal fuss”* to manage. To ensure the brand is a *“bit different”* and to give it *“more substance”*, he has put himself in his *“customers’ shoes”* by *“videoing events and filming the set-up from beginning to end”*. This has been expensive to do, but M sees it *“as part of my marketing spend”* and has *“definitely won business through the video”*.

The process of repositioning the business and creating two brands has not been straightforward. While building a new website in 2018, M lost the *“search history on Google that used to bump us to the top, which really impacted cashflow”*. The consequences were significant. First, M moved from *“worrying about how many vans to buy”* for the new business to wondering whether they *“would make it to July”*. The plan became using the new brand to *“keep (the business) going”* during the transition because that would permit M to retain staff in a seasonal industry in which *“most marquee companies pack up”* in November and re-start in April. The benefits would be two-fold: first, the new brand could turn over £300-400k per year; second, that would allow M to use the

*“smaller jobs” to “focus on developing a good culture and team” who could be deployed “as needed” with large marquees, keeping costs for the new business low. At that stage in the firm’s development, however, M suddenly “went from a team of ten to a team of five in five weeks”, losing two staff as a result of poor performance and three who “went to the pub on payday and didn’t come back”. Single-minded in his pursuit of his business goals, M “had to let them go” because to “take them back would give the wrong signal”. He therefore recruited an “Admin Assistant part-time [who] kept the business afloat” while he rolled up his sleeves and went back to erecting marquees. Compared to the same period of the previous year, he put up twelve fewer, but turnover was £10k higher.*

This upturn was attributed to making marquees *“sexy”*. M displays *“attention to detail”* and a *“fine eye”*. The ability to be a *“one-stop-shop”* has set customer *“expectations so high”* that the business is perceived as an event organiser rather than installers of marquees. The website and extensive use of online/digital marketing activities are consequently integral to the company’s success. Online, M exploits cookies to follow people who land on his website and uses this to tailor his marketing communications through *“social media, FB and Instagram”*. He feels that using online platforms to *“follow up and keep in touch”* improves *“conversion”* because it manages to show customers that the firm *“cares”* and does not want people to *“miss out on having a great party”*.

However, despite sophisticated use of online marketing, M believes that the most valuable marketing activity is word-of-mouth, observing that *“people are doing this without us asking, which is fantastic and has to be the ultimate goal”*. The company has *“comments endorsing us”* that are *“often in depth”* and uses the *“testimonials everywhere”* in its marketing, *“whether it’s print, online or social media”*. M feels this gives his business credibility by providing *“social proof”* that they are not inventing their claims, demonstrating they are *“the clear choice of who to spend your 1k or 10k with”*. He exploits word-of-mouth promotion deliberately with younger audiences by providing a *“big Instagram board made up with a hole in the middle and a hashtag so friends at the party can upload photos”* at eighteenth birthdays. To be able to use this, people must provide their e-mail addresses; in return, the company gives *“prizes for the best or most outrageous ‘photos,’”* thereby gaining access to one of their *“biggest markets”* by using *“their language”*.

Similarly, he has developed a *“referral scheme”* that gives the provider a *“£30 High Street voucher of their choice, and the referred client a 15% discount”*. To encourage referrals, he has *“also introduced a prize-pot giveaway”* in which people who refer more than twice are entered in a *“grand raffle for things like an iPad, a spa day”*. He sees referrals as being of particular importance to developing his business because *“people who are referred spend about 20% more on additional items”*. He



therefore feels it is *“his job to keep reminding them”* and has adopted a systematised process of communication that encourages customers *“by e-mail so they can even refer someone before their event”*.

M has clearly been monitoring his brand across the different channels he uses for marketing and communications and modifies *“things on a weekly basis”*. He has also invested heavily in using customer testimonials as the *“ultimate feedback”* and so has invited feedback in *“multiple ways to appeal to different sorts of customers”*. He is *“quite clear”* that this is the *“only way”* he can think of to improve the business and that *“constructive criticism”* plays a critical role in helping him to evaluate performance.

#### *5.4.4.3 The extent to which M ‘markets with’ his customers*

Throughout our conversations, M has explained that ongoing dialogue with his consumers is critical for three reasons: to help him learn by providing *“constructive criticism”*; to promote the business through clients telling their friends *“how great”* it is; and to ensure he creates experiences that align with his brand – the notion that people at a party will say *“oh well, this is [the firm’s name] because it’s going so well”*. Communication is therefore a key focus, with M *“using different landing pages”* on his website to appear to be the expert in *“birthday parties, anniversaries or Indian weddings”* without *“trying to be all things to all people”* and using an automated e-mail system to send messages at key points in the purchase process. He is clear that his customers value the *“personal touch”*, and that dialogue needs to continue as the business grows; otherwise, it will lose its *“uniqueness”*.

M appears to work hard to establish his firm’s reliability in a sector that does not always enjoy a positive reputation. He says he often gets *“panic phone calls on a Friday when [competitors] don’t show up for a daughter’s 18th birthday”*, stressing that his *“far higher quality and service”* is a source of sustainable competitive advantage. He recognises, however, that his market is price-sensitive, and he therefore must *“show we are personal”* by offering customers *“time ... listen and give them ideas on how to improve their event”*. He comments that the firm receives a lot of customer feedback about *“how we listened and gave advice while others were quite bland and generic”* and attributes his high referral rates to providing an *“incomparable”* service that *“creates experiences”*.

M tacitly understands that value is co-created by multiple actors and has developed a deliberate strategy of seeking word of mouth communication to exploit the agency of his customers. He proactively uses his customers as part of a network of ‘resource integrators’ by asking them to refer his business to their friends. As he sees it, *“every marquee is there not for one customer but like an open day – it’s an experience for fifty to sixty people”*, so he rewards referees with cash, prizes, and

discounts for their friends. He explains that he involves customers in all his marketing activities and, whether *“its print, online or social media”*, uses *“testimonials...everywhere”*, making sure they are *“in depth, with name and location”* to provide *“social proof”* of how popular his firm is for potential new customers, in order that they can have confidence *“even at the quoting stage”*.

M has furthermore developed a network with other firms in his market. He initially established a reciprocal relationship with *“companies that do large marquees”* to take *“the leads that they turn down”*. In return for any business secured, he paid these firms up to £50, which compares favourably with *“the average cost of £75 acquisition per customer”* that he usually incurs. Once he had taken the decision to move into the large marquee market, he could *“sub-rent from these partners”* to ease cash flow, allowing him to spread the cost of investing in his own marquees over *“three phases and not shell out £60K”*.

The level of referrals and the fact that he has sustained relationships with firms that could be competitors, suggest that M has found ways for his collaborators to derive unique value from their exchanges with his firm. In relocating his business to support further growth, an undertaking M describes as being *“like an adolescent going through puberty with growing pains”*, this momentum has not always been easy to maintain. M talks candidly about the tensions of having to be *“on the ball every second of the day”* and being *“acutely aware”* of having to decide how much growth is sustainable, saying *“the more time I spend on it the more I can grow, but the bigger it gets the more demand there is to run the business”*. As an EOM, he is also clear about the need to keep a close eye on both his brands now because *“Google will recognise they both want the top slot”*, effectively forcing them to compete. He is clear that, whilst his corporate brand remains *“fun and friendly”*, it and the original brand offer different value propositions, and he can *“transition people both ways”* depending on their expectations. His focus is now to *“pressure the staff more on where the brand should go”* with *“building a decent culture”* a high priority to take the business forward.

#### 5.4.5 Feedback from M

In a telephone follow-up conversation on 12th October 2020, M was in good spirits despite having to make redundancies because the Covid-19 ‘rule of six’ seemed likely to remain in place until March 2021, having a lasting effect on his new domestic-hire brand. He intends to use this quiet period to focus on separating his two brands properly and putting in place the appropriate marketing support for each. He is part of the way through designing an app to sit on his website, which will calculate a price based on a customer’s requirements and produce a picture of the finished product to show what they will get for their outlay, thereby reducing the amount of manual pricing work.

During our conversation, he offered the following feedback on the case write-up, reported here verbatim.

“I am a control freak, and it is interesting that this comes through in certain parts of the case study. It is also interesting to see how my attitudes and decisions have developed over time. My biggest challenge has always been that I have ‘battle plans’ but not a ‘war plan’. I find it hard to see the long-term picture”.

In response to my comment that “There is nothing wrong with having an emergent strategy”, he responded: “This is true, and I think sometimes I need the challenge of changing things because I get restless. I know I will go to the next stage with the business because I won’t sit still. But working with you has also shown me that my thinking has developed due to what is happening around me in the market”.

## 5.5 Themes emerging from the narratives

Axial coding (relating collected data to defined categories and subcategories) was used as a supplement to the narrative analysis, for its ability to refine coding to “achieve its best fit” (Saldaña, 2013; Glaser, 1978: 62). This was an iterative process to develop themes from the data – an experience like the “hermeneutic circle” described by Alvesson and Sköldbberg (2000: 53). The axial coding procedure is summarised in Table 5.1 below.

As a result of that coding, the following six themes were initially identified for critical discussion:

- Entrepreneurial Owner Managers (‘EOMs’) have differing views of their brand. It is not always an extension of their personality and they may be quite detached from it. This relationship with their brand seems to be moderated by their business goals, but also tempered by their personality.
- A variety of Brand Management Practices (‘BMPs’) are adopted. The level of their sophistication depends on the branding capabilities of the EOM and/or those within his firm.
- EOMs are creating interactions with their customers at the brand interface which encourage purchase or loyalty. There is clear evidence of dialogue and co-creation.
- Small Firm (‘SF’) brands are being used as communities of interest that leverage the social interactions of the actors in the network. This process ranges from simple engagement to the benefit the business through to the sophisticated use of activities to build brand

reputation and presence. This process appears to be moderated by the marketing capabilities of the EOM or his firm as a whole and, specifically, their social media capabilities.

- An emphasis on providing exceptional customer experiences means that EOMs are using the brand to guide decision-making within the firm. However, the extent to which the brand is a strategic organising principle varies. Consequently, the degree of brand orientation adopted by the firm also varies.
- The EOM's staff team is integral to providing customer experiences that match or exceed customer expectations. EOMs are aware of the potential for reputational damage if the brand fails to deliver its promise at its different interfaces.

**Table 5.1: Summary of themes emerging from the narratives**

Theme	Participant P	Participant N	Participant M
The way the EOM views his brand varies and it is not always an extension of himself.	<p>Close personal affiliation to his brand; places emphasis on personal selling.</p> <p><i>[My] brand says who I am.</i></p> <p><i>To me I am the brand and that's why I am loath to give it to someone else.</i></p> <p><i>A statement that reflects what my business is</i></p> <p><i>The style, the package – It's all me, isn't it?</i></p> <p><i>Portrays a statement of what the company is, the status of that company.</i></p> <p><i>It's a bit like having a Vista business card and a professional one where the company is trying to say something about itself.</i></p> <p><i>I am the artist</i></p>	<p>Can see his personal stamp on the brand – his values of integrity, reliability, honesty. But he appears one step removed from it.</p> <p><i>I work very hard to see myself and my company from the eyes of other people.</i></p> <p><i>Recognisability.</i></p> <p><i>Reliability.</i></p> <p><i>Consistency in the same way that you know what you're going to get when you walk into a McDonald's anywhere in the world.</i></p> <p><i>I think it's pride.</i></p> <p><i>I think when people see it, they think it's a good company.</i></p> <p><i>it's that you are established and not just set up, which is common in my business.</i></p> <p><i>An outward image and a self-image.</i></p>	<p>Appears detached from his brand which is there to serve the business. Split into two brands during the period of this inquiry.</p> <p><i>Recognition to the customer of the service we gave them.</i></p> <p><i>I want my company to be like Apple.... A kind of global awareness but only in Hertfordshire.</i></p> <p><i>I want to be incomparable.</i></p> <p><i>I want to be known as the company that creates experiences and memories and occasional hangovers.</i></p> <p><i>Our product is our image.</i></p> <p><i>Position us as the experts in the field, the only company customers need to come to.</i></p>
EOMs adopt a range of BMPs although their level of sophistication in brand	BMP 6 & 10* - limited application.	BMP 6* limited; BMP 10 not discussed.	BMP 6* – split his brand during cycles 3 and 4 of interviews.

management varies.	Not all dimensions are covered for the other items.	Not all the dimensions are covered for the other items.	BMP 10* – seeks brand equity and monitors it.
EOMs appear to be aware that they do not own the outcome of the brand (brands have value only if and when consumers buy them). Thus, they invest in creating consumer interactions that encourage purchase and/or loyalty.	<p>Business is <i>personal</i>.</p> <p><i>For 60-75% of the work his SF does they get a testimonial back.</i></p> <p>Working with customers, P likes to be <i>interactive, enthusiastic about that they want, not what I provide.</i></p> <p><i>Talk about what they (customers) want. I treat every client differently.</i></p> <p><i>I don't find it hard to build rapport.</i></p> <p><i>Face to face, I am the happiest at. Once I get my foot in the door and can talk to them and make them feel special. I want the most successful hit rate with inquiries, which involves me seeing the clients. That's the part I enjoy and want to do. Most caterers don't – that's the unique point.</i></p>	<p><i>A very high percentage – probably 80% of my customers – are repeat customers.</i></p> <p><i>I have a hands-on attitude to my business, so I am very much involved with all my customers.</i></p> <p><i>I get e-mails. This one just says "N?" There are 100 garden firms in [name of town] alone, so why is he still chasing after me to go? We want them to trust us.</i></p> <p><i>I think one of the most important things to do with repeat business is to do whatever it takes to keep the customer happy, even if that means costing money.</i></p> <p><i>If people are happy, they will come back. The trick is to make it so that they cannot stand the thought of going anywhere else. And if they do, and they happen to be disappointed, you will be their next point of call.</i></p> <p><i>People talk to me and tell me things. You know your branding is working when people say "when you guys turn up it really looks like a professional outfit".</i></p>	<p><i>On the day we set up my staff such as T can deal with any questions. We have people with experience in every field.</i></p> <p><i>They (customers) also get several automated e-mails ... positions us as experts and helps with trust.</i></p> <p><i>A full money-back guarantee, which puts their mind at ease.</i></p> <p><i>Feedback, feedback, feedback.</i></p> <p><i>Every marquee is there not for one customer but like an open day – it's an experience for 50-60 people.</i></p> <p><i>I want them to say "wow, I didn't expect that".</i></p> <p><i>Friendly and professional; clearly know what we were talking about.</i></p> <p><i>Give them time, listen and give them ideas on how to improve their event.</i></p>
SF brands are being used as communities of interest that leverage the social interactions of the actors in the network	<p>Talking about building the business:</p> <p><i>like an inverted pyramid, one job led to a referral for the next.</i></p> <p>His clients also <i>offer their services</i> to pass on business cards and to endorse his firm through word-of-mouth marketing: something</p>	<p>Member of Business Networking club.</p> <p>Did not mention referrals or WOM.</p>	<p><i>You probably got an e-mail. We sent it to about 300 of our past customers. I wanted to know people's reasons (for using them) so we could use the copy for our new website.</i></p> <p><i>In all our marketing, whether it's print, online social media, our</i></p>

	<p><i>people don't have to do but they do because it's how they feel.</i></p> <p><i>I joined Business Networking last year (2012) and it has been a terrific help.</i></p>		<p><i>testimonials are everywhere and are in-depth with name and location. Now doing video testimonials as well.</i></p> <p><i>Every time we work with someone, she can tell five of her friends how great we are.</i></p> <p><i>Getting a big Instagram board made up with a hole in the middle and a hashtag so friends at the party can upload photos.</i></p> <p><i>A big referral scheme. We have a – not a trade agreement – but approached some companies.</i></p>
<p>There is awareness that reputational damage results from customer experiences that do not meet expectations.</p>	<p><i>A client can go away at the end of a meeting thinking I like this person, they listen to me, I can work with them.</i></p> <p><i>Trust is very important, especially for weddings.</i></p>	<p><i>We did an experiment with surveys, but they are very, very time intensive.</i></p> <p><i>I think one of the most important things to do with repeat business is to do whatever it takes to keep the customer happy, even if that means costing money. I suppose you should put in brackets there "within reason" because they will walk all over you.</i></p> <p><i>We are a problem-solving company and people come to us when other people don't know how to solve their problems.</i></p>	<p><i>Enforcing the reliability thing I now do a 100% money back guarantee, so all the risk is on me.</i></p> <p><i>We seemed like we cared so were friendly and listened.</i></p> <p><i>We have to show value which is quite difficult in our market.</i></p>
<p>The emphasis on providing exceptional customer experiences leads EOMs to use their brand to guide decision making.</p>	<p><i>I'm not a white van man. I use a silver Mercedes van as it is synonymous with quality.</i></p> <p><i>The biggest thing that has changed the business is having a set of terms and conditions and asking for a deposit at the start. It's almost a sense of relief: people know they have something booked.</i></p>	<p><i>A culture that just requires regular maintenance.</i></p> <p><i>Instilling the passion for the brand in the management team.</i></p> <p><i>The occasional tool-box meeting about these kinds of things.</i></p> <p><i>Standardised letters, standardised accounting systems, having an infrastructure in place.</i></p>	<p><i>Done a lot of market research.</i></p> <p><i>Going to do it in two or three phases (talking about extending the business into a new segment).</i></p> <p><i>Our target audience is generally female....so our brand is positioned to appeal to a female audience.</i></p> <p><i>I need to modify and change some of what</i></p>

	<p>On business processes - now am I a professional caterer with a professional business. All these things make the client feel more comfortable working with you.</p>	<p>Very, very heavy internet presence. We change the "TSs and Cs" and procedures as our knowledge evolves.</p>	<p>we do, without losing our brand values.</p>
<p>The staff team are integral to the brand</p>	<p>Excellent staff team are integral to his brand's ability to offer superior value propositions because they give clients trust and confidence. Staff are very customer focused and enjoy what they are doing. There is general all-round customer awareness. When the event is completed, I always get told the staff are brilliant</p>	<p>I have created a culture of care and pride in the job. Me especially but most of my men too, consider integrity a way of life and not something just to do when someone is looking. The entire firm.</p>	<p>I want customers to say, "these guys are amazing" and to tell their friends so I need to prep staff to go beyond the basics and really help customers with their events. If you can have a high retention rate then they probably enjoy what they are doing and agree the values and direction of the brand, which has a positive impact on the brand. Pressure the staff more on where the brand should go...building a decent culture is a high priority.</p>
<p>There is variation in the extent to which the brand is used as single organising principle for the firm varies, seeming to relate both to how the EOM views his brand and to his business goals.</p>	<p>Never have done a business plan. Historically - I let the business grow at its own pace. I've found that by talking with the client, getting the quote out within 24 hours and following up by e-mail that they will work with you.</p>	<p>I give my team regular pep talks. This is an extract from a company memo (talking about use of company mobiles). Standardised letters, standardised accounting systems, having an infrastructure in place that allows me to find anything from any point. We maintain high-tech communications for our customers. We maintain a fleet. Takes constant management and monitoring. Uniform. There is a pattern of response every single time.</p>	<p>Summed up by: I want people to have conversations and say company B are doing this, but I'm not interested as NAME are better despite company B being cheaper. It goes back to positioning for me.</p>

Evaluation of brand performance is informal but regular	<i>At the end of each event, I'll run through my mind what went right or wrong and how we could have done better. The number of testimonials that I get... the client always passes on praise. It's rare that we don't get it.</i>	<i>Mainly we introduce policies when things go wrong. We change the "Ts and Cs" and procedures as our knowledge evolves. People talk to me and tell me things.</i>	<i>Tend to evaluate and modify things on a weekly basis. I kind of see it as how much of a stake we hold in our industry.</i>
The brand is repositioned as the firm develops	<i>When I started the brand, I wanted to be a cottage industry. Now it is quite simple and clean. I don't like complicated. Precise and simple. It's been tweaked... It has evolved, it is not conscious. My strapline has been the same for eight years and it works.</i>	<i>I'm about to change to the third version (of the website).</i>	<i>The business is like an adolescent going through puberty with growing pains.</i>

**\* BMP: Brand Management Practice**

**6 = "Brand portfolio and hierarchy make sense". 10 = "Company monitors sources of brand equity" (Berthon et al., 2008)**

5.6 Chapter 5 Notes

**Stepping back and stepping up: An inter-subjective reflection (Finlay, 2002) about working with my research participants and how this has affected data analysis.**

(Initially written 27th June 2018; updated 30th March and again 1st June 2020)

**Context**

*On 11th April 2018, Participant P asked me to work as a member of his service team to deliver an upmarket buffet at the opening of a new church. Since the beginning of this study, it was the fourth time I had worked as a 'casual' with his regular team since summer 2016. The other events were a corporate barbecue, a large marquee wedding and a formal birthday party in a village hall.*

*I know each of my participants, but to varying degrees, through business networking. Consequently, the opportunities to engage with them beyond the interviews I was conducting were different:*



- *P is a member of my circle of friends, and I have known his partner, who has worked as a freelance marketing consultant for many years, for about 15 years.*
- *I have been a customer of M's and, in that capacity, given him testimonials to support his business. He has visited and worked at my home twice and was kind enough to provide a marquee at cost for an event a friend ran for me in her garden in June 2017.*
- *N has invited me to visit his new offices, which he built, and to meet his team – although at the time of writing this is yet to happen. We have met socially in restaurants for interviews.*

### ***Qualitative research as a process of involvement and detachment (Elias, 1956)***

*Early in this study, I acknowledged my positionality as a researcher in the Chapter Notes in Chapter 4. This was a process of 'prospective reflexivity' (Edge, 2011) that considered the effect I might have on my research as an individual.*

*Throughout this study, I have used 'think pieces' as a tool to support my inquiry and to develop my cases (Piantanida and Garman, 2009: 19). In 2018, I came across the work of Cole and Masny (2012), which suggests that a process of retrospective reflexivity should also be adopted, to consider the effect of the research on the researcher. The aim is to capture the experience to evaluate the value of an encounter (Dewey, 1916). Having moved further into my research, I found this a useful descriptor of the process of engaging with my respondents, wrestling with nebulous ideas, and trying to think more widely than my "narrow location within the system" (Elias, 1956: 232). As I wrote up my narratives in 2020, I revisited this reflexive exercise and have added a summary of my current thoughts at the end of this Section.*

*Qualitative researchers need to be able to step back and theorise as well as to step up to participate in "contextualised action" (Attia and Edge, 2017: 33). This requires us to develop an ability to manage "two-way traffic between two layers of knowledge: that of general ideas, theories or models and that of observations and perceptions of specific events" (Elias, 1956: 241).*

*To me, this process of moving in and out of one's research links to the often-uncomfortable sense of being "betwixt and between" and the 'liminality' of being in transition as I try to shift myself and my thinking (Savin-Baden and Major, 2013: 76). Mezirow (1991) suggests that a process of reflexivity allows a researcher to ensure my constructions of reality are not simply by-products of my world view. In this way, the practice of reflexivity allows me to try to "face myself" whilst simultaneously "holding up a mirror" to those I am working with (Elias, 1956: 234, 236).*

*I therefore feel that ongoing reflexive practice is an essential part of my modus operandi, to maintain the evaluation of how my interactions with my subjects are "context-dependent and context-*

renewing" (Mann, 2016: 28): it helps to create a feedback mechanism that operates between my "inner and outer controls" (Elias, 1956: 233). In this way, I hope I may be able to keep confronting the paradox of being both a participant and an inquirer, so that I can establish the "undisputed dominance of the latter" in my work (Elias, 1956: 238).

This may seem a tall order, in practice, but I enjoy a challenge. What, then, is the value of involvement and detachment for my work (Elias, 1956)?

### **The benefits I gain from involvement.**

#### **The value of being an 'Insider'**

Although my study is not ethnographic, the opportunity to participate in the work of P and his team affords a similar kind of opportunity to understand the day-to-day substance of what they do. It enables me to better understand what is "normal" for P as an EOM and to observe and comprehend how his team works. By gaining more insight into his team's perspective on the business, I should be better placed to reflect on his 'lived experience' and the decisions he makes regarding his firm and its brand, as well as how those feed back into theoretical models.

P's firm is a sub-group within wider society. As such, its members are interdependent, with each other and with society. In joining them, I became part of the group, and correspondingly engaged myself (my feelings, values, and needs) in the process of my research. My aim, although it was unconscious until I undertook this reflexive exercise, was to try to be a researcher who does not just engage intellectually, but who also "gets inside what it means to exist in a situation" (Cole and Masny, 2012: 1). Thus, as I attempted to make sense of what I experience, I expected to encounter some of the "insecurities and vulnerabilities which make us unable to be detached observers" (Elias, 1956: 232-233). This, to me, seems a normal part of being in a group situation.

#### **Achieving 'contextualised action'**

Being an insider allows me to observe and try and understand the relationships among people in P's team. He is not just the EOM but often a solo male in a service industry that is disproportionately run by women. (There are casual male staff, but the regular team is all-female). His leadership style is of interest with respect to the extant literature relating to brand management in SFs: working within his team gives me a chance to see and experience what he does rather than simply hearing what he tells me. It also enables me to consider the 'heuristics', or simple rules, the team has developed and their impact on performance.

*Whilst neither the gender issue nor the heuristic aspect is a central topic relating to my research questions, this sense of “contextualised action” (Attia and Edge, 2017: 33) may help me to analyse more effectively how the theories in which I am interested are then operationalised. This suggests that my involvement is a necessary step towards detachment, in line with the “analytical” and “synoptic” steps described by Elias (1956: 245).*

### **Corroboration**

*I have not been pursuing a research design that would enable me to generalise. The need to generate credible data therefore becomes significant. Creswell and Miller (2000) say that may be achieved through the close collaboration of researchers and their participants. The engagement of individuals associated with my key participants in networks offered me a way to gain additional insights, which could help me to construct richer and more thorough cases and to avoid missing things because I had a fixed and/or narrow ‘location’ (Elias, 1956: 232). Until now, I had not considered fully how the voices of “connected others” might add depth and detail to my cases, so incorporating them is a future point for consideration if I continue the longitudinal study post-doctorally.*

### **Developing trust**

*Given the need for credible data, trust became a critical issue for me as a qualitative researcher. Trust would enable me to develop data that were more reliable and honest, allowing me to develop rich data with ‘thick’ descriptions which would strengthen the validity of my cases (Mercer, 2007; Creswell and Miller, 2000). I feel that my existing relationships with my research participants made the first set of interviews more candid than they might have been without a connection, because of the existence of established trust. This varies as a shared experience but can result in a “strong emotional undertone” (Elias 1956: 236). This can be positive: people feel a sense of community which contributes to a willingness to share their experiences fully (Attia and Edge, 2017). However, I feel it could have resulted in a pressure on me to conform, as the upholder of a “particular social and political creed” (Elias, 1956: 236). Effectively, I belong to two groups – my business network and academia – so the perceived quality of my research output by entities that may have different ‘rules’ will influence how trustworthy I am perceived to be in the future.*

### **The benefits I gain from detachment.**

#### **Maintaining rigour**

*One of my challenges as a qualitative research is trying to ensure I faithfully reproduce the accounts I am given. As I am part of both the process and the product of the research, it is essential that I step back and monitor what I am doing. This monitoring should be evident throughout the study, to*

ensure there is no “unconscious editing” (Berger, 2015: 222). However, Elias (1956: 234) suggests that my ability to “face myself”- which suggests detachment and analysis – will be dependent on the degree of security I feel. Personally, I feel that security can lead to complacency about one’s actions, making my insecurities as an ‘early years researcher’ potentially a positive in this respect.

### **Space to think**

I have acknowledged the potential benefit of being an ‘insider’ and the way in which it can contribute to a process of reflexivity, but there is an equal need to step back and think. As someone whose entire career has been spent in hands-on roles, I found that the deep thinking that would enable me to change what I think, how I feel and/or behave didn’t come easily: transformation is challenging, so time and space in which to think are essential.

I am unsure of the precise meaning of “analytical and synoptic steps” (Elias, 1956: 245), but it is clearly part of the process of trying to gain deeper understanding through research to break down complex situations into their basic elements and relationships before reconstructing or synthesising them into a connected whole, which may be a case, a model, or a concept. This is a process I discuss frequently with my Master’s dissertation students. Allowing myself the time and space for retrospective reflexivity would have been a way of supporting the thinking process as “reflexive practice never returns the self to the point of origin” (Edge, 2011; Sandywell, 1996: xiv). I need in future to be more generous with the time I give myself for this aspect of my work: I am conscious that I see this as ‘my time’ meaning it becomes subordinate to the demands of work and family.

### **The opportunity to develop coherent and cohesive research**

Without detachment, it would have been impossible to develop congruent research. My individual cases were narrated in different ways by people with different ‘lived experiences’ but are about themes and topics that inter-relate. Deciding how to present such data lucidly and in an appropriately reasoned way presented me with messy complexities and a certain amount of discomfort where boundaries blur and decisions are not always clear. As I tried to write coherently and with conviction, I sympathised with the suggestion that induction and deduction do not “retain quite the same character” when working with complex problem frameworks (Elias, 1956: 244). Holding on to a clear, consistent, and appropriate methodology was challenging.

### **Achieving credibility**

Reflexivity is used to assess the credibility and trustworthiness of qualitative research practice. This suggests a process of detachment is necessary to think deeply, as already acknowledged. However, the fact remains that we cannot be outside our research – we are integral to it, as well as integrated

with it. Elias (1956: 229) even claims that the scientific tradition is not “value free”. I therefore hope that the existence of a documented process of reflexivity will demonstrate an attempt to examine and question my own work (Edge, 2011; Cole and Masny, 2012).

### **What will I be changing following this reflexive exercise?**

#### **Ensuring I am ‘on the bit’**

As a past student of dressage, I am going to use the analogy of being ‘on the bit’ to capture the essence of involvement and detachment that I aimed to bring to my research work.

My horse is ‘on the bit’ when she accepts the contact I offer. In other words, we are connected. She is more comfortable to ride because she is relaxed. I feel in control and can manage transitions smoothly. She will be light, obedient, and ready to follow my instructions. I can let her follow through confident that she knows what I am asking. We can work effectively together for as long as I maintain appropriate contact.

Contact is not pulling on or shortening the reins; equally it is lost if the rein is elastic. Good contact is therefore like involved detachment.

#### **Becoming more disciplined**

Elias (1956: 230-31) describes the challenges of thinking, and how we have become “overlaid and counterbalanced” by others whilst imposing constraints and short-term satisfactions on ourselves. Peck (1990) elaborates on the notion of discipline, which he says has four aspects: delaying gratification, acceptance of responsibility, dedication to the truth, and balancing.

As a mature adult and early-years researcher, I hope I already meet the first three requirements, but as someone who is working and studying part-time, I intend to focus more on balancing or managing conflicting requirements. I particularly identify with the suggestion that balancing is about ‘disciplining discipline’ (Peck, 1990) so that we can be flexible and act spontaneously. This leads neatly back into how I understand the concept of ‘involved detachment’ and suggests to me that I must recognise for myself when the balance is wrong and take actions to restore it. This feels liberating. My research is under my control and I do not need to benchmark myself against others.

#### **What I intend doing differently**

I am going to fully embrace a “developmental approach to research methodology”, identified by Attia and Edge (2017: 42-43) as including: recognition of the value of reflection as a means of raising awareness; capacity building; going beyond the limits of hegemonic models; emphasising researcher responsibility; continuous engagement with fellow researchers and communities of interest.

*I feel I have been engaging with points 1 and 4 since the outset of my study, so my focus in the discussion that follows will be points 2, 3 and 5.*

### **Capacity building**

*Attia and Edge (2017: 42) encourage researchers to be creative and innovative, and to “discern methodological opportunities in their environments”. Following this reflexive exercise, I think I had been quite rigid with my interview approach, despite believing I was adopting a flexible exploratory study with limited structure.*

*As an example of a change I will be making, I intend to extend my dialogue to include practitioners within my field of interest who are not EOMs but who may have relevant ‘lived experience’ in either small business and/or brand management. At an event after completion of the writing-up process, last weekend, I met a lecturer who helps to start up entrepreneurial small firms within the IT sector, and a brand advocate whose employer works with small firms. Both could have had interesting perspectives to bring into my study, but I now realise that I had lacked the confidence to follow through on such opportunities.*

*Update, 1st June 2020: Whilst the invitations were extended neither of those contacts responded. I therefore put the idea on hold for the future.*

### **Going beyond the limits of hegemonic models**

*These have been described as including “institutional practices, policy documents, ethical codes and publishing guidelines” (Attia and Edge 2017: 43). My area of focus was on how I could develop my PhD submission in such a way as to present my cases in a way in which I feel appropriate.*

*Update 1st June 2020: Ultimately, this led me to make use of chapter notes to organise reflexive work that I felt was critical to the development of my thesis.*

### **Continuous engagement**

*Although I have been a regular contributor to ISBE conferences and others within the University of Hertfordshire and use my research to inform and support my teaching here, I have not made any attempt to develop engagement with communities of interest outside academia. As that could help me to address whether my study has impact or not, this is now a priority for consideration.*

*Update 1st June 2020: To plan and execute this, I joined an online research forum, Fast Track Impact, in July 2018 and undertook an associated online training programme. For my Research Impact Plan, refer to Appendix E.*

### ***My current feelings about stepping back and stepping up (updated 30th March 2020)***

*As I developed my cases, I was aware that in many ways it felt easier to write a narrative as an insider, because that status would confer some confidence that an informed view was being taken. Writing up the case of Participant P therefore felt the most straightforward of the three because I felt I had a rounded view of him. The case of Participant N was the most challenging in some ways because I knew less about him as an individual.*

*Being an insider also provides personal reassurance that it may be possible to achieve 'contextualised action' by virtue of having experienced the rules the team within the business are following and the group dynamics that shape those, rather than simply hearing what the EOM chooses to reveal (Attia and Edge, 2017: 33). Given that my research design could not deliver generalisable data, yet I wanted to aim for objectivity as an outcome of active subjective approaches to my work, having had relevant experience is helpful. However, the limitations of the time available for this study meant that I had not gone as far as I had hoped to when developing this reflection in 2018. The intention then was to extend the study to include connected others, for example some of the EOMs' team members. However, the logistics, paperwork and time needed presented a significant barrier, not least on the part of the participants. However, once my research is truly completed, that could be a way of continuing to add to the general debate on the topics I have been exploring, particularly if I continue the longitudinal study.*

*The process of writing narratives has raised some interesting questions for me about trust. I feel my participants have been open, but there is of course the knowledge that we only reveal certain things and may not say the same thing in the same way on every occasion or to every person to whom we speak. Specifically, however, I am mindful of not wanting to cause offence as I write and do feel pressure to present my participants not just constructively, but also in a way they will like and recognise as a fair representation of their view (Elias, 1956). In that sense, there is a keen sense of being caught between the two groups of business and academia, and I am conscious of treading lightly. The advice offered by Elias (1956: 234) to embrace detachment and analysis is therefore constructive and, to support that process, I have constructed the narratives loosely around key theory to support me in monitoring the story I am presenting and achieving intellectual rigour.*

*Update 1st June 2020 – I also decided to give my participants the opportunity to comment on their case write-ups prior to writing up my thesis. Whilst I was not seeking their permission for my interpretation, I was interested to know how close they felt it was to their sense of what was happening. This decision was partially inspired by Wertz et al. (2011), who neatly demonstrate how the same story changes when analysed by five different qualitative methodologies.*

*The process of 'working back to theory' has also enabled me to break down complex situations and analyse them. Here, the process of retrospective reflexivity has been critical. I have found it interesting to observe how the process of research has shifted emphasis from reading to thinking in order to make sense of the data and attempt to present three disparate cases as a coherent and cohesive inquiry.*

*I still like my analogy of good contact being like involved detachment as, for me, it sums up the need to be immersed in but also step outside my research. However, not everything changed as I had intended in 2018:*

- *Balancing remains a challenge, as it does for anyone who works, studies, and has family responsibilities. However, acknowledging it as a principle has enabled me to develop more effective approaches to my research and to prioritise it as part of 'what I do and who I am.' Similarly, I did not extend my dialogue to practitioners who were not EOMS. Initial invitations elicited no response and I decided that chasing more participants would over-extend me within the time possible, and I might lose focus.*
- *In terms of moving beyond the 'hegemonic models', I have not achieved a revolution. I have however managed to negotiate a structure to my PhD, by using Chapter Notes. I feel this presents the process of reflective practice better than using either traditional appendices or presenting only the 'highlights' in text boxes.*

*Finally, whilst I am still not highly networked, I have joined a couple of online forums.*



## Chapter 6: Critical discussion

### 6.1 Chapter overview

Chapter 5 presented three cases that merged content narrative (data) and meta-narrative (a research report) to demonstrate how sense was made of the phenomenon of brand management in small firms, based on formal conversations with the EOMs of three such enterprises in Hertfordshire. The process of writing the narratives was supported by various forms of data analysis, including the process of axial coding to identify key themes for further critical discussion. Six emerged from refinement of Table 5.1 in Chapter 5 and Appendix C.2. They can be condensed into the following 5:

- (a) The EOMs' relationships with their brands.
- (b) Brand management practices deployed.
- (c) Dialogue and co-creation at the brand interface.
- (d) Communities of interest and awareness of reputational damage.
- (e) Importance of 'internal branding', customer experience and reputational damage.

This chapter critically evaluates these themes in the context of the conceptual framework outlined in Chapter 3. It then considers the contribution of my research to academia, business practice and policymaking.

### 6.2 The EOM's relationship with their brand

#### 6.2.1 Three vignettes of EOMs and their brands

Two of the interviewed EOMs strongly identify with their brand, meaning the organisational identity of their SF reflects personality and characteristics of the owner. At the most extreme manifestation, Participant P *"is"* the brand. He feels he is an *"artist"*, and his personality is correspondingly stamped through his brand, like the lettering in a stick of rock, in a way that provides both 'sustainable value and 'differentiation'. His awareness that he can use his personality to create a differentiation in his market thus supports his strong focus on personal selling which enables growth.

However, in making it *“all me”*, he is also limiting his business as he clearly feels unable to delegate the sales process. Initially, this reluctance to expand a successful business seemed to be due to a lack of marketing competence and capability, linked to personality, but further into the inquiry it was clear that personal goals were taking precedence and he was choosing to maintain a lifestyle business rather than exploit further business development opportunities.

Similarly, Participant N’s personal values of integrity, reliability and honesty are clearly visible within his brand. Here is an EOM who strongly influences the branding process and personifies the organisational culture. In observing that his brand is both *“an outward image and a self-image”*, N positions himself strongly as the role model for his business. His values are therefore explicit as the *“main source of brand associations used to develop core brand identity”*, in the words of Spence and Hamzaoui Essoussi (2010: 1049). N spends a significant proportion of his time *“instilling the passion for the brand in the management team”* and is therefore focused on the roles he and his staff play as providers of the service and therefore its branding. A service company becomes its own brand because its customers’ experiences are the foundation of the branding in the quest to create a *“culture of care and pride for the job”*, N has used this rationale to develop a corporate brand with a clear identity that acts as a basis for credibility and trust among consumers and other stakeholders.

By contrast, Participant M appears somewhat detached from his brand and adopts a more visionary leadership approach, an indicator of ‘strategic’ brand building according to De Chernatony (2001). His conversation focused less on his relationship with the brand than on what he wanted it to achieve: *“I want my company to be like Apple ... a kind of global awareness but only in Hertfordshire ... I want to be incomparable”*.

