CRANFIELD UNIVERSITY

Emanuel Said

INSIGHT INTO ACTION:
How Firms Use Customer Insight

SCHOOL OF MANAGEMENT

PhD Thesis
Academic Year 2014 - 2015

Supervisor: Dr. Emma K. Macdonald

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This thesis is submitted in partial fulfilment of the requirements for the degree of Doctor of Philosophy

ABSTRACT

Customer insight is fundamental for market oriented organizations to understand their markets. However, the use of customer insight in marketing decisions is poorly understood, partly due to the difficulties in obtaining research access within organizations. But in part because under the perspective of market-based learning (MBL) theory, knowledge is a fixed asset so while there has been interest in insight acquisition, there has been less interest in the processes of insight use.

This doctoral research focuses on managers' use of customer insight within the organisation. It applies the case research method within two organisations using multiple sources of data, including interviews with multiple individuals and real-time experience tracking over a period of time. A framework of the process of insight use is developed from a review of literature and then explored and expanded upon through case study analysis.

The emergent framework provides a more granular understanding of the multiple stages of the customer insight use cycle within an organization. It identifies that the insight use process is a perpetual feedback loop learning mechanism and involves several stages identified as: acquiring, filtering, transforming, sharing, analysing/interpreting, actioning and storing. The study finds that some phases are more likely to involve an individual manager while others are more likely to involve managers working collectively. For instance, the stages of acquisition and transforming tend to be individual while the stages relating to interpretation and actioning of insight tend to be collective. Managers may also opt to store insight as their next step for potential actioning at a later stage after any of the process stages. In addition to identifying the stages of insight use, this study identifies the pivotal role of organizational memory in the insight use process. Enablers and blockers of insight use are identified including that managers may respond to perceived information overload by (consciously or unconsciously) blocking information.

A key contribution of this thesis is that it incorporates the first use in an organizational behaviour context, of the real-time experience tracking (RET) method. This pioneering use of RET demonstrates that this method may address some of the limitations that plague traditional participant observation techniques in organizational settings, such as active or moderate participation. It demonstrates that RET can be used to track the insight use process of individuals in organizations over time, helping to understand their individual and collective insight use processes.

This multi-informant, multi-method study of customer insight use thus provides a deeper understanding of the processes of customer insight use than most previous MBL studies, which have typically employed single-informant, cross-sectional survey approaches. Practitioner implications include that new individual competencies in information use may be needed and that organisations may need to foster a new code of etiquette for information sharing and feedback between peers in organizations operating in today's information rich environment..

ACKNOWLEDGEMENTS

Had I chosen to mention each and every person who in some way has contributed to my successful completion of this study, it is very probable that I would have required a separate document, printed, bound and submitted as an annex to this thesis. But time and space restrictions limit my thanks to a handful of words. So here goes…

My first thoughts go to my supervisor, Dr. Emma Macdonald who proved to be more than just a patient guide throughout this four year journey for me. From the very first day, Emma stood out of the Cranfield academic crowd, constantly supporting my work and challenging my ideas until these became crystal clear in my mind. That was true insight in the making. I wonder if I would have ever found the stamina to survive the entire journey without Emma. I feel privileged and honoured to have worked alongside you Emma and for this I shall remain grateful for the rest of my life.

In a challenging journey, all is lost unless there is a capable navigator. Prof Hugh Wilson was nothing less than an expert helmsman, helping me get through the difficult straits of access to organizations and academic dissemination. To say I'm indebted is perhaps a big understatement.

Studying at Cranfield meant I met so many different characters with one common characteristic that makes Cranfield so rich and distinct from other academic institutions I have encountered in my life. This is an outstanding caring approach about anyone that is part of Cranfield. Topping the examples is Prof. Donna Ladkin -- a true altruist in every sense whose devotion to students shall inspire me for the rest of my academic life. Wendy Habgood, Irena Pidlyskyj, Sandra Bettison at Administration – thanks for being there when I needed you. God knows how I could have managed (or rather not managed) with my acute requirements. And thanks also to Andy, Marco and Mick who very patiently fulfilled all my "special" printing requirements throughout my field work and beyond, every time, anytime. And on documentation and writing, my thanks are in place for Karen, Cassandra, Alvine, Angie and Jessica whose dedication to their transcribing meant patiently endure every "uhm" in my interview recordings.

I am also fortunate to have worked alongside practitioners in marketing research in different UK organizations. I'm indebted to Fiona Blades, Beverly Clark and Maz Harding of MESH Experience who assisted in no small way to capture the real-time experience tracking data in the study's cases. I also doubt if this study would at all have happened without the help of Ian Baines at Cranfield University and Dr. Charles Randall at SAS UK. Thanks indeed Ian and Charles.