The extent of the EOMs’ willingness to develop their brands as part of a dynamic branding strategy appears to be directly proportional to the degree of personal attachment to it. Two demonstrated reluctance to separate their image from that of their firm, despite appearing to be at the ‘effective growth stage’, suggesting that SFs may not easily transition from one phase of the corporate branding lifecycle to the next because of owners’ personal affiliation to a brand they have created themselves. Thus, while each EOM exhibits brand management practices that involve dialogue and interaction, how and why these relate to brand orientation and branding strategy seems to vary.

### 6.2.2 EOMs’ relationships with brands moderates their brand-management practices

Participant P observed that *“business is personal”* and was accordingly willing to *“treat every client differently”*, a tacit recognition that value is uniquely determined by his customers. That approach to branding influenced his behaviour, which was high on both empathy and the need to conquer, two

key attributes considered essential for successful selling by Mayer and Greenberg (2006). As a result, he did not *“find it hard to build rapport”* and achieved a *“successful ‘hit rate’”* once he got his *“foot in the door and can talk”*. However, it does not have an explicit impact on how he manages his brand, which he describes as *“a statement that reflects what my business is”*. This suggests that he maintains a more traditional inside-out view of the brand when it comes to developing brand orientation. This is borne out by his obvious control of the branding process: *“I don’t like complicated”*.

As a service brand in the ‘post-digital marketplace’, P’s brand is not just an identifier in his market but also a way to build the relationship between his firm and customers. His service offer is the determinant of brand meaning and thus influences equity, which P understands at a basic level to be the ability to differentiate in his market because it informs consumer choice. It is focused on him, although he has also used his brand to leverage the social interactions of his customers for word-of-mouth marketing, meaning that *“like an inverted pyramid, one job led to a referral for the next”*. His customers can therefore be considered what Gummesson (1991) called ‘amateur part-time marketers’ who help to build the business. P has thus been accessing operant resources in his network to provide potential for growth or enhanced performance, or both.

Given the emphasis on personal service and the exceeding of customer expectation, it seems clear his brand is being used as a relational asset. It is therefore a key source of customer and firm brand equity because brand experiences and brand meanings are co-created through interactions with consumers. Thus, the brand has also been used as a single organising principle for the firm, which guides decision making and, specifically, enables the *“excellent”* staff team to have *“general all-round customer awareness”*.

P himself is however integral to all these interactions with customers; those are not delegated to his staff team although they do help to deliver the customer experience. Thus, whilst he recognised albeit subconsciously, that a brand could be linked with a firm’s assets and competences to *“strategically manage the processes that give the brand value and meaning”* (Urde, 1994:122), the firm’s identity and position were firmly based, in an inside-out process, on P’s personality. Although the brand has *“evolved, it is not conscious”*, he has stopped short of collaborating with his customers and staff to further refine brand identity and position, and thereby brand orientation, because those are effectively sacrosanct: based on his perception of himself as an *“artist”*.

Like P, N is also using his brand as a relational asset. He was clearly aware that the culture, people, and organisation within his firm offered a basis for differentiation in his market by creating a distinct value proposition and specific type of consumer relationship: *“there is a pattern of response every*

*single time*". In this way, his service brand "provides focus to the internal relationship between the service company and the employees and comes alive in the external relationship (encounter) between consumer and service provider", as Riley and De Chernatony (2000: 148) put it. In line with the 'services brand relationship triangle' of Brodie et al. (2006a) reproduced at Figure 3.1 in Chapter 3, N has therefore clearly been engaging in external marketing (making promises), interactive marketing (delivering them) and internal marketing (enabling them to be fulfilled). Communication and dialogue were therefore essential to the integration of customer, employee, and organisational perceptions of the brand if it was to operate as a relational asset. As a result, N has invested in a "very, very heavy internet presence" (making promises), has a "hands on attitude" and is "very involved" with his customers (delivering them) and works with his team to instil "a culture that just requires regular maintenance" (enabling them to be fulfilled). This more company-wide approach to brand management appears to moderate his relationship with his brand, and he strives to "see myself and my company through the eyes of other people". In a significant divergence from P, his focus is therefore on creating "consistency in the same way that you know what you're going to get when you walk into a McDonald's anywhere in the world", rather than on how the brand represents him personally. Accordingly, his brand is a more formalised single organising principle than P's that has led to "having an infrastructure in place" (Bean, 2009).

King et al. (2013) suggest that the service brand and brand orientation are co-existent concepts in that they share the objective of maintaining high levels of customer service while developing an organisation-wide commitment to protecting brand values and identity. By that yardstick, N seems to have been more receptive than P to adopting a dynamic brand orientation because his firm is clearly situated within a brand network that facilitates dialogue and interaction within the 'service brand relationship value triangle'. This shift blurs what Ind (2017: 13) calls the "boundaries between, inside and outside the organisation". He has maintained a top-down approach internally, however, in which he is directional about enforcing the brand mantra as he sees it. Hence, his values are clearly apparent within the corporate brand even while he has made regular, incremental adjustments to his branding strategy as his "knowledge evolves". I therefore find his internal and external brand leadership behaviours dichotomous. He has invested management time in building customer relationships, stating "one of the most important things to do with repeat business is to do whatever it takes to keep the customer happy, even if that means costing money", which implies willingness to adopt a dynamic and fluid approach to branding based on a hybrid orientation that embraces both market and brand orientation, with the additional benefits this affords the firm. Yet, internally, there has been a clear emphasis on the need to have his team comply rather than inviting

their contributions although, given some of the points arising in conversation, this may have been a management response to the specific challenges of the sector in which he operates.

By contrast to N and P, M is in the process of creating a second corporate brand to respond to changes in his market environment and feedback from customers and other stakeholders. He thinks it is particularly important to use his brand to *“show value”* as it is *“quite difficult”* to achieve this in his market. As a result, he has detached himself from his brands as part of a deliberate strategy to position his business as *“the experts in the field”*. Rather than dominating the brands with his personality, he has chosen to position them as *“friendly and professional”*, to indicate that his firm *“clearly knows what we are taking about”*. Thus, he is actively responding to his competitors and consumers as the reference points for what is unique and valuable, aligning his resources and business practices in such a way as to use the brand as part of a corporate marketing approach which is embedded within his organisational culture. In so doing, he has demonstrated an understanding of the brand’s role in improving consumers’ confidence in their buying decisions, and hence their overall experience.

M seems to have the most developed brand orientation of the three participating firms. He views his brand as an integral part of his marketing strategy, with a clear understanding of his firm’s competitive advantage and its overall distinctiveness compared to its competitors. In that sense, he displays the potential for what Wong and Merrilees (2005: 160) describe as ‘integrated brand orientation’, in which the brand is an integral part of the marketing strategy and plays a greater role in the implementation of the marketing mix. M was clearly benefiting from a hybrid BO-MO, in which *“both the brand image and the needs and wants of consumers play an important role in the strategy and culture of the organisation”* (Urde et al., 2013: 17). He recognised the need to *“modify and change some of what we do”* but *“without losing our brand values”* and therefore invested heavily in interacting with his brand community to ensure a dynamic orientation without losing control of his key marketing asset.

Throughout those interactions within the network, his focus was on achieving positive customer-based brand equity, to enable him to gain competitive advantages linked to long term revenues, the ability to command higher prices, and effective marketing communications. He therefore wanted his customers to say *“wow, I didn’t expect that”*, understanding that would be the route to people saying, *“company B are doing this, but I’m not interested as [his firm] are better despite company B being cheaper”*. Such interactions have been carefully orchestrated to ensure that the negotiated brand meets his strategic aims, something I believe he would have found it harder to do if he were emotionally invested in the brand identity and positioning to the same extent as P.

### 6.2.3 A brand leadership continuum

Further to the findings of McCartan-Quinn and Carson (2003) and O’Dwyer et al., (2009), the preceding vignettes illustrate that the marketing practices of the SFs studied are determined by the owner-manager’s experience, expertise, and attitude. The extent to which those EOMs are willing to adapt their brand seems to be directly proportional to how closely it reflects their personality and values, but also their vision for the business). Accordingly, the EOMs are deciding whether and how the continuous creation of superior customer value is adopted as a core value of their organization through MO, BO or a hybrid orientation. However, rather than an EOM being “all controlling and all deciding” (Krake, 2005:230), I have observed that there is a continuum of personal engagement with the brand that defines their managerial approach and therefore the extent to which they are prepared to co-create their brands. I develop this typology graphically in Figure 6.1 below.

**Figure 6.1: Brand Leadership Continuum**



	<b>Brand Sovereign</b>	<b>Brand Chief</b>	<b>Brand Steward</b>
	<b>Participant P</b>	<b>Participant N</b>	<b>Participant M</b>
<b>Brand Profile</b>	Personifies the brand.	Exercises authority over the brand.	Has brand vision and guides brand direction.
<b>Brand behaviour</b>	Limited market/competitor research.	Regular market and competitor research.	Constant scanning of market and competitors.
	Defines brand values, identity and positioning based on an ‘inside-out’ view of the brand (Urde, 1994).	Defines brand values, identity, and positioning, based on a MO/BO hybrid.	Defines brand values. Co-creates identity and positioning. Adopts a BO and MO hybrid.

	“All controlling and all deciding” (Krake, 2005:230).	Retains top-down decision-making power.	Consults and leads.
	Staff are ‘acolytes’ to the brand owner.	Staff are compliant.	Staff exhibit identification with and commitment to the brand.
<b>Overlaps with existing theory and literature</b>	The corporate brand is strongly linked to the EOM.	<p>The service brand has logical policies, consistent communications and internal ‘brand passion’ (Brodie et al., 2006a; Dall’Olmo Riley and De Chernatony, 2000).</p> <p>The role employees play (Gill-Simmen et al., 2018; Saleem and Iglesias, 2017).</p>	<p>Two strong brands offer specific advantages.</p> <p>Uses the brand as a “relational asset” (Brodie et al., 2006; 368; Dall’Olmo Riley and De Chernatony, 2000).</p> <p>Exhibits management behaviours to support brand co-creation (Ind and Schmidt, 2019).</p>

### 6.3 The adoption of brand management practices

This section refers to Appendix C.3 and Table 3.1 in Chapter 3: ‘The Brand Management Practices by item and dimension’ (Berthon et al., 2008).

The primary aim of my inquiry was to explore the brand management practices that SFs adopt, from the management perspective of the EOM as the brand owner, to understand more about how those are operationalised. As the vignettes in 6.2 have shown, it appears that what EOMs do and how they do it is fundamentally driven by their own relationship with their brand, which defines their attitude to branding strategy and their subsequent brand management practice. Thus, the overall level of sophistication of brand management also varies according to the branding capabilities and competences the EOM chooses to access, which may reside in themselves, be available within the SF through internal branding, reside in operant resources outside the traditional boundary of the firm, or be a combination of all three.

#### 6.3.1 Do small firms differ from large organisations, and if so, how?

Berthon et al. (2008) found that three brand management practices (BMPs) differentiated SFs from LOs:

- BMP 10            monitoring sources of brand equity.
- BMP 5            ensuring the brand is consistent.
- BMP 7            using a full repertoire of marketing activities to build brand equity.

However, confirming the work of Centeno et al. (2013), my findings suggest that the EOMs do not necessarily fail to undertake these practices; those simply do not show up in published research because of how they are operationalised. My participant EOMs described them in language that does not align with the existing BMPs and adopted approaches the usual list of BMPs apparently does not recognise because they are based on the terminology and processes of LOs.

It is possible to explore this issue in more depth by breaking the BMPs down into their items and dimensions.

#### *6.3.1.1 BMP 10: Monitoring sources of brand equity*

Each of the participating EOMs demonstrated an understanding of equity as the relationship between a brand and its consumers. The interview data also suggest they understand that a strong brand offers them sustainable competitive advantages linked to price premiums, inelastic price sensitivity, market share, and cash flow. For example, Participant M told me: *“our prices don’t really move, well only one way. They are going up again this year for the reason that we know there isn’t another marquee company that has our professionalism and service”*. Specifically, the participating EOMs use their brands to create added value. Even Participant P, who strongly identifies with his brand, sought that added value, explaining that *“I want my particular brand to make a statement that reflects what my business is. Not that I’m a caterer, but the style, the package”*.

It is also clear from our discussions that the EOMs focus their marketing efforts on developing positive customer-based brand equity. Whilst their business goals vary, each was able to give examples of how he did so, mostly informally and often with a focus on listening to the customer and meeting their specific needs, a process that involves dialogue and co-creation. It seems that this happens most often by paying attention to detail. For example, M explained: *“if we have to spend an extra 15 minutes helping a customer to bring their chairs in on a Friday afternoon then we will”*. N built loyalty and repeat purchase by keeping *“the customer happy, even if that means costing money ...within reason”*.

There is also evidence that they are using their brands as a single organising principle to guide their business operations. P explained that, having put systems and processes in place that aligned with his brand, he was a *“professional caterer with a professional business”*. He saw clear advantages in this because *“all these things make the client feel more comfortable working with you”*. N



commented that his branding had led to a *“culture that just requires regular maintenance”*, suggesting to me that it permeated the entire organisation. Meanwhile, in the process of building and repositioning his business, M had felt the need to *“modify and change some of what we do, without losing our brand values”*. However, given low staff numbers and the relatively informal way the businesses operate when compared to LOs, the EOMs did not see the need to invest time and resources in developing a brand charter as a strategic document to achieve that as a business outcome. For example, M had *“the values on the board out there”* (a large whiteboard in his warehouse), which acted as a reminder to his staff team when they prepared for each installation. Given that the EOMs were the only people in their firms who had strategic responsibility for the brand, that type of approach is good enough to meet their business needs without diverting critical resources or distracting them from day-to-day operations.

There is also evidence that the EOMs monitored how their brands performed (see BMP 10 b and c) but did so informally, which equates more with professional reflexive practice than formal auditing. It is fundamentally different from the ‘measuring’ of equity in a LO. Thus, rather than doing a tracking study to evaluate the current market performance of his brand (BMP10c), P said he ran through his mind *“what went right or wrong and how we could have done better”* at *“the end of each event”*. M perceived this kind of activity as evaluating *“how much of a stake we hold in our industry”* and also stressed that customer testimonials were the *“ultimate feedback”*, a judgment the other EOMs echoed. Such activities suggest they are not ignorant or neglectful of the need to monitor sources of brand equity but used business-appropriate ways to do so that were not reflected in the current items and dimensions of BMPs because those were designed for use within LOs.

Even though they are neither ignorant nor neglectful of the need to monitor brand equity, it seems that the EOMs do not fully appreciate the brand equity construct as the value of the brand as a separable asset that can be sold or included in a balance sheet, as it is defined by Atilgan et al. (2005). For example, the narratives demonstrate that P did not leverage his brand when selling his business, and he admitted that he did not see how brand equity is *“relevant to me”* (BMP10a). By contrast, M, who is focused on growing his business, saw his brand like a *“local Apple”*. I therefore believe that, whether EOMs can see the brand as a separable asset is inextricably linked to the extent to which they identify with their brands – or their position on the Brand Leadership Continuum shown in Figure 6.1 above. In other words, they can only be objective about the brand as an intangible asset once they separate from it. My view is supported by the honest feedback from P about his narrative, reported in Chapter 5, which confirms that his limited business and marketing experience, combined with strong emotional investment, constrained business expansion and brand

development, ultimately meaning that secured less money for his brand when he sold the company than suggested by an independent valuation.

That said, at its simplest, the financial contribution of the brand arises from factors associated with growth such as new customers, extension within the same or new categories or new markets; or from factors associated with profitability such as brand loyalty, the ability to charge premium prices and enhanced cashflow (Veljkovic, 2010). It is evident that the participating EOMs are considering some of these factors and are therefore 'measuring' company performance in relation to brand management even whilst this is informally done.

#### *6.3.1.2 BMP 5: Ensuring the brand is consistent*

I have already noted that the EOMs are using their brands as a single organising principle to guide decision making, which suggests that consistency is an aim. However, the extent to which this happens varies in practice, and whether or not they can develop and execute marketing programmes that do not send conflicting messages about their brand seems to be linked to what is happening in terms of the business lifecycle, the demands placed on the EOMs as the holders of strategic brand responsibility, and how knowledgeable they are about marketing as a discipline. Participant P, for example, ran a static and established SF, with a strapline that *"has been the same for eight years and it works"*. Similarly, over time, N has put *"an infrastructure in place"* and his brand is consistent across his *"vehicles...business cards, paperwork"*. By contrast, M, in developing a new business model during the research that meant splitting his brand into two different corporate brands to reflect different value propositions, observed at one stage that it is *"our biggest weakness at the moment"*.

What I found interesting in these discussions is how the EOMs interpreted "marketing programme". Generally, they did not focus on the marketing mix as a whole (either as McCarthy's 4Ps or the 7Ps later advocated by Booms and Bitner) but instead highlighted individual elements of the mix they felt were particularly relevant to their SF at that point in our discussions. In response to probing, it seemed there might be inconsistencies in their application. For example, when I asked P about communications and specifically about social media, he told me he was not a current user but was *"on that case"* and had *"sunny skies and swimming pools in mind"* for a Facebook page. This would be incongruent with his *"knife and fork logo"* and with the upmarket, lavish colour photographs of food on his company webpage. Around the time of that discussion, P had started planning to emigrate to Spain and I believe that was front-of-mind as a personal aspiration rather than a focus on his brand, particularly as he is the EOM with the closest personal identification with his brand.

As might be expected in a small firm, M explained they *“focus on reputation rather than awareness”* which said to me that each of the participating EOMs was using such cost-effective ways of making their brand visible as branded vehicles and staff uniforms. Those constituted key components of their marketing programmes. However, what also emerged in discussions is that N and M were both making extensive use of digital marketing and social media to develop a brand presence. M was *“concentrating on things like Google Adwords and Facebook so I can be a lot more focused on who I am targeting, rather than newspaper, radio etc that would usually be used for brand building”*. (Google Adwords, now ‘Google Ads’, is an online platform for short-form advertising messages to be placed on a pay-per-click basis.) When we last spoke, he was also investing in a new website because he gets *“90% of business from the website”*. Similarly, N had a *“very, very heavy internet presence”* and was *“about to change to the third version”* of his website when we last met. It therefore appears that social media and digital marketing are offering these SFs opportunities that traditional media do not because they are cost prohibitive and less easily targeted.

Whilst this is worth further exploration in the future, the second aim of my inquiry is to evaluate whether EOMs use co-creation to develop a branding strategy and, if so, how. I am therefore most interested in the emphasis my participants placed on people as an element of their marketing programme. The Service Dominant Logic paradigm emphasises the exchange of intangibles as understood in a services context in which value arises from the service encounter co-created with the consumer (Bitner et al., 2000; Vargo and Lusch, 2017, 2004). This focus on service-for-service exchange means that employees play a critical role in enhancing consumers’ experiences through their interactions with them. It therefore becomes strategically important to ensure that they do so as part of the marketing programme so that co-creation does not push the brand in unintended directions with a corresponding loss of competitive advantage. All the EOMs understood the importance of internal branding in terms of customer experience, and thus focused on internal marketing, albeit to varying degrees, to enable brand promises to be fulfilled.

The wording of BMP 5, *“develop marketing programmes that do not send conflicting messages about our brands to our target audience”* therefore seems to need refining and updating. To be commensurate with the ‘post-digital’ context for brand management in SFs, these are the limitations of the current expression of BMP5:

- it suggests a focus on push marketing to raise brand awareness, when most SFs have limited resources for this and, despite the benefits of social media and/or digital marketing are more likely to focus *“on reputation rather than awareness”* as M does;

- it does not explicitly recognise the role staff play in delivering a brand in the 'post- digital world', in which the context is service-for-service exchange;
- that being so, it fails to recognise the implications of a service ecosystem in which meaning will arise from the mindset of all the actors involved in the network, in turn meaning it fails to recognise that brand management is no longer an internal activity owned solely by a branded firm.

#### 6.3.1.3 BMP 7: Using a full repertoire of marketing activities to build equity

If brand equity arises from consistency, then, to some extent, BMP 7 overlaps with BMP5 and harks back to points made about the brand promise being clearly executed and delivered in every interaction with customers, and the use of the brand as a single organising principle. However, further analysis of this brand management practice based on the 'brand report card' (Keller, 2000) identifies several additional points for consideration.

Keller suggests it is necessary to use the brand name, logo, symbol, slogan, and packaging to maximise brand awareness. Sharp (2010) asserts that consumer recall of a brand is a critical influence on intention to purchase and is enhanced by a consistent and pervasive logo. However, according to Shaw and Merrick (2005) it may in practice not even be possible to effectively measure brand awareness because of the vagueness of the concept. The design of my inquiry has not allowed me to assess if the participating EOMs were maximising brand awareness in this way and, as services, their firms are not packaged like a product such as Coca-Cola (Keller's chosen example). That said, both N and M, who used digital and social media marketing methods, could have used website analytics and search volume data to gain insight, although the data will be 'dirty' unless the company name is unusual in its category. This makes M's comment about brand performance significant: In saying "*I kind of see it as how much of a stake we hold in our industry*", it appears he may be benchmarking against his competitors by tracking 'share of voice', which would give him greater context for his brand's performance.

Whether the SFs studied used push and pull strategies to target both distributors and customers, the received wisdom, is also not entirely relevant, given that the three cases focus on firms that offer services and would therefore not be seeking distributors. However, there is a parallel in that all the EOMs is involved in formalised business networking organisations in the region, giving them access to intermediaries who connect them with potential business opportunities.

If the definition of push marketing is extended to include direct promotional activities, then each EOM did engage in a range of activities. For P, the focus was on personal selling in a potential customer's home or office rather than a showroom, which also creates a point of differentiation: "*I*

want the most successful hit rate with inquiries, which involves me seeing the clients. That's the part I enjoy and want to do. Most caterers don't – that's the unique point". M and N both used a range of online advertising initiatives, including pay-per-click ads. (In an online search of my own, M's firm appeared as a banner advert on a webpage, no doubt because I had looking at his company webpage the day before). Here we have evidence of marketing activities starting to cross over into pull strategies, in that M can shadow potential customers as they search for a product or service. Digital marketing is therefore offering significant potential advantages to SFs with their limited marketing resources, provided they can adopt the technology. Both N and M were strengthening their brands by using social media and digital techniques.

M is the most 'digitally savvy' of the EOMs. At one point, he described how he was "*getting a big Instagram board made up with a hole in the middle and a hashtag so friends at the party can upload photos*". His intention was to use the posts of the young people at the parties to influence their friends, who in turn would influence their parents as the makers of the buying decision. As a strategy, this offers M two benefits. First, campaigns that include user-generated content see a 50% lift in engagement, according to Hutchinson (2016). Second, data from Tapinfluence/Nielsen (2020) suggest that 'influencer marketing' generates an 11 times greater return on investment than traditional digital marketing. Thus, for a small outlay, this creative marketing activity could result in significant future business. Similarly, M developed an entire marketing programme around word-of-mouth promotion. Acknowledging that "*every time we work with someone, she can tell five of her friends how great we are*", he created a referral scheme to build a 'pipeline' of new business. Referees were initially rewarded with a discount and eligibility for entry into a draw for a monthly prize. Finding some customers did not like this, M modified the incentives to include charitable donations.

To varying degrees, each of the EOMs therefore emphasized the value to their business of word-of-mouth marketing. They are all critically aware that this represents free advertising triggered by the experiences of their customers, and work hard to exceed customer expectations, thereby securing testimonials. P explained that, for "*60-75% of the work*" they do, they "*get a testimonial back*". Since Nielsen (2015) found that 83% of consumers act because of trusted recommendations, he is therefore well placed to exploit this phenomenon by using his testimonials to persuade others to buy. N, aware of the mistrust in his market, aimed to have his customers "*trust us*" and found the simple act of "*putting very small placards up*" at completed projects acted in a way similar to word of mouth.

Given the size of the three firms studied, it is to be expected that marketing is managed directly by the EOM and there is limited evidence of outsourcing. Unlike a LO that splits brand management from marketing communications and may be using various agencies, there is no need for communication between different teams and individuals to ensure integration of messages and activities. However, the participating EOMs did try to keep their staff on board with marketing and branding decisions because of the need to deliver the brand promise. This aspect will be discussed in Section 6.7.

#### *6.3.1.4 Are these three cases in Chapter 5 examples of high or low performance?*

In addition to the known differences between LOs and SFs, Berthon et al. (2008:39) assert that high-performing SFs “place relatively more emphasis than low-performing ones on seven of their ten BMPs: brand benefits; relevancy; consistency; portfolio; marketing activities; meaning; and support. Consistency (BMP 5 and marketing activities (BMP 7) have already been discussed in the context of whether they are operationalised in a similar way in SFs as in LOs. Determining whether the performance of my participating EOMs’ firms was ‘high’ or ‘low’ was not the intention of my inquiry and would in fact have been impossible because the original study derived its findings from a quantitative study, so there is no basis for like-for-like comparison. That said, a critical discussion of the remaining BMPs is possible in terms of how they were put into practice, which has been the main focus of my inquiry.

#### *BMP 1: Brand delivers benefits customers truly desire*

The amount of formal market research undertaken varied among the SFs, and Participant M was the only one to say he regularly did “*market research*”. However, each of the EOMs emphasised the need for dialogue and interaction with customers as a way of understanding the benefits being sought and maximising their experiences (BMP 1a and 1b). This was expressed in a variety of ways, including: “*I like to be interactive*”, (P); “*I just listen, and people say things. I often ask why we were chosen*” (N); and ensuring “*my staff can deal with any questions*” (M). All three had feedback processes in place, so that customers’ comments reached them. N had even tried feedback surveys, but found them “*very, very time intensive*”.

The extent to which a formal process exists to facilitate feedback varied, with P focused on face-to-face dialogue and M having both a “*FB page where they can leave comments*” and using “*automated e-mail asking more detailed questions about the whole process from initial inquiry to setting up the marquee*”. It thus seems reasonable to think that these SFs all have a customer orientation that enables them to develop suitable value propositions as part of a co-ordinated and firm-wide response. In other words, they were adopting what Hult et al. (2005) call a ‘cultural’ MO. However, except for M engaging in market research regularly, they were not generating market intelligence

that would have enabled them to plan, and correspondingly did not meet all the criteria of what Helfert et al. (2002) have called 'behavioural' MO. Nonetheless, they have been gaining competitive advantage by being close to their customers and able to respond to their needs. The cases thus align with the first building block of the Brand Co-Creation Model (Ind and Schmidt, 2019); which emphasises the need to understand consumers.

#### *BMP 2: Brand stays relevant*

There is evidence in the cases of dialogue and interaction with customers to keep in touch with their tastes (BMP 2b). Participant P said: *"I treat every client differently. I don't have a template"*; N similarly described his *"hands on attitude"* and was *"very much involved with all of my customers"*. M stressed the role staff played and the importance of *"feedback, feedback, feedback"*. Thus, by being adaptive and flexible the EOMs were gaining such organisational benefits as customer insight, closer relationships with consumers and, correspondingly, reduced risk and competitive advantage. Accordingly, they could position their brands appropriately because they were market oriented.

However, keeping abreast of market conditions (BMP 2c) happened in a more ad hoc manner. P was reactive: if he saw something and thought *"that's good"* he would *"copy it"*. In saying *"people talk to me and tell me things"*, N was implying that he used what his customers said to scan his environment. By contrast, M talked about mystery shopping: he *"pretended to be holding a wedding and out of 20, not 3 or 4, quotes there wasn't one I would trust with 10K to do a wedding"*. It therefore appears that two of the SFs may have been less able to base marketing decisions on knowledge of the market, even while they understood their current customers. As achieving a sustainable competitive advantage depends upon understanding both the competitors and consumers in a market, that may limit their ability to ensure their brand stays unique and valuable.

#### *BMP 6: Brand portfolio and hierarchy make sense*

Each of the three reported cases case aligns with the first of the 'Guidelines for the creation of a strong SME brand' proposed by Krake (2005: 232), that firms should focus on building one or two strong brands. The firms run by Participants P and N both had a single corporate brand (BMP 6a). Segmentation (BMP 6b) is based on behaviour rather than demographics, as they both firms looked for discerning customers, which N described as wanting to be *"taken seriously by serious customers"*. P acknowledged that this presented some marketing challenges because *"my target is 30 to 80s as an age bracket"* and talked about the corresponding need to be *"contemporary"* and yet not make the *"older generation feel left out"*.

By contrast, M took the strategic decision to split his corporate brand into two because he was *"confusing our [sales] leads"*. The change allowed him, *"like a sniper"*, to focus his marketing

programme on one or two important brand associations that were relevant to different segments (BMP6b), thus aligning with perceived wisdom about the role brand associations play in creating loyalty. In setting up two distinct brands, M could “*focus on specific customer characteristics and reach them*” (BMP6c). He improved his value proposition by ensuring that the corporate identity – and its elements of culture, behaviour, and corporate design – were consistent and that the different segments therefore understood the brand promise. In recognising that the brand experiences had to be consistent with the intended brand meaning (BMP 6d), he used one brand, which he defined as “*a better kind of Ryanair*”, as a means of educating his staff team on delivering a basic customer experience before they transitioned to the more upmarket brand. By investing in staff development in this way, he seemed to understand the need for the ‘intended’ and ‘enacted’ identities of a brand to overlap successfully if the brand was to create value for different groups of stakeholders.

#### *BMP 8: Brand managers understand what the brand means to consumers*

It seems clear that all the EOMs paid attention to listening to their customers and consumers, thus using their brands as what Brodie et al. (2006: 368) describe as a ‘relational asset’. Each of them stressed the importance of feedback and the value of testimonials in helping them to understand what is valued and what their brand means (BMP 8a). P emphasised that, he received a testimonial for 60 to 75% of his work, which helped to guide him as to whether he was “*doing something right in terms of the food or quality*”. N claimed not to have a “*process*”, but he listened and “*people say things*”. As the EOM most focused on growth, M was aware that his customers wanted him to “*keep the personal touch*”.

Hence, the three firms’ brands were operating as a two-way relationship-builder and allowing each one to position itself appropriately and offer appropriate value propositions to potential customers. N also talked about instilling the passion for the brand in his management team, an action that directly aligns with SME Guideline 6 (Krake, 2005: 232): “*cultivate a passion for the brand within the company*”. The importance of internal branding thus started to emerge as a means of supporting constant negotiation of brand meaning (Ind and Schmidt, 2019).

Their focus on being attentive to customer feedback also enables the EOMs in my study to develop knowledge of the core associations made about their brands (BMP8b). M was focused on the associations he wanted to establish as the company that “*creates experiences and memories and occasional hangovers*”. He therefore had a clear vision of how he wanted to develop his brand and recognised that communication with his customers must translate into branding activities if he hopes to build customer equity. This added to my sense that, in splitting his single corporate brand into two distinct brands, he was consciously moving from a product brand with a narrow message to



a corporate brand with a clear identity capable of acting as a basis for credibility and trust among consumers and other stakeholders. By increasing the focus on the relational aspects of his brand, through interaction and dialogue with his consumers, he is clearly using the 'service brand' in a similar way to N, to build a three-way relationship amongst his business, his staff, and his customers.

Meanwhile, in telling me that *"they see me load my van in Waitrose and they think I must be good because I use Waitrose"*, P was noticing the potential value of associations that are unintentionally created. This also aligns with the concept of the service brand, in so much as the brand is no longer an entity but rather a process that takes on other meanings (Brodie, 2009). Even if P had not actually been using Waitrose to buy for his business, that is what customers observed and, as brand experiences and brand meanings are co-created through interactions between consumers, suppliers and other partners, those brand associations become both a source of customer and of the firm's brand equity.

P and N did not have detailed, research-driven portraits of their target customers (BMP8c). Instead, they used personal contacts to create knowledge of their customers on a one-to-one basis. The notion of co-creation asserts that firms can only offer value propositions and that the customer is always a unique co-creator of value through value-in-use. I therefore feel that using service as a fundamental basis for exchange in this way may allow these two EOMs to start shifting their branding from an organisation-centric approach, where meaning is defined by the EOM, to a more dynamic and social process involving interactions and negotiations between the organisation and its stakeholders. Clearly, this does not change an EOM's relationship with the brand (P will probably always 'be' his brand), but it does imply that if they listen and learn from their experiences, they can maintain a successful brand. By contrast, M is specific, saying *"50% of our work is through females late 40s to 50s"* and *"in terms of the Asian market we are typically dealing with the male"*.

Accordingly, he was using his website, social media, and digital marketing techniques to target those different customer groups in very different ways, helping him to achieve a variety of organisational benefits including reduced risk and competitive advantage.

Lastly, under this heading, none of the SFs has developed brand extensions. Instead, in aiming to grow his business, M has opted strategically to develop two distinct corporate brands to target and support his different customer profiles more effectively. To do that, his website had a *"landing page"* where he would *"ask people what they are looking for and then split"* – in other words, he moves them into dialogue and interactions that are more closely aligned to their specific wants and needs.

*BMP 9: Brand is given proper support, sustained over the long run*

The extent to which the EOMs gave their brands proper support to sustain them over the long run varies. M regularly sought customer feedback to gain understanding of his marketing programme before he made changes (BMP 9a). He used e-mail marketing while working on an event with customers, who *“get several automated e-mails - this is a new thing”* and also formally followed up about his marketing activities in general, including (referring to me as interlocutor) *“you probably got an email. We sent it to about 300 of our past customers”*. By contrast, P did not *“have a programme”*, which was *“not a cop out”*; he just didn't. However, it is clear he reviewed customer feedback and was *“quite disappointed if we don't get a testimonial now”*. N alluded to having had to *“up our game”*, which suggests that he too paid close attention to what he learnt about the successes and failures of his programme, not least because he also talked about changing the *“Ts and Cs and procedures as our knowledge evolves”*.

The amount of research and development in support of the brand also varied across the three firms (BMP 9b). P acknowledged that to be of limited interest to him, but also that he had benefited from having a personal relationship with a partner who is *“much more interested”*. N suggested that he was at the stage in his business life cycle at which having a manager to take over the day-to-day operations of the business was beneficial because it allowed him to *“concentrate on developing business development and sales and brand development”*. M regularly took time to work on his brand: *“about ten days last time, on and off, and we probably do it two or three times a year”*.

There was also variation in attitudes to maintaining marketing support for the brand in reaction to a downturn in the market (BMP 9c). For example, during the inquiry the EOMs had been considering the impact of Brexit on their business. M was confident that *“his business grew in a recession”* and therefore felt that *“Brexit is about 1010 on my list of things to worry about”*. By contrast, P felt he could simply sustain his business because its *“niche is the smaller turnover the others don't want”*. However, Covid-19 in 2020 had a more dramatic impact on each business.

P had sold his business during the period of my research but, like M's, his firm had experienced the collapse of the events market. The new owner secured a contract for providing meals to the local council, who were required to house homeless people in a local hotel. This kept the business afloat in the short term, but she has since developed new services such as a home-delivered high-end afternoon tea while she continues to build relationships with potential customers for future business 'as usual'.

M responded to the Covid-19 pandemic by repositioning himself for the B-to-B market, adopting personal direct-selling techniques to win business and adapting his social media presence and

website accordingly. As restrictions are constantly changing, I note that those are regularly updated to reflect government guidance and that he is responding as appropriate.

In a different sector, N had to furlough his staff but has since undertaken most of the large contract work single-handed, to maintain his business. What I find interesting about this is that it has been the EOMs' ability to dominate branding decisions and take control that has enabled their firms to survive, and they have taken swift action to adapt their market and/or brand orientation in response to reactions from their consumers or stakeholders in response to the pandemic. This directly contradicts existing work on brand management suggesting that it has low priority in SFs. Ironically, this is said by Gilmore et al. (2001) to be because they adopt a short-term sales orientation to survive hostile business environments. There is evidence from my study, however, of three EOMs adapting rapidly to the external environment by adjusting how they designed, realised, and executed their brand strategy based on the operational needs of their business, precisely so they could survive in the long term. This could be considered an enforced 'brand exploration phase, in which trial and error, innovation, creativity and a commitment to learning would all be factors influencing their brand building, but it also suggests a level of brand management sophistication for which SFs and EOMs are generally uncredited, according to Centeno et al. (2013:454).

Lastly, it is worth noting that Berthon et al. (2008) do not discuss BMPs 3 and 4 in any depth, presumably because they do not differentiate between SFs and LOs or between low and high-performing SFs. As my first aim is to explore the brand management practices adopted by small firms from the managerial perspective of the entrepreneurial owner manager as the brand owner, however, those two BMPs will be considered next.

#### *BMP 3: Pricing strategies based on perceptions of value*

The SDL perspective argues that consumers are no longer passive recipients of a firm's offer, but possess expertise, skills and knowledge that can be co-opted to co-create new products, services, or meanings (Prahalad and Ramaswamy, 2000; 2004). Accordingly, companies and consumers create value "materially and symbolically" through various interactions (Galvagno and Dalli, 2014:644). In turn, this implies that connectivity is needed between the firm offering the value proposition and its customers. Thus, in the post-digital world, the brand owner must make the brand an 'inclusive relationship experience or they will not be able to optimise the price, cost and quality of the product or service offering to meet or exceed customers' expectations (BMP3a).

It is therefore interesting that P said he "*doesn't have a fixed price*". Instead, on account of the kind of service he provides, he was able to adopt a flexible pricing strategy that enabled him to set his price depending on the kind of event he was co-creating with his customer. He observed that he

doesn't *"get people refusing to pay"*, which suggests his brand is appropriately positioned (BMP 4). Similarly, N recognised that it was *"important to distinguish between value for money and cheap"*, explaining his is a *"problem-solving company"* and therefore *"not cheap"*. It therefore appears that he had been exceeding customer expectations and could charge a premium price. M did not advertise his prices because he didn't *"want to be known as cheap marquees but 'wow' marquees"*. His customers were *"co-developers of personalised experiences"*, in the terms of Prahalad and Ramaswamy (2000: 80), and he was able to withhold pricing information as part of a deliberate strategy that enabled him to *"shape expectations and co-create market acceptance for products and services"*.

Even while recognising that their brand enabled them to charge a premium, none of the EOMs has a formal system in place to monitor customers' perceptions of value (BMP3b). Instead, they engaged heavily in dialogue and interaction to gauge customers' views. M said he asked for *"feedback, feedback, feedback"* in *"multiple ways to appeal to different sorts of customers"*. N observed that there could be only one reason why customers would pay his higher prices: because *"they think it's worth it"*. P relied on *"people writing a card saying how good the service is"*. When it comes to estimating how much value customers believe the brand adds (BMP3c), P felt he was able to charge a premium because *"there is a large element of this being my own personal business"*. M was aware that demonstrating value is *"quite difficult"* in his market, and N identified a *"lot of mistrust in our business"*. Hence, it seems that price was acting as a brand association that serves as a source of equity to the firm by signalling quality to customers. It therefore enables them to process information and gives them confidence in their buying decision.

#### *BMP 4: Brand is properly positioned*

When it comes to positioning their brands, the EOMs had differing views about creating 'points of parity' (BMP4a and b) and establishing unique points of difference (BMP4c). As a baseline, P carried out research into *"other caterers' websites occasionally"* and read *"magazines for the catering industry"*. In the broadest sense, this enabled him to monitor trends. N explained that he *"works very hard to see myself and my company from the eyes of other people"* but did not elaborate on precisely what he did to achieve that, beyond dialogue with consumers and other stakeholders. M was not seeking to create points of parity at all, because he didn't *"want to be a commodity"*.

Each EOM focused more on creating unique points of difference to create competitive advantages (BMP4c). P felt it was important to create brand associations that were *"synonymous with quality"* and therefore drove a *"silver Mercedes van"* rather than being a *"white van man"*. N invested heavily in *"high tech communications for our customers"*, on the basis that *"most garden firms miss*

*calls; we catch them*". He also used *"top class equipment"*. M saw himself as EOM of the *"only marquee company that offers a full money back guarantee which puts their mind at ease"*.

It is perhaps important at this point to re-acknowledge that these SFs are all providers of services. Even prior to the emergence of SDL, service branding was a distinct concept compared to product branding, on account of the inherent characteristics of services and their impact on the service encounter (Palmer, 2005; Gilmore, 2003; de Chernatony and Segal-Horn, 2003; McDonald et al., 2001; Kasper et al., 1999; Dibb and Simkin, 1993). Thus, while awareness of the brand as presented by the company continues to influence brand equity, it is the consumer's experience of the organisation in delivering the service offer that becomes the determinant of brand meaning. By focusing on points of parity that enable them to differentiate and supporting those with competent service delivery at the brand's interfaces, the participating SFs are mimicking the trend observed in the 'post-digital world' of service brands, having shifted from being identifiers in their markets to builders of relationships between the firm and its customers. The best unique point of difference is therefore the experience that is co-created with the customer throughout all their encounters with the firm. This is reflected in N's observation that being reliable was critical for his firm in his sector, because *"the biggest complaint we hear is that people just don't come back"*.

#### 6.4 Dialogue and co-creation: the brand's conversational space is a place of interaction

The concept of co-creation asserts that firms should close the gap between themselves and their stakeholders (Meyassed et al., 2010). Various authors have explored the brand value co-creation practices of different stakeholders to develop models for brand co-creation, for example Brodie et al. (2009); Payne et al. (2009); Hatch and Schultz (2010); Frow and Payne (2011). However, Chapter 3 has pointed out that this work generally focuses on consumers, and co-creation is not explored from the perspective of a management activity in a firm. Hence the second aim of my inquiry was to investigate whether EOMs use co-creation to develop a branding strategy that delivers value and, if they do, how. This next part of my critical discussion therefore refers to Appendix C.2 ('Open coding: co-creation') and is based on the four principles of brand co-creation advanced by Ind and Schmidt (2019: 48), which they define as an "organisational reality, although organisations have the choice to embrace the idea and to take advantage of the opportunities afforded by co-creation or to reject it and adopt a more closed approach that relies on the vision of insiders".

Conceptual frameworks relating to brand co-creation generally consider all the actors in a network to be operant resources that interact and create mutual value (Ind and Schmidt, 2019; Vargo and

Lusch, 2017; Ramaswamy and Ozcan, 2016; Iglesias et al., 2013). Thus, processes are required to support the contributions of actors both inside the firm and beyond its traditional boundaries in creating a culture that recognises diverse and alternative perspectives. Branding therefore becomes a dynamic capability, requiring the brand owner to manage brand identity whilst facilitating the interactions of stakeholders to co-create brand meaning through various social processes. From the perspective of BO as a corporate strategy, these interactions need to be “inspired by the overall positioning of the brand” or the brand will drift away from the strategic aims of its owner (Schmidt, 2017:14).

Participant P put a lot of effort into talking with his customers and potential customers. He ensured that he responded promptly to inquiries and liked to be “*interactive*”. Given his dominant position in the SF as a ‘brand sovereign’ in the terminology of the Brand Leadership Continuum (Figure 6.1 in this Chapter), and the small size of his firm, his desire to build rapport with his consumers does not translate into formal processes. He said he treated “*every client differently*” and did not have a “*template where I quote and fill in space*”, choosing instead to focus on one-to-one relationship building through personal selling, which is what he was “*happiest at*”. It is clear his customers had opportunities to co-create their own experience as part of the service encounter, and therefore have their own brand meanings, but this did not impact significantly on brand identity. I feel that this is possibly because P ‘is’ the brand. Thus, he has been tending to see his brand as something he can influence and control rather than being co-created, even while his investment in building these relationships was giving him access to operant resources who would be willing to engage in word-of-mouth promotion. His customers “*offer their services – can you give me more cards, our wedding was great, we want to tell others*”.

P recognised that co-creation is not something his customers have to do but rather undertake “*because it’s how they feel*”. At the same time, on account of his definition of himself as the brand, I do not believe he understood that customers’ cultural and social contexts will determine how they create brand meaning. That said, he recognised that his staff team were integral to the brand experience. I witnessed his dialogue and interaction with them, usually in the form of a briefing prior to the start of each event, which ensured they worked together like a “*well-oiled machine*”.

The brand was therefore clearly operating as an interface between P and his stakeholders. With his emphasis on personal selling and building relationships with consumers as well as employees, brand value was literally being built “in the conversational space where the organisation and consumer meet” (Iglesias et al., 2013: 682). Nevertheless, P seemed resistant to interactions that might create the need for strategic change, saying: “*I stay in my comfort zone and don’t over stretch*”. For this

reason, I believe it reasonable to say a brand-related culture did exist, even if the full range of brand-related behaviours, such as brand research and the measurement of equity, were not demonstrated. It did seem that there was BO, but of a more inside-out than outside-in variety, to use the terminology of Urde (1994). Perhaps P's firm has an "embryonic BO" with a "de facto" branding strategy (Wong and Merriees, 2005: 158).

Similarly, N was using the brand as a conversational space to create brand value. He had a "*hands on attitude*" to his business and was "*very much involved*" with his customers. It pleased him that "*people talk to me and tell me things*" and he took evident pride in having "*probably 80%*" repeat business. He also placed great emphasis on the need to create trust, particularly given the sector in which he operated. P appeared to recognise both the need for interaction, as a way of maintaining the cohesiveness of his brand network, and its importance as a marketing asset for non-consumers who might become part of the wider brand community.

N said little about whether the operant resources in his network provided explicit brand benefits for him in terms of word-of-mouth marketing, testimonials or supporting digital marketing activity – and, if so, how they did. It is therefore tempting to assume that his brand network offered him little in return through dialogue and interaction. However, I have defined him as a 'brand chief' on my Brand Leadership Continuum, who exercised his authority over his brand because of his focus on ensuring that his staff were compliant with respect to his branding strategy, policies, and communications. This also suggests to me that he used dialogue and interaction from his consumers to maintain an appropriate branding strategy. In our discussions, N often drew attention to the need for quality across all aspects of his operations, linked to the need to build trust by providing a reliable service. For example, he employed "*nice men*", operated "*well maintained, good looking vehicles*" and produced "*top quality paperwork*".

The service encounters happened remotely from N, with his teams dispersed across the county working independently. He therefore emphasised the need to develop appropriate employee responses to the brand. For him, internal branding was critical to delivering the promises his brand made as a service provider. Dialogue and interaction with his employees therefore focused on engendering care for the brand; that with consumers enabled him to monitor what staff were doing to ensure that customers were "*happy*" and would "*come back*", thereby building loyalty. Thus, as King et al. (2013) suggest, the notions of the service brand and BO appear to conflate in N's case. His objective was to maintain high levels of customer service while developing an organisation-wide commitment to protecting brand values and identity, and his brand network provided the critical feedback that facilitated that as a 'living BO.' Consequently, N spent a significant amount of

management time listening to customer feedback and responding to it, important because trust and co-creation are undermined “when organisations fail to provide a proper response to the input they receive” (Ind and Schmidt, 2019:53).

However, it is difficult to pinpoint precise differences between P and N in terms of how “integrated” their BO was (Wong and Merrilees, 2005: 158) because the existing literature is unclear about how a SF with an integrated BO differs in terms of its brand management practices from one with a minimal or embryonic orientation. Internal branding is considered important for SFs wanting to develop a strong BO, so I believe that N’s was more integrated than P’s because he consistently checked his understanding of his competitive advantage and distinctiveness, based on dialogue and interaction with his consumers.

Likewise, M was heavily invested in creating opportunities for his stakeholders, particularly his customers, to provide “*feedback, feedback, feedback*”. In a significant difference from P and N, he was actively leveraging dialogue and interaction to create strategic advantages for his brand. Like N, his adept use of digital marketing and social media enabled him to create interactions at the brand interface that build brand value for both consumers and his firm. However, he took that activity further than N, and mimicked the ‘brand communities’ built up by such LOs as Lego and Harley-Davidson by deliberately facilitating customer agency through a range of activities that enabled the actors in his network to offer their operant resources. His ability to be inclusive fostered a willingness to share, which provided him with marketing resources such as business leads, visuals, content (for digital marketing) and testimonials as potential new sources of value. I believe that how M is working in this respect aligns most closely with the notion of a co-creative brand management system in which the intended and enacted brand identities overlap to achieve brand equity through a range of co-creation practices. BO in M’s firm clearly involves a range of collaborative interactions with stakeholders, in line with the notion of the ‘organic brand’ (Iglesias et al., 2013).

Further work is required to link the brand management practices of SFs with their strategic orientation. Meanwhile, the cases studied in my inquiry do indicate that SF brands are being used as communities of interest that leverage the social interactions of the actors in the network. This process ranges from simple engagement to benefit the business (P’s networking), through to the sophisticated use of activities to build brand reputation and presence (M’s digital marketing). These collaborations appear to be moderated by the marketing capabilities within the firm and, specifically those related to the use of social media. It therefore seems that the EOMs have adopted behaviours to support co-creation to a varying extent. At a basic level, dialogue was important to each EOM and provided a key opportunity for them to learn by uncovering the needs and wants of their



stakeholders in the form of feedback. Participation and interaction were also managed at the discretion of members of the brand community, which indicates that each EOM was open; in building relationships with stakeholders enabling participation, they are also building trust. It seems that, as a result, they were also able to evolve a branding capability, although the extent to which they pursued it varies, depending on the EOMs' brand leadership profile.

However, it is less clear if the EOMs were willing to listen and share, rather than directing and telling. That seemed to depend on, first, the relationship they had with their brand (for instance P's unwillingness to shift his brand identity because of his strong personal affiliation with it) and second, the extent to which they were willing and/or able to adopt a more transformational than transactional brand leadership style. As a result, the extent to which they might be considered 'humble' as brand leaders (Ind and Schmidt, 2019: 53) remains unclear.

### 6.5. The brand as a single organising principle for a small firm

I favour the notion of the brand as a single organising principle (Bean, 2009) for two reasons. First, it focuses on the idea that any business must be organised around its brand if it is going to make clear, consistent, and confident decisions that allow its product or service, its reputation and its culture to align. Thus, it clearly relates to the idea of the service brand, in which external marketing (making promises), interactive marketing (delivering these promises) and internal marketing (enabling promises to be fulfilled) need to come together because equity – for the consumer and the firm – can arise only from consistent delivery of the brand promise (Arruda, 2016). Second, the “paradox of the single organising principle is that it is one thought, arrived at by many” (Bean, 2009: 123), which encapsulates the idea that brand meaning and therefore brand strategy will be constantly negotiated as part of a process of co-creation. This overlaps with the idea of the 'organic brand' and recognises that brands operate in a hyper-connected world with multiple interfaces between employees and consumers (Iglesias et al., 2013).

In being unequivocal, the idea of the brand as a single organising principle is easier to apply to the real-world context of small firms than concepts relating to brand orientation, which do not always embody clear constructs, as is the case with the 'branding archetypes' (Wong and Merrilees, 2005). It is therefore possible to say each of the EOMs in my study was using his brand as a single organising principle, as follows:

- a) They have corporate brands

Each EOM has a corporate brand (latterly two in the case of M) that is systematically planned and implemented, even if that was often done informally. In this way, they aimed for consistency. That is clear in the discussion about BMP 5, above, although the extent to which that was achieved varied according to the business lifecycle, the demands this placed on the EOM as the individual with strategic brand responsibility, and how knowledgeable the EOMs were about marketing as a discipline.

b) The brand supports corporate culture

The values underpinning the corporate brand may not be formally articulated as a brand mantra, but still provide the basis for a culture that defines what is important to the business and why (Keller, 1999). I believe this is critically important, given that the brand is operating as an interface between the company and its stakeholders. Without clear values that are understood throughout the business, a firm will lack the 'glue' to hold its network together, with a significant risk that it will lose control of its brand. For example, the investment Participant N made in internal branding suggests that he clearly understood the need for his staff to successfully navigate relationships with consumers through brand interfaces that were often 'public and visible' and therefore 'transparent and risky' if he was to be able to sustain co-created brand value. His internal stakeholders therefore represented a major building block of brand equity for his firm.

c) Each EOM took responsibility for enforcing brand values, requiring them to have an adaptive management style

Thus, it seems clear that, although the EOMs had different profiles as brand leaders, they took responsibility for ensuring the 'understanding, stability and consistency' of their brand (Bean, 2009:112), although that happened in different ways. What I find interesting, given that Participant P was intransigent about his brand identity and N had a very top-down approach in terms of brand compliance, is that all EOMs appeared to adopt a transformational leadership approach to customers. The co-creation behaviours that involve testimonials, word of mouth and, in M's case, engaging with the firm in ways that created content and visuals suitable for use in social media campaigns, were focused on the intrinsic motivations and emotional engagement of their customers. It therefore seems that they adjusted their management style according to the stakeholders they were working with, although it is unclear to what extent that was done consciously.

## 6.6 Service matters: internal branding creates competitive advantages

In an era of co-creation where brands are 'polyphonic' (Kornberger, 2010) staff need to successfully navigate relationships with consumers through multiple brand interfaces.

Participant P was clear that his "*excellent*" staff team were integral to his brand's ability to offer superior value propositions because they gave clients "*trust and confidence*". He talked of having "*general all-round customer awareness*" because his staff were "*customer focused*" and "*enjoy what they are doing*". Whilst there was no formal 'brand mantra', it appears the staff did take their cue from P and that a culturally embedded and shared ideology helped to guide strategic decision-making behaviour and their interactions with stakeholders. That brand commitment and brand-related behaviour appeared to derive from P's strong self-identification with his brand. I therefore perceive his employees as 'acolytes' who followed his lead but enacted the brand uniquely and individually. From my experience of working within P's team, that seemed to enable his employees, who are mostly casual or part-time, to draw on a range of benefits they associated with the brand. Some of those seemed to be functional, such as flexible employment opportunities that allowed individuals to earn additional income, but there was also a social dimension linked to being part of a team who were credited with being highly professional by P as the brand owner. Thus, individuals were able to deliver brand co-creation by being brand champions.

By contrast, N talked of creating a "*culture of care and pride for the job*" and involved his "*entire firm*" in delivering the promises his brand made as a service brand. In recognising that he could achieve sustainable advantage through his brand, N focused on aligning his resources and business practices to embed his brand in his organizational culture. Hence, internal branding became a way for him to align MO and BO. However, he also mentioned some of the challenges he had experienced when trying to "*cultivate a passion for the brand within the company*", to employ the vocabulary of SME Guideline 6 (Krake, 2005: 232). Consequently, he seemed to take a more directional approach with his staff team than P did, but his employees also seemed less likely to co-create a brand relationship in the same way as customers do. This is despite having values, norms, and symbols in place (company uniform, liveried fleet) as part of a 'living brand framework' (Schmidt, 2017: 27). It therefore appears that his staff team knew what the brand represented but might have either lacked the relevant skills to follow the brand rules or did not feel it was in their interest to do so. I sense that is because his brand structure was quite rigid, as he was striving to achieve trust and reliability in a sector which is not recognised for having those attributes. As a result, his employee brand behaviour was at the time more like brand compliance.

Meanwhile, M wanted his customers to say *“these guys are amazing’ and to tell their friends, so I need to prep staff to go beyond the basics and really help customers with their events”*. He was clearly aiming for ‘brand citizenship’, or the sort of employee behaviour that “goes above and beyond what the company requires from an employee; and can have a positive impact on other internal and external stakeholders” (Saleem and Iglesias, 2017: 75). However, in focusing on other aspects of his business, he recognised that he needed to spend more time *“building a decent culture”* even while acknowledging that a high staff retention rate suggested that they *“enjoy what they are doing and agree the values and direction of the brand”*, which could lead to commitment and advocacy if managed and supported appropriately.

## 7. Chapter & Conclusions

### 7.1 Chapter Overview

This concluding chapter presents a synopsis of my inquiry before reviewing the original research contributions it has made and discussing the limitations of the research design. It then suggests the opportunities arising for future research, provides a brief personal reflection about my experience of undertaking doctoral research before ending with a final summary.

### 7.2 Synopsis

The title of this thesis – *What happens at the brand interface? A narrative inquiry into the brand management practices of small firms in Hertfordshire* – conveys my intention to research an unexplored perspective on the brand management practices of small firms, a category defined in the Glossary. I set out with two aims. The first was to explore the brand management practices adopted by small firms ('SFs') from the perspective of an entrepreneurial owner manager ('EOM') as the brand owner. The second was to assess whether such individuals engaged in co-creation of their brands with any combination of consumers, customers and staff, to develop a branding strategy capable of delivering brand value; and how they did so, if at all. To support those aims, I drew on conceptual frameworks relating to brand management practices (Berthon et al., 2008) and brand co-creation (Ind and Schmidt, 2019; Vargo and Lusch, 2017).

My supporting objectives were:

#### **Relating to Aim 1**

- To develop a conceptual framework for the inquiry
- To explore the attitudes of EOMs to branding and brand management practices through a longitudinal study to assess if and how those change.

#### **Relating to Aim 2**

- To produce narratives that 'story' what is done by the participating EOMs with respect to their brand management practices, and how and why they take the actions they do.

To critically evaluate if and how the brand management practices of the participating EOMs involve co-creation with consumers, customers, and staff.

Mapped against key themes and gaps identified in the literature summarised in Table 3.3 in Section 3.9.1, my inquiry can be seen to address several of those critical gaps.

My original contribution is to present narratives and a corresponding critical discussion that together contextualise brand management in three SFs based in Hertfordshire through the classic SDL lens of Vargo and Lusch (2004). Adopting a longitudinal design has enabled me to consider the temporal aspects of brand management, giving new insight into what happens in the participating SFs.

The case narratives demonstrate that a brand leadership continuum exists based on the personality, motivation and business aims of the EOM, and on whether they see the opportunities that marketing and branding present for their business. That continuum is shown in Figure 6.1 in Section 6.2. It defines the brand management practices ('BMPs') adopted by the EOM with varying levels of sophistication. By exploring those implemented by SFs through a qualitative longitudinal design, I have been able to demonstrate that the EOMs participating in my inquiry used their brand as a 'relational asset' (Brodie et al., 2006: 368). A more collaborative approach to brand management can be detected among my participants and I identify a shift away from the classic organisation-centric descriptions of the 'items' and 'dimensions' of BMPs as defined by Berthon et al. (2008). I therefore suggest that change is needed to the existing framework to make it more representative of brand management in the 'post-digital' world, specifically as practised by the participating SFs, which I show to be undertaking many of the BMPs that are generally associated with LOs, but more informally.

This need for change is reinforced by a critical difference in my findings when compared to the previous work by Berthon et al (2008), which found that three BMPs differentiated SFs from LOs:

BMP 10            monitoring sources of brand equity;

BMP 5            ensuring the brand is consistent;

BMP 7            using a full repertoire of marketing activities to build brand equity.

However, in line with the findings of Centeno et al. (2013), my inquiry suggests that the EOMs do not necessarily fail to undertake those practices. Thus, I conclude that these BMPs did not previously emerge because the way in which they are executed and evaluated in SFs is at odds with the terminology and processes adopted by the larger organisations on which existing research has focused.

Prior to my inquiry, few research studies had explored co-creation from the managerial perspective (Frow et al., 2015; Kazadiki et al., 2016). Those which did exist were based on work with managers who had led co-creation for well-known brands owned by LOs (Ind et al., 2017). By focusing on what EOMs do through their BMPs to support their brands as a 'relational asset', I have been able to explore the dialogue and collaboration happening at the brand interface, as described by Iglesias et al (2013). Thus, I have been able to observe that my participant EOMs engaged in two different kinds of activity. First, they were using their brands as 'communities of interest' capable of leveraging the social interactions of actors in the network to create benefits for the firm. This practice ranges from simple engagement to benefit the business, through feedback and learning, to the sophisticated use of activities intended to build brand reputation and presence. The processes involved appear, in my research, to have been moderated by the marketing capabilities within the SF and, specifically, its social media capabilities. Second, the participating EOMs recognised that the staff team is integral to the provision of customer experiences that match or exceed customer expectations. Accordingly, each EOM exhibited a commitment to internal branding, which was used to enable and encourage employees to support co-creation at the brand interface, although the extent to which internal branding resulted in staff teams' 'brand citizenship' behaviours (Saleem and Iglesias, 2017) was different in each firm. That finding is partly attributable to each participating SF's brand culture and the moderating effect the EOM himself had on that in his role as 'brand leader' but is also sector-specific and affected by such external factors as the availability and cost of staff. Establishing that the brand management practices involved external and internal actors confirmed that interaction maintains cohesion within the brand network, and that a brand-oriented culture leads to brand-oriented behaviour. Thus, I address the gap identified by Vallaster and Lindgreen (2011) by presenting evidence that the participating SFs are co-operatively developing their brands.

Based on my findings, I conclude that each of the participant EOMs has been using the brand as a single organising principle, allowing them to deliver their brand promises and minimise any possible reputational damage. Given that this is so, it seems that none of the firms participating in my study had adopted a minimalist brand orientation, suggesting that the EOMs looked beyond day-to-day survival with respect to their marketing and branding activities. However, further research is needed to link the BMPs of SFs with the constructs embodied in the 'branding archetypes ladder' proposed by Wong and Merrilees (2005).

### 7.3 Research contributions

Throughout this inquiry, I have argued that a knowledge gap exists concerning the brand management practices adopted by SFs and the extent to which those involve co-creation. I also state that this gap is exacerbated by being cross-sectional in design, because that fails to allow for brand management being a regular activity that evolves over time.

Based on the existing framework of Berthon et al. (2008) setting out the items and dimensions of brand management, I have successfully contextualised how brand management is happening by comparing and contrasting three real-world cases of SFs by means of a longitudinal study. Based on the view of originality advanced by Philips and Pugh (2000:63), my thesis therefore contributes to knowledge in three ways. First, by adopting the brand management practices defined by Berthon et al. (2008) but using these as a basis for a qualitative longitudinal inquiry, it undertakes 'empirical work not previously done'. Second, by using existing concepts relating to brand management and co-creation but synthesising them in a different way, it simultaneously continues 'previously original work'. Lastly, the longitudinal design adds 'to knowledge in a way not used before'. I am thus able to lay claim to the contributions to the state of knowledge set out in the next three sub-sections.

#### 7.3.1 Academic

I believe my inquiry to be the first longitudinal study to contextualise the brand management practices of small firms, thus responding to a gap in the literature. In synthesising concepts relating to brand management and co-creation to understand how brand management is executed in SFs from the managerial perspective of an owner-manager, it also explores how service ecosystems work in practice, thereby supporting the development of both metatheory and mid-range theory. The evidence it presents of how brand co-creation happens in the SF context thus addresses a second gap in the literature.

Specifically, I demonstrate how the relationship that participating EOMs had with their brands (described in 6.2.1) moderated their brand management practices (reported in 6.2.2), which enables me to present a typology reflecting the observed continuum of brand leadership styles (6.2.3 and Figure 6.1). In a significant divergence from the existing literature, I find that all the items and dimensions of brand management are put into practice, with the proviso that the extent to which this happens varies from example to example. Specifically, three of those items and dimensions that are not evidenced by previous research are shown to have been taking place. Those are BMP' Nos. 10 (monitoring sources of brand equity), 5 (ensuring the brand is consistent) and 7 (using a full repertoire of marketing activities to build brand equity). These have not featured in research studies



prior to my own because the language and terminology used to define them in larger organisations is not relevant to the reality of smaller firms.

I also demonstrate how co-creation is executed to support branding strategy within the participating SFs, at 6.3.1.4 and 6.4, offering evidence that the brand is being used by each EOM as a 'relational asset' and providing examples of how the 'conversational space' of the brand is being used as a place of interaction. There is thus an indication that SF brands are operating as communities of interest that leverage the social interactions of their networks to develop a dynamic branding strategy.

I have furthermore been able to demonstrate that in executing their brand management practices the participating EOMs were using their brands as a 'single organising principle', which supports their efforts to align their business operations and provides a basis for competitive advantage.

My findings therefore identify the need for further research to update the organisation-centric items and dimensions of brand management practices and to examine co-creative branding activities in the 'post-digital' world. This is discussed further in section 7.5.

### 7.3.2 Methodological

My inquiry makes three methodological contributions. First, its longitudinal design responds to a gap identified in the existing literature by demonstrating how branding strategy develops over time in the SFs participating in my inquiry. Longitudinal studies are relatively rare because of the problems associated with the collection of data across several points in time (Watson 2016). However, it is simply not possible to identify or document changes in either the practice of branding or the circumstances in which it occurs through the existing body of cross-sectional research. It may thus be argued that a longitudinal study offers a superior depiction of what is happening in these SFs (Watson, 2016).

Second, as an exploratory study, I take a new approach to the under-researched area of brand management in SFs by adopting the Service Dominant Logic lens of Vargo and Lusch (2017). My inquiry therefore offers a foundation on which to build more conclusive research in the future and potential avenues for further research, as discussed in section 7.5.

Third, in combination with the longitudinal design, a 'cohort study' using the same participants throughout has facilitated deep insights into the specific practices of the branding practices of different entrepreneurial owner-managers, thereby providing a 'nuanced understanding' of a previously under-explored phenomenon (Boddy, 2016).

### 7.3.3 Practical

As a lecturer in marketing who maintains her professional marketing practice by working with SFs through schemes such as Knowledge Transfer Partnerships, I have split this contribution to relate separately to education and policy.

#### *7.3.3.1 Teachers of Marketing and Entrepreneurship*

The existing literature is clear that models relevant to marketing and branding as carried out in LOs do not apply to SFs because of their unique business characteristics. However, marketing education in universities typically draws on conventional theories and models, thus overlooking the different context of entrepreneurial marketing. In turn this may limit the career aspirations of students, who might neglect opportunities beyond LOs because they do not recognise the marketing that is practised there. My research cases provide contextualised examples of how theory is put into practice in the SF context, thereby providing a resource with which to address this imbalance in marketing curricula.

#### *7.3.3.2 Policy Makers*

Whilst support for developing good practice is available from Local Enterprise Partnerships and schemes such as the Growth Accelerator programme, the Institute of Directors is critical of existing support for SFs, claiming that the “quality of available advice for small businesses is highly variable” (Parikh, 2018: 14). Marketing leadership seems to be the Achilles’ heel of SFs who are “unnecessarily vulnerable through inadequacies in their marketing practice”, according to McCartan-Quinn and Carson (2003: 210). The examples provided by my inquiry may therefore help business advisors, investors, and business support organisations to better understand what SFs need from their branding strategy.

## 7.4 Research limitations

There are three main limitations to my study, concerned with generalisability, synthesis of key concepts, and the impact of longitudinal design on data collection.

### 7.4.1 Generalisability

The key criticism of case research focuses on the fact that its findings cannot be generalised to a different context of population. Allowing for the heterogeneity of SF type and the range of entrepreneurs’ personalities and psychological traits, it is difficult to draw general conclusions from my data, even though care was taken to ensure that the selected cases were typical of the local small-business population. Following the lead of Boddy (2016), I therefore argue that, since my research has been carried out under a constructivist paradigm, my small sample is still able to

generate insight. My cases can therefore act as exemplars that “shed empirical light” on the theoretical concepts used, which may be useful in supporting the development of hypotheses for further testing (Yin, 2014: 40). Moreover, the analytical interpretations I have developed from the concepts integrated into my conceptual framework also allow me to suggest or corroborate the need to modify or change existing theories or ideas. For example, these cases show that the items and dimensions of brand management practices demand further development and adaptation if they are to be relevant to SFs’ brand management in a post-digital society.

#### 7.4.2 Synthesis of key concepts

A second limitation of my research design is the use of a conceptual framework as its basis, partly because the process of developing it involves personal choices regarding the ways in which existing theory and literature connect to create a foundation for further exploration, which other researchers might not share. I address this by arguing in Chapter 4, following the lead of Schwandt (2000: 210) that “all research is interpretive” because all researchers make personal choices about research design. However, when it came to developing the narratives and critical discussion in my own study, I feel that my conceptual framework made the task more challenging because the literature streams I made use of draw on differing and sometimes contradictory sources to develop a ‘paradigm for marketing’ (Vargo and Lusch, 2004). On the one hand, the resulting ‘incommensurability’ of the process – that is, the property of lacking a common quality on which to make a comparison – generated various approaches for meaningful research, allowing me to argue that mine is a valid perspective. On the other hand, this being an emerging paradigm, the terminology and concepts are in a constant state of flux compared with more established ideas, making it more difficult to communicate consistently and clearly.

In recognising that there are challenges relating to the synthesis of existing work, I believe my work provides evidence of ‘doctorateness’ as defined by Trafford et al. (2014). My thesis clarifies the gaps in and contributions to the current state of knowledge, devises and answers research questions through the use of a conceptual framework and allows me to set out and justify appropriate conclusions. In my work, I have engaged with theory to organise conceptual perspectives that articulate the research issues and extend the understanding of them (Trafford, 2010; Trafford and Leshem, 2008: 41-50).

#### 7.4.3 The impact of the longitudinal design

Before I started this inquiry, I had found no evidence of research studies seeking to examine the impact of branding in SFs over time, which offered me a critical gap that could be addressed. However, adopting extended qualitative case studies as a longitudinal design to explore whether the

brand management practices of SFs change over time and, if so, how, presented a range of practical challenges. Specifically, there were ‘casualties’ in the matter of being able to sustain relationships with participants, some dropping out of the research for such practical reasons as selling their business. The resulting attrition in the selection process meant I could only develop a small number of cases, further complicating application of the findings to a larger population. Watson (2016) concurs that attrition is the main challenge with longitudinal design. However, as a single example can be considered ‘highly instructive’ for in-depth research, my cases do add to knowledge by contextualising the under-researched phenomenon of brand co-creation from the perspective of the three participant EOMs (Boddy, 2016).

### 7.5 Future research

As key differences have been found in brand management practices numbers 10, 5 and 7, relating most closely to the extent to which an organisation is focused on developing brand equity, future work could usefully focus on that area. My inquiry has also established that the literature streams on co-creation and brand orientation would benefit from further integration, with a view to developing branding archetypes based on known and shared constructs.

In addition, the following avenues for future research can be recognised.

The longitudinal design can be prolonged to continue exploring how brand management is put into practice in SFs, giving additional opportunities for evaluating such factors as organisational learning. It could also be extended to the developing of more cases. Specifically, it would be relevant to explore the brand management practices of SFs that are not service firms, and to increase the diversity of the sample in this research study.

Interested researchers can use my formative research to develop hypotheses for a more definitive investigation, focused on developing and testing a new set of items and dimensions for co-created brand management practices, thereby updating the existing model for the post-digital era.

Work is also needed to link the brand management practices of SFs to the constructs used in the existing ‘branding archetypes’ paradigm so that the differences between them can be more accurately described and extended to reflect the complexities of brand management, particularly in SFs.

Opportunities also exist for further research aimed at exploring how service ecosystems are operationalised in practice, thereby supporting the development of midrange and micro- level

theory to allow the metatheory of Service Dominant Logic to be further tested, verified, and applied in the SF context.

## 7.6 A personal reflection on the experience of undertaking doctoral research

*This is a short “retrospective reflection” (Boud et al., 1985) written as I conclude this thesis, although my inquiry is ongoing.*

*I feel that research is a constant series of highs and lows, much like the adventure of life, but brought into sharper focus by time constraints and a pressure from within academia to produce work that is novel, noteworthy, and publishable whilst simultaneously being required to meet tighter deadlines and cover more bases as an existing member of staff at a university. In designing a longitudinal study, I probably did not make my life as a doctoral student any easier.*

*In part, this was due to a range of practical issues relating to collecting many waves of data. Trying to pin down my participants for interview when they were busy running small firms with the day-to-day challenges that involved, was a major headache. Project management often felt out of my control. The longitudinal design also meant finding the personal reserves to stay with complex concepts when my personal life was also experiencing a normal range of highs and lows, which distracted me from time on task. However, having ‘got into my stride’, I am committed to continuing this inquiry beyond completion of my doctorate as I feel the deep insights it is eliciting in terms of the phenomena I am studying is slowly advancing understanding as the study extends.*

*During this journey, there have been various ‘downs’ for which I have castigated myself. I did not always capture my interviews as fully as I would have liked and my forays into using technology enjoyed mixed success. This is a lesson learnt the hard way in terms of opportunity cost, and I am committed to extending my technological skills to enable me to have more consistently reliable data in future. As a practitioner who has worked in a variety of problematic situations, I am comfortable with complexity. This had a strange effect in terms of the exploratory design, as my relaxed approach to complex situations tended to allow me to procrastinate. There have also been times when my lack of confidence in my abilities as a researcher has made me want to stop. This was most often due to conflicts I experienced from being a student and a staff member at the same institution at the same time: there is nowhere to hide, and the pressure to meet a certain standard has often felt intense. By contrast, there have been many upsides. As someone who does not have a first degree and didn’t go to university until I was nearly 40, to do my MBA, I am almost at the point of completion. Achieving a doctorate is not something I would ever have imagined happening to me, so my fingers are crossed that I successfully end my journey. Although it has been a challenging time, I have benefited from so*

*many things: the opportunity to work with supervisors who have been collegiate and constructive; co-creating knowledge with a small group of owner managers who have allowed me to experience their own successes and failures vicariously so I can make sense of theories and conceptual ideas; extending my own knowledge and skills; and opportunities to present my thinking at conferences, where it has been met with interest and questions that have prompted me to refine my work.*

*Finally, I am fortunate to work in an environment with colleagues who are widely published in reputable journals. I have learnt much from their generosity of spirit as a member of the relevant research groups and activities. I am not sure that I will ever aspire to, or achieve, their standards. But as I near the end of my doctorate I feel inspired by the possibilities that future research may offer, and proud to have come this far after leaving school with relatively few qualifications.*

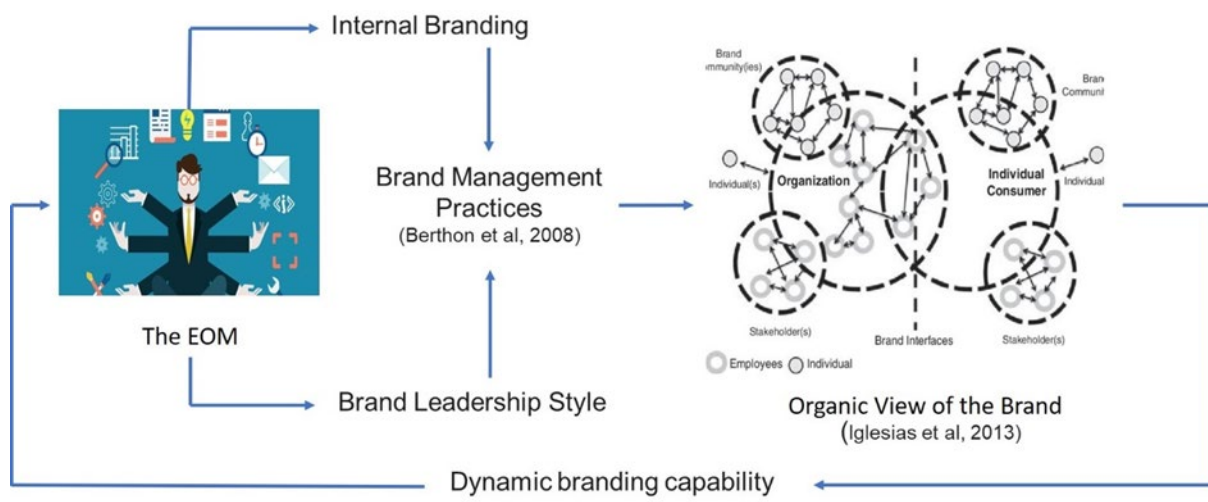
## 7.7 Concluding Summary

This interpretive study of how small firms and their EOMs view and exploit their brand as a key marketing asset has generated a typology of entrepreneurial brand-leadership styles (Figure 6.1). The existence of a continuum of brand management programmes based on the motivation, personality, and goals of individual EOMs, demonstrates that the relationship the EOM has with their brand moderates the BMPs that are adopted and how they are implemented. However, while brand management occurs with varying degrees of sophistication, the brand is found to be consistently used as a 'single organising principle' by the SFs meaning that none of them has a 'minimalist' brand orientation.

In a critical difference with previous work, this inquiry identifies that all the items and dimensions of brand management (Berthon et al., 2008) are put into practice, with the proviso that the extent to which this happens varies from example to example. Accordingly, BMP Nos. 10 (monitoring sources of brand equity), 5 (ensuring the brand is consistent) and 7 (using a full repertoire of marketing activities to build brand equity) are shown not to have featured in prior studies because the language and terminology used to define them are irrelevant in the SF context.

Finally, the research demonstrates how co-creation is being executed to support branding strategy within the participating SFs, providing examples of how the 'conversational space' of the brand is being used as a place of interaction. Accordingly, it indicates that SF brands are operating as communities of interest that leverage the social interactions of their networks to develop a dynamic branding strategy.

On this basis, the conceptual framework first presented as Figure 3.11 in Chapter 3 is found to be a credible representation of what is occurring:



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## Appendices

### A. Documents relating to ethics

#### A.1 Ethics Approval Notifications



**SOCIAL SCIENCES, ARTS AND HUMANITIES ECDA**

#### **ETHICS APPROVAL NOTIFICATION**

**TO** Diane Morrad  
**CC** Dr Christopher Brown  
**FROM** Dr Ian Willcock, Social Sciences, Arts and Humanities ECDA Chairman  
**DATE** 06/05/20

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**Protocol number:** aBUS/PG/UH/00235(3)

**Title of study:** Putting the brand at the heart of organisational decision making: a narrative inquiry into the brand management practices of small firms in Hertfordshire

Your application to modify and extend the existing protocol as detailed below has been accepted and approved by the ECDA for your School and includes work undertaken for this study by the named additional workers below:

**Name additional workers:**

**Dr Nika Balomenou**

**Modification:**

- New title
- Extend end date
- Because of Covid-19 restrictions, required to adopt telephone and email communication in place of face to face interviews
- All modifications as listed on the EC2 application

**General conditions of approval:**

Ethics approval has been granted subject to the standard conditions below.

**Original protocol:** Any conditions relating to the original protocol approval remain and must be complied with.

**Permissions:** Any necessary permissions for the use of premises/location and accessing participants for your study must be obtained in writing prior to any data collection commencing. Failure to obtain adequate permissions may be considered a breach of this protocol.

**External communications:** Ensure you quote the UH protocol number and the name of the approving Committee on all paperwork, including recruitment advertisements/online requests, for this study.