Another thought goes to the team at Scribendi, particularly the anonymous reviewer EM924. I acknowledge the perseverance and dedication of these people, making sure that every sentence delivers the right meaning. I'm delighted to have worked with you.

At Cranfield I also became part of a very strong collegial network of peers equally enduring a PhD process like myself. Irrespective of age, gender, origin, creed or orientation, my guess is that this network has a strong role in Cranfield's dynamic advantage. They also made my experience (in a climate that is chronically grey and cold) definitely warmer, more colourful… and bearable. Té, Morgan, Kamran, Richard, Shelly, Martin, Bjorn, Guy, Christina, Angela, Claus, Paolo, Helen, Alessandro, Maria, Rhea, Farooq, Farah, Jaya, Patricia et al… Thanks. And thanks to the friends I left in Malta but who kept up with my rants on the weather, the stress, the writing, the waistline and the moments of despair. Joe, Giselle, Isabelle, Ivan, Gordon, Vince and Tanya... I all owe you "one" in a big way.

But while experiencing this great journey in the UK, I left someone at home who patiently endured the challenging demands of teenage twin kids along with a full-time job, deteriorating health of ageing parents and a million other things. She probably worked more than ten times as hard as I did to make this study a success: Marthese. And of course, THE teenage kids who endured my absence for this journey while they were busy at school or at home.

This work is for you dear Marthese… and for Mark and Jeantide.

P.S. And to Guy… thanks for being such an inspiration to all of us, apart from a great friend. Truly, I never thought I'd be able to write a thesis that's shorter than yours.

Everybody gets so much information all day long that they lose their common sense.

Gertrude Stein, 1874 – 1946

If you create incredible value and information for others that can change their lives - and you always stay focused on that service - the financial success will follow.

Brendon Burchard, 1977 –

An educated person is one who has learned that information almost always turns out to be at best incomplete and very often false, misleading, fictitious, mendacious - just dead wrong.

Russell Baker, 1925 –

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GLOSSARY OF TERMS & ABBREVIATIONS

ad hoc research	(practitioner) research that is specifically designed to address a particular problem or issue, usually conducted when there is insufficient existing information.
ad hoc projects	single pieces of (practitioner) research and not part of a continuous programme of research.
agents	individuals who have the ability to think and act freely.
B2B	business to business.
brand	"a name, term, sign, symbol, design, or a combination of these that identifies the products or services of one seller or group of sellers and differentiates them from those of competitors" (Kotler and Armstrong, 2010:255). It "represents everything that a product or service means to consumers (Kotler and Armstrong, 2010:259).
client / customer	any individual or organization that requests, commissions or subscribes to all or any part of a market research project.
consumer	the ultimate user of a product or service, often the unit of analysis in market research studies.
customer insight	"a detailed understanding of customer profiles and behaviours, drawn from multiple data sources, that is potentially actionable through the prediction of how customers will react to different forms and content of interaction, or through other tailoring of the value proposition" (Bailey, 2008:2)
ESOMAR	the world association of research practitioners. Founded in 1948 as the European Society for Opinion and Marketing Research, ESOMAR's mission is to promote the use of opinion and market research for improving decision-making in business and society world-wide (Source: ESOMAR Glossary of Terms http://www.esomar.org/index.php/glossary-g.html, accessed 12 March 2011).
knowledge	"comprising a set of beliefs which informs decisions by agents to take actions that consume the agent's (scarce) resources" pointing at the asset and process properties of the construct as well as the location of the construct within the "agents" (Boisot and Macmillan, 2004:506). Knowledge is "the capacity that is built on information extracted from data. Knowledge assets yield a stream of useful services over time and hence have potential economic value" (Boisot 1998:loc108), and Kock, McQueen and Corner (1997) suggest that this stream lies in knowledge being "eminently predictive … with a degree of certainty based on information about past and present"(Kock *et al.*, 1997:71) . Nonaka and Takeuchi (1995) cite Plato when defining knowledge as "justified true beliefs" (ibid:loc354).
knowledge service provider	an external organization providing knowledge to customers in various areas exemplified by information technology, engineering consulting, investment banking, management development and training, legal services, audit and accounting (as well as tax advisory), management consulting and other business information services that include market research.
market information	includes "market research [information] provided on a customized basis by outside research suppliers *as well as* internal information as exemplified by sales volume, profitability and promotional expenditures"(Low and Mohr, 2001:71-72, after Deshpandé and Zaltman, 1987) (emphasis by author).