SOCIAL SCIENCES, ARTS AND HUMANITIES ECDA

## ETHICS APPROVAL NOTIFICATION

**TO:** Diane Morrad  
**CC:** Christopher Brown  
**FROM:** Dr Timothy H Parke, Social Sciences, Arts and Humanities ECDA Chairman  
**DATE:** 26/07/19

---

**Protocol number:** aBUS/PG/UH/00235(2)

**Title of study:** Is there value in intangibility? Brand, payback and learning in the life cycle of the SME

Your application to modify and extend the existing protocol as detailed below has been accepted and approved by the ECDA for your School and includes work undertaken for this study by the named additional workers below:

**Modification:**

Extend the end date  
Add additional workers  
Changes as listed on the EC2 form

**This approval is valid:**

From: 26/07/19

To: 09/01/20

**Additional workers:**

**Dr Nika Balomenou**

**Please note:**

**If your research involves invasive procedures you are required to complete and submit an EC7 Protocol Monitoring Form, and your completed consent paperwork to this ECDA once your study is complete. You are also required to complete and submit an EC7 Protocol Monitoring Form if you are a member of staff. This form is available via the Ethics Approval StudyNet Site via the 'Application Forms' page <http://www.studynet1.herts.ac.uk/ptl/common/ethics.nsf/Teaching+Documents?Openview&count=9999&restricttcategory=Application+Forms>**

**Any conditions relating to the original protocol approval remain and must be complied with.**

SOCIAL SCIENCES, ARTS and HUMANITIES ECDA

## ETHICS APPROVAL NOTIFICATION

**TO** Diane Morrad  
**CC** Dr Peter Fraser  
**FROM** Dr Tim Parke Social Sciences, Arts and Humanities ECDA Chair  
**DATE** 15/06/2017

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Protocol number: aBUS/PG/UH/00235(1)

Title of study: *Co-creating brands to realise greater potential for small firms: A Hertfordshire case study*

Your application to modify and extend the existing protocol as detailed below has been accepted and approved by the ECDA for your School and includes work undertaken for this study by the named additional workers below:

Modification: As stated in EC2.

This approval is valid:

From: 30/06/2017

To: 01/09/2019

Additional workers: Dr Peter Fraser

Please note:

**Any conditions relating to the original protocol approval remain and must be complied with.**

**Approval applies specifically to the research study/methodology and timings as detailed in your Form EC1 or as detailed in the EC2 request. Should you amend any further aspect of your research, or wish to apply for an extension to your study, you will need your supervisor's approval and must complete and submit a further EC2 request. In cases where the amendments to the original study are deemed to be substantial, a new Form EC1 may need to be completed prior to the study being undertaken.**

**Should adverse circumstances arise during this study such as physical reaction/harm, mental/emotional harm, intrusion of privacy or breach of confidentiality this must be reported to the approving Committee immediately. Failure to report adverse circumstance/s would be considered misconduct.**

**Ensure you quote the UH protocol number and the name of the approving Committee on all paperwork, including recruitment advertisements/online requests, for this study.**

**Students must include this Approval Notification with their submission.**



UNIVERSITY OF HERTFORDSHIRE  
SOCIAL, SCIENCES, ARTS AND HUMANITIES

## MEMORANDUM

TO Diane Morrad

CC Sue Halliday

FROM Dr Tim Parke, Social, Sciences, Art and Humanities, ECDA Chairman

DATE 25 June 2013

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Protocol number: BUS/PG/UH/00235

Title of study: Is there value in intangibility? Brand, payback and learning in the life cycle of the SME

Your application for ethical approval has been accepted and approved by the ECDA for your school.

This approval is valid:

From: 1 July 2013

To: 30 June 2017

**Please note:**

**Approval applies specifically to the research study/methodology and timings as detailed in your Form EC1. Should you amend any aspect of your research, or wish to apply for an extension to your study, you will need your supervisor's approval and must complete and submit form EC2. In cases where the amendments to the original study are deemed to be substantial, a new Form EC1 may need to be completed prior to the study being undertaken.**

A2. Participant Consent Forms

FORM EC3  
(Rev. June 11)

University of Hertfordshire

CONSENT FORM FOR STUDIES INVOLVING HUMAN PARTICIPANTS

I, the undersigned (please give your name here, in BLOCK CAPITALS)

IAN WHITE

of (please give contact details here, sufficient to enable the investigator to get in touch with you, such as a postal or email address)

mywhitespace@hotmail.com

AL7BJ

hereby freely agree to take part in the study entitled

**Is there value in intangibility? Brand, payback and learning in the life cycle of the SME**

- 1 I confirm that I have been given a Participant Information Sheet (a copy of which is attached to this form) giving particulars of the study including its aim(s), methods and design, the names and contact details of key people and, as appropriate, the risks and potential benefits, and any plans for follow-up studies that might involve further approaches to participants. I have been given details of my involvement in the study. I have been told that in the event of any significant change to the aim(s) or design of the study I will be informed, and asked to renew my consent to participate in it.
- 2 I have been assured that I may withdraw from the study at any time without disadvantage or having to give a reason.
- 3 I have been given information about the risks of my suffering harm or adverse effects. I have been told about the aftercare and support that will be offered to me in the event of this happening, and I have been assured that all such aftercare or support would be provided at no cost to myself.
- 4 I have been told how information relating to me (data obtained in the course of the study, and data provided by me about myself) will be handled: how it will be kept secure, who will have access to it, and how it will or may be used.
- 5 I have been told what will be done if the study reveals that I have a medical condition which may have existed prior to the study, which I may or may not have been aware of, and which could affect the present or future health of myself or others. If this happens, I will be told about the condition in an appropriate manner and advised on follow-up action I should take. Information about the condition will be passed to my GP, and I may no longer be allowed to take part in the study.
- 6 I have been told that I may at some time in the future be contacted again in connection with this or another study.

Signature of participant



Date

20/6/2013

Signature of (principal) investigator

Date 10.06.13

Name of (principal) investigator (in BLOCK CAPITALS please)

DIANE MORRAD

University of Hertfordshire

CONSENT FORM FOR STUDIES INVOLVING HUMAN PARTICIPANTS

I, the undersigned [please give your name here, in BLOCK CAPITALS]  
Paul Tew

of [please give contact details here, sufficient to enable the investigator to get in touch with you, such as a postal or email address]  
paul@clockhouse.biz

hereby freely agree to take part in the study entitled

**Is there value in intangibility? Brand, payback and learning in the life cycle of the SME**

1 I confirm that I have been given a Participant Information Sheet (a copy of which is attached to this form) giving particulars of the study, including its aim(s), methods and design, the names and contact details of key people and, as appropriate, the risks and potential benefits, and any plans for follow-up studies that might involve further approaches to participants. I have been given details of my involvement in the study. I have been told that in the event of any significant change to the aim(s) or design of the study I will be informed, and asked to renew my consent to participate in it.

2 I have been assured that I may withdraw from the study at any time without disadvantage or having to give a reason.

3 I have been given information about the risks of my suffering harm or adverse effects. I have been told about the aftercare and support that will be offered to me in the event of this happening, and I have been assured that all such aftercare or support would be provided at no cost to myself.

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6 I have been told that I may at some time in the future be contacted again in connection with this or another study.

Signature of participant.......... Date 17<sup>th</sup> June 2013

Signature of (principal) investigator..... Date 10.06.13

Name of (principal) investigator [in BLOCK CAPITALS please]

DIANE MORRAD

University of Hertfordshire

CONSENT FORM FOR STUDIES INVOLVING HUMAN PARTICIPANTS

I, the undersigned *[please give your name here, in BLOCK CAPITALS]*

NICK GEARING

of *[please give contact details here, sufficient to enable the investigator to get in touch with you, such as a postal or email address]*

nick@yahoo.co.uk

hereby freely agree to take part in the study entitled

**Is there value in intangibility? Brand, payback and learning in the life cycle of the SME**

- 1 I confirm that I have been given a Participant Information Sheet (a copy of which is attached to this form) giving particulars of the study, including its aim(s), methods and design, the names and contact details of key people and, as appropriate, the risks and potential benefits, and any plans for follow-up studies that might involve further approaches to participants. I have been given details of my involvement in the study. I have been told that in the event of any significant change to the aim(s) or design of the study I will be informed, and asked to renew my consent to participate in it.
- 2 I have been assured that I may withdraw from the study at any time without disadvantage or having to give a reason.
- 3 I have been given information about the risks of my suffering harm or adverse effects. I have been told about the aftercare and support that will be offered to me in the event of this happening, and I have been assured that all such aftercare or support would be provided at no cost to myself.
- 4 I have been told how information relating to me (data obtained in the course of the study, and data provided by me about myself) will be handled: how it will be kept secure, who will have access to it, and how it will or may be used.
- 5 I have been told what will be done if the study reveals that I have a medical condition which may have existed prior to the study, which I may or may not have been aware of, and which could affect the present or future health of myself or others. If this happens, I will be told about the condition in an appropriate manner and advised on follow-up action I should take. Information about the condition will be passed to my GP, and I may no longer be allowed to take part in the study.
- 6 I have been told that I may at some time in the future be contacted again in connection with this or another study.

Signature of participant.....



Date 14-7-15

Signature of (principal) investigator..... Date 10.06.13

Name of (principal) investigator *[in BLOCK CAPITALS please]*

DIANE MORRAD

University of Hertfordshire

**CONSENT FORM FOR STUDIES INVOLVING HUMAN PARTICIPANTS**

I, the undersigned (please give your name here, in BLOCK CAPITALS)

M. Hammond  
of (please give contact details here, sufficient to enable the investigator to get in touch with you, such as a postal or email address)

hereby freely agree to take part in the study entitled

**Is there value in intangibility? Brand, payback and learning in the life cycle of the SME**

1 I confirm that I have been given a Participant Information Sheet (a copy of which is attached to this form) giving particulars of the study, including its aim(s), methods and design, the names and contact details of key people and, as appropriate, the risks and potential benefits, and any plans for follow-up studies that might involve further approaches to participants. I have been given details of my involvement in the study. I have been told that in the event of any significant change to the aim(s) or design of the study I will be informed, and asked to renew my consent to participate in it.

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5 I have been told that I may at some time in the future be contacted again in connection with this or another study.

Signature of participant



Date: 21.09.2015

Signature of (principal) investigator

Date 10.06.13

Name of (principal) investigator (in BLOCK CAPITALS please)

DIANE MORRAD

## B. Data collection

### B1. Phase 1 data collection instrument

#### Phase 1 Initial Exploratory Research: Semi Structured Interview Questions

The aim of this stage of the research is to explore to what extent SMEs and their owner/managers are applying the foundational premises of SD-Logic (Vargo and Lusch, 2008) and if there is a link to brand management.

Question	S-D Logic Foundational Premise to be tested
How do you think your company delivers value to your customers?  or  What do you need to do in order to deliver value to your customers?	1, 2, 3, 5
How do you stay ahead of your competition?	4
Who do you involve in developing value for your customer?  How? Why?	4, 5, 6, 7, 9
How do you learn from your customer's experiences or feelings about the value they have received from your/your company?	6, 7, 8, 10
How do you learn from the activities linked to developing and delivering value to your customers?	3, 6, 8, 9, 10
How do you make changes to the activities you do based on your learning?	4, 7

(Vargo, S.L. and Lusch, R.F (2008) Service Dominant Logic: Continuing the Evolution, Journal of the Academy of Marketing Science (2008) 36:1 – 10)

## B2. Phase 2 Semi Structured Interview to explore the meaning of brand

1. What does “brand” mean to you?
2. What do you want your brand to achieve?  
How? Why?
3. What engagement do you want from your customers?  
What do you want them to do? How/why?
4. What values do you want your brand to convey?
5. How do you achieve repeat business?
6. How do you evaluate your brand success?

### B3. Phase 3 Semi Structured interview to explore brand management practices

The aim of this stage of the research is to explore to what extent SFs are developing brand management practices (Berthon et al, 2008) that enable them to deliver sustainable value propositions.

The researcher wants to explore whether there is any connection between the adoption and application of the foundational premises of SD-Logic (Vargo and Lusch, 2008) by the SF and the brand management practices the firm undertakes.

Question	BMP being explored
In what ways do you ensure that your brand offers your customers the benefits that they want?	1
How do you ensure your brand stays relevant?	2
In what ways do you find out how your customers value your brand?  In what ways does this knowledge affect your strategic decision making?	3
How do you ensure your brand gives you a competitive advantage in your market?	4
In what ways do you invest in and support your brand?  Prompt: short term and long term	5, 7, 9
What do you do to ensure your staff team understand your brand and the value it creates?	6, 8
How do you monitor your brand?	10
What does "brand value" mean to your firm and why is it important (or not)?	Over-arching question to explore the extent to which the firm is committed to developing equity from their brand, and whether this is consumer or firm based equity/both.

**(Berthon, P., Ewing, M.T. and Napoli, J. (2008) Brand Management in Small to Medium-Sized Enterprises, Journal of Small Business Management, 2008 46(1), pp 27 - 45)**

Phase 3 interview structure was adopted as an interview guide for further data collection cycles.



## C. Interview Transcripts

Note: Material collected from I and S has not been used for this Doctoral submission as one withdrew from the study and the other has not completed three phases of data collection.

### C1. Phase 1

#### **Interview with I 2<sup>nd</sup> July 2013**

**Please can you give me a brief overview of the company and its history to this point? A biography.**

I have been in and around the food industry in some way for 20 plus years. I've had my own restaurant, corner shop, food retail unit. I had an appreciation of what people liked/wanted. I had another restaurant on the Isle of White as part of a concession through a sailing club. I had the opportunity to work there in 1996, came back by which time Pam had fully qualified as a chef.

K----- Caterers came up as a purchase opportunity –it was a “dog with fleas.” I had no money; bought it for £6K on AMEX. This says a lot about my mind-set: I think I am risk tolerant and risk taking. I had a month to 6 weeks to find a premises as the lady worked from home. I had an opportunity to get a small, shoddy unit in Gifford Road, St Albans. Had to do everything: paint etc. There was a 4 ring domestic cooker, a sink was installed. Had an 18<sup>th</sup> month accounting period for the takeover: turned over £120K in that time, which was more than the previous owner achieved in any year. We bought what we knew we had: phone number, database, some stock, some good-will and an ability to hit the ground running.

2002 – 2004 we were adding about £100k/year, primarily through a little bit of corporate but also “mum and pop” catering at the village hall – 2 courses, tea and coffee. If people paid £10/head...we probably did 60/70 of these a year while slowly building up the corporate work in the background. When I bought the business it was 70% private, 30% corporate. By 2004 it was 40% corporate and 60% private. In 2004 things started to change, probably due to the economic climate. We were starting to get known- increase in weddings due to profile etc; higher spends; extending into canapes, marquees. People started realising they didn't have to use hotels. In 2004 we bought out P-----rs in St Albans - they were quite a big corporate supplier – adding on significant chunks of money. By 2006 turnover was about £0.5 Million/year. We moved to WGC and started to diversify with E—L----- as a brand – the sandwich plus the piece of cake plus K---- Catering weddings, corporate events etc.

We spent £150K to relocate the business to Welwyn Garden City in 2006. We were very bullish and gung ho about the future of the business. We invested in a re-fit of the kitchens, new vans and marketing. Money for investment came from the bank. We started to develop E—L----- in its own right and took a private catering business to £150-200K/year. Corporate was growing steadily and by 2008 corporate was outweighing the private business. This is what we wanted: to be more reliant on a strong Monday – Friday with some weekend business. It was quite demanding – we were working all week, then setting up Friday evenings for weekends and taking down on Sundays.

By 2008 we took another unit to support the business model. We were generating a good net profit, taking dividends but a limited amount out of the business. The market started slowing down, but I thought we wouldn't be impacted. Within 6 months private events almost hit zero from 200K and the corporate business lost 25%. The “squeeze” with increased food prices etc meant the business

started to go backwards. In 2009/10 we were like a rabbit caught in the headlights. We were trying not to spend money but still had overheads (had spent £35K fitting out the unit over the road). We had staff to pay and leases and were still paying down the debt. In 2009 we sold the K---- Weddings business to Dan our ex head chef which reduced our salary overheads and gave him an opportunity. By 2008/9 we had developed E—L----- into its own brand – answering phones, emails, a van with the logos. It was a difficult time as we were seen as a premium product in a failing market.

We regrouped. The period 2011/12 saw the end of all the financial commitments we incurred to move to Welwyn Garden City (£150K). X joined in mid-2010 as Operations Manager with a view to us ramping up the business in the corporate market. Most of the past 4 years has been around re-aligning the business and reorganising e.g. HR, H&S etc. In 2010 we secured the rights to the café in the BTEC centre in Stevenage. Again, it was like a “dog with fleas” but I had support from Wente and knew what I was getting into.

We took a £400K slip in the early recessionary years. Last year we turned over £550K; this year we expect £650K. We are getting close to replacing what was lost as part of the recession with a more definable, manageable Monday – Friday business. We have had to have enough confidence therefore to throw £30K at a new website. This opens up the business to do some events, but all under the E—L-- banner. The holding company is E—P---- The business is fragile. We run the gauntlet like most small businesses and don't have the competitive advantage. I think we can get the business back to making a small profit, but we have had to reinvest all the monies from the business. Our nuts are well and truly on the line. That's what small businesses do.

We have opportunity, we have vision and consensus. But we run the gauntlet like all small business. Much of our decision making is driven by hindsight and by circumstances out of our control. e.g. banks won't lend money. The market is driven by price.

We are on the market, looking for a buyer. I don't believe we will find one without profits. We have a brand, we have 15 years of goodwill etc, but people don't want to buy a business unless they know what the ROI will be – unless they are just looking for a location.

The business has given us some great opportunities, but if you look back over the years it's taken a lot of effort and investment. Hard work. We had no family money, inherited land or anything. We are entrepreneurs in the true sense of the word, taking business ideas and trying to make them work. We employ 13 people, and no-one earns the minimum wage. They are all on living wages. They are all people looking to earn locally and we collect taxes on their behalf for the government. We're buying from local markets so supporting that economy, but there is no support for us – we can be allowed to fail. When Woolworth's went to the wall it was going to happen: the model no longer worked. It's great that some of the HMV shops have stayed because of their history, but it was going to fail. But SMEs get very little support. We might not make it, meaning 13 people are redundant and suppliers won't be paid; and nothing is done, the banks won't help. I haven't seen anything yet. The people who can't trade, who can't find a solution etc...precariousness will pale into insignificance.

### **What do you feel your company needs to do in order for your consumers to feel they have value?**

The pace of change and sheer volume of information in the marketplace means many of our consumers want it easy, straightforward – the route of least resistance. If I think about the large companies, e.g. M&S, Waitrose, Tesco, they seem to say, because they have critical mass, that we want to do business with you, but you have to do it this way. No deviation from the route. In Tesco, for instance, the goods in store help compensate for the cost of the on-line business. All these things

offer customers limited choice. As a family business we try to offer ultimate choice. An SME can turn on its heel, so we can be more flexible, but we are also being driven down the “must make your customers more responsible” route. As an example, take a cheese and ham sandwich. As you grow and get more process oriented it becomes harder to individualise, so you either say “I can do it, but it will cost more”, or “I can do it a different way”. I can’t absorb the cost anymore. We’ve just built an e-commerce website. I’ve tried to be considerate of what our customers want, but the trouble is customers don’t want to take responsibility e.g. with not filling in their details correctly. We have to find ways therefore to be responsive, engaging and human. We have to find ways of having a dialogue without it eroding margin.

### **How do you stay ahead of your competitors?**

We need to understand what they are doing – spent time on doing it. It’s about customer service, listening too. I fundamentally believe it is about trying to say yes and not no. Other than the noise, there is this belief that everything has to be new. If we’re not constantly adapting or developing our packaging etc., we are accused of being staid, of not being innovative. But if we make changes people don’t like it. It’s a dichotomy.

### **Who do you involve in developing value for your customer?**

A lot of it comes from me, trying to come from the big picture, trying to get buy in from X and Y.

Gut feel based on being aware of what’s out there, what’s happening in the world. I didn’t come up with the idea of the e-commerce platform, it came from the market. I’m reliant on the staff team, who don’t see the bigger picture, so I have to persuade them. I collect a general amount of intelligence and then have to ask questions e.g. can we do it? Then have some subtle questions e.g. how do we package it? Take the example of the coffee and cake offer. We spent time investigating display options etc. There is a lot of gut feel but it’s not random. I try to have a process. Lots of mini meets – do we think this is a good idea etc.

### **How do you learn from your customer’s experiences or feelings about the value they have received from your/your company?**

Well (shakes his head) .....very confusing. I have a passion, a belief as a small local company buying locally, employing locally, a green agenda. As an SME we do this as well as we can. We spent last year investing heavily in new packaging that’s compostable because we believe our customers think it is part of our brand values and important. But then customers will say they liked the gold trays, which weren’t recyclable. You think you’re doing the right things in terms of the general market – it’s great that you are doing it but...

Everybody seems to be under such pressure. Listening to the whole market and trying to assess/assume what that market wants. I assume that’s because of the influence of the media: consumers will buy free range etc. Consumers have all of that and hear that, they are making decisions every day. I have been challenged about it but if my produce is 50p more than a supplier who doesn’t do it they will go there. There is a wider debate about how we create change in our society.

The pace of social media has led to a whole lot of noise: you have to try and sift out the bits that are relevant to you. We are not McDonalds you know, where you know what you are going to get, how it will come packaged, what environment you’re going to eat in. The reality is that this is our product, our brand. If you don’t want to buy this, you will go elsewhere. Most markets are becoming more homogenised.

Note “values/differentiation” – what did this mean?

### **How do you learn from the activities linked to developing and delivering value to your customers?**

Take the café at the BTC – it has gone through massive change. They were selling instant coffee in plastic cups at 40p. When we said we were going to do fresh coffee in recyclable cups, frothy coffee etc in excess of £1.80 people said it couldn't be done. You have to take customers on the journey in small steps. Let's give it a go, let's trial and then re-trial. Have we given our clients clear communications, have we asked the right questions? Not everything will work in the same way, so each project develops in its own way, e.g. an example of packaging. It wasn't trialed or benchmarked. We went for it and got 80% positive feedback. We got customer feedback that said our packaging looks bland, so we now have a sheet that has various advantages. So, by hook or by crook, it started in one place, we got some feedback and developed it further.

We now believe the café at the BTC with all its systems and processes can be replicated. We have another opportunity to open one, but will it be exactly the same – no. We need to be listening, responding.

### **How do you make changes to the activities you do based on your learning?**

We go back through the loops. The next phase...that didn't work so what next? E.g. people like cake, but not with fresh cream therefore you need a longer shelf life. Cake is mostly bought between 2 and 3pm so people want cake that goes with tea.

Some of it is gut feel, some is based on feedback, some on what the market is doing. Don't have time, unlike a project, to write a thesis every time we want to do something. As a business we just have to do it. Take the example of having a van on the road. Of course this will have a business plan, because it is very different to 90% of what we do on a daily basis, which is our customers need a solution today otherwise we will have a problem tomorrow. We don't get everything right. I think we get more right than most. It's a numbers game: more people buying on a regular basis grows our business.

Just reflecting back there, a lot of what I've said seems to be left to chance. There are a lot of internal checks to ensure things are on track, e.g. tuna: we sourced a different product and got negative feedback, so we changed supplier. There was a cost involved (£1 extra per tin) but we had to keep our clients happy. Can grow this analogy across all aspects of the business. E.g. if clients are not using the website it might be they are quiet and no action is needed. But say the website is too complex I have options e.g. I may say I can sit down and help you with it.

I think a lot of SMEs are constantly adapting. (I gave a bike shop example where the business diversified into selling bells and cleaning bikes). I think we all find ways of doing those things that separate us out. We answer the phone, we see people e.g. for an event at the weekend. The feedback was we were the only company out of 6 who responded. This job has a value of £6 – 700 and a profit of £2 – 300. I would hope these kind of things shine through. The fact that we care. Even if it is a complaint – there was a piece of plastic in a sandwich at Ocado last week – we have a process for dealing with that. I can apologise and give them a free sandwich, but I have not lost responsibility.

It is incredibly draining. Think of all the things that happen in an SME daily. If you could employ more staff it would help, but we have had to shrink. We are looking for things we can bolt on to add value without it costing. If you spoke to our customers, I think they would say we are reliable, trustworthy and meet their needs, not that we are the cheapest or make the best tuna sandwich.

## **Interview with S 8<sup>th</sup> July 2013**

**Please can you give me a brief overview of the company and its history to this point? A biography or potted history as it were.**

We are a family business and the overall business is 50 years old this year. It was started by my Mum and Dad who are still the main shareholders. Originally it was a transport business – buses, coaches, taxis etc. In the 1980s they wanted to move into the leisure industry and looked at pubs etc.

B\_\_\_ Zoo was bought on 1<sup>st</sup> April 1984. It was officially the worst zoo in Britain, but it had freehold land. Zoo licencing was just coming in: we opened as it was but closed on Christmas Day 1984, did all the work needed and re-opened Easter 1986.

As a business we have been through the classic over-expansion as a business. Cash flow was tough. We put both the coaches and the zoo up for sale, but sold the coaches, so all the family has been involved in the zoo business since then.

In 2013 we are making profits, and this affords us a nice lifestyle, but it is a 24 x 7 operation. In 2000 we opened the B\_\_ C\_\_ S\_\_ in Kent which operates through B—W—, although we own the land. We lost our way a bit in 2006/7: we had exceptional years so took our eyes off the ball, but we are back on track. We are spending a lot of time/energy investing in technology to deal with the internet generation. Service is important in terms of how you engage with your customers, not just in terms of what's on offer.

**What do you feel your company needs to do in order for your consumers to feel they have value?**

I think our value proposition is exceptional, especially compared to other leisure activities. Our peak adult price is £17.00 which compared to other leisure activities e.g. theatre, football, is good value.

Our Trip Advisor score is 4.7 – 4.8 on average, so we get a nice certificate at the end of the year. What's interesting and has changed dramatically is if there is a complaint on Facebook or Twitter. The peer pressure is amazing. We often don't respond; people do it for us.

We try to listen to our customers. The reason I had a meeting this morning is because of a perception with the layout of the park. People think you pay for a lot of things after paying to come in, so we will re-layout, put up signs - "free" – for the first five attractions.

I have looked at doing a net promoter score, but it's too expensive. It costs \$2000 per month which I can't defend. It's ridiculous. So we are looking at people being advocates rather than investing in this. So we have some new initiatives over the next 12 months.

We did get it wrong. We got it right actually, but there was a perception in the market that we were expensive compared to other attractions. So we have sold tens of thousands of tickets through Groupon, Wowcher, etc. Although we sold at discount, heavily discounted, it was run as a pump primer. Visitor numbers are 25% up. So far a good year.

Last year a combination of things impacted on the business. It was the wettest summer on record, the coldest winter, there were lots of competing events and the economy. We can see the end of the storm: we are coming out of it.

**How do you stay ahead of your competitors?**

We have always been innovative in terms of how we've done what we've done. In terms of location we couldn't have picked a worse place: there are probably 20 proper zoos within an hour of PWP and that's without Sunday shopping (Cheshunt has a large retail park), the cinema and all the other leisure activities. So we ensure that people can get close to the animals and interact. We are proud to be the best zoo in Europe for animal experiences, but most zoos now offer experiences. We are still by far the biggest, but we are changing our offering. Technology as part of the experience e.g. augmented reality, is what we believe, well, we know, because we speak to people all the time, will set us apart for the next 10 – 15 years. For a business our size, we are investing a huge amount in the technology infrastructure to support the different platforms. The best example of this: in the last two months you can buy your tickets in the queue and then just show your phone: it speeds up entry. We also hate people paying cash: if they pay online, we can collect data on them and sell to them again. The problem is that our internet connection is really bad. Our broadband comes in off satellite. Our Wi-Fi has been extended throughout the site but is accessed through Facebook, but this allows us to collect data. At the moment this is fairly passive, but we will be able to use it in the future. The Editor of BBC Click visited a few weeks ago and was blown away with this, one of the few places he has seen it. The company we engaged to put in the Wi-Fi, Air Angel, were trialling new software and we said we would be the guinea pigs.

Our belief system, our values that sort of thing. We always got the value of the experience. I was lucky enough to see Joseph Pine speak 12 or 15 years ago when Animal Kingdom opened at Disney. Not that he said anything new, as it was how I felt anyway, but it was an endorsement. People want an immersion experience, they don't want to look anymore. That's always been, fundamentally, what we have tried to achieve.

### **Who do you involve in developing value for your customer?**

Am going to say everybody! Somebody, somewhere, has to make a decision so you try to get as much information as you can either from simple market research; maybe just talking to people. Or you get external help. It was before Joseph Pine so probably 15 years ago, Computer XS did an audit on every component part of the attraction then went away and crunched numbers. It didn't tell us anything we didn't know but it did confirm a few things, e.g. there was not enough for boys to do with their fathers. It did say that we didn't create enough queues: I was pleased about that as I wanted people to have experience overload. We have lost momentum a bit, but like to think that people coming to the park will experience surprise and delight.

We monitor everything. That's stupid. We monitor as much as we can using social media - Facebook, Twitter and others; 10 social media sites. We work with Youtube, Google, so we can check on an almost hourly basis. Because it is in real time, e.g. a girl being killed by a tiger, it breaks before it hits the news. Sometimes stupid things happen e.g. the drains are blocked or the toilets are dirty, which we can pick up. As I say, we are not perfect, but we try to be.

We hold regular meetings with our staff. We try to encourage people to come forward with ideas to improve things, do mystery shoppers and are just going to invest in something we've not done for a long time: customer awareness training for everyone at the business from the Directors down. We try to have an open-door policy.

### **How do you learn from your customer's experiences or feelings about the value they have received from you/your company?**

Everybody that comes on an experience is given a feedback form and they are monitored carefully. They usually score 9, but occasionally people don't like things, e.g. if you go for afternoon tea in

Tiger Treetops you get tea in a paper cup. This is okay for the Starbucks generation but older people, (my Dad is one of them), want a china teacup. The problem for us is that there is no kitchen there, so we have to use disposables. Social media sites gave us the opportunity for selling, but the problem was we sold 10,000 teas so we needed to respond to this issue.

We send staff to visit other attractions to see their offering, and the same with family members.

We try to listen as best we can to visitor feedback in various forms. We've not done one for ages, but we have used focus groups.

Social media has changed the way we glean information. People are constantly reporting what they do and don't like. We are just about to start a structured programme bringing in 60 – 100 bloggers over the summer holidays and then spring next year. We have tried this before but not to the same extent.

Something we need to address and will do when schools go back in September: historically we have employed an environmental science teacher to ensure we are linked to the national curriculum. We need to give this an overhaul – an MOT – and check it is aligned properly.

### **How do you learn from the activities linked to developing and delivering value to your customers?**

It's an ever evolving process; and it's fun! You can't always get it right. If you want an easy life, then don't go out on a limb. Sometimes you get it right, sometimes wrong. Sometimes this is due to external forces, sometimes internal, e.g. pony rides and parrot shows, 10 years ago. We decided it wasn't right to have performing animals to that extent. It's done its time and it is time to move on. Strangely, this was partly why business dropped off: we changed our value proposition before we needed to.

We are lucky. We are a family business, a small group, the core team has been there 20 years. We have learnt from experience and try to avoid repeating mistakes. We carry a lot of knowledge – the classic example of 10,000 hours before you're an expert. So we've done that. We give each other a lot of support.

There is always something new and we are always evolving.

### **How do you make changes to the activities you do based on your learning?**

It's a simple but complicated answer. It's a hotchpotch of information that comes at you directly and indirectly. If you go back in time, our toilets were, literally, shit. We tarmacked the car park – just first impressions really make an impact. If you get the fundamentals right, people are generally forgiving. So it's about communication. Things happen e.g. a show not happening, so it's about communicating quickly. Even 5 years ago people would write a letter, now it's instant. We prefer to deal with people while they are still on site.

In terms of our value proposition it's the combination of everything I've spoken about, Now, it's trying to ignore the noise and focus on what people really like in order to get consistency. So we can offer different pricing structures; low, mid, high season. You get what you're paying for basically. We deliver the same value proposition but you get less in the winter.

## Interview with P, 16<sup>th</sup> July 2013

**Please can you give me a brief overview of the company and its history to this point? A biography.**

C----- started in 2002. I've always been interested in food and entertaining. When I left the City, it seemed a good idea to work with food. I had this concept for high end ready meals and sat at Liverpool Street station watching about 2000 people go past with no idea how to go about it. Five years later I had the idea to start as a cottage industry with 8 recipes... (*gap in my notes*) Beef Bhaji, Thai Chicken, Vegetable Chilli, Vegetable Lasagne and I can't remember the last one. I sourced via the internet various ways of packaging type machines that I would need. It was very important that it would be the best available. I used a CPET tray that you can freeze down to -30, microwave or put in the oven. The best tray was manufactured in Israel, so I contacted them, and they gave me a supplier in Ireland. It was all very well sourcing packaging, but I needed equipment to pack and at approximately £10,000 it was too expensive. I found a company in Luton, a sandwich business who was an ex trader too and bought it for £1000. (*Note: he means the equipment and not the firm*). I got the okay from Environmental Health to work from home, bought two freezers and converted part of the garage to a packing area. Within a year I had 70 regular customers. I offered a free delivery service within 15 miles of Hitchin with a minimum spend. In my naivety I didn't have, never have done, a business plan. I was going to have to sell a lot of ready meals to make a living. The cost was about 30% higher than supermarkets at £4.50. No one commented on the price, only on the quality. After about 9 months, a friend of my ex-wife asked me to do a barbecue for about 50 people. I was quite daunted. I put a package together and probably way under charged. It went well so I picked up two events one of them being a dinner party which led to an anniversary buffet for 50. To cut a long story short, like an inverted pyramid, one job led to a referral for the next. There was a 4:1 return on outside catering. Not including labour, just the materials, but quite a good margin. It became apparent that outside catering was more profitable so – stupidly - I let ready meals go. But I picked up two corporates, doctors and surgeons plus LV and became their designated caterer for three years.

The break-up of my marriage meant I needed to buy new premises. I soon found a bar in Hitchin willing to let out their kitchen. I let the business grow at its own pace. I was scared of success and with leaving the City I had enough to cover myself for a couple of years. I am pretty much self-taught: I've had the luxury of some failures without it damaging the business. After four years I started making some money. Going forward I picked up another corporate, so I needed to move (*premises*) again. I found someone who wanted to rent out part of a large unit – a butcher/greengrocer who had freezers available. For a flat rate I could use these. It lasted about three years and the business grew 20% year on year. The guy sold out, so I needed to find another new premise. I found one cheap that needed a full refit – 600 M2. I've grown 30%/year for the last four years up to this year and, at the moment, I am on track to make the same as last year despite losing my main corporate who is no longer running courses. I have since decided to get back into ready meals as this was my passion and what started the business. I was encouraged to try by Waitrose (*I think he meant the range they offer, which suggested an available market*) but I am scared too. I joined BN last year and it has been a terrific help. My business is stable: in order to grow I need to double turnover and that's not possible on my own. I therefore made the decision to take on a long-term friend who has better business acumen. I am comfortable cooking and comfortable selling, but I am absolutely awful in the office. I hate quoting and have lost a lot of business. The perfect job is a £5K food wedding, but not doing the evening. There is an issue around profit and my hourly rate ends up being about £1.50 as the margin doesn't cover labour. I need to



grow up now. I have been an infant who needs to go to senior school. I only realise through talking to J (*his partner, who happens to run a marketing consultancy*) that I need an exit strategy.

**What do you feel your company needs to do in order for your consumers to feel they have value?**

Customer service, managing the expectations of what they expect. It's quite broad. In this industry we are literally offering a customer service, so timing is really important to maintain a rolling customer base.

**How do you stay ahead of your competitors?**

I don't know if I do, to be perfectly honest. What's interesting is in the last six months six large companies have gone bust. The reason is because they took for granted the business that was out there. The reason I am still here is that my cost base is low, meaning I can keep my pricing realistic. I've found that by talking with the client, getting the quote out within 24 hours and following up by email that they will work with you. That's the private sector. Corporates are very different and are governed by how cheap it will be. Especially Local Authorities. I have given up because they want something for nothing, and I won't serve poor quality food. A good analogy is Pizza Hut and Pizza Express. We are Pizza Express.

**Who do you involve in developing value for your customer?**

I don't know the answer to that because it's all me, isn't it? For big events I would involve my front of house guy, who can be brought in as needed like all my waiting staff. It gives clients confidence, trust (*I think he means to have reliable people front of house*).

**How do you learn from your customer's experiences or feelings about the value they have received from your/your company?**

I'd say that for between 60 – 75% of the work I do I get a testimonial back. People who take the time to write or send an email to tell me I'm doing something right in terms of the food or quality.

*He gave an example of a lunch for a specific client – no notes.*

People don't have to do it, but they do because it's how they feel. I want to keep this bit – that's why I am reluctant to expand.

**How do you learn from the activities linked to developing and delivering value to your customers?**

I guess if we take an example, the response from the client after the initial consultation. I know from that whether they want a caterer. The critical meeting and how it goes. In a nutshell when the event is completed. I always get told the staff are brilliant etc, therefore we are a well-oiled machine. They (*the staff*) are very customer focused. They are all 40-plus and enjoy what they are doing. There is general all-round customer awareness. It's still what this country lacks, despite its getting better. The view is that the service industry is lowly and part-time.

**How do you make changes to the activities you do based on your learning?**

At the end of each event I'll run through my mind what went right/wrong and how we could have done better e.g. by having a different menu. I evaluate it for myself. E.g. for a dinner party, doing something elaborate and then finding the oven doesn't work properly. I now stay in my comfort zone and don't over stretch.

## **Phase 1 Interview with N 14<sup>th</sup> July 2015**

### **How do you think your company delivers value to your customers?**

Mostly, and there are exceptions where we make mistakes, when somebody doesn't employ us it genuinely confuses me. There is no reason, other than price, for them not to choose us because we are as good as - or better- than everyone else. It's like buying a car. If I offered you a Ford or a BMW at a similar price you would pick the BMW. You only take the Ford because you can't afford the BMW. On the whole we offer a quality service, although we can make mistakes. That's driven by me out of a need to please and to avoid conflict with difficult people. I would rather have fewer customers at a higher price than more customers at a lower price.

### **How do you stay ahead of your competition?**

Where do I start...(pauses and smiles).

I'm...I work very hard to see myself and my company from the eyes of other people. I try and always do a top-quality job so a very high percentage, probably 80% of my customers, are repeat customers. If I never get another phone call, I will still have a business due to high retention. Well, until they all die (laughs). I feel this comes from having nice men. It sounds funny but people want to have nice men. And intelligent men. The sort you can invite in and leave alone in your lounge for a minute while you pop upstairs. I have created a culture of care and pride for the job. That has to be continually driven – without that it falls apart very quickly. We maintain high tech communications for our customers. Most garden firms miss calls, we catch them. We maintain a fleet...we have a fleet of well maintained, good looking vehicles

(Me: Yes. They looked impressive when I came round the corner)

We, me especially but most of my men too, consider integrity a way of life and not something just to do when someone is looking.

I mean I could go on all day. We produce top quality paperwork (showed an example). This sort of quality you don't get from 1-man bands. Standardised letters, standardised accounting systems, having an infrastructure in place that allows me to find anything from any point in history, the history of my company that is.

(Reaches for a file and flicks through it).

If you asked me what Mike was doing on 30<sup>th</sup> September 2008 at 08.45am he was picking up fruit in Mr X's garden. That attention to detail allows me to pick up when things go wrong. It's a robust if not perfect system...

Top class equipment. We don't buy rubbish...

A very, very heavy internet presence. I don't spend as much time as I should do as I am so busy, but our website is good, and we use all the social media. It is...well, it is a new website and has some mistakes. I could probably pick up 50 errors, but people don't notice. It is a third-generation website so, like cars, we have progressed with the technology.

The sheer length of time that we have been in business. We can spot problems coming where we used to walk into them.

I can think of a million things...

Employment. These days I wouldn't employ someone I wouldn't stand a chance against in a physical fight. I'm not saying I beat my men up, or that they couldn't beat me. Just that it wouldn't be pretty. My Dad taught me that, and someone else taught him. I know it's not corporate or PC but this is a tough business. Always pay your men a little bit more than anyone else would. I always pay my men well; the ones I want to keep that is.

(Laughs). I'm trying to think now...That's all that springs to mind right now. I'm sure I'll think of something else in a minute.

**Who do you involve in developing value for your customer?**

A runs all the accounts. We have a fairly unique time management system we use for our customers which is not used by other companies as basically I invented it. When a customer buys time from us we try to use it as fairly as possible and be beyond reproach. A is as straight as an arrow and I couldn't cheat, even if I wanted to, as she wouldn't let me.

(Could you repeat the question? I did).

The entire firm. (Gets up and walks across to a memo board). This is an extract from a company memo

(Reading aloud) "You are being paid to carry a charged and working mobile phone and compensated for the calls you need to make to the office. Making personal phones calls in company time will be penalised as per the memo re-issued in October 2012. You are paid by the time you work, and we charge our customers by the time we are on their site. Chatting to your friends while booked onto a customer's clock is stealing their money."

(Returns to his chair)

It's no different to stealing money out of their pocket. I try to instil it in all of my staff that if you wouldn't steal from someone's wallet on the table you shouldn't steal their time. I'm not saying we are perfect. Men are men and sometimes stop for a cigarette or to answer a call from a friend, but that's how we are able to pay more as our customers are willing to pay.

Always assume you are being scrutinised because sometimes you are. Integrity is not a one off, it is a way of life. There is no such thing as honesty, only dishonesty.

**How do you learn from your customer's experiences or feelings about the value they have received from you/your company?**

We ask them! We did an experiment with surveys, but they are very, very time intensive. However, since recruiting a PA I may revisit it. It was a waste of our and our customers' time really as we collected the information but couldn't do anything with it as it took too long to process.

Our customers keep coming back. For instance, I get emails. This one just says "N--?" There are 100 garden firms in Stevenage alone, so why is he still chasing after me to go? He'll still try and haggle me down on price though!

**How do you learn from the activities linked to developing and delivering value to your customers?**

One of the ways we've learnt is from writing "Ts and Cs" which have evolved as jobs go wrong so it can't happen again. Or the costing programme. Costs are added into the computer so they are not forgotten in the future. When you price a job you can't run through all the things that people may get upset with, so these both help. The "Ts and Cs" are now 3 pages long, not because I am a genius

but because I am a pragmatist and learn from mistakes. The “Ts and Cs” do the job or remembering all the dozens of niggling things people would never remember. But, ultimately it’s down to experience.

**How do you make changes to the activities you do based on your learning?**

I have a hands-on attitude to my business, so I am very much involved with all of my customers. But mainly we introduce policies when things go wrong. I can give you an example. We went through a period of smashing windows with projectiles so we said low windows must be covered. When a gardener goes to a new job and smashes a £400 window, he doesn’t do it again as it wipes out all of his earnings for the week. But a PAYE employee will say sorry and then do it again. So you introduce a policy. The only alternative is to make them pay, but that doesn’t instil loyalty – and they couldn’t afford it anyway.

I give my team regular pep talks. Like in the army (laughs). I say “Do you want to be a gardener?” If they say no I tell them to go and do something different. But if they say yes, I say “Be the best, because you are what you do and if you don’t do it well then you are nothing.”

We change the “Ts and Cs” and procedures as our knowledge evolves. One man can’t remember everything. One clever person like me can, but 10 men can’t, so you rely on procedures.

**Phase 1 Interview with M, 21<sup>st</sup> September 2015**

**Please can you give me a brief overview of the company and its history to this point? A biography.**

Started five years ago. Dad started with 2 small marquees. When I turned 18, he gave me the business. Dad was quite old school re marketing. When I took over, I got rid of the print ads and went online, reinvested in the business and now we have got 20 marquees, plus carpets, furniture and third-party services such as catering and ‘D-J-ing’. I kind of turned it from where Dad started with marquees to a one-stop shop where you can get anything for any kind of event. The only other thing I can say is we’ve doubled every year in terms of customers and turnover and it’s that way again this year.

**What do you feel your company needs to do in order for your consumers to feel they have value?**

In terms of being specific in terms of what we do, we leave the marquee and everything in a position where 5 minutes after we leave guests could arrive, e.g. we do the wiring etc. In terms of 3<sup>rd</sup> parties we take the stress out, we have done all the hard work finding people and organising things like toilets, P’s catering. We do all the setting up and taking down, so they are not having to anything, especially if it is raining.

**How do you stay ahead of your competitors?**

There isn’t much competition out there in the small marquee market. In the big football pitch sized one there is loads, which is why I don’t want to go into that market. The small marquee firms don’t have all the complimentary things I have – carpets, furniture, third party contact, so if the customer wants a bare shell I have competition, but not if they want extras...sometimes my competition is that the customer will buy a marquee but then they don’t have the carpet, lighting, heating. What we try and push with these people is the problems they will have. It won’t fit back in the box, it will take up a third of the garage, doesn’t come with good fittings and will blow away. I get a lot of calls

on Fridays: “M, you have to come and help me because it’s blown away.” In terms of keeping up with competition we are always buying new things which is why I kicked my Dad out of his storage unit.

**Who do you involve in developing value for your customer?**

On the day we set up, my staff, such as T, can deal with any questions relating to the marquee or the party. Have they thought of all the little things like buying ice, plastic glasses, getting bottle openers? Obviously, all my suppliers like P have experience in their areas. We are not only the “go to” people for marquees, but we have people with experience in every field. They (*customers*) also get several automated emails, this is a new thing, that give them a tick-box for event organisation. It also positions us as experts and helps with trust. They will feel they know what I am talking about when I turn up on the day. Not sure if it counts, but we also have a guarantee. It’s for the people who’ve never hired a marquee before, and it’s not a small spend. We are the only marquee company that offers a full money back guarantee which puts their mind at ease. As this is a time limited service it helps people feel confident that we will do what we say. I think it has definitely brought us a few more customers this year who would otherwise have knocked it on the head.

**How do you learn from your customer’s experiences or feelings about the value they have received from your/your company?**

Feedback, feedback, feedback. I ask for it in multiple ways to appeal to different sorts of customers. So we have a FB page where they can leave comments (*which is*) aimed at the younger section of our market. We also have a page on our website called “what our customers say” where they can leave testimonials and comments. The thirdly, several days after they have had the party, they get an automated email asking more detailed questions about the whole process from initial inquiry to setting up the marquee: how clear was all the information provided to you, how successful was the event thanks to the help and services, do you have any ideas or constructive criticisms about what we can do to help or improve. I make it quite clear that this is the only way I can think of to improve the business and that to have constructive criticism helps me learn. They will get 3 or 4 emails so if they don’t open the first one, they get another.

**How do you learn from the activities linked to developing and delivering value to your customers?**

It’s mainly staff. There are a couple who are quite practically minded. It’s easy to get stuck in your ways, but people come along that make suggestions that help us become more efficient, which supports growth as we develop ways of doing more in the same time. There has been a couple of times when we’ve had to look things up. For example, we had some new marquees we weren’t happy setting up, so we found some on-line tutorials on YouTube that helped us a lot as we weren’t being very efficient with them.

**How do you make changes to the activities you do based on your learning?**

Normally...(*pause*) it’s literally briefing the staff on the job. It’s quite visual. What we have to do isn’t terribly mentally challenging, so new methods can be learnt on the job. No-one needs to go through training, although I am in the middle of doing an A---- handbook

*DM – what’s that about?*

Mainly about how to deal with customers. Had a guy started today and we took four marquees down. By the second one he’d got it.

*DM – tell me more about the handbook?*

It's in the planning stage at the moment. It's literally about how we can create the wow factor. I want customers to say, "These guys are amazing", and to tell their friends, so I need to prep staff to go beyond the basics and really help customers with their events. And also how to deal with problematic staff...I mean customers. I want to get to the point within 10 years where people go "that must be an A----- marquee" and be the go-to person in Hertfordshire for our part of the industry.

## C2. Phase 2

**P, 13<sup>th</sup> January 2016**

### **What does "brand" mean to you?**

I understand brand more than when we last met. I have more respect for it now. Brand to me portrays a statement of what the company is, the status of that company. It's a bit like having a vista business card and a professional one where the company is trying to say something about itself. It's the statement the company makes about itself. If I like the statement, I'll be attracted to the company. Hermitage Road (Note: where the interview was taking place) is welcoming. You have to target the brand you want at as many people who you can attract to it.

### **What do you want your brand to achieve? How/why?**

I want my particular brand to make a statement that reflects what my business is. Not that I'm a caterer, but the style, the package. My brand is quite modern and that's the style I want to offer. When I started the brand, I wanted to be a cottage industry – so the clock at five past eight meant time to eat and clock-house kitchen was the small business. The brand says who I am. Content can be added easily and says who I am. The brand doesn't need changing.

### **What engagement do you want from your customers?**

I like to be interactive, enthusiastic about that they want, not what I provide. A client can go away at the end of a meeting thinking I like this person, they listen to me, I can work with them. Trust is very important, especially for weddings. That's how my business has worked – perhaps I'm more confident. I get people who want to talk about what they want.

### **What values do you want your brand to convey?**

I think the value is professionalism, quality, sustainability. Branding – the more you have it the more recognisable it becomes the more it stays in your mind. For example, my van is five years old and is recognized around my area and I've got business from it being seen driving around. The brand has to emphasise who you are and give a clear indication. So, I wouldn't use Fat Face with its outdoorsy feel to promote M&S. A brand is a buy-in. You can equate price with quality, but you need a guide. It doesn't have to be a big brand. Smaller company labels are often more memorable than large organisations.

Look at Nike and M&S and how they create images. I choose C---- Catering as it was the house where I started my business. Now I think it works really well.

DM: what specifically works about it?

It's simple and very clear. Apart from catering there is no mention of food. Softness? ...I don't know. Ask J, she'll know (Note: J, P's partner, is a professional marketer and runs her own consultancy). I guess for me the logo is how I like to think of the business, smooth running. It's not a big dynamic company, but smooth running. If someone said I need to change it, I'd ask why. It works. But why, I don't know. It's like the menu and not changing it: people don't like too much choice. It's a welcoming brand. It's not big with Edwardian Script and lots of menus, but clear cut and descriptive.

DM: do you check customer understanding?

No, I don't ask for that feedback. The number of testimonials that I get is positive, but I wouldn't know how to ask the question. It's not an easy one to ask. Maybe I might...

### **How do you achieve repeat business?**

In a nutshell the client always passes on praise. It's rare that we don't get it. Occasionally I follow up with a Christmas card or an email. I find potential clients wouldn't consider going anywhere else. They just ring up and then I don't find it hard to build rapport. There has been a suggestion that I send birthday cards or mark anniversaries just to reinforce the company in their mind. It's also about the type of things you use. For example, I'm not a white van man. I use a Silver Mercedes van as it is synonymous with quality.

### **How do you evaluate your brand success?**

It's not in your face. It's clear, it's not overwhelming, it's nice and it just sits there. I was conscious when I was choosing the brand that it's "Sainsbury's Orange" and I have Sainsburys. But it's not in your face. People just say C----- and not C---- Catering, but people only say, "I met P--- from C-----." The logo on the car is smaller. What we do is out there. You can read the van from fifty yards. To have too much information is not the way to do business.

I treat every client differently. I don't have a template where I quote and fill in space. The biggest thing that has changed the business is having a set of terms and conditions and asking for a deposit at the start. It's almost a sense of relief: people know they have something booked. Payment is now cleared funds 72 hours prior to the event. I'm saying you don't get your food unless you pay up front. 98% of the time, it's what people do. They want me to lead. Only now am I a professional caterer with a professional business. All these things make the client feel more comfortable working with you.

I look at the turnaround with quotes. I do it immediately otherwise you lose the impetus. Then I follow up, not too soon, usually after a week. I usually just say something like, "Did you get my email?"; and you can tell from their response whether they will book or not. I am quite passionate about how I sell and the role of intuition.

DM: what was your motivation to set up?

There were a lot of negatives in my life. My marriage wasn't happy, and I was having an affair, even though I had money, no mortgage and a lovely house. I was in my mid-40s and felt I could easily achieve, could have done another job in the city. I was late at Kings Cross and thought wouldn't it be nice to pick up some really nice food on the way home. Tesco had just opened, but I didn't want supermarket food, I wanted really good food. I did some research at Liverpool Street and was overwhelmed by the scope, but then I went back to what I knew! Two years later all stations had quality food outlets, so I was ahead of the curve. I started on a wing and a prayer doing ad hoc catering for events at schools etc. I've always approached things with a half empty glass, but that's

just my way. I've seen turnover improve, but still do the glass half empty thing; can I retain turnover? But I am doing it with confidence. So I went out and bought a Laura Ashley sofa yesterday!

I gain confidence when I'm talking like this. But in the cold light of day I still can't accept it. For example, we did a tepee birthday party and I've only just started letting the girls run events without me. I went back to the unit and it looked like a bomb had hit it. S had an honest talk with me a couple of days later and said there was nothing extra I could have done. I pay them all good money, but you get what you pay for. They don't do it just for the money, they enjoy it and I need to cut them some slack and have some fun. If you can keep your workforce happy they will do their best. I'm a very lucky man, so if I could achieve what I achieved in 2015, but maybe with a bit less stress, it would be great. You're always learning.

**S, 3<sup>rd</sup> March 2017**

**What does "brand" mean to you?**

Brand is inter-linked and it is the hub of everything we do. It speaks to our values. It sets out our stall – far more than a logo. It says who we are and what we want to do. If you think about when we inherited B--- Zoo and it was officially the worst zoo in Britain and you have no currency in your sector. When we had our last inspection Peter Scott, the Zoo Vet, said we were officially viewed as the mavericks and now we are viewed as the pioneers. Our brand is not just of our firm but also of our family. The balance between fun, family, animals, education, experiences and conservation mean we punch above our weight in terms of conservation.

**What do you want your brand to achieve?**

It's achieved it. We are already there. We are in a blessed position as a business as we met our objectives in 2000. It's a two-part answer: Financial: making our business fit its site and our reputation, the trip advisor scores. If anything goes wrong our brand ambassadors come to our defense on social media.

**What engagement do you want from your customers?**

It comes at different levels. Obviously, we want them to pay to come in to support what we do. But we also want them to support conservation and the wider thing. It's about entertainment, ecology and the environment. It's about people feeling part of things and taking time out when they want and having a good time. We tried to force conservation and it didn't work so we have to do it subliminally.

**What values do you want your brand to convey?**

Same thing. That we care. That we care about everything: our staff, our animals, our guests, the future, our legacy and each other. Although you would never know that, because as a family we tear each other to pieces. Everything I do is about fun. It's not worth it if it isn't fun. Life is too short and too fragile. And it's about knowing where you want to be. Most people want to grow and grow. When we took over the business, we wanted to grow to fit the site, so now it's about maintenance. We are debt free...so it's about making the best of what you have got, reinvesting in the business and then enjoying what we do.



### **How do you achieve repeat business?**

By giving people good value and a great experience. We are in the worst place in the world to own a zoo. There is no place on earth where there is such a high density of good zoos within a fifty-mile radius. And it's not just zoos. There is X Farm Park and other good leisure attractions. You've got to be at the top of your game just to get people to drive past (supplied a list but did not catch them all) because you are going past good attractions just to get here.

### **How do you evaluate your brand success?**

Personally, or generally?

*DM: both?*

If I get my Dad you'll wet yourself laughing as he looks like McLaren as he's wearing four logos: P—W—P, Zoological Society, Wildlife Heritage Society and the B—C—S—, which is the operational name. That's my fault as I came up with WHA but is not emotive. Here they are pushing the Zoological Society but will probably balls it up as it will cause confusion. But you have to pick your battles. If we had loads of money, we would probably do it differently. But evaluation:

Our animals are well cared for. There is no stereotyping behavior. Staff attrition rates are really low, and they don't do it for the money. It comes back to the customer. Our brand ambassadors, who we don't appoint, do it willingly and talk glowingly about our work. We are sending a male lion back to Uganda and that is as good as it gets. It's like coals to Newcastle or ice to Eskimos. He can't go back to the wild, so he is going to \_\_\_\_\_ Centre.

It goes back to all the things we said a while ago. Ensuring your brand and your brand values, and you can't do it consciously, meets what people expect.

D H's comments were not acceptable (*Note: a reference to a professional boxer who was criticized for inappropriate pre-fight comments this month*). They would have been acceptable twenty years ago but not now. It's the same thing. There are loads of things we used to do that we wouldn't do now, like taking animals to schools and dressing them up. The world changes and you have to change with it. But there is nothing written down. It's not something we consciously think about or write as a policy.

**M, 4<sup>th</sup> March 2016**

### **What does "brand" mean to you?**

Recognition to the customer of the service we gave them. Our branding is pink. The reason for that is that most of our customers are women, even if it is the husband's 50<sup>th</sup> or the son's birthday. Pink stands out. So, everything we do or put out has pink, the same font, so even if our logo isn't there it will still be recognized.

Can I elaborate on that...Just trying to think if I can go any further...

### **What do you want your brand to achieve? How/why?**

Recognition within the whole county. We are geographically restricted in our services so brand is not as important as it would be to a company like Apple that needs to get its brand to everyone. So we focus on reputation rather than brand awareness. So we would rather focus on specific customer characteristics and reach them. A bit like throwing shit at a wall and hoping some of it sticks! I

prefer to be like a sniper. I'm concentrating on things like Google Adwords and Facebook so I can be a lot more focused on who I am targeting, rather than newspaper, radio, etc., that would usually be used for brand building.

What's the question again?

**DM: What do you want your brand to achieve? How/why?**

I want my company to be like Apple. If you want an iPhone, you go to them. If someone wants a marquee, I want them to come to me. A kind of global awareness but only in Hertfordshire. This will eventually mean that I won't have to advertise so much because of WOM: we are always in the back of people's minds and come to the forefront.

I'm trying to think of a local example to Hitchin rather than Apple

*DM: it's harder regionally.*

If we go down this route it should be cheaper to run the business. I'm currently spending £12 – 15K per annum on just Google. I wouldn't mind cutting that down to £12 – 15K in total. The reason I want to do this is because people who are referred spend about 20% more on additional items.

You will probably get an email soon (Note: a reference to the fact the interviewer has been a customer)

*DM: I had one about speedos!*

*DM: We touched on this already:*

**What engagement do you want from your customers?**

Every time we work with someone, she can tell five of her friends how great we are, and this will really have a snowball growth effect on our business. The way I see it, every marquee is there not for one customer but like an open day – it's an experience for 50-60 people. Everyone who is there has probably spoken about the marquee. One thing we are doing for 18<sup>th</sup> birthday parties is we are getting a big Instagram board made up with a hole in the middle and a hashtag so friends at the party can upload photos. To get this they have to give us their email and we will give prizes for the best/most outrageous photos. They (18 year olds) are one of our biggest markets, but trying to get an eighteen year old to contact us is hard, so this uses their language. The focus is on using existing customers to get new customers. All it costs us is great customer service.

**What values do you want your brand to convey?**

Reliability...

I'm just trying to find the right word. I always say "wow." What I mean is that for the way we communicate before, during and after an event I want them to say, "Wow, I didn't expect that. I expect it from Disney but not from a local company." Because then when they are talking to a friend, they will not just say we are good they will say "M told me to do this" and the friend will want to ring me immediately. Enforcing the reliability thing I now do a 100% money back guarantee, so all the risk is on me. It took a while to do, I wanted to for some time but had to get all the staff to the right level. This is converting the "sit on the fence" customers as there is no risk to them. It's important: people are spending upwards of six figures. I think this is important as we are not the cheapest, but you get what you pay for. We don't advertise our prices and I don't want to be known as cheap marquees but wow marquees.

### **How do you achieve repeat business?**

A big referral scheme for which in basic terms the referrer gets a thirty -pound High Street voucher of their choice and the referee gets a 15% discount. They now have a choice this year of a charity donation of thirty pounds as some people feel guilty about being bribed to refer their friends. I also introduced a prize pot giveaway. If they introduce 4 or 5 people they are automatically entered in a grand raffle for things like an iPad, a spa day, nice headphones so it appeals to a younger market, the forties and fifties as well – something to appeal to everyone. If someone refers more than two people they always get referred, another name in the hat. That’s constantly being reminded to people by email so they can even refer someone before their event. Also, there is a little package that people get before the event and there is a printed reminder in there. It’s important to keep reminding people. It’s my job to keep reminding them.

It’s kind of similar, we have a, not a trade agreement, but approached some companies that do large marquees with a “Hey, we’re not here to tread on your toes. We do the marquees that go in gardens” and wanting the leads that they turn down. If it’s under five hundred pounds + VAT, they get a £25.00 voucher of their choice. If it’s over, they get a £50.00 one and it’s tax free for them. And it compares to the average cost of £75.00 acquisition per customer. And again, to keep them topped up and referring us as many times as possible, the highest lead generator got a new iPad. So, it’s still costing me quite a lot of money, but I am getting leads. I’m now starting to apply this approach with event planners, party planners, DJs and caterers. I’ll show you the video I send them. It’s a bit like a sales letter, but I wanted something that would get their attention. I now have four or five partners and it’s a two-way relationship.

### **How do you evaluate your brand success?**

The level of testimonials I have. It’s really the ultimate feedback to me. To give you an idea of how many we have I had to take some off my website as the page was loading so slowly. I’m now starting to use video testimonials, as you know from the awards ceremony, which is good as its more realistic and stops people thinking I am making up a name. Indirectly this has had a big effect on growth and turnover. I can’t directly say it’s the brand, but it’s only going to go one way if you keep a positive reputation.

Probably staff as well. If you can have a high retention rate then they probably enjoy what they are doing and agree the values and direction of the brand, which has a positive impact on the brand. I was toying with the idea of asking all my customers to do a net promotor score which you could compare on a monthly basis. It’s a bit more technical than I realized, so it’s on the back burner. I wanted it included in my email, but it had to come via net promotor score, so people are more likely to junk it.

Just trying to think how else we would measure...

That’s about it. It’s what we would do anyway. Otherwise you can spend all your week reflecting on how your business had done and not getting on with anything.

**N, 4<sup>th</sup> April 2016**

### **What does “brand” mean to you?**

Recognisability. Consistency in the same way that you know what you’re going to get when you walk into a McDonald’s anywhere in the world.

*DM: anything else?*

Not without thinking about it.....

I think its pride. When I see my vans driving down the road, and you see a fleet of them and you see the same vehicles over and again, I've got four of them, and people see you over and again and then people think about you. It's also about security. We work on a lot of security sites and they expect you to arrive in a branded vehicle whether its schools, factories or data sites.

**What do you want your brand to achieve?**

I think when people see it, they think it's a good company. You can't please all people all the time, but you can please some people some of the time. Also, it's that you are established and not just set up, which is common in my business. It gives you an outward image and a self-image – the men need to feel they are part of a well-organized, branded firm.

**What engagement do you want from your customers?**

We want them to trust us. There is a lot of mistrust in our business. Sometimes when you've looked after a customer it's frustrating when they don't trust you. We have a lot of customers who do trust us. They don't even ask for the bill, and we always make sure they are well looked after. Then there are the customers who never trust you and are always asking questions. Not that we would cheat them. Yes, it's trust and like all companies we can make mistakes, but we don't set out to make mistakes.

**What values do you want your brand to convey?**

Value for money. It's important to distinguish between value for money and cheap. We are not cheap. We are a problem-solving company and people come to us when other people don't know how to solve their problems...

Reliability. The biggest complaint we hear is that people just don't come back. One of the reasons people don't last very long in this business is that people start work on what they earn, not realizing that what they need to earn is at least three times that wage and that's before they start employing people. Then it gets expensive. So, going back to your question, what we want is to be taken seriously by serious customers.

**How do you achieve repeat business?**

I think one of the most important things to do with repeat business is to do whatever it takes to keep the customer happy, even if that means costing money. I suppose you should put in brackets there "within reason" because they will walk all over you. That's the crux of it. If people are happy, they will come back. The trick is to make it so that they cannot stand the thought of going anywhere else. And if they do, and they happen to be disappointed, you will be their next point of call.

**How do you evaluate your brand success?**

I don't have a process, but I just listen, and people say things. I often ask "Why were we chosen?", and you get responses like "You just seemed more professional than everyone else." And I know it is a cliché, but people buy people, especially in the service industry. That's it really. No specific system in place, but you just listen to people and you know your branding is working when people say, "When you guys turn up it really looks like a professional outfit."

### C3. Phase 3

**P, 17th February 2017**

#### **What research/sector research do you do/how?**

Can't honestly say that I do. In the catering industry, many people do similar branding e.g. use the knife and fork logo, but I wasn't conscious of it until I started developing my own brand. I didn't go out searching for branding but noticed in my industry that it is quite stereotyped.

#### **Diane: how much time do you spend/frequency?**

I've spent more time recently. Started to think about how I brand certain items e.g. black bar cloths with "C-----, very special catering." Not thought of that before I don't really have uniforms, but I do have aprons. As the business has grown, I have thought about it more.

#### **Product/service changes and improvements**

I don't think I consciously do that. Something will catch my eye. Maybe I go into a pub or a restaurant and think "that's good" and I copy it, like people copy my website. I'm not proactive, more reactive. I would rather someone else do it to be honest. In the thirteen years I've been doing this...I took a photo ten years ago of a quote: if you look at that and where I am now the branding has grown with the business. I've become more corporate to be honest.

#### **Diane: relevant to target audience?**

Difficult because my target is quite extreme in terms of 30 – 80s as an age bracket. That's why my brand is quite simple and clean. I don't like complicated. Precise and simple. If you look at my van it is simple: my strapline has been the same for eight years and it works. It's been tweaked, slightly different format with the knives and forks. It has evolved. It is not conscious.

#### **How do you evaluate and improve your marketing activities?**

I get told. Sorry, do you know it doesn't interest me really. It's amazing because J (Note: P's partner is a marketing consultant who runs her own business) just works it all out. If I was growing, but I don't really want to....

#### **Pricing?**

Random! This is an interesting question because I don't have a fixed price because of what we do. If we are doing a wedding on the Bowes Lyon estate and there is a distance between the drinks and the event and I need more staff, then I have to price accordingly. I don't get people refusing to pay. But now we are VAT registered I have to charge another £5 per head. To me this is like taking a 10% cut in price but...example of canapes. **Check recording** logistics and levels of staff will impact the most, food is the cheapest part of it.

#### **Value?**

Whether it's a small event for ten, a funeral for 20 or a wedding for 200, they get 150%. We get people writing a card saying how good the service is. I get quite disappointed if we don't get a testimonial now. The wedding last weekend we got a card by the Tuesday. I think there is a large element of this being my own personal business, even though it is now a limited company, and I

don't want to expand it further. My accountant says I could easily grow the business by 40% but I'd be happy to do 80% of what I did last year, which I think was an exceptional year.

### **Benefits?**

It's important to have the clarity of what type of service you can offer. I'm thinking about the information on my van, my cards and my flyers. It's important to state the type of service, you can't have ten different things – weddings bar mitzvahs etc. Private catering can cover this. Funeral catering is different. People don't want to talk about funerals, but they want to know you know what to do at a difficult time without explaining. I think branding shouldn't be over complicated. I like it to be contemporary but not to make the older generation feel left out. It's quite hard because I am targeting lots of different audiences.

### **Points of parity?**

No idea. Can you repeat the question? **Check recording**

I do research other caterer's websites occasionally. I read magazines for the catering industry. I see things and will incorporate ideas. Bowl food has been around for a few years, but older people don't like it. I might amend my website photos to appeal to 40s/50s groups, but I wouldn't focus on it.

Talking to people – buying comes in because of conversations in which you include ideas (I graze ideas) but if I wasn't at this phase of life, I might do it differently

**Example of working as a chef in Majorca – check recording.**

### **Points of difference?**

I don't know. I don't know how to answer. It's not like there are lots of caterers in Hitchin. I'd refer to what I said earlier. It's (the brand) clean cut, clear, works well and is enough to get interest. When you talk to people you want something to say to people. So many caterers have too much information on their websites: you read a couple of menus and you've had enough.

Take an example of a lady looking for a wedding quote. I stand 70 – 80% chance of getting the job. To me I am the brand and that's why I am loath to give it to someone else.

### **Consistency?**

I occasionally look at competitor's types of branding, but I would say that 80% of mine is mine, or J's led it to be honest, moving away from the cottagey thing. I don't do it as much as I ought to, but there aren't that many competitors.

M – conversation about his involvement. **Check recording**. M is now running his business and not putting up marquees. I think you can't do that in food: I am the brand.

### **Equity?**

How would you define brand equity? Note: it was defined by DM **Check recording**

How can I measure that? Explained about the ISO and how it is calculated.

The phase of the business you are in now: looking to sell and move on. Is it something you think about?

It is certainly relevant for GM/Vauxhall and Peugeot, I can see how it would work for them. But I can't see how it is relevant to me. Marmite: who owns this? (DM: I think it is Kraft). I can see the value there as they can't change that brand. For small business, I don't see how it is relevant.

**Check recording** Elements of marketing – awareness and image?

I'd get an E for that. I don't do much apart from cards and some flyers.

DM: prompt re van - Isn't that awareness/image – and it's mobile?

I guess so. That's true. I've picked up work because people see my van. For example., they see me load my van in Waitrose and they think I must be good because I use Waitrose. The van probably deserves more credit.

DM - Social media? **Check recording**

I don't use it at present. I will be. We are on that case. I'm probably a bad example. I have a FB page but it's not live. I've got sunny skies and swimming pools in my mind, but J will do it. I'm not interested. It doesn't float my boat. Whereas M (another participant who Paul knows) loves it. But his product is like a machine: put something up, fill it, take it down. Food is like art: you taste it, you get pleasure. Like art. I am the artist.

DM - Do you use anyone else?

Yes, I do! It's my partner. She's much more interested than I am and sees things I don't, but she needs to be more pushy with me. You can tell her that! But we agree things and then there is no follow through. I've got my CEO hat on now I suppose.

Communications mix (DM Listed)

Face-to-face I am the happiest at. Once I get my foot in the door and can talk to them and make them feel special. 90% of the time people who are genuinely looking for a caterer like this and take the opportunity. Example of going to Woodford (**check recording**): nice guy, and I want to go and give him the experience. I want the most successful hit rate with inquiries, which involves me seeing the clients. That's the part I enjoy and want to do. Most caterers don't – that's the unique point, that's how I have grown the business. Someone else can't so that, so that's why the business is where it is.

### **What do people think?**

I think they like it. I've had compliments. If the website is part of branding I've had people say it is clear and they can navigate. Don't know what social group they are but 40s/50s office workers, but they give positive feedback. I wasn't happy with the copy, but it works. But because I don't take the interest in it. I want other people to do it, which is not always helpful to them to be honest.

### **Do you involve customers?**

Yes! They offer their services: "Can you give me more cards, our wedding was great, we want to tell others." I don't push, I don't have the ballsy sales approach e.g. I am seeing C—A—(a funeral director) on Monday and J has said, "What information do you want on a brochure?", and I didn't think we were at that stage. I am reactive, not a proactive person. I wouldn't put business cards out at a funeral unless asked for. I would be discrete and not push it.

## How do you evaluate your brand programme?

I don't have a programme. That's not a cop out. I just don't.

The economy is more of an issue. The nature of my product is that people will get married and will do whatever the economy will do. My whole approach is an Easyjet one, e.g. in March I got 4 jobs, which is good for that time of year, so I would now charge top dollar for any new work coming in, e.g. £14/head instead of £12/head. My niche is the smaller turnover that others don't want.

**BMP 10 – Company monitors sources of brand equity – my notes say discussed – check recording**

This makes me evaluate my business, just by talking to you.

**M, 2<sup>nd</sup> March 2017**

### **Catch up on the business:**

The business is like an adolescent going through puberty with growing pains. I am looking into venturing into large marquees, so I can do weddings and large functions. I am starting to rebuild the website. Needing to look for a new unit now to store things and things have to happen chronologically which is stopping business expansion. (*Regarding where the business should relocate to*)...there is a trade-off between labour/fuel costs and the rent in a more urban area.

#### **1. Brand delivers benefits customers truly desire**

##### **What research/sector research do you do/how?**

Done a lot of market research locally recently so wanted to know who's out there, what we are up against, pricing etc. Realise they are all pretty crap. Well, bad at positioning themselves as we pretended to be holding a wedding and out of 20, not 3 or 4, quotes there wasn't one I would trust with 10K to do a wedding. That's the smaller end of the market and fairly basic, not like the marquee you went to with P (Note: P is another participant and DM did some service work for him at a wedding). Still, the budget end maybe only 60 – 80 people, as that's all they can afford, but still done well.

##### **Diane: how much time do you spend/frequency?**

Took about 10 days last time, on and off; and we probably do it 2 or 3 times a year. People are doing similar things to us, but they are pretty poor. I know we could be better, but we are still better than them. This is the time of year when firms are gearing up for the summer and so if they are doing something we will follow, although they usually follow us.

So, as I said, we are sticking with the garden marquees but also splitting the business with bigger marquees. I think we are turning away a lot of business. Hence the new website, as we get 90% of business from the website. Hence the landing page. We will ask people what they are looking for and then split. Positioning ourselves better as we know we have the right products to do both the small stuff and the big events.

##### **Brand stays relevant**

##### **Investing adequate resources/product and service changes**

Going to do it in 2 or 3 phases. Will invest £20K in buying larger marquees for weddings and large events. They are obviously more profitable than the garden size marquee, the reason being they still



require the same vehicles and labour, but the charge cost is up to 10 times greater. The reason we are working with larger marquee firms is that in this investment phase we can sub-rent from these partners which helps cashflow. It means I can do it in 3 phases and not shell out £60K. We are like the unofficial event organizer so will continue to offer DJ, catering etc as part of being an unofficial event organizer.

Our target audience is generally female and in her 50s, whether organising a 50<sup>th</sup> for her partner or 18<sup>th</sup> for her kid. So our brand is positioned to appeal to a female audience and our brand colour is pink. So repositioning our website to appeal to weddings, Indian weddings etc., and attract wider audiences without repelling anyone and without trying to be all things to all people. Basically, I want to appear, if someone lands on our website, as if we are experts in birthday parties, anniversaries or Indian weddings, which you can quite easily do with different landing pages.

### **Knowledge of market conditions, customer tastes and trends?**

Tend to evaluate and modify things on a weekly basis, especially with our best performing marketing, which is Adwords. I tweak that weekly as it's expensive and my main source of business. Now with the events I need to modify and change some of what we do, without losing our brand values. Because we are local, we are quite fun and friendly, but we are needing to come up with a plan for marketing the weddings which is new to us and might involve using wedding planners etc., which we have not done before. Need to let people know we are the new guys come to stir the pot a bit.

### **Pricing strategies based on perceptions of value**

We are very stubborn! Our prices don't really move, well only one way. They are going up again this year for the reason that we know there isn't another marquee company that has our professionalism and service. We are the only award-winning company with its own money-back guarantee. Some customers are upset when there is no movement on price, but they are not my customer. They can make someone else bankrupt. We are already aware that there are other companies doing it much cheaper, but they don't offer what we offer. They don't offer a full service, including other suppliers included in the guarantee like we do. We are aware of companies that don't turn up because the customer has gone the cheap route and then we get panic phone calls on a Friday when they don't show up for a daughter's 18<sup>th</sup> birthday. The reason we are stubborn on price is because we have testimonials backing up our service; had to take some down as they were slowing the loading of the web page. The reason our prices are 20% more than others is because our service is far higher and therefore the cost of providing that service is much higher. Ultimately it depends whether the customer wants something cheap or a far higher quality and service.

### **Systems in place to monitor customer perceptions of value?**

Did this last week actually, you probably got an email. We sent it to about 300 of our past customers. I wanted to know people's reasons (*for using them*) so we could use the copy for our new website. And interesting to see if their values are our values. We got over 10% feedback which is good for an email campaign.

Our values are: give a shit, give a damn. If we have to spend an extra 15 minutes helping a customer to bring their chairs in on a Friday afternoon, then we will. We are fun but professional. It's a fun environment where we are invited into people's homes for a wedding or a party; unless it's a funeral. But we don't want to be jokey as we don't want to lose our professional edge. Some of these values were reconfirmed in emails last week. Several of them said we are friendly and

professional. We clearly know what we were talking about, so they took everything as gospel. We seemed like we cared so were friendly and listened. They felt we were helpful: other companies didn't give them ideas to further enhance the party.

DM – must have been satisfying

It was nice actually. And I was going to the gym which is only a 7 minute journey and I'd had half a dozen by the time I got there. I was happy as I wasn't sure I'd get any. Also came across that its important that I'm local, which I hadn't realized so we will have pages for specific towns and locations in the area on the new website.

### **Talking about pricing (BMP 3)**

I think price is important even to people who are not price related. So we have to show value which is quite difficult in our market. So we have to show we are award winning and everything is under one roof, before we give them the price, so we show we are not a one-man band who puts up a tent in their back garden. We also have to show we are personal. We have to give them time, listen and give them ideas on how to improve their event. There was quite a lot of feedback about how we listened and gave advice while others were quite bland and generic. And all our staff go through this culture of showing they care, whether they are responsible for putting the tent up, answering the phone, or doing a site visit. They are told they are not just another customer but are running a special event and may not know where to start.

### **BMP 4: Points of parity and differentiation:**

Our category: one we are the only award-winning company, and the only one with a full money-back guarantee. No one else has that. I've spoken to some of our customers and they say that's helped with their buying decisions. Some of our customers are well into the 4 figures and this might make the difference to their daughter's wedding. We don't want to be a commodity. Essentially with the website, once they've landed, I don't want them to look anymore, and that's because I want to be incomparable. I think our other point of differentiation is our event planning. They've got all the event services under one roof and only one contact for it. If someone is starting from scratch it can be daunting to choose everything, from the venue to the DJ, but if someone has already vetted them it puts them in a good position.

### **BMP 5: brand is consistent**

This is our biggest weakness at the moment because the difference in how our quote looks compared to our site, compared to our emails, it could be three different companies. Hence working on the new website and we are going more pink. Don't think they will remember the name, but they will remember pink. We now only use 3 types of font, but at the same time we are splitting. So while we try to be consistent, we are splitting at the same time (*the business*)

*(Note: Brand Portfolio and Hierarchy (BMP 6) not discussed but may be relevant next time due to business splitting)*

### **BMP 7: Brand equity**

I want to be known as, if someone stepped into a party we organized, "This must be A--- as no one else does everything". This should be quite easy as we...Brand equity is: everyone calls a vacuum cleaner a Hoover. I want everyone to define a marquee with a party in it as an A--- marquee. I want our branding and marketing to be, "We hired an A-- marquee or we had an A-- party". I don't want to be known as the company that puts up tents or marquees. I want to be known as the company

that creates experiences and memories and occasional hangovers. This is quite an important thing we are focusing on.

*DM – asked about brand awareness and image:*

Don't necessarily focus on brand awareness as such. It's more our product is our image. It's back to the Hoover again. As soon as someone steps into our event, "Oh well this is A---- because it's going so well." Testimonials say we hired an A---- marquee and it had everything in it. Using these everywhere. On social media we are getting comments endorsing us. These are often in depth, "We hired an A---- marquee two weeks ago, the bar was in it, everything was fantastic." People are doing this without us asking, which is fantastic, and has to be the ultimate goal. In terms of people managing the brand there isn't really anyone. In terms of following people when they land on our site, a cookie is placed on them so it seems we are everywhere but in reality it is a clever bit of coding. Some of the stuff you can do on FB now is clever. You can advertise to people who've just got engaged, people with children's birthdays. Same with Google. People who land on our website, Google will put a cookie on them and then they will get banner ads etc. It's probably given the effect we are a lot bigger than we are.