market insight	the result of a cognitive process where explicit market intelligence and other tacit information arising from experience is translated into an understanding of prevailing mechanisms, influences and conditions around a marketing dilemma. Insight is held in the individual's mind but shared among individuals through direct exchange or through insight's linked and resulting altered behaviours.
market intelligence	"an analysis of exogenous factors that influence those needs and preferences… such as government regulation, technology, competitors, and other environmental forces… current and future"(Kohli and Jaworski, 1990:4).
MBL	market-based organizational learning
MR	market research. It includes social and opinion research, and it is the systematic gathering and interpretation of information about individuals or organizations using the statistical and analytical methods and techniques of the applied social sciences to gain insight or to support decision making. The identity of respondents will not be revealed to the user of the information without explicit consent, and no sales approach will be made to them as a direct result of their having provided information (Source: ICC/ESOMAR International Code on Market and Social Research © 2008).
MR client	any individual or organization that requests, commissions or subscribes to all or any part of a market research project (Source: ICC/ESOMAR International Code on Market and Social Research © 2008). This definition also distinguishes from the "MR user" below
MR firm	an organization or firm engaged in the provision of market research services to public and/or private customers.
MR industry/sector	an economic sector comprising a number of organizations and self-employed persons whose main economic activity is that of providing market research services to public and private customers.
MR information	information resulting from the analysis of data collated through market research activities. This information is used to generate market information (along with other information from different sources).
MR process	a systematic approach of collating market research information involving definition of scope/requirements, the collection of data to satisfy these requirements involving a selection of field techniques, the subsequent analysis of this data and the translation of this data into information that supports marketing decisions.
MR service	the activity where market research organizations/individuals undertake market research processes for and on behalf of their public and/or private customers.
MR users	the ultimate user of information and knowledge derived from market research undertaken by market research practitioners (distinct from MR client above)

1 INTRODUCTION

Customer insight is a key input into strategic decision making for organizations operating in competitive, global market places. Customer insight provides the "big picture", composed of many pieces joined in one coherent understanding about how customers will respond to shifts in the environment and to the firm's offerings. Customer insight is indispensable for all managers in marketing and senior management (Wills and Williams, 2004).

In competitive, globalised environments, organizations need to be responsive to trends and opportunities in the markets in which they operate. Market-oriented organizations perform better in dynamic environments because they pay attention to the generation and dissemination of customer insight across the organization (Kohli and Jaworski, 1990).

The acquisition and use of customer insight is widely recognised as a key success factor in leading organizations, but surprisingly little is understood about the activities of individual managers in the insight use process. In most industries, managers face a deluge of information from many sources.

This study looks at how *managers* engage with customer insight, and it contrasts with earlier research into market orientation and customer insight that typically takes an *organizational* level perspective. Indeed, this study examines the behaviours and stages of managers' use of customer insight, adopting a retroductive, case study investigation on two UK service organizations. Each of these organizations relies on customer insight in marketing decisions that is drawn from different information sources.

The study involves real-time experience tracking and in-depth interviews with multiple informants. It examines how managers cope with different challenges that impact their engagement with customer insight and the steps they take to ensure effective actioning of insight in marketing decisions.

1.1 Background to the research and rationale

Customer insight is the result of managers' integration and abstraction of information about customers, markets and competition from different sources. Within an organization, customer insight combines managers' cognitive processing, their knowhow and their experiences (tacit information) with information in the form of reports and databases (explicit information). In the terminology of marketing, explicit information sources might include market research reports, segmentation studies, customer analytics, transaction data or other forms of customer data (Bailey *et al.*, 2009). The understanding of present and future customer behaviour that comes from customer insight helps managers design strategies that enable the organization to respond to environmental change (Smith and Raspin, 2008) and realize profitable, customer-focused growth (Langford and Schulz, 2006). Customer insight might thus be viewed as a strategic asset (Wills and Webb, 2007). Customer insight relies on a wide range of internal and external sources. One of the more important external sources is outsourced market research. The outsourced market research industry is a significant global business-to-business (B2B) knowledge service sector that generated in excess of US$40Bn in revenue in 2014, up from US$31Bn in 2010, according to the industry's peak body ESOMAR (2014). This industry involves market research firms collecting, analysing and providing market research information to clients. Some 82% of marketers say they rely on market research information (IBM, 2011) in making informed and effective marketing decisions.

Organizations face many challenges in the acquisition and effective use of customer insight, regardless of the source of that insight. First, the rise of an increasing array of digital, mobile and social channels means that organizations face a proliferation of external information channels from which customer insight can be sourced. While customers select and combine these various channels in ways that suit them, managers increasingly struggle with the challenge of how to keep up with customer behaviour across all of these channels (IBM, 2011). Second, information technology and networks now allow organizational information systems, such as customer relationship management systems, sales databases, operations planning systems and manufacturing and service management systems, to capture ever-increasing volumes of behavioural

and transactional data. These petabytes of data, known colloquially as "big data" create new opportunities for organizations. However, the sheer volume of data being generated challenges established skillsets within market insight teams, which have traditionally relied on small group sampling and surveys. Third, the pace of change in competitive market places means that managers feel pressured to process and action customer insight promptly and effectively. Yet, research shows that they also feel increasingly vulnerable as both the volume and variety of data sources surpasses their capacity to comprehend and exploit data effectively (Day, 2011).

The market-based learning domain of literature provides some understanding of the stages and behaviours that characterise organizations' engagement with insight. The fair volume of empirical literature within this domain offers only a fragmented picture of insight use because it is construed from mostly single informant, cross-sectional survey studies (e.g., Deshpandé, 1982; Diamantopoulos, *et al.*, 1990; Maltz and Kohli, 1996; Moorman *et al.*, 1992; Sinkula, 1990, among others). By contrast, studies that look at how organizations adopt customer insight are rare and often rely on the memories of single informants about the events that form part of the mundane, day-to-day processes happening within the organization (such as Perks, 2000; Ryals and Wilson, 2005). The research set out in this document attempts to bridge these gaps in understanding how organizations acquire and use customer insight.

A personal motivation

From the perspective of the supplier, that is, from a market research practitioners' perspective, these trends have accelerated the gap between the market researcher and their clients (Batchelor, 2010; Neal, 2002; 1989; 1998; Sutherland, 2010) and increasingly leaves them unable to understand their clients' needs or provide true value to customer firms (Ryals and Wilson, 2005).

As a former independent market research practitioner, I was frustrated by the consistent inability for clients to provide feedback on their firm's use of the market research that I supplied. Whereas the executives within the customer firms had no reservations providing feedback about the quality of service or the tangible deliverables emerging from the contracted services, the use of the market research report, data or

interpretations by the customer firm managers remained shrouded in mystery. Like fellow practitioners, I considered this feedback an important opportunity to learn about and to improve my offerings to customers, yet it was denied to me for various reasons which remain unclear to me. I speculated that this lack of feedback was due to any number of reasons, such as a lack of trust on the part of customer firm executives, political or other interferences in the insight use process, utilization of my deliverables to justify a previously held position or simply having a set of suggestions and recommendations available for use in the longer term. On occasion, I observed customer firms implement product or service improvements as recommended in my deliverables, suggesting to me that at least at one point, the client considered the insight I had provided valuable. My thoughts centred on two questions. A) What leads customer firms to implement or disregard the insight earned from the external agencies? B) How do executives use the insight they acquire from different sources?

I have found that many other independent practitioners share these reflections and concerns. My unanswered questions and an unabated longing for the processes of new research approaches were perhaps the key triggers for my starting this PhD journey. A true understanding about the fate of customer insight within the client organization offers the consultant an opportunity not only to improve the value proposition, but also, perhaps optimistically, to gain access to the clients' boardroom.

1.2 Conceptual framework

In the resource-based view of the organization (Wernerfelt, 1984), customer insight is a strategic asset (Wills and Webb, 2007) that is rare, unique, useful and of value to the firm (Smith *et al.*, 2006). Believable customer insight (Smith and Culkin, 2001) supports firms in resolving their responses to environmental threats and opportunities (Smith and Raspin, 2008). Profitable, customer-focused growth (Langford and Schulz, 2006) is possible as the firm better understands the present and future customer behaviour (Macdonald *et al.*, 2012). This definition offers two important inferences about the use of customer insight. The first is that the use of insight involves knowledge processes within organizations. Second, customer insight helps

organizations change their behaviour in dealing with customers, markets and competition as a learning outcome.

Various empirical streams offer perspectives on how managers may engage with customer insight. Of these, two theoretical fields stand out in offering a relevant picture of the learning processes involving organizations and their executives' engagement with customer insight: market-based learning (MBL) and knowledge process (KP) theory.

The first theoretical field, market-based learning (MBL) (Sinkula *et al.*, 1997; Sinkula, 1994), proposes that organizations identify the information needs and acquire the needed market information. Organizations diffuse this information among their members, who in turn interpret and assimilate messages from the market before applying the emerging insight to marketing decisions. The second theoretical field, knowledge process (KP) theory (Boisot and Macmillan, 2004; Crossan *et al.*, 1999; Nonaka and Takeuchi, 1995), proposes that acquired market information is transformed before it is diffused across different users within the firm. As knowledge is sticky and difficult to transfer across individuals (Boisot, 1998), managers need to translate and transform market, customer and competitor data into intelligible messages for peer managers to make sense. Upon interpretation and application, managers embed their learning emerging from their engagement with customer insight in organizational memory taking different forms, ranging from the individuals' tacit memory to organizational (explicit) artefacts such as documents or databases.