*Prompted to talk about the communications mix used:*

Social media. FB and Instagram. With Instagram we appear on their timeline once visited and it's automated, so we don't have to do anything. Email reminders to any leads who haven't booked. We are all busy so I'm always aware that we want to follow up and keep in contact. Not only does it improve our conversion, but it shows we care as we don't want customers to miss out on having a great party. The email system is an example of an additional cost we have that 90% of other companies don't and which keeps going up because of that damn dollar rate!

### **BMP 8 – what customers believe about the brand**

Touched on this earlier which is good. Again, our automated service manages feedback and makes us be listening and attentive. Customers who haven't used us in a while have feedback that they want us to keep the personal touch as we grow. I need to keep that one of our personal values as we grow, otherwise we lose our uniqueness. It's going to be important for the next 18 months and I think we can measure this by whether we lose it in the testimonials or testimonials reduce. It's that slightly cheesy line about big enough to cope small enough to care despite the fact that we want to grow by a sizeable chunk this year. At the same time the way I'm running the business, moving from doing everything to being more corporate and more structured, means I need to keep that personal face. I don't want to be a faceless nameless business, so I need to be available. I need to get the balance right between the customer and the company's needs.

*Asked to profile his customers (BMP8:28):*

It's specific for each event. 50% of our work is through females, late 40s – 50s, who have above average education and income, and are trying to organize a party for their partner or kid and do not have the knowledge to do everything. The need someone to provide the knowledge and the comfort and support for them to run the event so they can just focus on inviting friends and family.

In terms of the Asian market typically dealing with the male. These guys have more experience; either hired marquees or been in them before, so we talk more directly with them. Our copy is different. This corner of the market is important, and they do need to be treated a bit differently.

Another two profiles we're going to be new to this year, are wedding clients and corporate clients. Going to be different, and something we will have to get used to. How we position ourselves will be different to the Asian market and the birthday market and going to need significant research. In terms of information Google Analytics can tell us a lot including how old they are, where they live, how long they stayed and where they have visited. This can help us build audiences on FB so that we can try and market to similar people.

*DM- do you involve customers?*

Absolutely. In all of our marketing whether it's print, online, social media, our testimonials are everywhere and are in depth with name and location. Now doing video testimonials as well. Do this because it gives people social proof that we are not making it up. It also shows how popular we are compared to someone else. It kind of makes us the clear choice of who to spend you £1K or £10K with. We are adding people into our email campaigns when they are leads and trying to give them confidence even at the quoting stage that we are the right guys for them.

**BMP 9: DM – how do you respond to the market environment?**

We are kind of going through that thing at the moment, with a new unit that we are doubling our rent and will have to pay business rates. We have factored that into our prices. We will also have to start paying pensions, but we are not the only company in that position, and I think people will accept it. Because we are increasing volume and average spend the average order will only have to go up £30 - £40 to cover what I call uncontrollable expenditure. Because this year we will bring in a new team they will bring in the same as team 1 and 2, but we are dividing our fixed costs across 3 teams.

In terms of Brexit, unless I am being naïve, it will not affect my business directly but it may affect my customers firms and employers, so it may affect what they are willing to spend because they are being more careful. That's the same issue everyone is facing, Personally, this business grew in a recession, so Brexit is about 101 on my list of things to worry about.

**BMP 10 monitoring sources of brand equity**

I kind of see it as how much of a stake we hold in our industry. We get copied quite a lot, so other companies are seeing us as the benchmark and a threat, which means for us we need to think of new services and stay one step ahead.

How we manage this is to remind customers that we were the first to do this and we get better every year, so we are becoming incomparable. I want people to have conversations and say company B are doing this, but I'm not interested as A-- are better despite company B being cheaper.

It goes back to positioning for me. I want to position us as the experts in the field, the only company customers need to come to because we are incomparable.

**N, 23<sup>rd</sup> January 2018**

**BMP 1 – benefits customers truly need**

Takes constant management and monitoring. These things slip quickly. Best example is uniform. If I didn't have a zero-tolerance people wouldn't wear it. Had an incidence a few years ago where people weren't wearing it. Even though I spent thousands on it, it wasn't worn other than on their

first day. Bit by bit I got things turned around where now people get jumped on, “Where’s your jumper?” Have managed to change the culture, and uniform is part of who we are.

I’m usually fairly in touch. I know all my customers although there are some I haven’t met. I still talk to them on the phone or by email. Especially with the agencies I work for. They get a response email. Within 24 hours they get a quote. If that is accepted, then they get an invoice with an email. They are dealing with hundreds of people the same as we are. There is a pattern of response every single time. I am the person doing that. That is our branding. Its why the agency send me 2/3 jobs a week; they know what they will get. Even for my domestic customers, it evolves slightly; language, grammar. Things I would have said five years ago I wouldn’t dream of saying now. And of course, our quoting structure has to be the same. If someone doesn’t have a job done its always about price. As a company who cares about everything they do, what could it be about other than price?

### **BMP 2 – stays relevant**

People talk to me and tell me things. Every customer I go to and hear regularly; and in fact heard today, “What a wonderful website I was impressed.” And that is a direct quote that I hear every day. I’m about to change to the third version. Even the first version people liked, even though it was a bit amateurish. I’m going to hire a company this time. Bit scared. The first one was built from the love I have for my business and this time it will be someone who doesn’t have the love. The “je ne sais quoi” comes from the love of the business.

So, I guess in short, just listening to people.

### **BMP 3 Pricing strategies based on perceptions of value**

Our hourly rate is generally higher than other people’s and yet they keep coming back. There can only be one reason and that’s because they think it’s worth it. Our rate is still well below what it should be, but unfortunately, we work in an industry where the participants or the protagonists are their own worst enemies. Even the higher end of the market is competing with an army of amateurs who seem to be willing to work for nothing except a “daily wage.”

### **BMP 4 – brand is properly positioned**

I think this is going back a little bit to what we talked about before. Every time an agency tries out, before we know it they are ringing every day. Having the system makes us efficient because things don’t get forgotten (so much!) Doing 2,000 jobs a year; how do you cope with that so things don’t get forgotten?

### **BMP 5 – brand is consistent**

Again, uniform. I spend about £2k per year on my uniforms. My vehicles are all branded. Business cards, paperwork, outgoing paperwork are all carefully branded. I’ve taken to putting very small placards up. Lots of firms put big placards up and they get taken down because they are obnoxious. I can go around town and find placards I put up years ago because they are big enough to read only if someone is interested.

We do have the occasional tool-box meeting about these kinds of things, but simply expressing displeasure when they are not done creates a culture that just requires regular maintenance. This is done by not accepting any deviation from the culture. The best example of this is not allowing people to not wear uniform. I believe it is singly one of the most important parts of branding. When was the last postman you saw not in uniform?

*BMP 6 is not relevant – single brand*

**BMP 7/8 seem to have been amalgamated:**

Don't think I have any great insightful answer to that. I just know what is right and when I see something I don't like I change it. Or pursue the deviation, not the right word, or the person creating the deviation to disciplining them sometimes. Also instilling the passion for the brand in the management team so I don't have to monitor it day in and day out. It's very hard to tell a member of staff to do something that his own manager is failing to do. And subsequently I wear the uniform myself albeit rather different as I tend to wear a management shirt rather than t-shirts/jumpers – but it's still the uniform. The other thing we try and do is keep our vans neat and clean. You know you see comments like, "I wish my wife was this dirty," and "Cleaned by Stevie Wonder." I can't believe the top brands driving around looking filthy.

**BMP 9 – brand is given proper support**

This time last year I decided to move the business. This was equivalent to moving your car from 2<sup>nd</sup> to 4<sup>th</sup> gear. We had to up our game. We were like a pot bound plant trying to run a big company from a broom-cupboard and we were holding ourselves back. Combined with the traffic and parking situation with our old location which was beyond tenable and the fact that it was impossible to evolve the business any further we decided it was the year to move despite having no resources to do so. We borrowed £40K, constructed an office 5 times as big and 2 months later a key member of staff decides to go off sick and remained so for 6 months, costing us tens of thousands in lost contracts. He never returned to work despite making us hold his job open for 6 months. Late summer our most senior member of staff decided it was time for him to start his own business and handed his notice in despite never have expressed unhappiness. Despite his massive salary he thought he could do better alone and took more contacts with him. Serendipitously, his replacement has proved exceptional and in the long run the turn of events will actually be for the better. He totally gets what I am trying to do and achieve. And I really felt for the first time that I am not alone. Talking about what's happened in the last year, in the last three months he's been with me, he's not only doing the last foreman's job better, he's also doing half of the administrator's job who we also had to sack earlier in the year and taking a lot of the exhausting man-management work from me allowing me to concentrate on developing business development, and sales and brand development. I suppose that is business development. We have re-established contact with another firm that we used to do large projects with and restructured the relationship, and now we are working on some large projects.

We do not appear to have discussed BMP 10

[C4. Phase 4](#)

**M, 15<sup>th</sup> November 2018**

Field note

Met at M's new office and unit, which is on a farm. I was late: he didn't tell me the address was different to the HQ address listed on his website, which is in fact just a postal address and panic ensued as he is actually further away than I realised.

I'm impressed with the new-set up with its spacious office divided from the storage area, which is well organised, with shelving for all the event accessories and plenty of hanging space for drying marquees. There is a kitchenette area with a noticeboard and toilet facilities. Plenty of space for parking vehicles outside, with views over fields.

The office area is efficiently set up with desks, the requisite IT and headsets for managing calls. It is also like a "man cave" with a large flat screen TV and music streaming. It was quiet while I was there: just M and A in the office so harder to get a sense of how it might work when all the team is in.

A is the relatively new Operations Manager and deputises for M.

DM: what has happened since we last met?

M: Over a year ago I took the plunge to buy some bigger kit geared to the hire company. So much more robust, higher quality; can bolt things on. Aim is to be responsible for bigger events like the Ryder Cup with a three-storey glass thing. I have changed the website and the business name.

Got a new website. It was a big challenge as we lost all our business overnight. Due to how the website was built we lost all our search history on Google that used to bump us to the top. It really impacted cash flow. We were worrying about how many vans to buy (for the new business) but it became an issue of wondering whether we would make it to July.

DM: why the changes?

M: we were confusing our leads, so we created two brands. PIYG is what was the core business and A--- drop feeds it. The gap between A---- and PIYG will continue to grow. Most marquee companies pack up around this time of year, but PIYG will keep us going. I see no sense in packing up as I would have to train all my staff again. And the guys would know they have an end date. Most companies work really hard to get a team in for April and only keep a skeleton team, so they really can't focus on developing a good culture and team without the smaller jobs. PIYG was only set up a few months ago, but it is busier than A----. Aim is to keep the separation with ¾ guys working on PIYG and then helping out as needed in A----. PIYG could turnover £3 – 400K/year.

Our second challenge was staff. We went from a team of 10 to a team of 5 in five weeks. One was sacked, not good enough. One left us on his last warning. You would have thought the remaining guys would have thought about it, but they went to the pub on payday and didn't come back. I had to let them go: couldn't take them back or it would give the wrong signal. I took on an Admin Assistant part time (that's all she wants to do) and she kept the business afloat while we were on site. This happened last year and had a bit of a slump, but she has kept it going.

We've struggled with trying to get a good culture. Asked lots of questions but not got an answer. Maybe asking the wrong questions. Lacking motivation... (Gap in my notes and the recording did not work).

DM: how much time do you put into training/development?

M: Not enough. Most of it is done on site. Did try and create a policies document but a bit of a waste of time. Don't think they'd read it. Most of it is done by our Head of Operations but it might be better coming from me.

What we are trying to do to make us a bit different. We are videoing our events and filming set up from beginning to end. Trying to put myself in our customer's shoes (Showed a video of an 18<sup>th</sup>

birthday with the staff seen setting up the marquee and installation). Try to do one for each of our different type of events. Creating a case study for each to give us a bit more substance. Looked at lots of marquee firms and most have photos of empty marquees. Some have videos, but none of the final event. Cost me quite a lot but see it as part of my marketing spend. We have definitely won business through the videos. Want to focus more on high end large parties, rather than weddings.

Notes say something about weddings and see voice file (which is non-existent).

Making various different furniture, lighting etc., available so they can't get it from anyone else. Was quite frustrating at first. We are on Google, so we would do all the work to quote and then the customer would send it out to get cheaper quotes. This way (he means supplying the package) they can't do that as no-one else will be able to do what we do.

DM: Tell me about your two different brands

M: PIYG all our branding has been designed to be linked. Important as obviously starting PIYG and it is new, so being part of A----- is important to our reputation. Its more confusing in the office, but we can route customers. PIYG is a better kind of Ryanair. There is not much contact from us, everything is done online, the website is simple and we have stripped down all the services. Basically, we offer 10 different marquee sizes with 6/7 interior options. The webform gives us all the detail needed to produce a quote with minimal fuss. Our challenge is trying to feed it enough leads as we have got to build up on Google again. In a way we are competing with ourselves. It's good for staff as they can start with PIYG and then move onto A-----.

A: this is a whole transformation of the business. Logistically and everything. A new business and also restarted a business. (Some missing as no voice recording?)

Sometimes numbers speak for themselves. In October 2017 we had 39 marquees up, this year 27. But 2017 we turned over £40K with the 39 and this year we have turned over £50K with a lot less work. The administrative costs as a percentage have halved. Expectations are so high because of the website and guarantee that it does mean there is no opportunity to let it slip. We are dealing with the negativity of the customer sometimes, and have to be on the ball every second of the day.

M: I am acutely aware that the more time I spend on it the more I can grow. But the bigger it gets the more demand there is to run the business. Our jobs have probably changed three times this year.

A: the pressure is intense. At the end of the weekend we might have been responsible for 2,000 people's experience.

M: We've had a couple of people leave because of the pressure. They didn't share my view that you have to take some of the shit.

A: It's more than a manual job now. M has made it more sexy; and he has attention to detail, a fine eye.

DM: What's next in terms of the future?

M: I'm wanting the gap between the 2 businesses to ever increase.

This is another thing I've learned: got 2 loans out for £30K. Tried to have the mantra of funding the business through its revenue, but the level of investment required had meant I couldn't make the payroll in August. Now I have management accounts.



The difference the loan makes to cashflow means we can plan for 2019. My granddad told me to do this two years ago, and I said no.... What's the word, consolidation? Going to stick with the kit we have got and book our diary for the kit we have got. Hopefully that will mean we have £50K behind us by the end of the year. Have worked out we have £800,000 – £1.2 Million potential with what we have. There have been times when we have been peeing money down the drain. We had such a slow start to 2018 that we decided against having a 4<sup>th</sup> van, so we have had to hire, which is dead money. I think this year there have been 3 or 4 major learning curves that we won't repeat. This is to the year of profit.

A: 2020 can be a moving year.

M: have made decisions that were wrong because we were backed into a corner financially. I've taken a £12K pay cut but mentally when you're not making payroll...(seems to be a gap). I think we were £525K this year but I had plans for over a million so far. September was £75K.

A has come up with the idea of taking money up front and giving a discount to help with cashflow by evening it out.

DM: how are you monitoring your brand?

M: I have to keep a close eye on it now as one business is competing with the other and Google will recognise that they both want the top slot. Otherwise our brand stays the same: we are fun and friendly. With regard to PIYG, it's like a Ryanair model but with A----- service: you get what you pay for. And if you want more than that then we can transition you over. We can transition people both ways. I have an example tomorrow who was a PIYG lead but we've transitioned her over to A----. As a £2k spend she was wrong for PIYG.

A: Events are something that can be supported more with the new A----- branding. We can do Love Island. We have a Casino Royale event booked for next year. Taking more of an event management focus.

M: This creates expectations. I need to pressure the staff more on where the brand should go. We've got the values on the board out there. Building a decent culture is a high priority and it's on my list to do in the winter. We have got a guy as a consultant to see how he built a team. Going from a team of 10 to a team of 5 is chance to re-sharpen the focus.

Another thing we focused on this year is content. For example, we have set up a knowledge centre to educate our customers. Some of these posts push people away as they are not right for us.

No notes about how the interview concluded as was relying on the recording. When M sent this to me it was only 30 seconds long...

## D. Data analysis

### D1. Initial analysis (Phase 1)

	<b>Foundational Premise</b>	<b>Substantiated Yes/No</b>	<b>Example</b>
1	Service is the fundamental basis of exchange	Yes	“Expectations are quite broad....in this industry we are literally offering customer service” SF C
2	Indirect exchange masks the fundamental basis of exchange	Yes	“6 large companies have gone bust in the last 6 months as they took for granted the business that was out there” SF C  “As a family business we try to offer ultimate choice” SF A
3	Goods are a distribution mechanism for service provision	Yes	Many of our customers want it easy; straightforward, the route of least resistance” SF A  “As you grow it becomes harder to give individual choice: you either say I can do it, but it will cost more; or I can do it a different way” (Example of customising a cheese sandwich) SF A  “Think our value proposition is exceptional. Our peak adult price is £17 which compares

			favourably to other leisure activities” SF B
4	Operant resources are the fundamental source of competitive advantage	Yes	Go back through the loops...that didn’t work so what next?” SF A  Always been innovative in terms of how we’ve done what we’ve done.” SF B  “At the end of each event I’ll run through my mind what went right or wrong and how we could have done better.” SF C
5	All economies are service economies	Needs further testing – sample limited to one sector	Large companies seem to say, because they have critical mass, that we want to do business with you, but you have to do it this way: no deviation from the route” SF A
6	The customer is always a co-creator of value	Yes	“Gut feel based on what’s out there, what’s happening in the world. I didn’t come up with the idea of the e-commerce platform it came from the market.” SF A  “It’s an ever-evolving process. And it’s fun!” SF B  (It’s) “The response from the client after the first meeting...I know from that” SF C

7	The enterprise cannot deliver value but only offer value propositions	Yes	<p>“60 – 75% of my work results in testimonials, think that’s why I am reluctant to expand as want to keep this” SF C</p> <p>“Monitor everything, well, that’s stupid, but we do as much as we can on social media...you can check it on an almost hourly basis. Because it’s real time, stories break before they are on the news.” SF B</p> <p>“The pace of social media has led to a whole lot of noise: you have to try and sift out the bits that are relevant to you” SF A</p>
8	A service centered view is inherently customer oriented and relational	Yes	<p>“Social media has changed the way we glean information. People are constantly reporting what they do and don’t like.” SF B</p> <p>“General customer awareness...still what this country lacks despite getting better” SF C</p> <p>Listening to the whole market and trying to assess/assume what that market wants.” SF A</p>
9	All social and economic actors are resource integrators	Yes	<p>“You can’t always get it right...sometimes this is due to external forces sometimes internal ones. “</p>

			<p>SF B</p> <p>“Have we given clients clear communication; have we asked the right questions?”</p> <p>SF A</p> <p>“A well-oiled machine” (talking about the role of staff working with clients)</p> <p>SF C</p>
10	Value is always uniquely and phenomenologically determined by the beneficiary	Yes	<p>“The reality is that this is our product, our brand. If you don’t want to buy this, you will go elsewhere.”</p> <p>SF A</p> <p>“If you want an easy life don’t go out on a limb”</p> <p>SF B</p> <p>“People who take the time to write or to send an email”</p> <p>SF C</p>

## D2. Open coding: co-creation

### Data analysis: open/first cycle analysis (Saldana, 2013)

#### Analysis of co-creation

One of the challenges of an inductive, exploratory and longitudinal study is that ideas emerge and evolve over time as the researcher and participants become embedded in the study, and because the literature in which they are situated also develops and changes. Initially, at the outset of this inquiry, I explored whether the firms participating were using the “building blocks of co-creation” (Prahalad and Ramaswamy, 2004; Hatch and Schultz, 2010). If these basic foundations were not present it seemed reasonable to assume that the brand management practices of the SFs would not involve co-creation (See the previous appendix, C.1)

I published a paper based on this at ISBE in November 2013, but more recently I decided to revisit my data as part of writing up for two reasons a) there has been a significant stream of emerging literature into brand co-creation since I began the inquiry; b) participants have changed and 2 were not involved in the study when I wrote the 2013 paper. This time I have adopted Ind and Schmidt’s (2019: 48 - 54) four principles which are said to support co-creation: a focus on people; being open; building trust; becoming humble. Accordingly, I have considered it a process of open/first cycle analysis although it was undertaken as I was writing the narratives and interpreting the stories from the interview data as an aid to “sense checking.” It could therefore also be considered axial coding as I am synthesising this theme with others, such as the brand management practices.

In line with longitudinal analysis I have also considered each cycle of data collection.

<b>Factor</b>	<b>P</b>	<b>N</b>	<b>M</b>
<b>Focus on people</b> Firm uses processes that encourage participation and close the gap between the organisation and people	Focuses on dialogue Prompt responses to inquiries	“I work very hard to see myself and my company from the eyes of other people”  Involves “the entire firm” in developing value with consumers  “I have a hands-on attitude to my business, so I am very much	“On the day we set up my staff such as T can deal with any questions... Obviously, all my suppliers like P have experience in their areas. We ...have people with experience in every field.”

		involved with all my customers. But mainly we introduce policies when things go wrong.”	“Feedback, feedback, feedback. I ask for it in multiple ways to appeal to different sorts of customers.”
	<p>“I like to be interactive” (with clients)</p> <p>“I don’t have a template where I quote and fill in space”</p>	<p>“What we want is to be taken seriously by serious customers.”</p>	<p>“Every time we work with someone, she can tell five of her friends how great we are...”</p> <p>“Every marquee is there not for one customer but like an open day. It’s an experience”</p> <p>At this point has introduced the Instagram board, his referral scheme and his trade agreement with other suppliers = a community of interest</p>
	<p>Focuses on personal selling “Face to face I am the happiest at. Once I get my foot in the door and can talk to them and make them feel special.”</p> <p>Customers “Offer their services – ‘can you give me more cards, our wedding was great, we want to tell others.’”</p>	<p>“Takes constant management and monitoring”</p> <p>“People talk to me and tell me things”</p> <p>In house: “We do have the occasional tool-box meeting about these kind of things”</p>	<p>Still using referral scheme; automated email system collects feedback</p> <p>Sophisticated use of online marketing with cookies etc., creates tailored advertising</p>
<p><b>Being open</b> Firm recognises it cannot control expression of the brand; has values</p>	<p>Feels he is the brand so possibly not open to alternative interpretations</p>	<p>“One of the ways we’ve learnt is from writing Ts and Cs which have evolved as jobs go wrong.”</p>	<p>Asks consumers “do you have any ideas or constructive criticisms about what we can do to help or improve. I make it quite clear that</p>

<p>to guide decision making; learns from interactions with stakeholders</p>		<p>Sense N tends to exert control: "I give my team regular pep talks like n the Army" rather than I have dialogue with my team.</p>	<p>this is the only way I can think of to improve the business and that to have constructive criticism helps me learn"</p>
	<p>Talks about "targeting" rather than marketing with</p>	<p>"No specific system in place, but you just listen to people..."</p>	<p>Understands that exceeding expectations will lead to positive word of mouth if can't actually control what is said:          "When they are talking to a friend, they will not just say we are good they will say, 'M told me to do this', and the friend will want to ring me immediately."</p>
	<p>At the time of interview wasn't using social media: "I'm not interested. It doesn't float my boat"</p> <p>Possible conflict here as identifies very much with his brand:          "Food is like art: you taste it, you get pleasure. Like art. I am the artist."          And when talking about building a relationship with the customer:          "Someone else can't so that, so that's why the business is where it is."</p>	<p>Even though he talks about listening to customers, a sense that he feels he controls the brand – especially internally:</p> <p>"I just know what is right and when I see something I don't like, I change it. Or pursue the deviation, not the right word, or the person creating the deviation to disciplining them sometimes."</p>	<p>Customers are involved in all the marketing "whether its print, online social media our testimonials are everywhere and are in depth with name and location. Now doing video testimonials as well."</p> <p>Proactively using these as "social proof that we are not making it up"</p>



<p><b>Building trust</b> Firm creates an environment where people feel confident to express themselves; demonstrates willingness to learn</p>	<p>Feels there is, “All-round customer awareness”</p> <p>For 60 – 75% of the work they do they get a testimonial: “People don’t have to do it, but they do because it’s how they feel.”</p>	<p>Emphasis on talking to customers, “We ask them”</p>	<p>“Feedback, feedback, feedback. I ask for it in multiple ways to appeal to different sorts of customers.”</p> <p>When talking about learning, says “It’s mainly staff” who give him ideas. Goes on to say “It’s easy to get stuck in your ways, but people come along that make suggestions that help us become more efficient, which supports growth as we develop ways of doing more in the same time.”</p> <p>Identifies trust as critical: “We are the only marquee company that offers a full money back guarantee which puts their mind at ease. As this is a time limited service it helps people feel confident that we will do what we say.”</p>
	<p>“I treat every client differently”</p> <p>Sense of evolving processes based on learning: “Biggest thing that has changed the business is having a set of terms and conditions.... All these things make the client feel more comfortable working with you. “</p>	<p>On what engagement they want from customers: “We want them to trust us. There is a lot of mistrust in our business”</p>	<p>Harnessing the power of social media with the Instagram board, actually embracing different interpretations: “Will give prizes for the best/most outrageous photos”</p> <p>Acknowledges staff contribution “If you can have a high retention rate then they probably enjoy what they are doing and agree the values and direction of the brand, which has a positive impact on the brand”</p>

	<p>Talking about reactions to his website:  “Don’t know what social group they are but 40s/50s office workers, but they give positive feedback. I wasn’t happy with the copy, but it works.”</p>	<p>“In short, just listening to people”</p> <ul style="list-style-type: none"> <li>- But do staff feel able to make suggestions?</li> </ul>	
<p><b>Becoming humble</b>  Less telling and more listening by the firm; co-creation extends beyond marketing and communications</p>	<p>Emphasis on face to face meeting followed by post meeting reflection; second cycle of reflection after an event</p> <p>Staff are focused on customer service which feedback says is excellent – so must be a “listening organisation” that aligns what it does beyond marketing/comms</p>	<p>Direct link between dialogues and listening and develop organisational systems/procedures: “we change the “Ts and Cs” and procedures as our knowledge evolves.”</p>	<p>Considerable focus on listening: “feedback, feedback, feedback”</p> <p>Co-creation is linked to processes (money back guarantee) and also culture (developing a handbook for staff).</p>
	<p>“The client always passes on praise. It’s rare that we don’t get it.”</p> <p>Talking about the staff and how they are involved:  “ They don’t do it just for the money, they enjoy it and I need to cut them some slack and have some fun. If you can keep your workforce happy, they will do their best.”</p>	<p>“I don’t have a process, but I just listen, and people say things.”</p> <p>“one of the most important things to do with repeat business is to do whatever it takes to keep the customer happy... The trick is to make it so that they cannot stand the thought of going anywhere else” – gives a sense of value being co-created</p>	<p>Testimonials are “really the ultimate feedback to me”</p>

	<p>A sense that he is willing to be told what to do, even if not taking much interest:          “I’m not proactive, more reactive”</p> <p>Talking about product/service development specifically:          “I would rather someone else do it to be honest”</p> <p>And on marketing:          “I get told.”</p>	<p>Website is now outsourced so supplier involvement there</p> <p>Systems are being developed based on feedback/listening to people</p> <p>Working on culture “instilling the passion for the brand in the management team so I don’t have to monitor it day in and day out”</p>	<p>“our automated service manages feedback and makes us be listening and attentive”</p> <p>Sense that he works closely with other actors in his network:          “I want to position us as the experts in the field, the only company customers need to come to because we are incomparable. “</p>
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### D3. Open coding: brand management practices

#### Data Analysis: open/first cycle analysis (Saldana, 2013)

#### Analysis of Brand Management Practices

Interviews 3/4, about BMPs, were open coded to provide a foundation for starting to write the narratives. Once this was completed relevant material from the other interviews was incorporated to start a process of axial coding, which continued through a process of narrative analysis – structuring and interpreting the stories from the interview data - and analytical revision (see also 5.5. Themes emerging from the narrative). In this way I hoped to maintain a rigorous approach to the data that could achieve validity and insight (Reiter, 2017:131). Accordingly, I believe the themes that emerge from the data are objective, in so much as they have been subject to an active process of analytical and synthetic reasoning (Ratner, 2002).

#### Colour code

Interview 1 SDL lens – Pale blue

Interview 2 The meaning of brand – Red

Interview 3/4 BMPs - Black

Brand Management Practices (Berthon et al, 2008) Item	Dimensions	P	N	M
1 Brand delivers benefits customers truly desire	a) Attempt to uncover unmet consumer needs and wants	Face to face	I'm usually fairly in touch. I know all my customers although there are some I haven't met. I still talk to them on the phone or by email	On the day we set up, my staff such as T can deal with any questions  Done a lot of market research locally recently

	b) Focus on maximizing our customers' product and service experiences	Customer service  the style, the package  Once I get my foot in the door and can talk to them and make them feel special	Our customers keep coming back.  The trick is to make it so that they cannot stand the thought of going anywhere else. And if they do, and they happen to be disappointed, you will be their next point of call.  There is a pattern of response every single time	I want them to say "wow, I didn't expect that. I expect it from Disney but not from a local company."
	c) Have a system in place for getting customers' comments to the people who can effect/implement change	I like to be interactive	We ask them! We did an experiment with surveys, but they are very, very time intensive  I just listen and people say things. I often ask, "Why were we chosen?"  Takes constant management and monitoring	we have a FB page where they can leave comments ( <i>which is</i> ) aimed at the younger section of our market. We also have a page on our website called "what our customers say" where they can leave testimonials and comments. The thirdly, several days after they have had the party, they get an automated email asking more detailed questions about the whole process from initial inquiry to setting up the marquee
2 Brand stays relevant	a) Invest adequate resources in product improvements that provide better value to our customers	It's not a big dynamic company, but smooth running...It works  I don't think I consciously do that I'm not proactive, more reactive	Gave specific example of website: I'm about to change to the third version	They ( <i>customers</i> ) also get several automated emails - this is a new thing - that give them a tick box for event organisation  Going to do it in 2 or 3 phases.
	b) Keep "in touch" with our customers' tastes	I treat every client differently. I don't have a template  Talking to people  conversations in which you include ideas	I have a hands-on attitude to my business, so I am very much involved with all of my customers  I guess in short, just listening to people.	It's mainly staff  people come along that make suggestions  Feedback, feedback, feedback  Tend to evaluate and modify things on a weekly basis
	c) Keep "in touch" with current market conditions	Something will catch my eye. Maybe I go into a pub or a restaurant and think "that's good" and I copy it  I graze ideas	People talk to me and tell me things	There isn't much competition  we pretended to be holding a wedding and out of 20 - not 3 or 4 - quotes there wasn't one I would trust with 10K to do a wedding

	d) Base marketing decisions on knowledge of the current market conditions, customers' tastes and new trends	A good analogy is Pizza Hut and Pizza Express. We are Pizza Express.  I see things and will incorporate ideas	I guess in short, just listening to people.	we have people with experience in every field  Feedback, feedback, feedback
3 Pricing strategies based on perceptions of value	a) Optimise the price, cost and quality of the product/service offering to meet or exceed customers' expectations	The reason I am still here is that my cost base is low, meaning I can keep my pricing realistic.  I don't have a fixed price because of what we do I have to price accordingly I don't get people refusing to pay	Mostly, and there are exceptions where we make mistakes, when somebody doesn't employ us it genuinely confuses me  I would rather have fewer customers at a higher price than more customers at a lower price.  Value for money. It's important to distinguish between value for money and cheap. We are not cheap. We are a problem-solving company  Our hourly rate is generally higher than other people's and yet they keep coming back. There can only be one reason and that's because they think it's worth it	Its literally about how we can create the wow factor (about a handbook)  We don't advertise our prices and I don't want to be known as cheap marquees but wow marquees.  Our prices don't really move, well only one way We are the only award-winning company with its own money back guarantee
	b) Have a system in place to monitor customers' perceptions of brand value	I don't find it hard to build rapport  We get people writing a card saying how good the service is I get quite disappointed if we don't get a testimonial now  Talking to people	I think when people see it, they think it's a good company Also, its that you are established and not just set up, which is common in my business  There can only be one reason and that's because they think it's worth it	Feedback, feedback, feedback. I ask for it in multiple ways to appeal to different sorts of customers.  I make it quite clear that this is the only way I can think of to improve the business and that to have constructive criticism helps me learn  There was quite a lot of feedback about how we listened and gave advice
	c) Estimate how much value our customers believe the brand adds to our product	I think the value is professionalism, quality, sustainability  You can equate price with quality	We want them to trust us. There is a lot of mistrust in our business	Feedback, feedback, feedback  we have to show value which is quite difficult in our market

		I think there is large element of this being my own personal business	Even the higher end of the market is competing with an army of amateurs who seem to be willing to work for nothing except a "daily wage."	
4 Brand is properly positioned	a) Establish "points of parity" for our brands that are necessary simply to complete in the product/service category	I do research other caterer's websites occasionally I read magazines for the catering industry	I work very hard to see myself and my company from the eyes of other people	We don't want to be a commodity others were quite bland and generic
	b) Establish "points of parity" for our brands that negate the advantages our competitors achieve in the product/service category	I see things and will incorporate ideas	There is no reason, other than price, for them not to choose us because we are as good as - or better- than everyone else	we are the only award-winning company and the only one with a full money back guarantee. No one else has that
	c) Establish unique "points of difference" for our brands that provide us with a competitive advantage in the product/service category	I'm not a white van man. I use a Silver Mercedes van as it is synonymous with quality.  it's not like there are lots of caterers in TOWN  To me I am the brand	I have created a culture of care and pride for the job.  We maintain high tech communications for our customers. Most garden firms miss calls, we catch them. We maintain a fleet  Top class equipment. We don't buy rubbish  Reliability The biggest complaint we hear is that people just don't come back  what we want is to be taken seriously by serious customers.  Having the system makes us efficient because things don't get forgotten (so much!)	In terms of keeping up with competition we are always buying new things  We are the only marquee company that offers a full money back guarantee which puts their mind at ease  I want to be incomparable

5 Brand is consistent	a) Develop marketing programmes that do not send conflicting messages about our brands to our target audience	I think branding shouldn't be over complicated  My strapline has been the same for eight years and it works  It's been tweaked  It has evolved, it is not conscious.	Standardised letters, standardised accounting systems, having an infrastructure in place  You know your branding is working when people say, "When you guys turn up it really looks like a professional outfit."  Uniform  My vehicles are all branded. Business cards, paperwork, outgoing paperwork are all carefully branded.	We focus on reputation rather than brand awareness  Our biggest weakness at the moment
	b) Adjust the brand's marketing programme to keep current and abreast with changes in consumer tastes	I occasionally look at competitor's types of branding	We do have the occasional tool-box meeting about these kinds of things,	While we try to be consistent, we are splitting at the same time
6 Brand portfolio and hierarchy make sense	a) Have a corporate brand that creates a seamless umbrella for all the brands in our portfolio	Not relevant	Not relevant	NAME is important for reputation
	b) Ensure that the brands in our portfolio target specific, well defined segments, which do not overlap with each other	Single brand, however:  Difficult because my target is quite extreme in terms of 30 – 80s as an age bracket	Single brand  What we want is to be taken seriously by serious customers.	We would rather focus on specific customer characteristics and reach them  Two brands: One business is competing with the other  PIYG is new so being part of NAME is important for reputation  A better kind of Ryanair; minimal fuss



	c) Ensure that the brands in our portfolio fully maximise market coverage	Single brand:  I like it to be contemporary but not to make the older generation feel left out	Single brand  What we want is to be taken seriously by serious customers.	I prefer to be like a sniper  I'm concentrating on things like Google Adwords and Facebook so I can be a lot more focused on who I am targeting, rather than newspaper, radio etc that would usually be used for brand building.  Can transition people both ways
	d) Create a brand hierarchy that is well thought out and well understood by our staff	Not relevant	Not relevant	We were confusing our leads, so created two brands
7 Brand uses full repertoire of marketing activities to build equity	a) Design the brand name, logo, symbol, slogan, packaging, signage etc for our products/services to maximise brand awareness and image	It's simple and very clear  It's a welcoming brand....clear cut and descriptive.  is clean cut, clear, works well and is enough to get interest	Recognisability. Consistency in the same way that you know what you're going to get when you walk into a McDonald's anywhere in the world.	I want my company to be like Apple ... A kind of global awareness but only in Hertfordshire  Don't necessarily focus on brand awareness as such. Its more our product is our image
	b) Implement integrated "push" and "pull" marketing activities to target both distributors and customers	Focus on consumers  I've found that by talking with the client, getting the quote out within 24 hours and following up by email that they will work with you  I'd get an E for that. I don't do much apart from cards and some flyers.	Focus on consumers  When I see my vans driving down the road, and you see a fleet of them and you see the same vehicles over and again – I've got four of them – and people see you over and again and then people think about you  I've taken to putting very small placards up  The other thing we try and do is keep our vans neat and clean	Every time we work with someone, she can tell five of her friends how great we are, and this will really have a snowball growth effect on our business  I won't have to advertise so much because of WOM  Focus on consumers  our best performing marketing which is Adwords People who land on our website Google will put a cookie on them and then they will get banner ads etc. It's probably given the effect we are a lot bigger than we are.