Each of these theoretical streams alone provides an incomplete (and sometimes contradictory) view of organizations' use of customer insight. As will be discussed in greater detail in Chapter 2, four inconsistencies emerge when the propositions from the two empirical streams are compared. First, MBL theory assumes that customer insight use processes involve a linear sequence of five phases: acquisition → dissemination → interpretation → application → storage (see Figure 1-1).

In contrast, KP theory proposes feedback loop mechanisms to explain users' exchange and processing of tacit and explicit information. Feedback loop processes typically involve a perpetual sequence of four processes where managers *intuit* their information needs, *interpret* acquired information, *integrate* information from different sources into

insight and *institutionalize* insight across the organization at individual, group and organizational levels (Crossan *et al.*, 1999).

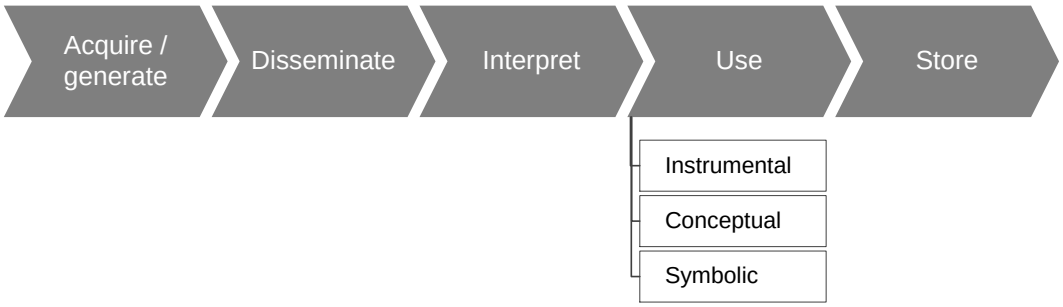

Figure 1-1 An initial conceptualization of the customer insight process from a review of literature (Source: Author)

Second, MBL emphasises the flow of insight from suppliers to user organizations, where the use of customer insight is limited to a number of actors within the marketing function (Sinkula *et al.*, 1997). KP literature, on the other hand, is relevant to organization-wide phenomena happening at individual and group levels.

Third, MBL considers knowledge a fluid asset that is easily utilized, whereas KP theory regards knowledge as a process (Boisot, 1998; Crossan *et al.*, 1999). Knowledge processes rely on social mechanisms that surmount the difficulty (*stickiness*) that characterizes the exchange and sharing of insight among actors as well as within and between organizations (Argote and Ingram, 2000; Jensen and Szulanski, 2004). Fourth, unlike KP theory, MBL does not distinguish between *explicit* (formal, databases, reports or documentation) and the more viscous, sticky, *tacit* (meanings and understandings emerging from experience) knowledge exchanged by individuals, groups or organizations (Boisot, 1998; Nonaka and Takeuchi, 1995).

In this study, I start with a tentative conceptualization of the customer insight use process by combining the key propositions from MBL and KP theories offer (see Figure 1-1 above). There is some consistency in the types of behaviours identified in both the MBL five-step linear process and the four-step knowledge process feedback loop (Crossan *et al.*, 1999). For instance, both frameworks include an "interpreting" stage , which is also consistent with the "externalizing" processes in Nonaka's (1994) SECI

framework of knowledge processes. There is also a similar consistency across the "integrating" and "institutionalizing" stages in Crossan *et al.*'s (1999) and the "use" stage in the MBL framework. Finally, "institutionalizing" in Crossan *et al.*'s (1999) framework is also consistent with the "internalizing" behaviours described in Nonaka (1994) and the "store" step described in the MBL framework for customer insight use.

At the same time, three inconsistencies hamper the full combination of the propositions from both theoretical streams into one combined conceptualization. First, whereas KP theory proposes that knowledge process happens in perpetuity, MBL studies view customer insight use as a linear process, with a clear start and end. Second, if customer insight users disseminate or share insight in both tacit and explicit forms (Nonaka, 1994), then it is likely that individuals transform the information they encounter to accomplish customer insight "dissemination" that Kohli and Jaworski (1990) discuss. However, MBL does not advocate users' transformation of customer insight.

Third, MBL literature rarely mentions users' dependence on organizational systems for their generation and application of customer insight. Customer insight systems constitute explicit forms of organizational memory that individuals *access* in acquiring specific insight related to marketing decisions. Only rare studies in MBL (such as Citrin *et al.*, 2007; Perks, 2000; Ryals and Wilson, 2005) consider insight storage from a peripheral perspective without any reference to the individual, group or organizational level of manifestation.

Thus, as a further development of the initial conceptualization in Figure 1-1, this study proposes that users access, retrieve and *acquire* information from different internal and external sources. To develop a message that they can disseminate among colleagues, users *transform* these pieces of information into an *insight packet* – or an artefact that comprises meanings derived from encountered documentary and experiences emerging from users' interaction with individuals within and outside their organization. Users *share* customer insight packets with colleagues who, in turn, interpret the "packet" relevant to impending (foreseeable or unanticipated) decisions. Users *apply* insight in specific decisions, observing and *embedding* the outcomes of such decisions in their own and in their organization's memory.