				Social media. FB and Instagram.... its automated, so we don't have to do anything. Email reminders to any leads who haven't booked.
	c) Ensure that brand managers are aware of all the marketing activities that involve their brands	It's all me, isn't it? (creating value)  (Partner deals with marketing)  it doesn't interest me really  J just works it all out	I give my team regular pep talks  Instilling the passion for the brand in the management team so I don't have to monitor it day in and day out	Our automated service manages feedback and makes us be listening and attentive
	d) Ensure that all people involved in managing the marketing activities for a brand are aware of one another	They (the staff) are very customer focused. They are all 40 plus and enjoy what they are doing. There is general all-round customer awareness.  I get told I don't take the interest in it I want other people to do it	We do have the occasional tool-box meeting about these kinds of things, but simply expressing displeasure when they are not done creates a culture that just requires regular maintenance	The way I see it, every marquee is there not for one customer but like an open day. It's an experience for 50-60 people
	e) Capitalise on the unique capabilities of each communication tool while ensuring that the meaning of the brand is consistently represented	I'd get an E for that. I don't do much apart from cards and some flyers	You know your branding is working when people say, "When you guys turn up it really looks like a professional outfit."	I prefer to be like a sniper. I'm concentrating on things like Google Adwords and Facebook  Our automated service manages feedback and makes us be listening and attentive
8 Brand managers understand what the brand means to consumers	a) Develop detailed knowledge of what customers dislike about our brands	I'd say that for between 60 – 75% of the work I do I get a testimonial back. People who take the time to write or send an email to tell me I'm doing something right in terms of the food or quality.  I didn't go out searching for branding but noticed in my industry that it is quite stereotyped	I don't have a process, but I just listen, and people say things	Customers who haven't used us in a while have feedback that they want us to keep the personal touch as we grow

	b) Develop knowledge of the core associations that people make with our brands, whether intentionally created by our company or not	<a href="#">The response from the client after the initial consultation</a>  They see me load my van in Waitrose and they think I must be good because I use Waitrose.		I want our branding and marketing to be “we hired a NAME marquee or we had a NAME party” I want to be known as the company that creates experiences and memories and occasional hangovers.
	c) Create detailed, research-driven portraits of target customers	Difficult because my target is quite extreme in terms of 30 – 80s as an age bracket  But  I want the most successful hit rate with inquiries, which involves me seeing the clients.		Its specific for each event  50% of our work is through females late 40s – 50s  In terms of the Asian market typically dealing with the male
	d) Outline customer-driven boundaries for brand extensions and guidelines for marketing programmes and activities	Not relevant – no brand extensions	Not relevant -no brand extensions	We are sticking with the garden marquees... Hence the new website as we get 90% of business from the website. Hence the landing page. We will ask people what they are looking for and then split.
9 Brand is given proper support and it is sustained over the long run	a) Develop a good understanding of the success and failures of our brand’s marketing programme before it is changed	I don’t have a programme. That’s not a cop out. I just don’t.	<a href="#">I can think of a million things...</a>  We had to up our game	Did this last week actually – you probably got an email. We sent it to about 300 of our past customers
	b) Provide our brands with sufficient research and development support	My partner... She’s much more interested than I am and sees things I don’t	Allowing me to concentrate on developing business development and sales and brand development.	Took about 10 days last time, on and off; and we probably do it 2 or 3 times a year
	c) Resist the temptation to cut back marketing support for the brand in reaction to a	My niche is the smaller turnover that others don’t want.		Personally, this business grew in a recession, so Brexit is about 101 on my list of things to worry about.

	downturn in the market or a slump in sales			
10 Company monitors sources of brand equity	a) Create a brand charter that defines the meaning and equity of the brand and how it should be treated	It is certainly relevant for GM/Vauxhall and Peugeot, I can see how it would work for them. But I can't see how it is relevant to me.	Not discussed	Got the values on the board out there
	b) Conduct periodic brand audits to assess the "health" of our brands	This makes me evaluate my business, just by talking to you.		I want to get to the point within 10 years where people go, "That must be a NAME marquee" and be the go to person in Hertfordshire for our part of the industry.  The level of testimonials I have. It's really the ultimate feedback to me  We get copied quite a lot, so other companies are seeing us as the benchmark and a threat which means, for us, we need to think of new services and stay one step ahead.
	c) Conduct routine tracking studies to evaluate current market performance of our brands	At the end of each event I'll run through my mind what went right/wrong and how we could have done better		I kind of see it as how much of a stake we hold in our industry
	d) Regularly distribute brand equity reports which summarise all relevant research and information to marketers to assist them in making decisions			
	e) Assign explicit responsibility to an individual within the organization for monitoring and preserving brand equity			I don't want to be a faceless nameless business, so I need to be available. I need to get the balance right between the customer and the company's needs.

#### D4. Longitudinal data summary matrices

##### Longitudinal data summary matrix (Adapted from Saldana, 2013: 235)

##### D4. 1 From Sept 2015 – April 2016 (From 1<sup>st</sup> to 2<sup>nd</sup> cycle of data collection)

Participant	Increase/emerge	Cumulative	Surge/epiphany/ Turning point	Decrease/cease	Constant/consistent	Idiosyncratic	Missing
<b>P</b>	Income is up so feeling more stressed	More familiar with branding as a concept  Improved processes e.g. bookings and pre-payment	Delegating to staff and realising their standards may not be as meticulous as his; recognising this is probably okay if not a customer facing situation	Procrastination – is turning quotes around more promptly; seems more proactive	Identifies as the brand  Adopts a customer focus  Values  Brand image/positioning	Self-actualising through the business; growing in confidence	No underlying sense of brand positioning - disinterested
<b>N</b>	Has started building a new office = more work-related responsibilities	Brand used for self- image and outward image	Standing apart from the competition: seeing his business as a problem-solving company		Systems and processes in place  Customer focus – emphasis on dialogue  Online presence  Brand image/positioning	Taking pride in his firm	Doesn't delegate anything

<b>M</b>	Developing the “wow” factor + increased interactions with consumers and suppliers	Leveraging a network approach – using a referral scheme; “trade agreement” with suppliers in other segments	Won a Hertfordshire business award	Abandoned idea of using Net Promoter score	Brand image/positioning  Online presence  WOM	Seeing himself as a sniper (targeted advertising)	
<b>Contextual/intervening conditions influencing/affecting changes above</b>							
<b>P</b>			<b>N</b>			<b>M</b>	
Is more settled in his personal relationship. His partner is a professional marketer and I can see the impact she is having on the business in terms of the website and marketing communications, but also in starting to encourage P to professionalise his business operations. He seems generally happier and more settled: is this allowing him to focus more on his business?			Was having to move out of a rented property at the time of the interview; we did the interview in his kitchen while he cooked an evening meal as this was the only “free time” he had available. He seems to work around the clock, even at weekends when he is building his new office.			Interview was over lunch in a local pub. M was actively hands on with erecting marquees/seeing clients even though it was out of season. Talked about his holidays with “his mates” and going to the gym being a hobby: starting to look like a body builder so must put the hours in with this.	
<b>Participant</b>		<b>Interrelationships</b>		<b>Changes that oppose/harmonise with human dev/social processes</b>		<b>Participant/concept rhythms</b>	
<b>P</b>		His focus on face to face dealings with potential clients seems to drive the interactive culture of the business.  Work is being done on the company website and marketing materials by P’s partner. He is also actively engaged in business		`Co-creation of value (Vargo and Lusch)  A link with the concept of “service brand” where value creation is a dynamic process. Building blocks of co-creation present (Hatch and Schultz, 2010)		It feels as if the business is gaining traction in its’ market, five years since moving into the current premises: higher turnover and more customers. To what extent is this the result of P’s partner getting involved with the marketing and giving him support/a push? Or has he settled	

	<p>networking, which seems to have increased the amount of business he has.</p> <p>The level of business has increased, which seems to be driving a more professional approach in terms of managing the business. He is using a bookkeeper to manage his accounts now: correspondingly there is more attention to getting payment in promptly.</p>		<p>into his role as an EOM? He talks a lot about confidence: Professionalism?</p>
<b>N</b>	<p>Emphasises the need to establish trust with customers and to exceed expectations: dialogue is delivering tangible benefits to the firm.</p> <p>The brand creates a sense of belonging for the staff team which creates business benefits. E.g. perception by consumers of being professional.</p> <p>In a market with lots of new entrants who do not survive the brand is important for demonstrating sustainability/longevity.</p>	<p>A link with the concept of “service brand” where value creation is a dynamic process. Building blocks of co-creation (Hatch and Schultz, 2010)</p> <p>The role of management and staff (Horan et al, 2011) in a SF service brand</p> <p>Brand as an indicator of trust; Centeno et al (2013) brand building model; evidence of brand management (Berthon et al, 2008)</p>	<p>There appears to be a commitment to the brand for the long haul, so a sense that consistency balanced with evolution is becoming important.</p>

<p><b>M</b></p>	<p>Focusing on creating relationships with consumers that bring tangible benefits to the business e.g. WOM</p>	<p>Merrilees (2007), brand led venture development; using creative approaches to take the firm's capabilities to the next level.</p>	<p>Wanting to be a "local Disney" by creating "wow."  A sense of the business going up a gear: more focused, forward looking, excited.</p>
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**Preliminary assertions as data analysis progresses**

Brand management (as an active and regular process) is indicated in all three cases. It varies: P does not have a formal programme/is ad-hoc; N is focused on using the brand as an SOP for the firm; M is exploiting the brand to gain competitive advantage

P seems the least developed as a brand leader – happy to opt out of responsibility for it; N sees it as a way of creating consistency for staff and consumers; M is quite sophisticated and is actively using his brand to sharpen his business model and acquire customers (Merrilees, 2007)

They appear to have different relationships with their brands. P is the brand (the artist); N is paternal about it (he feels pride); M is passionate about delighting customers but subordinates the brand to his will (being a sniper).

All 3 EOMs seem to take time to reflect. In different ways they evaluate what is happening, and there is a branding dimension to this, even if sub-conscious. Dialogue with customers and getting feedback is a critical part of this process. To what extent can they be considered "learning organisations?"



D4.2 From April 2016 – Jan 2018 (From 2<sup>nd</sup> to 3<sup>rd</sup> cycle of data collection)

Participant	Increase/emerge	Cumulative	Surge/epiphany/ Turning point	Decrease/cease	Constant/consistent	Idiosyncratic	Missing
<b>P</b>	Product/service development linked to the brand e.g. uniform items	Understanding the benefits to the business of working with customers; exploiting this  Becoming more “corporate” with branding	Doesn’t want further business expansion and has decided to move to Spain within the next two years.	Evaluating marketing activities – “gets told”  Engaging with marketing – “would get an E for that”  (Is this a decrease given someone else is doing it?)	Happiest with face to face contact with potential/actual customers	Seems proud of not taking responsibility for marketing/branding – is this delegation or arrogance? Perhaps prefers to be the CEO?	Planned brand programme – ad hoc  Exit strategy
<b>N</b>	Relocated the business  Change in personnel has shifted his role from day to day team supervision to business and brand development	Instilling the passion for the brand in his team	The previous business premises were a “broom cupboard” that held the business back - he can now move from “2 <sup>nd</sup> to 4 <sup>th</sup> gear”	Has stepped back from day to day management of the team	Emphasis on dialogue with consumers  Monitoring of brand as a SOP  Pattern of response to business inquiries	The “je ne sais quoi” comes from the love of his business and he finds it hard to let go e.g. outsourcing website  Importance attached to uniform	No mention of equity: is it something he wants to build in the firm?
<b>M</b>	Continuing to develop strong	Positioning the business	Change of strategy as can	Happy to turn people away if	Emphasis on dialogue and	Desire to maintain the personal touch	Lack of a suitable

	differentiation in his market	around experiences rather than product/service	see he is losing business	not "his customer"	interactions with consumers  Monitoring of brand as an SOP  Wanting to be incomparable	even while the business expands significantly	unit impacting on developing new strategy.
<b>Contextual/intervening conditions influencing/affecting changes above</b>							
<b>P</b>		<b>N</b>			<b>M</b>		
<b>Participant</b>		<b>Interrelationships</b>		<b>Changes that oppose/harmonise with human dev/social processes</b>		<b>Participant/concept rhythms</b>	
<b>P</b>		<p>Product development seems to be happening due to feeling "more corporate."</p> <p>The ad hoc nature of the branding programme seems linked to the lack of interest the CEO takes.</p> <p>If he fulfils his desire to relocate abroad, will he sell the business for what it is worth without an exit strategy?</p>		<p>Brand management evolves over time (Juntunen et al, 2010). The SF as a corporate brand (Horan et al, 2011)</p> <p>See Krake (2005) on the EOM and O'Dwyer et al (2009) on branding not being a priority in SFs</p>		<p>P seems to have settled "into his stride" and is in a phase of what might be called consolidation. He is limiting growth, because he sees himself as the brand, but also subconsciously as he has a lifestyle he likes?</p>	
<b>N</b>		<p>After the disruption of a move N is focused again on maintaining corporate identity, being consistent with his brand and providing a</p>		<p>See Juntunen et al, 2010 and Brodie et al (2006a) "service brand relationship value triangle"</p>		<p>N has talked about shifting from 2<sup>nd</sup> to 4<sup>th</sup> gear, so I have a sense of transition but not yet what the vision is. With more time to focus on brand leadership</p>	

	<p>friendly service – creating a “competitive edge” in a market which is considered unreliable.</p> <p>Is starting to outsource (website) and delegate (supervisor) so has more time for business and brand development.</p>	<p>Shifting to use of brand to lead venture development? (Merrilees, 2007)</p>	<p>and business development where will the business go?</p>
<b>M</b>	<p>Using the brand as a relational asset to drive his business forward.</p> <p>Change of business strategy has opened up new potential.</p> <p>Proactively using consumer and supplier agency to develop his brand as an SOP</p>	<p>Brodie et al (2006a); Merrilees (2007)</p> <p>Organisational learning as part of a co-created brand (Payne et al, 2009)</p> <p>BMPs (Berthon et al, 2008) need to be more collaborative – not all under firm control.</p>	<p>Transitioning: clear vision and plan.</p>
<b>Preliminary assertions as data analysis progresses</b>			
<p>Each of the firms is undertaking a range of brand management practices that align – loosely – with the BMPs (Berthon et al, 2008) but these are more collaborative than the current framework indicates. The brand is a relational asset although the extent to which this is leveraged varies.</p> <p>There is a corresponding sense of evolution – of the businesses, the brand and the EOMs although the extent to which this is happening varies depending on circumstances/the individual: P has a lifestyle business and is limiting it; N has been focused on day to day operations but now has an opportunity to focus on brand leadership; M has decided to create 2 separate brands for 2 markets.</p> <p>I see a variety of approaches to brand management: ad hoc and unplanned (P who has no exit strategy); deliberate (N) and emergent (M)</p>			

D4.3 From Nov 2018 – Mar 2020 (From 3<sup>rd</sup> to 4<sup>th</sup> cycle of data collection)

Participant	Increase/emerge	Cumulative	Surge/epiphany/ Turning point	Decrease/cease	Constant/consistent	Idiosyncratic	Missing
<b>P</b>	P sold the business in Dec 2018. The new owner A is willing to take part in the study. Data collection did not happen in 2019 as she was setting up the business and experienced a variety of challenges. It was planned for March 2020 but lockdown due to Covid-19 has prevented this happening (not because it is impossible to talk: the business has won a commercial contract through the Local Authority to feed homeless people who have been temporarily housed in a local hotel and with staff furloughed A is working round the clock).						
<b>N</b>	Planned meetings have been cancelled twice due to work pressures of N. Currently he has staff furloughed due to Covid-19 and is working solo to keep his business established so that it can resume post the lockdown. We have agreed to talk again when he the personal capacity to participate.						
<b>M</b>	Challenges of growth	Attention to firm culture  Brand building – now 2 brands  Formalising/streamlining systems and processes	Losing search history on Google  Taking a loan	Less hands on – has an operations manager	Emphasis on dialogue and interactions with consumers  Monitoring of brand as an SOP	Making the brand “sexy”	Usual passion – sense of moving into new territory as the business grows and it being less fun.
<b>Contextual/intervening conditions influencing/affecting changes above</b>							
<b>P</b>		<b>N</b>			<b>M</b>		
<b>Participant</b>	<b>Interrelationships</b>			<b>Changes that oppose/harmonise with human dev/social processes</b>		<b>Participant/concept rhythms</b>	
<b>A replaces P</b>							
<b>N</b>							

<p><b>M</b></p>	<p>Challenges of growing the business are creating management responsibilities which seem to have taken some of the fun out of it.</p> <p>Developing 2 brands led to lose of search history; the 2 brands are aimed at different markets but effectively compete on digital platforms.</p> <p>Using the brand as an SOP helps to mitigate some of the issues connected with growing the business e.g. culture.</p>	<p>Business functions can't operate in silos but need to be connected - BO</p> <p>Change is difficult, especially when brand consistency is demonstrated to be significant</p> <p>BO to support strategy and aligning decision making/behaviour as well as engaging employees and consumers.</p>	<p>Still in a period of upheaval post a significant change in the business model.</p>
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**Preliminary assertions as data analysis progresses**

It seems that the brand is increasingly being used to focus organisational decision making, but now the business has the challenge of developing a coherent way forward using two brands.

Does having an operations manager help or hinder the firm's ability to use the brand as a SOP? The staff team and culture appear to be a challenge no-one is addressing because of other more pressing issues. How will this impact? (Thinking in terms of service brand/brand as a relational asset).

Firm seems to be evolving through the branding archetypes (Wong and Merrilees, 2005). Are these sufficient to explain brand orientation in the context of a SF? What are the differences between "integrated" and "unintegrated" firms?

## E Reflexive practice

### E1 Developing reflexive practice as a researcher

#### **Memo to self: Why I believe reflexivity may be useful**

If research is an interpretive activity, then “positivist notions of objectivity and empirical facts are rejected” Nadin and Cassell (2006:208). Instead the process becomes one of interpretation and is subject to various influences. A reflexive stance is considered helpful in order for the researcher to understand what is impacting on their work (Alvesson and Sköldbberg, 2000; Johnson and Duberley, 2003; Cunliffe, 2003; Weick, 2002). To me, this means considering different aspects of the study, for example working relationships, how you/your participants are feeling - and not just the data. Reflection can therefore be defined as the “interpretation of interpretation” (Alvesson and Sköldbberg, 2000:6). It is a process that requires critical self-reflection.

The benefits of a reflexive approach include an enhanced understanding by researchers of their role and impact (Cassell, 2005), and greater credibility of the data (Finlay, 2002:531) through a process of “intellectualisation” (Alvesson and Sköldbberg (2000: vii). This process of reflexivity draws on ideas from the philosophy of science to develop in depth thinking about methods and epistemology.

This sounds quite daunting to a novice researcher! I am therefore particularly attracted to the idea that reflexivity is empowering: “Done well, it has the potential to enliven, teach and spur readers toward a more radical consciousness. Voicing the unspoken can empower both researcher and participant” (Finlay, 2002:531).

My aim is to explore a conceptual theory to see if/how it operationalises in specific situations. It is therefore helpful to consider the suggestion that theory construction is “partly an exercise in disciplined reflexivity,” with “attention to self-as theorist (Weick 2002:893). The suggestion that the researcher may develop better theory if they are attentive of the need to find hidden voices and think deeply about topics prompts me to consider how I can work closely with, observe and try to understand my participants as the small business owners and entrepreneurs as well as evaluating my own role in the research Weick (2002). It also suggests the need for practice: in qualitative research the researcher may be perceived as the instrument of research meaning the senses and skills must be fine-

tuned and a level of self-knowledge is required (Janesick, 2011; Piantanida and Garman, 2009).

### **How I might set about managing the process of reflexivity**

The question then, is how to develop a suitable approach to reflexive practice than can be sustained over the period of this research project? Several authors (Finlay, 2002; Cunliffe, 2003; Nadin and Cassell, 2006) suggest that it is a difficult and problematic process – often because of the complex and ambiguous nature of qualitative research. There is also a body of writing that highlights the need for reflexive practice that “adds value” and insight to research (Weick 2002; Fournier and Grey, 2000; Lynch, 2000) thus avoiding “narcissim run amok” (Weick, 2002:894). This suggests to me that a diary, with its emphasis on regular entries could tempt me to stray into too much self-reflection that is not aligned to the research itself. Johnson and Duberley (2003) suggest that reflexive researchers must understand their epistemological assumptions with regard to reflexivity. At this early stage of my work I believe I am a constructionist, with possibly a large dose of pragmatism (Cherryhomes, 1992). I know I want to explore using a narrative approach because I feel this enables me to draw on elements of phenomenology, ethnography and grounded theory (Bold, 2013:37). I think this is important as there are three criteria that seem to be highly relevant to my study: temporality, causation and human interest (Cortazzi, 1993; Clandinin and Connelly, 2000; Bold, 2012). I therefore think I need to adopt a reflexive approach that allows me to use a range of techniques. Mauthner and Doucet (2003) state that reflexive practice requires the researcher to develop the time, space and contexts in which to be reflexive, further suggesting the need to adopt some tools or techniques that I can use in a focused and meaningful way that makes a genuine contribution to the overall project (Nadin and Casell, 2006)

I have therefore decided to adopt an approach based on Piantanida and Garman’s (2009:60) notion of “reflective interludes” to focus on a particular idea, problem or concept with the aim of allowing me to frame a piece of writing based on where I am in my thinking at that point; what I am finding challenging or constraining and deepening my thinking on a subject. In other words, these should serve as points for deliberation. This deliberation can also be turned inward towards me, enabling me to hone my personal skills and self-knowledge.

If I link this idea to Rainer's (1978) seven techniques for journal writing it is possible to use a range of devices to explore aspects of my work. Lists, portraits and unsent letters appeal particularly as they should enable me to develop a range of perspectives on my research and my participants. Thus, I perceive various activities that may help me consider what I am thinking, feeling and wrestling with at different points during my research. In this way I hope to develop tangible ways to evaluate my experiences, refine my thinking and practise scholarship.

I have limited research experience, so I am hoping that this process will enable me to understand my own learning journey. This is 'at odds' with some of the literature about reflexive practice. For example, Finlay, (2002) advises against a focus on self as researcher rather than on the participants; DeValut (1999) says that personal revelation must be linked to an analysis of its relevance to the broader study. This seems to align with Weick's (2002) previously mentioned suggestion that narcissism is to be avoided. However, in professional fields where practitioners are required to undertake a process of continuous professional development it seems to me to be useful, as a student and an educator, to undertake a process of reflection on how I develop during the period of this work.

My broad aims in adopting reflexive practice are therefore:

- To explore how I am situated in this inquiry, and how my assumptions, values and beliefs impact on my research as it develops; Mauthner and Doucet (2003) state that reflexivity alters as time, distance and detachment from the research process increases and I am interested – as someone who has to support students undertaking dissertations – in how this happens
- To develop portraits of my participants which will grow and develop over time
- To reflect on key themes, topics and problems as they arise

It is valid to make a note to self here: reflexivity is an ongoing practice and "adopting a research diary does not turn a non-reflexive researcher into a reflexive one" (Nadin and Cassell, 2006: 215). I take this to mean that something tangible and useful must result from the process and not just introspection.

I like to think I adopt reflexive practice both in my professional practice and in my limited research to date. For my MBA thesis I used exercises designed by Piantanida and Garman (1999) and Janesick (2011) to help support my qualitative analysis. However, I consider



myself very much a fledgling researcher and am therefore interested in finding new and different ways to support reflexivity throughout a much longer inquiry.

(Updated November 2015)

## E2 Participant portraits

### **Who are you? Memo to self to produce participant portraits**

#### **P: From broker to Head Chef**

(First interviewed July 2013)

#### **How I know P**

I know P through a girlfriend as they have been a couple since December 2011, although we first met through business networking some years previously when I was working for a small business. P has done three events for me – one a year since 2012 – as well as helping with some family social events for which he hasn't charged. I have done a shift for him as a waitress when he needed extras for a big event summer 2015.

#### **About P**

Passionate about food, P left the City and gave up life in the fast lane to open his own catering business. He started out with a concept for high end ready meals, but before launching his business he told me he spent several hours sitting at Liverpool Street station watching 2,000 people go past with no idea of how to turn his idea into a reality. It was 5 years later before he started in business as a cottage industry using just 8 recipes. Since then he has both developed and repositioned his company.

I wonder what makes P tick because it is clear he misses the money and lifestyle he had as a broker. He has never shared what convinced him to make the change, but knowing brokers are generally highly motivated and driven individuals I wonder if he couldn't let go of an idea once he had it. He has spoken of personal challenges in his life and maybe this was a catalyst? Or perhaps he just burned out.

P is fastidious. When I see him socially (he is dating a friend) he is always the male in our group who is immaculately groomed. Something of a "clothes horse" he likes fashionable and expensive shirts and shoes; his appearance is always well co-ordinated. In a work setting (he has done several events for me and I have also filled in for him as a waitress) he is always in clean, matching chef's outfits. He takes spare aprons and shirts to functions in case he gets hot and dirty. I have never noticed he smells of cooking, only of aftershave!

Appearances are clearly important to P and this translates into his business. He only serves “very special food” and is meticulous with all aspects of his service. Having seen him both sides of a function he pays close attention to detail from planning the event through to its delivery. In my experience it is not uncommon for chefs to be very particular - they see what they do almost as an expression of themselves – but sometimes this makes P stressed. If a weakness is a strength overplayed, P doesn’t handle stress well and can become pedantic and picky.

Despite his frequent reminiscences about when he had money, P clearly takes personal pride in his company. He seems to enjoy talking about the company and belongs to a local chapter of a well-known networking organisation. However, he is careful about who he networks with: if he recommends or works with other organisations, they must have a quality dimension to their business to (he knows and works with M) because he sees this as a reflection on him.

P strikes me as a “people person.” He enjoys being either side of an event and engaging with people, but I know he dislikes the paperwork and financial management side of his business. Because he likes people and has excellent social skills P has become an integral part of my social group, quickly establishing himself when he met my friend; he is one of the few men in this group who is always happy to get on a dance floor! He treats his friends well, and in a reflection of his business approach, is considerate and willing to do things for others in the group. He once rustled up a birthday meal for me and some friends on an occasion I was too ill to cook. However, we know when he is over-tired or over-stressed as he gets a little snappy!

P is close to his two adult sons and they do a lot of activities together. I wonder sometimes if he over-compensates for being divorced from their mother as he still seems very “hands on” for a father of 20 somethings. I wonder if his underlying tendency to stress about details also plays out in his personal life. P can be self-effacing, so maybe beneath his painstaking approach there is a lack of confidence that he is getting things right? This may explain why he took his initial move into business slowly and why he has opted to grow his business steadily.

## **N: a thinking gardener**

(First interviewed July 2015)

### **How I know N**

I met N at a local networking organisation in May 2015 when I was asked (by P) to stand in to represent a business who couldn't attend one week. N rather gallantly responded to my request for participants to take part in my PhD research saying he hoped to learn something useful about branding in the context of his business.

### **About N**

I arranged by telephone and email to meet N at his business premises after work on a summer evening. In all of our initial communication I was struck by how polite he is – not at all stuffy, just good manners, but also with a real attention to detail: he asked several questions about the ethics approval form.

On the day of the interview N had evidently worked since early morning but was still clean and smart in the company livery. He washed his hands before making me a cup of tea, but I noticed that his nails and hands were already clean and in good condition: my grandfather was a professional gardener and he was always painstaking to keep his hands in good condition. He said it was important because nobody wants to shake a dirty hand. N struck me as being a gentleman, like my grandfather, and this idea developed as we talked: I found myself wondering, rather idly, if N would have worn a hat too and lifted it to the ladies if he had lived in my grandfather's day. It is clear that he puts a strong emphasis on personal standards and, therefore, on recruiting pleasant and intelligent men – the sort people are happy to have working around their homes. I felt this conveyed a strong sense of what was appropriate and an underlying courtesy that sets the tone for how Nick seems to behave. As a further example I sent a small box of chocolates as a thank you gift post the interview, as I always do. I got a very pleasant and humorous thank you email in return.

N is a thinker. He likes to write in his spare time and is both creative and analytical. He read me a couple of passages from his copy which he thinks, at some point, he might turn into a "how to run a business" type of book. It is clear that he reflects a lot on what he does and what happens in his business. He seems happy to spend late nights working on his writing, sometimes with a glass of wine or whisky. It seems partly a process of sense making and partly a process of catharsis, so it occurred to me that he finds running a business quite a

solitary endeavour despite the fact that his father ran his own business (from what N said) as does his brother.

Integrity is “not a one off, but a way of life” for N. He plays close attention to detail and thinks through how there can be quality and integrity in all aspects of his gardening firm. He takes great pride in the fact that he has 80% retained customers and is able to charge a premium price for his firm’s work. He also seems to be unrelentingly honest and above board: his language was peppered with comments such as “she is straight as an arrow” (when talking about his PA) and “there is no such thing as honesty, only dishonesty.” I find myself wondering how he feels when someone lets him down because he also spoke about the gardening sector being tough and how you need to assert your authority over your workforce. Does he manage disappointment well, given he seems to have high expectations of people and their work?

It seems that N likes to have systems and processes in place that enable him to track all aspects of his business. His attention to detail is quite incredible: he runs a system that can tell you what any gardener in his firm was doing, where on a specific date! This starts me thinking that maybe, if a weakness is a strength over-played, he might be quite rigid and stubborn and is probably quite autocratic in his management style. He spoke of giving his team regular “pep talks like they do in the army”: although he laughed, I feel he might not easily be open to suggestions from his team regarding alternative ways of doing things.

I therefore wonder post the interview what role this business plays in N’s life: he talked about working very long hours and only mentioned a dog and his brother’s family. Assuming he has no family or partner, is this business everything to him?

### **S: leisure attraction owner and technology enthusiast**

(First interviewed July 2013)

#### **How I know S**

I met S through UH when I was running an undergraduate model called “marketing planning in practice” and I recruited his business as a client. We developed the relationship through UH as he worked with MBA students on several occasions while I was responsible for managing Applied Individual Projects and the relationship with the university continues as S has a business based at the innovation centre.

On a personal note my nephews (now 21 and 16) were both animal mad as children so we have had many years of visiting S's family business. My youngest nephew did a week's work experience with them last year, and we have been fortunate, as a result of knowing S and his sister, to have been given a "behind the scenes tour" which meant we got to feed the wallabies.

### **About S**

S has a background in the leisure and travel industry spanning over 25 years, during which he has set up and run various businesses and organisations, often with a strong environmental or animal welfare slant. When you talk with him you get a sense that he is passionate about specific causes, but I feel, after working with him on several occasions, that this is part of his wider enthusiasm for life. He has an infectious energy about him and seems to always be busy.

S is well known in local business circles and more recently has been involved in tech start-ups. It is clear he finds the power of technology and the impact it can have on business very exciting: when you talk to him about the main family business, he has been responsible for developing marketing using social media and uses a variety of activities such as Trip Advisor to monitor and control the business. Steve has high energy and appears to invest much of it in trying to make the business attractive to the internet generation, playing to all his interests.

S seems to throw himself into his work. This translates in several ways. He talks passionately about the business and seems genuinely excited by what they do, with the result that he is dedicated to giving people as much immersion in the experience of a visit as is possible. Second, whilst he can talk with enthusiasm, and from an informed perspective, he strikes me as being very open minded and a good listener. He has remained keen to learn (hence maybe his interest in emerging technologies) and seems often to bring in outsiders in order to hear about aspects of his own business from an independent perspective. Finally, his business still seems to be a source of fun and pleasure – he admits that he thrives on it being an "ever-evolving process."

S seems to develop deep working relationships with people, which may be a result of the main business being a family concern. He seems to genuinely value the close support he has from his family members in running the business; and talks warmly about how they work

together. He also seems to be a charismatic “people person” and is well regarded in local business circles. This is despite having experienced a few challenges in the past that could have made people regard him with less respect. I attribute this to him being genuine. In fact, I once hosted him on a table at an MBA dinner and he was the person who managed to speak with everyone on the table during the course of the evening – as well as doing some serious networking in the bar!

It strikes me that S is one of those people who can see the big picture but is also able to focus on detail. He is clearly strategic and thinks in depth about how to enable his business to survive in the long term, but also talked about many short term or tactical activities from an informed position. I wonder to what extent he is the “lynch pin” of the family business.

### **I: the musical caterer**

(First interviewed July 2013)

#### **How I know I**

I recruited I to take part in marketing planning in practice and he took part for two consecutive years, because he found it a useful experience. The students loved working with him because of his energy and enthusiasm. We have remained business “friends” since then: I have visited I on several occasions to catch up and compare notes on running a small business and it felt like more than being acquaintances as we shared many confidences. Since this interview was completed I was invited to a leaving do organised by I and his wife in 2014: they sold their business to realise a long held dream of relocating to Australia.

#### **About I**

I talks at a rate of knots, covering a huge number of topics and ideas in a short space of time. His mind seems to work as a stream of consciousness, and he tends to go off on tangents. That said there is always a relevant point...in the end! I wonder if he works like this: is his obvious tiredness and a sense that he is burning out a counterpoint for his natural enthusiasm and excitement? Would he get further with less effort if he took things a bit more steadily and was more focused?

I has worked in and around the food industry for over 20 years and is currently in a partnership with his wife P who trained to be a chef. He has run a number of restaurants, a food concession on the Isle of White, and a corner shop to varying degrees of success. He

strikes me as a serial entrepreneur in that he sets up a business in the hope to make a profit with a very relaxed attitude to the financial risks involved for himself: he bought his current business for £6K on AMEX as he had no cash.

It is clear that I is a “grafter.” The business was run from home by the previous owner, so he had to find and set up a premises within 6 weeks – doing most of the work to fit it out himself as he had no funds to invest in capital expenditure. This seems to have set the tone for most of I’s working life: he is very hands on. That said, I seems to possess an intuitive sense of his market and the key trends that will develop. He has repositioned his business several times, firstly around workplace eating at lunchtimes and then around healthy eating. He followed this up by developing strong green credentials. Each time he seems to have been slightly ahead of the curve but never quite seems to fully capitalise on this in terms of “first mover advantage.” I wonder to what extent he finds it difficult to delegate and, if he could take restrict himself to being more strategic, whether his business would have been more successful. He clearly is an “ideas person” - I just think he gets bogged down in execution and distracted by trying to do too many things at once.

I also wonder if his natural enthusiasm for his business and working on multiple ideas simultaneously sometimes gives him a blind spot. A significant proportion of the current business was based on corporate functions and this declined within 6 months from £200K to zero as a result of the global recession. The firm went through a very difficult financial period in 2009/10 with Ian, who is a genuine and thoughtful man in terms of his staff, trying hard to cover his overheads as he was very conscious of the impact on individuals. He hasn’t talked much about this, but I think it very nearly made him ill: I get a sense that he felt he was failing and taking people down with him. It was around this time that I became aware that I and P had a daughter living in Australia and they were starting to look for a way out as they no longer felt able to cope with the demands being placed on them. I got a different perspective on I at this point: he had always been the “ideas man” who seemed, at times, to be reckless. It transpires that he is much more concerned about the wellbeing of others than he seems to be for himself. I wonder if he sees himself as a “hunter gatherer” or a provider for others.

I has retained a sense of humour. He talks about his business being a “dog with fleas” but that he stills loves the challenges it brings – although the desire to make money seems to be being replaced with a desire to have an easier life with less people depending on him. I know his vision now is to be on a beach somewhere in Australia playing his guitar.



## **Note post interview**

True to form, I and P went to Australia having sold their business with nowhere to live and no firm offers of work. They decided to “throw fortune to the winds,” live with their daughter for a few months and see how things panned out. I think that takes courage and a certain attitude to life/risk. I have kept in touch via social media and they currently run a successful catering business in New Zealand.

## **M: the entrepreneur from school**

### **How I know M**

M was recommended to me by P in 2012 when I hosted my first event at the house I had moved to in 2011. M has subsequently done 2 more events (both 50<sup>th</sup> birthday parties!) for us.

### **About M**

Still only in his early twenties, M says he wasn't a classically clever guy and didn't aspire to go to university or college. Instead his Dad set him up in business at the age of 17 with the minimum of equipment to start a small marquee hire business. Since then M has been shortlisted three times for the Hertfordshire Business Awards Young Entrepreneur Award. He continues to grow his business and, as his revenue has increased, has consistently re-invested to expand the business. He seems to have an “old head on young shoulders”: although he has just bought himself a nice car (because his insurance had gone down, now he has been driving for a while) he seems much more interested in supporting his business to grow than spending money recklessly on a fast paced lifestyle. I know several much older business people who would be well advised to copy him!

M is a confident young man but doesn't come across as arrogant. The first time I met him I was struck by his self-assurance, and his ability to talk with authority and knowledge about his business. As you get to know M, you start to appreciate he is more diffident in social settings, although it is clear that he is a polite and courteous person. This translates into him rating customer service very highly in his business: he has great listening skills, unusually perhaps for such a young man, and seems to become part of your event. He doesn't take over in any way at all, but through listening gets a real feel for what you could do better and makes his suggestions with charm. He also has the business savvy to make his ideas easy for

you to execute. You hardly notice at all that you are spending a bit more money, but the results are always positive so you don't resent it in the slightest.

M seems very disciplined about his business. During the summer months he obviously works very long hours. At an age when many young people would want to be out and about socialising, he seems very focused, although he has shared that he knows how to party when he gets the chance. I was amused by this: I wonder if he sometimes feels constrained by being in business and having responsibilities at a young age and therefore likes people to know he can break out at times?

I do not know what M's personal aspiration is for the business beyond knowing he wants to be the best in the region at what he does. However, I wonder if his intention is to dedicate himself to building it up in order to sell it and turn his hand to something else. We have talked about it being hard physical work, so it strikes me that it is a young man's firm.

Being the age he is, M has grown up with the internet and social media. He uses this naturally as part of his business activities. He is passionate about his business and likes to engage with his customers in order to spread the word. Again, he is very disciplined about this making sure collecting testimonials and using customer feedback is a planned part of his business activity. I was therefore not surprised to receive a request to upload a video clip to tell the judges of the Herts Business Awards why he should win. In M's view it made more sense for his customers to sell his firm.

I have an impression that M is from a close knit family: when we did the interview, he said he needed to text his mum so she a) knew he was okay and b) knew when he would be home for dinner. Combined with the fact that his dad set him up in business and his grandfather used to work with him I get a sense of a strong support base who are willing to put time and effort into helping him to make his way. This may be one of the reasons he seems to be such a genuine person.

### E3 The efficacy of semi structured interviews

#### **The challenges of interviewing: a reflexive exercise based on the Gibbs model (in Dye, 2011)**

**“You do 1,000 interviews. 20% of every one is not what you said or is twisted a little.**

**If you multiply 20 x 1,000 you’ve got a lot of inaccuracies out there”**

**(Steven Seagal)**

I am partway through my third phase of data collection/analysis. In noting gaps and, correspondingly, more questions arising from my work thus far I find myself reflecting on whether my research design is effective. Will it enable me to meet my aims and objectives?

I registered to begin my PhD in 2011. Since then a great deal has happened personally and professionally, often distracting me from my inquiry, which has made data collection feel disjointed. This has been exacerbated by my participants being busy and often unavailable. Evaluating whether the continued use of semi-structured interviews remains appropriate and how I might improve my practice has become a priority for two reasons. First, I am starting to write up my thesis and, second, my initial exploratory research has developed into a longitudinal study which I intend to continue beyond the submission for my Doctorate.

#### **Description**

I began my study with a design to support exploratory research into whether and how SFs use co-creation to develop and maintain brand management activities that deliver sustainable competitive advantage. I had done some thinking about my epistemological and ontological stance (notes to chapter 4) and was confident that I would be adopting an interpretivist approach drawing on my belief that reality is socially constructed and multiple based on our experiences and relationships (Collis and Hussey, 2014).

Because I wanted to understand the thought processes and choices of entrepreneurial owner manager’s (EOMs) regarding their brands within the context of their overall business decision making, I decided to use interviews because they provide “rich and substantive data” (Janesick, 2011: 100). The “intermediate space of the semi-structured interview” is

considered the “most common of all qualitative methods” as it offers the researcher flexibility and an opportunity to reveal the behaviour of both individuals and organisations (Qu and Dumay, 2011:246). This was particularly attractive given it would allow me to expand and develop my line of inquiry as I learnt more about the topics I was working with. I felt this to be particularly important with an exploratory study that was drawing, in the main, on conceptual theory as there was no existing empirical evidence regarding how the ideas operationalised in practice. It also meant I would be able to focus on the interest, knowledge and experience of my participants. Once it became clear that the study would adopt a longitudinal design this flexibility assumed additional importance: it meant I could start to probe their experiences deeply and could follow up with individual participants as and when additional information was needed, in a similar way as one would with a natural conversation (Savin- Baden and Major, 2013).

Over four years I have conducted three phases of semi structured interviews. These have focused on three distinct, but inter-related, thematic areas that have gradually been identified in my conceptual framework through an iterative process: as understanding emerges from one set of interviews it informs the questions being asked in the next cycle of conversations (DiCicco Bloom and Crabtree, 2006). This happens in tandem with the process of revisiting and updating myself on the existing literature. To date I have 36 A4 pages of typed transcript, with one interview outstanding in phase 3, and the next set of interviews at the planning stage.