1.3 Research questions

A comparison of the above tentative conceptualization with organizational learning and KP literature, however, reveals two conceptual limitations. The proposed conceptualization makes no distinction between:

a) tacit and explicit portions of customer insight (after Polanyi, 1962) at any of the stages that constitute the customer insight use process;

b) individual and group-level behaviours.

An empirical study of the use of customer insight is thus justified. The present study is intent on answering two questions emerging from the above initial conceptualization:

Research Question 1. How do managers use customer insight?

Research Question 2. What is the process of customer insight use in an organization?

1.4 Study's methodology and design

Answering the research questions involved designing and executing a mixed methods, case study (Yin, 2009) investigation of two UK-based service organizations that rely on multiple users of customer insight in their marketing decisions. Users were located in different functions, and they depend on different sources of customer insight. The two organizations served domestic markets[1] with different levels of turbulence, dynamism and complexity (Kohli and Jaworski, 1990; Slater and Narver, 1995; Souchon and Diamantopoulos, 1996). The first of these two organizations was a private training institution (hereafter termed EDU), comprising six business units that include a central administrative unit. A total of 17 managers from EDU participated in this study. The second organization was the UK arm of an international software organization (hereafter termed SOFT) that comprised five business units including an administrative core. A total of 29 managers from SOFT participated in this study (see Table 1-1).

[1] As opposed to export markets for manufacturing goods. Exporting manufacturing firms are often the subject of extant customer insight literature as in Bierly, Damanpour and Santoro (2009); Diamantopoulos, Schlegelmilch and Allpress (1990); Maltz, Souder and Kumar (2001); Souchon and Diamantopoulos (1997), among others.

A purposeful sampling approach was adopted to capture evidence from multiple informants within each organization (Piekkari *et al.*, 2010). Informants in each case study firm were managers involved in acquiring, sharing, interpreting and applying customer insight in their day-to-day marketing work across a range of business functions, including marketing, sales, services, finance and top management. In each case study, the individual managers and the customer insight packets constituted the units of analysis.

Table 1-1 Summary of participants in the study (Source: Author)

		Organization								
		SOFT				EDU				Total
		Phase 1 Interviews	Phase 2 RET	Phase 3 interviews	Total	Phase 1 Interviews	Phase 2 RET	Phase 3 interviews	Total	
Gender	Male	7	11	15	19	5	4	5	7	26
	Female	1	8	5	10	5	5	6	10	20
Role	Senior manager	7	5	9	13	6	4	5	7	20
	Middle manager	1	14	11	16	4	5	6	10	26
Function	Finance	1	1	2	2					2
	Marketing	3	1	3	5	7	6	7	12	17
	Sales	2	17	14	20	3	3	3	4	24
	Sales support	1		1	1			1	1	2
	Support services	1			1					1

Each case study captured multiple users' own experiences and associated interpretations about an everyday phenomenon (customer insight) in their own language, over a period of time. Relying on multiple informants helped this study avoid "homogeneity" and enabled the capture of maximum variation (Creswell, 2009; Hammersley and Atkinson, 2007) to realize the construction of a rich, processual account of the use of customer insight from a temporal development perspective (after van de Ven and Huber, 1990; van de Ven, 1992).

The use of customer insight is a process composed of events where managers interact with insight (Pettigrew, 1992). To capture managers' interpretations of these experiences, the study adopted a quasi-ethnographic longitudinal inquiry that employed a mixture of data collection methods (Hammersley and Atkinson, 2007; Miles and Huberman, 1994) in four phases. The first phase (Phase 1) involved initial qualitative, exploratory interviews with customer insight users, followed by real-time experience tracking (RET) in the second phase (Phase 2). Pre-identified customer insight *packets*

were tracked over a period of a month during this phase, helping me generate encounter timeline maps. The ensuing phase (Phase 3) involved follow-up, in-depth, semi-structured interviews with customer insight users. Initial findings were discussed with managers from a number of different organizations in a workshop (Phase 4) intent on validating these findings (see Figure 1-2).

Whereas the interviews in Phase 1 followed a structured approach intended to explore the insight sources and key activities, Phase 3 interviews took an unstructured approach that probed deeper into the motivations and behaviours of managers in their engagement with customer insight.

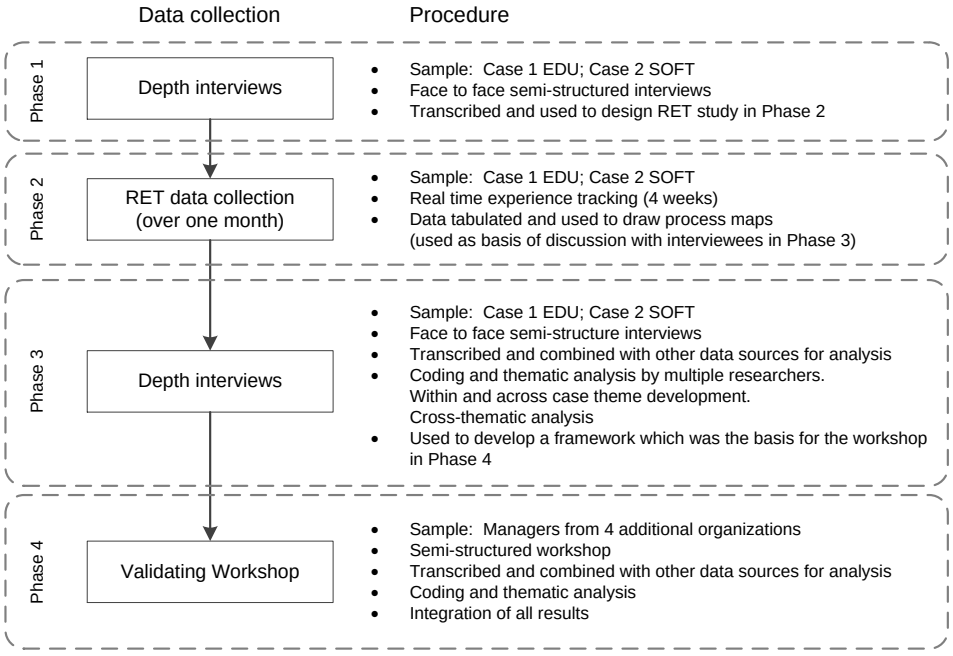

Figure 1-2 Methodology used in this study (Source: Author)

Phase 2 involved the collection of reported usage behaviour by managers using real-time short-messaging responses and online-diaries over a four week period (after Macdonald, Wilson and Konus, 2012). RET was used to capture users' engagement with 37 different customer insight packets, with encounters reported by 28 participating managers across the two firms. Participants in the RET phase sent a text message every time they encountered a source of customer insight, including in their report the source name, the medium of the source and the action they took as a result.

Phase 4 involved validating Phase 3 findings by seeking active feedback from eight managers from four firms participating in a workshop that was specifically organized for a managers engaged in using customer insight in different UK-based service firms. Twenty-two participants from twelve firms (including the case study organizations) contributed feedback during this workshop.

The above fieldwork efforts resulted in the capture of around 300 customer insight encounters from RET during Phase 2. Time series approaches on RET data led to the construction of encounter timeline maps showing how customer insight packets moved across individuals and functions, as well as how individuals encountered different customer insight sources. Social network analysis on RET data identified clusters of groups/functions engaged in customer insight sharing.

Where permitted, all interviews in Phase 1 and Phase 3 were recorded and subsequently transcribed verbatim following the guidelines of Du Bois *et al.* (1993). Transcripts were coded using NVivo™ software, a process that involved several phases and cycles.

Apart from relying on qualitative and quantitative methods as a means of methodological triangulation to address the study's validity objectives, the study's design also incorporated various other measures that address potential bias that hampers the quality of the study's contribution. These measures are discussed in Chapter 4. The author's own biases as a result of his own life experiences are also acknowledged and reflected upon (see Chapter 9), as these experiences bear important consequences in how data has been interpreted in this study.

1.5 Summary of research outcomes

The analysis of the case studies finds evidence of the existence of all five stages of insight use that have previously been identified in the literature (*acquiring*, *disseminating*, *interpreting* and *using* or *storing*). However, due to the longitudinal and in-depth nature of this study, a more granular understanding about the sub-processes within each of these stages emerges from this investigation. For instance, this analysis identifies additional stages and sub-processes, including a stage where data and information is *filtered*, which previous literature appears to have missed.

Furthermore, because this method included tracking of insight use over time and across multiple users, the study finds evidence of the *actioning* of insight in marketing decisions. While the focus of this research is the customer insight, in examining the stages of insight use, interview data touches on a multitude of issues related to the core building blocks of management strategy, including processes, resources and systems, skills and competencies, culture, leadership, structure and policy. The emergent framework of customer insight use in Figure 1-3 is the basis of the discussion that follows in Chapters 7 and 8.

1.6 Summary of contributions

This section briefly summarizes the contributions to theory and practice emerging from this study.

1.6.1 Contributions to theory

Unlike most of the extant MBL studies, this study focuses on the individual managers and their engagement with customer insight as the level of analysis.