### **Feelings**

Semi-structured interviews instinctively felt the appropriate data collection tool for use in my research. A “shared characteristic among qualitative researchers is a genuine curiosity about people” and I was keen to explore the life experiences of my participants in the context of my study (Holley in Savin-Baden and Major, 2013: 371). Having conversations with EOMs felt natural as I have a work history that includes time working in SFs as well as running my own SF. It was a bonus to me that this carried with it the opportunity to potentially give something back to my participants as a process of knowledge exchange, a key difference with running a focus group, for example.

On a positive note, I feel that the process has been balanced in terms of both the relationships between me and my participants, and the knowledge/experience we bring to the study. Qu and Dumay (2011:239) and Riach (2009) both discuss issues relating to “asymmetry of power” where the researcher is in charge and the interviewee may be naïve

and/or feel less than equipped to deal with the questions or to take a reflexive stance. However, because I sampled carefully and am taking a flexible approach with my data collection, I feel there have been appropriate opportunities to use the “perspectivism” of my participants (Bourdieu trans. Parkhurst Ferguson 1999: 3 – 4). All these things have helped me to avoid dominating the process.

Linked to this, I have discussed with my supervisors the possibility of developing “action research” to extend this dimension of my study and I am now considering co-producing narratives to increase the opportunity for critical reflection by my participants on “previously habituated forms of action” (Adkins, 2003:27). A recent introduction to the work of Professor Mark Reed on “Fast Track Impact” ([www.fasttrackimpact.com](http://www.fasttrackimpact.com)) and doing some thinking about ways to improve the impact of my own work (see Appendix E) has reinforced the importance of incorporating dialogue into my study as part of the knowledge exchange process, and has made me reflect on how I might take this process beyond my participants.

Less positively, there have been times during the interview process when I have felt I am not doing a very professional job. The intense concentration required when interviewing, particularly if the respondent has chosen a busy location (I usually offer to buy coffee or a meal to ensure my participant is “out of their office” and not distracted by the demands of work) makes it difficult to capture everything that is being said (Savin-Baden and Major, 2013). Combined with my health challenges this has caused me some cognitive difficulties at various points, particularly early in the study. In reviewing my transcripts, I can see where I have not always been able to maximise the opportunity to probe or extend the discussion, or where there are gaps I have not closed. My corresponding use of technology to support interviewing has been poor: initially I did not use voice recordings and relied on taking notes. Having adopted recording later in the study I am currently having trouble accessing the files made on my mobile phone. This is the cause of a certain amount of stress while I am revisiting my data to ensure I have fully captured my conversations! I often find technology overwhelming and the temptation is to ignore it: even though it could be an asset I am nervous of it going wrong.

I also feel I have not always been as well prepared as I should be. Thinking about using recordings is a key example, but the efficient and effective use of time feels a rare achievement. Taking a pragmatic view, a lot of the existing literature in my area of interest is highly conceptual (e.g. on co-creation) and/or does not relate to SFs (on brand management practices) which has meant I am “ploughing my own furrow” with limited

guidance from existing literature on how to position my questioning. I imagine this is to be expected with exploratory research, and I am quite relaxed about this aspect of my work: complexity and uncertainty are familiar companions from my time in business and the beauty of the research design is I can continue to have conversations as needed, (assuming my participants are willing), to fill any gaps in my data. Although, obviously, time plays a role in situated accounts and returning to a discussion will affect the findings. However, I am left with the feeling that too often my primary research has been taken in moments snatched from the day jobs of both me as the interviewer and my interviewees. As Hannabuss (1996) points out, interviews that are conducted in a casual manner with little preparation can result in wasted opportunities and I feel some valuable insight may have been lost. I suppose my main feeling is a sense of there never being enough time: my research activities are done under time pressure, which is not conducive to deep thinking.

### **Evaluation**

The use of semi- structured interviews as the data collection tool in my exploratory research design has been positive in the following ways:

It is an effective and expedient way of gathering information which allows me to adapt my style, pace and tone to suit my different participants (Kvale and Brinkmann, 2009). Now that I have established a good rapport with each interviewee, I feel it enables me to support them to provide responses in their own way, based on their knowledge, experience and how they use language. This is beneficial if I really want to understand how they perceive the phenomena under study. Accordingly, it is helping me to develop an understanding of how my EOMs make sense of, and create meanings about, their brands and their business environments thus meeting my objective and addressing an identified gap in existing literature (Qu and Dumay, 2011).

The interviews clearly move through “exploration” and “co-operation” phases with participants initially giving descriptions but now being prepared to participate more fully, for example by clarifying a point or correcting me (DiCicco-Bloom and Crabtree, 2006:317).

More recently I feel I have bonded with each of my participants and we are working together on this study: as an example, I was invited to view N’s new premises on the basis I was “free to drop by anytime.” These opportunities are enabling me to gain a more detailed and in-depth account of the phenomena under scrutiny and to understand more about my EOMs.

I believe that “social phenomena do not exist independently of people’s understandings of them and that those understandings play a crucial generative role (Hammersley, 2007:297). Thus, the opportunity to use “scheduled and unscheduled probes” is enabling me to hold true to my researcher positionality as articulated in the notes to chapter 4 (Qu and Dumay, 2011:247). I do not believe that there is one “objective truth,” so, for me, the process of carrying out semi-structured interviews is not a neutral “pipeline for transmitting knowledge” but rather an essential part of the creation of a situated account (Qu and Dumay, 2011: 242). As a “localist” (Alvesson, 2003) I therefore view the interviewing process as a “social encounter” (Qu and Dumay, 2011:242) and consequently a “productive site of reportable knowledge” (Holstein and Gubrium, 1995:3). In line with Kvale’s (1996) metaphor of the research interviewer as a traveller this is enabling me to conceptualise knowledge as a story. In my research area the idea that knowledge is not static but will consistently evolve is pragmatic: my aim was to add to the debate and not to prove something conclusively, and I feel the research design is effectively enabling me to do this.

Maintaining the localist perspective (Alvesson, 2003) there is no “right way” of interviewing (Qu and Dumay, 2011:247). Throughout my career I have been required to interface with people and I feel this research design has enabled me to make effective use of my “soft skills” to create appropriate interview environments with my different participants that have resulted in “rich and substantive data” (Janesick, 2011:100).

However, there are challenges associated with this research design:

There are various criticisms of interviews as over simplified and idealised settings that assume participants are “competent and moral truth tellers” (Qu and Dumay, 2011:238). Positivists may be dismissive because the design will produce data that is “unreliable, impressionistic and not objective” (Denzin and Lincoln, 2000:12). As I believe that reality is socially constructed and multiple based on our experiences and relationships, I am less concerned about achieving objectivity. However, I am concerned about producing a faithful representation of what I have been told, and there are many challenges inherent in the use of language and the processes of transcribing, understanding and writing that are widely discussed in existing literature (e.g. Alvesson, 2003; Riach 2009; DiCicco-Bloom and Crabtree, 2006; Rubin and Rubin, 1995). As an example, my interview notes are punctuated, but this is based on how I would speak/write. My participants did not say “colon; full stop, exclamation mark” as they were talking aloud. I have therefore made judgement calls but am conscious that the “insertion of a period or a comma can change the meaning of an

entire sentence” (DiCicco Bloom and Crabtree, 2006: 318). This is further exacerbated by having proof-readers who also hold different professional views and may inadvertently change meanings in their attempts at clarity. An ongoing concern is therefore that understanding is elusive when using semi structured interviews, an experience, which, on a bad day, reminds me of Lewis Carroll’s nonsense poem “The Hunting of the Snark.”

In an ideal world, undertaking data analysis concurrently with data collection could probably mitigate some of these challenges. For example, on the basis that reflexivity has a temporal dimension it seems reasonable to accept that there will be differences between reflexive moments as part of the interview and reflexive moments after the fact - and in the short and long term (Weick, 2002). I have worried about this quite a bit – mostly about forgetting relevant things that I may have noticed but not noted when collecting data, and I think I should develop the practice of making field notes. However, Riach (2009) stresses that sense making as part of a reflexive process can only happen retrospectively and, having been working again with my data sets this summer, it does seem that a more coherent narrative is emerging. This may be because I have been engaged in an iterative process of re-analysing, thinking and revisiting literature and this process has, in turn, given me better understanding?

### **Analysis**

This experience shares similarities to my previous experience of undertaking qualitative research as part of a programme of study. When I did my MBA (graduating in 2005) my research design then incorporated semi structured interviews with EOMs, although the focus of the study was different. Trying to find the time to plan and execute my interviews in a professional manner, and to produce the transcripts and first analysis immediately afterwards was almost impossible with a full-time job in marketing which required me to commute into London. Here I am some years hence, and it appears to be a classic case of ‘plus ça change plus c'est la même chose.’

However, there are two key differences this time. First, working in an academic environment with many experienced researchers I better understand the tensions that exist between the demands of the day job and undertaking quality research. My work environment is collegiate, and I have been fortunate to be able to attend many presentations by active researchers in which they have shared the challenges and pitfalls of their work, which has improved my confidence. This shared experience is incredibly empowering and often inspirational. Knowing that professors and readers often experience many of the same



problems has helped me address some of the vulnerabilities I feel as an early career researcher. Linked to this, the second difference is that a prerequisite for this study has been deliberation about my researcher positionality. Doing the ground work to consider where I am situated on the research continuum and why has helped to make sense of my subsequent engagement in the “production of answers through complex interpersonal interaction” as a “localist” (Alvesson, 2003:15). This has given me confidence based on being able to defend the legitimacy of my inquiry.

## **Conclusion**

Most importantly, working through this reflexive exercise and revisiting my data tells me that I am obtaining suitable data to be able to answer my research questions and meet my aim and objectives. Notwithstanding the many challenges relating to finishing this work, this is reassuring at this point in its completion.

Semi-structured interviews provide flexibility but guidance: I can prepare questions ahead of time, which means I can link them closely to my understanding of the existing literature and previous discussions, but they also allow me to probe or expand the discussion with a participant based on how they express their experience. Importantly, as a result, they provide comparable data (Cohen and Crabtree, 2006)

Finally, I am attracted to Flyvbjerg’s (2001:167) idea that “the purpose of social science is not to develop theory, but to contribute to society’s practical rationality in elucidating where we are, where we want to go, and what is desirable according to diverse sets of values and interests.” In developing case studies based on a series of semi structured interviews I hope I am some way to achieving this.

## **Action Plan**

Based on this reflexive exercise I am intending to do the following as I continue with this study:

### **1. Develop field notes**

Field notes have evolved from being the private jottings of researchers to become an essential element of rigorous qualitative research intended to enhance data and provide rich context for analysis (Creswell, 2013). According to Phillippi and Lauderdale (2017:381) they can be useful in “subsequent analyses including secondary analyses and metasynthesis” and “produces copious amounts of data useful to other researchers” as they “situate qualitative studies within a larger societal and temporal context.” However, given the contribution field

notes can make, it interests me that Phillippi and Lauderdale (2017:382) were unable to find a guide to field note content “appropriate for the new researcher using qualitative or mixed methods.”

Having recently attended a GTR session about open access for researchers I feel I must start making field notes that can contribute to my study and also provide a potential resource to the wider researcher community. Phillippi and Lauderdale (2018) present a useful guide for this purpose.

## **2. Prompt typing up of transcripts and field notes**

To improve my practice, I think it is essential to develop the habit of writing up my notes promptly after the interview is completed. This is a good time for an initial analysis, while everything is fresh in my mind (Phillipi and Lauderdale, 2018:386).

## **3. Improved use of technology**

I am making an appointment with the technician in the business school to access and download my existing voice files from my mobile phone. But I have also ordered a portable voice recorder today to ensure less stress and better data capture going forward.

## **4. Time spent planning**

Eisenhower is credited with saying “plans are useless, but planning is indispensable.” It is ironic, given much of my career has involved the planning and execution of significant projects or periods of change that I feel I have perhaps not dedicated enough time and resources to planning this study. I suspect that the exploratory nature of the work, combined with my workload and personal commitments combined to allow me to adopt a “laissez faire” approach. I think that was a good thing initially, as I started out with no preconceptions. However, now that the study has become longitudinal, I need to balance having a structure that will enable me to make comparisons between my data with an openness that enables me to develop authentic situated accounts.

## **5. Co-production/co-creation**

I believe there is merit in involving my participants in the development of narratives that reflect their experiences and intend to explore this further in the context of opportunities presented by action research and the need to disseminate my research.

## **6. Commit to changing some of my behaviours**

I came across the ideas of Lilly by accident (Brenner, 2013). However, the notion that we can “self-programme” to go beyond self-limiting beliefs is powerful. His series of questions to

challenge held beliefs and to change them is a useful mechanism for personal development, particularly for someone who probably appears confident professionally but has deep seated anxiety about her ability to achieve her Doctorate. Specifically, I would like to stop patterns of behaviour that distract me from my study or allow me to procrastinate.

#### **7. Revisit my researcher positionality**

I wrote in my original think piece that formed the basis for my positionality that I could define my ontological position but find it harder to pinpoint my epistemological view. I need to revisit this; whilst I suspect even more strongly now that I am a pragmatist, I need to develop a clear argument as to why this is the case.

### [E4 Change of supervisor](#)

#### **Think Piece 8<sup>th</sup> November 2015: Regarding the need to change supervisor**

Based on: Gibbs, G. (1988) Learning by doing: a guide to teaching and learning methods. Oxford: Further Education Unit.

#### **Description**

I have been experiencing difficulties progressing my PhD studies as a result of workload, health issues and the relationships with and between the supervisory team. Since registering in September 2011, I have had three formal suspensions: 7<sup>th</sup> August – 12<sup>th</sup> October 2012 due to ill health; 2<sup>nd</sup> January – 2<sup>nd</sup> June 2015 due to my workload and 2<sup>nd</sup> June – 2<sup>nd</sup> October 2015 due to health issues again. In addition, it was recorded on my annual review form that 2013/14 was difficult due to my workload being miscalculated making me considerably over hours (for which I received back pay). Throughout this period, I was not advised by my supervisors or other colleagues, e.g. Head of the Doctoral College, to seek an extension because this might be more appropriate given my circumstances and would not impact adversely on my deadlines.

Conscious of the need to progress a lot of work in a short period of time as a result of the suspensions I met with the disability team in June 2015 to explore what steps I could take to make the learning journey more achievable. We discussed various options and also set up a study needs agreement (SNA) to support me with the challenges I have relating to working memory and cognitive function when I am experiencing a period of acute depression. This was copied to my supervisory team.

In September I needed to decide whether to become an active student again. I requested a meeting with my supervisors to a) review work I had submitted earlier in the summer, but which we had not discussed due to the suspension, and b) decide how we would prioritise work on my return as my Doctoral Review was due in December. Unfortunately, my second supervisor C was delayed due to a Doctoral Review over-running, meaning the meeting was between me and my primary supervisor, S.

S had contacted the disability team, but they do not discuss individual cases due to data protection. She said that she felt difficult having a meeting when I was suspended and would not be giving me feedback on my work. She suggested the meeting was a point to decide whether and how we should go forward but added that she was mindful of not saying “something that would push me over the edge.” I pointed out that I am not an over sensitive person and decided to explain how depressive episodes affect my ability to learn to see if I could develop better understanding between us. This had a positive outcome in that S suggested I should seek an extension for my Doctoral Review. However, she disregarded my need for specific and constructive feedback by refusing to say anything more than my work was not at doctoral standard and I would fail the review. This was distressing, as I had tried hard to progress some work over the summer.

At this point I felt angered by her attitude to a genuine problem but also frustrated and anxious. S appeared to be being sexist; several of my colleagues insisted she was antagonistic because I was a younger, more attractive woman (their view, not mine). I felt more strongly that she regarded me as a “non-academic,” and casually dismissed by extensive business experience.

A subsequent email discussion in which she made reference to “you, with your health problems” made me feel we had reached an impasse. I met with the colleague responsible for Doctoral Programmes in my School and sought an extension as agreed with S. As part of this I revisited with him the communication and relationship issues that I felt existed and we discussed a plan that would mean I could change my supervisor if the situation did not improve. Just after this my Head of Department asked to meet with me to pick up on a discussion we had had earlier in the year; he urged me to change supervisor. With his support this was achieved within a week.

## **Feelings**

By the time I met with my Head of Department I was experiencing a mixture of anger, frustration and distress. I thought again about withdrawing from the PhD (I had considered this twice before, in 2014 and early in 2015) as I felt both inadequate and humiliated, with an overwhelming sense that S thought I was lazy, unfocused and stupid. It was humiliating.

I was panicking about deadlines which was preventing me from thinking clearly. I was also upset that, unlike my experience at Masters' level, my learning journey was becoming something I was growing to actively dislike and resent.

## **Evaluation**

At the time of my final meeting and communications with S I did not feel that the situation was improving. Our relationship had not been on a good footing for some time, something she had sparked with a throw away remark that I "could not write," although she refused to explore with me how I might improve. It was increasingly hard to stay calm and focused and I was scared that I would lose the opportunity to pursue my study goals. After speaking with my Head of Doctoral Research I felt there were practical steps that could be taken but that I would run out of time: even with an extension I did not feel I could do the work required with the additional burden of trying to build an effective working relationship with S. My situation felt similar to undertaking a grievance procedure in the workplace: whilst I was trying to manage circumstances professionally and with respect the process would be correspondingly slow.

C was clearly in a difficult position: we are all colleagues, but C and S are required to work together on other projects. C had said that he felt the situation was being made personal by S: this worried me. I felt I was taking all the steps I could, but personality is a variable that is not controlled in the workplace (Sills, 2006). I was starting to feel things could not be resolved within the timeframe for me to progress if S would not meet me partway. The intervention of my Head of Department was therefore timely. I felt encouraged by his feedback that I had behaved in a professional manner throughout the experience and was also excited by the prospect of being able to resume my studies differently.

## **Analysis**

My relationship with S has been difficult from the outset. Early in our relationship she appeared to exhibit the characteristics of a "malcontent complainer" (Webster,

educationworld.com). She had many ongoing and persistent problems with my work and outputs but made no constructive suggestions about ways to move forward.

I believe that negativity feeds negativity and so I initially decided not to take S's attitude personally. I was lucky to have a foundation of support from many colleagues and tried to focus on practicing mindfulness to ensure I didn't get caught up in a stream of thoughts and feelings that were unhelpful. This is a technique that I have learned as a result of experiencing acute depression and it helps me to stand back from my thoughts and see their patterns, preventing them from taking control.

However, although I was actively trying to "wait it out" it seemed increasingly the case that our relationship was "turning me off" to learning: I found I was making excuses for not developing my work in order to avoid having to communicate or have meetings. I therefore feel I should have been more assertive earlier in the relationship by expressing how I was feeling and asking to explore whether we could work in a different way.

Personality clashes are the third most common cause of workplace conflict (Suff, 2012). Thus, both parties clearly bear some responsibility for the situation. Although I did try to use three activities to address the situation: co-operative communication (initially until I felt S wasn't listening); focusing on S's strengths; and reflecting on my own behavior, I was disappointed that I couldn't seem to stretch enough to create a more comfortable zone for us to operate within (Fredrickson, 2015; Sills, 2006). I felt that whilst I was prepared to evaluate myself and try to commit to doing some things differently, S did not feel she should make any changes in her own approach. However, I did not articulate how I felt within the supervision meetings and allowed myself to become reticent: this could have been misconstrued as a negative attitude as I am not normally known within the workplace for not having an opinion.

### **General Conclusions**

Despite practicing a range of activities to try and build a more effective relationship with S I felt little progress was being made. I believe this may have arisen from the power dynamic that seemed to form the basis for our supervisions.

All organisations provide a potential power base for individuals by creating platforms for the expression of their personal interests and motives. As a result, the development of careers, particularly at a senior level, depends on the accumulation of power as a means of converting individual interests into actions that can influence others (Zalzenik, 1970). In

contexts such as universities, senior academics, in addition to the formal authority given by their roles, have considerable power invested in them by being perceived as leading authorities in their areas of research. How they respond to this power will depend on their personality and personal goals as well as their leadership ability. In my experience I feel that the skills of an able researcher are not necessarily those associated with a strong leader: maybe S was insecure about her leadership abilities and, as a result reverted to the power invested in her role. It certainly felt that she was always claiming higher knowledge and intellectual ability.

According to the Coady Institute (Lauby in Reyes, 2013) there are four types of power:

“Power over” where power is seen as a win lose relationship; “power with,” or finding common ground to build collective strength; “power to,” or the ability to shape your life and “power within” or your sense of self-worth and self-knowledge.

I had expected that the role of power within the supervisory team would be one of “power with,” working together through a process of mutual support and collaboration on a project that would benefit all the members of the team by multiplying our individual talents, knowledge and skills. However, for me it felt more like an experience of win-lose power where I was being dominated and my needs were not met. I do not know why this would be the case, but I am aware that I am one of a number of students who have started with S but moved onto other supervisors. I therefore believe that confidence may play a part, surprisingly, for S is well-respected. Some colleagues have also suggested that as my colleague, S was challenged by my referent power because I am generally well-liked by peers and students. However, referent power may also be connected to a desire for approval and I know that I like to be liked and try to avoid conflict situations. In future, I need to consider how I can adapt my behavior in similar situations.

Whatever, the specific circumstances of the breakdown in our relationship this situation reinforces my belief that it is good practice for everyone in the workplace to engage in reflective practice in order to ensure we are proactive in finding ways of working comfortably with a range of people (Sills, 2006).

### **Specific conclusions**

In retrospect I would do a number of things differently.

First, I would be more assertive about what was/wasn't working and try to develop better two-way communication about this. As I often do with my own students, it may have been

helpful to set some ground rules about things like feedback, regularity of meetings and outputs from the beginning so there were common expectations.

Second, it may have helped to invest more time in developing a professional relationship with S. I found early on that I started to avoid conversations or meetings as I didn't want to be in a situation that felt negative: I should have challenged myself and the supervisory team about this. As relationships are fundamentally built on trust, I probably should also have been more honest and open about my personal challenges at different points in the process so S would understand why I was slow to produce work to an appropriate standard.

I think I tried to approach a difficult situation in a professional manner, but instead of suspending my studies, which has caused pressure with deadlines, it would have been more sensible to articulate clearly what the issues were and be more proactive in finding solutions. With hindsight I feel I allowed myself to stagnate because of a desire to avoid conflict. This puts additional pressure on me now to do work to the required standard in the time available, so I need to pay careful attention to project management.

Finally, although I have the generous support of many colleagues and friends it would have been sensible to develop more of a profile amongst the PhD student fraternity as a way of benchmarking my experiences and considering solutions.

### **Action Plan**

In future, I will ensure that I problem-solve situations like this more promptly. This does not require me to become aggressive or impatient, but I do believe I need to be more proactive about observing how I feel and dealing with negative situations. Avoidance of conflict is not always a positive.

Having had a change of supervisory team, we have already discussed how we should work together. Part of this has been setting some immediate deadlines for discrete pieces of work that we all feel will enable me to build my confidence and skills whilst adding to my portfolio of work. This seems much more achievable than trying to work on a chapter by chapter basis in a linear fashion.

In terms of training, this experience overall has made me appreciate that I need to feel more confident about my academic ability. I therefore continue to book onto sessions through the Doctoral Development Programme and remain a proactive member of the Marketing Reading Group.



## F Planning for research impact

### 10 Questions to identify your impacts: exercise completed 20<sup>th</sup> July 2018

(Based on <https://www.fasttrackimpact.com/step-1> accessed 6th July 2018)

1. Other than researchers, who might be interested in some aspect of your work?
  - a) Entrepreneurial owner managers (EOMs) who want to grow their firms
  - b) EOMs who find marketing scary/don't understand marketing/have few resources to support marketing
  - c) People thinking of starting a business who have a great idea/product/service but don't know much about business and/or marketing
  - d) People working directly with small business owners/managers, especially accountants and consultants (good brand building creates intangible asset value = money)
  - e) Angels and other investors (same reason as d)
  - f) Stakeholders in small firms, particularly strategic partners and suppliers whose growth potential may be linked to the growth of the small firm
  - g) Organisations working with small firms to develop their capabilities and competences e.g. the 38 Growth Hubs representing the Local Enterprise Partnerships (LEP) as the single local access point for public and private sector support. These include Chambers of Commerce, FSB and Business Schools
  - h) Trainers/educators specialising in marketing skills development
  
2. What are those interests, why are they interested and how might they benefit as a result of engaging with your work? If you can't answer this, go and speak to one of these people and ask them why they are interested and how they benefit from this interest.

Who?	What interests?	Why interested?	How could they benefit?
EOMs seeking growth	Revenue Balance sheet Cash flow	Seeking strategies to leverage the firm/support growth	Through examples and ideas that have worked and could be replicable

			Better alignment of marketing to the business; improved decision making and ROI = potentially avoiding expensive mistakes
EOMs with fear and/or lacking competence/capability	Business survival	Needing to feel confident about how marketing can contribute to business strategy	Through examples/templates and ideas that have worked and could be replicable  Acquire marketing confidence (competence and capability) = potentially avoiding expensive mistakes
New EOMs	Business launch, then survival	Interested to learn how marketing contributes to business strategy	Through examples/templates and ideas that have worked and could be replicable  Acquire marketing confidence (competence and capability) = potentially avoiding expensive mistakes
Advisors	Revenue Balance sheet Cash flow Reputation	Looking to give the best strategic guidance to SFs	Improved strategic and budgetary decisions by SF = enhanced reputation for advisor
Angels/investors	Revenue Balance sheet Cash flow ROI	Want to maximise ROI	Better alignment of marketing to the business; improved decision making and ROI = potentially avoiding expensive mistakes
Stakeholders	Revenue Cash flow	Want sustainable business relationships	Stronger business networks that are more sustainable

Business support organisations	Revenue Balance sheet Cash flow ROI Credibility	Looking to give the best strategic guidance to SFs whilst simultaneously improving ROI and GDP for government/taxpayer	Better alignment of marketing to the business; improved decision making and ROI = potentially avoiding expensive mistakes  Stronger business networks that are more sustainable
Trainers/educators	Credibility	Need to deliver appropriately tailored course content/materials	Case studies and teaching resources

3. What aspects of your research might be useful to someone, or could you (or someone else) build upon parts of your work to create something useful at some point in the future?

- a. The case studies could be translated into narratives/scenarios that are accessible to non-marketing specialists and offer examples/ideas (success stories/pitfalls to avoid). These could be available as podcasts, interviews, presentations as well as soft and hard copy files. They could be disseminated through networks used by SFs, for example, FSB or through regional organisations for business networking, for example, Hitchin Buzz. They could also be developed as templates/guides for SFs.
- b. Templates could be produced to demonstrate how to “operationalise” theoretical concepts via management systems and processes. The research reinforces the need to align marketing closely to business strategy, so a set of “how to” guides in simple “non-marketing speak” would be desirable.
- c. A key barrier to success for small firms when brand building is the ability to measure success: the major dimensions of brand equity are the awareness, associations and loyalty of the customer base, but a simple and cost-effective way of monitoring these needs developing; given the limited reach of most SF brands due to resource issues clarifying and simplifying this aspect of brand management is significantly important. Future work could explore ways to help SFs measure what they are doing in a practical and cost-effective way.
- d. Linked to c) there are various software applications that link to accounting packages. It would be possible to help SFs set up easy to use dashboards to monitor key marketing activities and see how they impact on revenue.

- e. Further research is needed to develop a different approach to valuing the SF brand: ISO 10668: 2010 is not appropriate for SFs.
  - f. Teaching/training resources could be developed, tailored to the needs of the different groups listed in questions 1 and 2.
  - g. Curricula of university programmes should be developed to consider SF marketing more explicitly, with students having access to applied coursework opportunities. This would not only develop relevant problem-solving experiences for the students, but could also help SFs in “real time” to address marketing related challenges for which they have no resources or capabilities to address
4. Going beyond your research for a moment, think of issues, policy areas, sectors of the economy, practices, behaviours, trends etc. that link in some way to your research. What problems or needs are there in these places, and what are the barriers that are preventing these issues from being resolved? Could your research help address these needs and barriers in some way?

#### **Key UK trends relevant to this research**

- A shift towards sole proprietorships (businesses with no employees) with growth of 84% in 2016 compared to 59% for all businesses, i.e. increasing fragmentation with a corresponding proliferation of SF brands
- Consistent growth in “business births”: 414,000 business births in 2016, up 31,000 on the previous year. Business births outnumbered business deaths by 87,000 in 2016.

(Rhodes, 2017)

- SF survival rates are 91% after one year of trading, but within 5 years only 4/10 SFs are still trading

(Ormsby Street Research, 2016)

#### **Key issues that relate to SF success include:**

- Lack of customer insight/ignore customers
- Lack of business knowledge/skills
- Poor marketing
- Failure to plan

- Failure to measure
- Lack of suitable measurement tools/standards for SFs
- Cash flow issues

(Fortune, 2014)

**Barriers preventing these issues from being resolved:**

- EOMs don't know what they don't know; lack of time to seek help or do all the work required to achieve success with branding
- Market research costs time and money
- Help is often accompanied by bureaucracy and jargon that makes it inaccessible
- Help exists in many places but is not always clearly signposted
- Help can exist in silos that function independently
- Advisors and business support organisations can be out of date e.g. branding is usually relegated to creating a point of differentiation for communications purposes rather than being understood as a strategic orientation
- Lack of easy to use metrics for SFs to measure the awareness, loyalty and motivation of their customer base, and therefore -
- Lack of an appropriate measurement technique to value brands: ISO 10668:2010 is only suitable for large organisations

**Policy areas**

The Government's White Paper on Industrial Strategy sets out "five foundations" for productivity and two of these carry actions that relate directly to this research:

- a) **Business Environment** - "Launch a review of the actions that could be most effective in improving the productivity and growth of small and medium-sized businesses" (p11)

And

- b) **Places** – "Agree local industrial strategies that build on local strengths and deliver on economic opportunities" (p11)

5. What is the most significant area of current policy, practice or business that your research might change or disrupt?

The White Paper states it is "not enough just to look at the economy we have. We must make preparations for the economy we need to become" (p23). Specific to this research it

wants to “build on the strengths of the UK economy by promoting growth through “fostering clusters and connectivity across cities, towns and surrounding areas” (p18) and to address its weaknesses by tackling the “long tail of underperformance....(because) “if the long tail of lower productivity persists it will hold back UK growth, wages and living standards” (p20)

The government wants to make the UK the best understood major economy and proposes working with the Office of National Statistics, academics and other stakeholders to “identify gaps in our evidence base” (p28). This is essential to plan for new markets and to continue to build the UK’s competitive advantage. This means that greater understanding of what SFs do, how and what makes a SF brand successful (and what success means and how it can be measured) becomes critical given the prevalence of SFs within the UK economy. For example, the available data (UK Innovation data, 2015) shows 30% of firms change their marketing concepts or strategies but is based only on enterprises with 10+ employees. However, we know that 5.5 million (96%) of UK firms employ less than 9 people and account for 33% of employment and 22% of turnover (Rhodes, 2017). We need to better understand what these firms are doing as they are major contributors to our economy!

Consider the East of England (the local region). It is characterised by a predominantly rural landscape, with a high number of market towns and few large urban areas i.e. Norwich, Luton, Peterborough and Cambridge. It is a region of contrasts: the south, and specifically Hertfordshire, is dynamic with the rest of the region typically having “stand alone cities.” Its economy is heavily dependent on services although there are concentrated areas of manufacturing, for example the automotive industry. In 2015, GDP per capita was the third highest in the UK and unemployment was well below the national average – both attributable to the proximity of part of the region to London (European Commission). Parts of this regional economy demonstrate a strong entrepreneurial element, e.g. Hertfordshire has the “equivalent of 84 active enterprises per 1,000 working age residents, compared to the 65 per 1,000 across the UK. However, the County also has a productivity growth that is half that of the England average” (Hertfordshire.gov.uk:3). Meanwhile, the local plan stresses the promotion of the region as an environment for business and enterprise as a strategic priority: how will we achieve this if we don’t know what support and development they need to be successful? Many firms have a good idea, but it is the business practices they adopt, and specifically their marketing, that will determine success. Advisors, investors and business support organisations need to understand the role of the brand as a strategic asset for a SF and SFs need skilling up in areas such as brand management, the effective use of consumer agency and how to obtain meaningful information from the use of metrics cost effectively.

6. Which are the individuals, groups or organisations that might be interested in this aspect of your research (whether now or in future)?

As already listed under questions 1 and 2

7. What aspects of your research are they likely to be most interested in, and what would need to happen for this to become more relevant to them? What could you do differently to make your work more relevant to these people? Who would you need help from?

What they are interested in and what needs to happen to make the research accessible is already addressed in questions 2 and 3

**Things I need to do differently:**

- Develop confidence that my research is relevant outside of the requirements of a PhD/academia (doing this exercise has helped!)
- Start proactively marketing my work to the different audiences; develop a marketing and communications plan
- Initiate action research with my participants; evaluate and if it works expand the opportunity to the local business community as a series of short workshops which could be delivered through an appropriate partner e.g. business networking organisation
- Get involved with local strategic partnerships that are involved with the execution and delivery of the industrial strategy at regional level e.g. the Growth Hub representing the Local Enterprise Partnership (LEP) for Hertfordshire

**Individuals and organisations from whom I need help**

My principal supervisor as KT leader for the Business School works with Hertfordshire LEP. I am hoping to be able to network into the different members of the regional Hub e.g. Chambers of Commerce and FSB

A local contact is ex Membership Manager for the FSB and is currently running a local networking organisation called Hitchin Buzz. They may be able to help be contact business support organisations and/or be able to provide a platform for disseminating my work

Ultimately the aim should be to network across the 38 Growth Hubs

8. If these people took an interest in or used your research, what would change? How would you know they had benefited? What specific things would you notice or be able to measure? In the future, what might people say about your research was transformative for them?

Assuming we could achieve regional interest in this research, there are four outcomes I would like to achieve:

- a) Reduce the number of SFs regionally that fail within the 5 year period as a result of poor marketing/brand management (US figures suggest this is 14% of SF failure (Fortune, 2014) but no UK figures found).
- b) Increase the number of SFs that develop asset value from their brand (in the absence of anything like an ISO this could be measured by revenue, cash flow and even pension contributions the EOM can make)
- c) Positive feedback from advisors, investors and business support organisations about the insight/understanding gained from the research and changes to the local economy in terms of SF performance

d) Ongoing longitudinal research with a wider participant base to develop further insight

9. Might you see changes in individuals, groups, organisations, or at a societal or some other level?

Yes. The following changes could be possible:

**Individual level**

EOMs who feel better equipped and more confident to develop branding strategies that deliver tangible benefits for their businesses

Advisors and investors who can assess with greater confidence whether a SF is developing effective branding strategies and signpost them to appropriate help where needed

**Groups**

Members of networking groups feeling empowered to manage their brands effectively

**Organisations**

Growth Hubs able to deliver more effective support to SFs regarding branding and thus seeing tangible benefits from enhanced revenue generation

**Society**

If SFs can become more sustainable and more valuable as a result of the intangible asset value of their brand there is a knock-on effect in terms of GDP, pensions, contributions to the NHS. Improving the branding of SFs and helping them to be more profitable and competitive, would also deliver benefits in terms of the Local Plan.

10. Would these changes be beneficial, or might some groups be disadvantaged in some way as a result of your research?

It may be a “Utopian Ideal” but I would like to think it will be possible to develop a marketing and communications strategy based on this research that is inclusive and open access. I therefore do not currently see anyone being disadvantaged.



## Glossary of Terms

**Brand** is defined as a ‘person’s perception of a product, service, experience or organisation’ (Neumeier, 2004). From the managerial perspective the brand can act as a “single organising principle” with consistent application of the brand across an organisation’s culture, products or services and reputation resulting in a business that is better aligned, more focused and more efficient (Bean, 2009:16)

**Brand Management** has been defined in many ways. The definition adopted for this study was formulated by Berthon et al (2008): “the process of creating, co-ordinating and monitoring interactions between an organization and its stakeholders”. The organisational function of brand rests on the assumption that designing, realising and executing a brand strategy is an integral element of marketing strategy, but its typically low priority in small firms is widely acknowledged in the literature.

**Brand Management Practices** describes the actions by means of which the brand management function implements branding strategically and tactically (Aaker, 1994).

**Brand Orientation** is a process of focusing a company’s commitment and on developing a brand to provide a platform for a sustainable competitive strategy (Urde, 1994).

**Co-creation** describes the coming together of internal and external actors in joint production of an outcome that is mutually beneficial. It occurs in the form of personal and unique experiences for the customer (value in use) plus ongoing revenue, learning and enhanced market performance for the firm through the building of customer loyalty (Prahalad and Ramaswamy, 2004).

**Entrepreneurial Owner Managers** are individuals who have a deep personal attachment to their firm but are simultaneously innovative and committed to growing their business (Carland et al., 1984).

**Large Organisations** are enterprises with more than 250 staff or either an annual turnover greater than 50 million Euros or an annual balance sheet total exceeding 43 million Euros (Ward and Rhodes, 2014).

**Market Orientation** is a company philosophy that meets the needs and desires of customers through the product mix (Narver and Slater, 1990).

**Positionality** is the stance a researcher chooses to adopt within a given inquiry. Stating it clearly allows the reader to assess the extent to which the researcher's preconceptions have influenced the findings. Savin-Baden and Major (2013: 71) call upon researchers to "continually interrogate their biases, beliefs, stances and perspectives" as part of an "open description" of how those have influenced themselves and the research outcomes.

**Post-Digital Society** or **Post-Digital World** are terms in common use but no single, generally agreed definition yet exists. My personal interpretation is that they describe a global business environment in which business owners are obliged to adopt digital technologies in order to operate effectively in a market. Daugherty (2019) points out that digital know-how is thus no longer a source of differentiation and competitive advantage, although how it is used to create trust and build relationships among customers, consumers and employees may confer advantages.

**Push** describes a marketing strategy aimed at getting a product or service to the consumer, and may therefore include such activities as setting up distribution channels or direct promotional initiatives. Once a brand is established, push can be integrated with a pull strategy (Fill, 2013).

**Pull** describes a marketing strategy in which, assuming that consumers actively search for product or services, requires a visible brand to create demand. That is usually achieved through comprehensive communications activities (Fill, 2013).

**Service Dominant Logic** states that "marketing activity (and economic activity in general) is best understood in terms of service-for-service exchange, rather than exchange in terms of goods-for-goods or goods-for-money. In other words, it is the activities emanating from specialized knowledge and abilities that people do for themselves and others (i.e., service, applied abilities) and the activities they want done for them, not the goods, which are only occasionally used in the transmission of this service, that represent the source of value and thus the purpose of exchange". Hence, "value is cocreated, rather than created by one actor and subsequently delivered". (Vargo and Lusch, 2017: 47).

**Small Firms** are defined in a number of ways. The UK Government's definition has been adopted for this study: a firm with 10 to 49 employees. However, the main criterion for selecting firms to participate in the fieldwork aligned with an alternative definition by McCartan-Quinn and Carson (2003): "an independent owner-managed business organisation of limited significance within the industry [in which] the owner/manager's omnipresence creates a highly personalised management style".

## List of abbreviations

The following abbreviations are used throughout this study:

- BMP** Brand management practice
- BO** Brand orientation
- EOM** Entrepreneurial Owner Manager
- LO** Large Organisation
- MO** Market orientation
- SDL** Service Dominant Logic
- SF** Small Firm
- SOP** Single organising principle