This study offers a fine-grained understanding about the process in which managers use customer insight. Earlier research about this phenomenon conceptualized a process by drawing ideas from organizational learning theory (see Day 1994a; 1994b; 2002), but these studies rarely included empirical support, or else they provided a partial understanding gathered from single-informant, cross-sectional studies. MBL studies (systematically reviewed later in this thesis) conceive insight use as a linear process involving between three and five steps.

The use of RET, in-depth interviews and associated analyses generate a more granular explanation of the customer insight use process, leading to a deeper understanding of the behaviours managers adopt in their engagement with customer insight in five distinct but closely associated ways (see Figure 1-3).

First, unlike earlier MBL literature, this study determines that customer insight use follows a perpetual learning cycle rather than a linear process where information feeds into the organization's repositories. Observations from RET and in-depth interviews

suggest that the entire customer insight process has a close resemblance to sense-making (Thomas *et al.*, 1993; Weick, 1979; 1995) because (a) managers rely on retrospective information to understand future customer behaviour, and (b) customer insight use relies on a perpetual interplay between cognition and action.

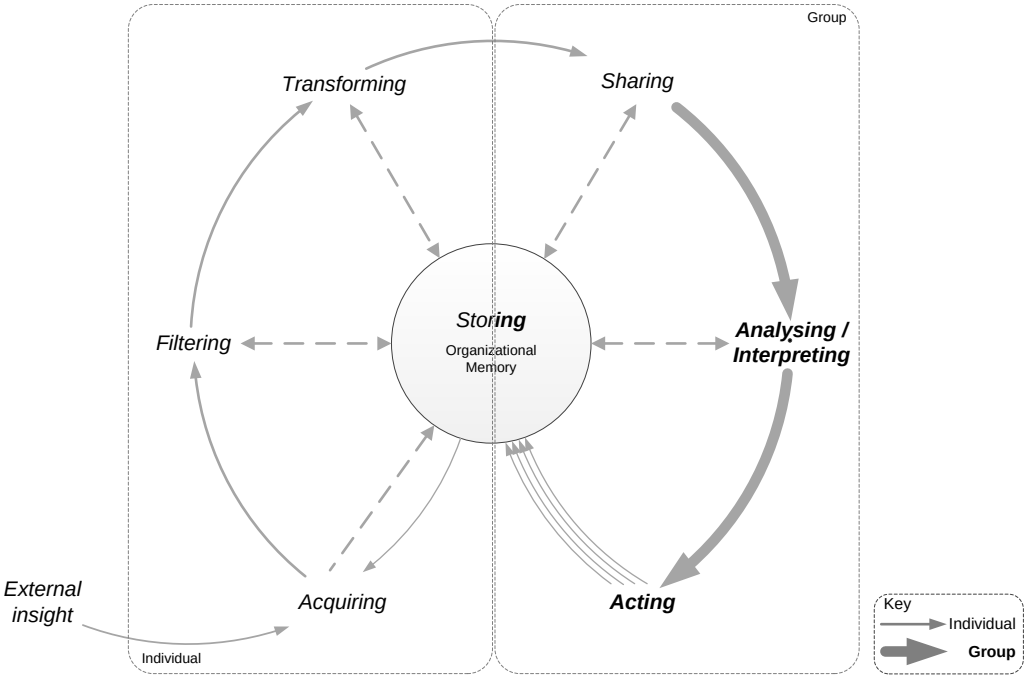

Figure 1-3 Emergent framework of customer insight use process (Source: Author)

Second, the study's method produced high granularity data that helped distinguish between individual and group-level behaviours when managers engage with explicit and tacit customer insight. This study presents customer insight use as a social process involving managers interacting with insight and with each other in formal and informal approaches. Also, as a result of the high-granularity data, this study identified a mainstream sequence of behaviours managers adopt in their engagement with customer insight, as well as less common sequences of behaviours that managers adopt in response to specific motivations and organizational conditions.

Third, this study offers a rich account about the behaviours involved at each stage of the customer insight use process. A summary comparison (Table 1-2) shows how this

account contrasts with earlier literature with respect to each process step. This rich account also offers a more comprehensive view (compared to extant MBL literature) about the conditions that block or enable the customer insight process at each stage and at different levels of analysis.

Themes of collaboration and competition emerge from managers' accounts about their experienced customer insight sharing and exchange, echoing observations in organizational learning literature (like Inkpen, 1998 and Kale and Anand, 2006, among others) but that are overlooked in MBL literature.

Table 1-2 Summary comparison of this study's contribution compared with earlier literature on customer insight use (Source: Author)

Customer insight use process step	MBL literature	What this study contributes
Accessing and acquiring	Generally treated as formal information acquisition typically from external sources (Diamantopoulos and Souchon, 1999)	Managers access various sources formally and informally. Access varies with role, seniority, organizational culture and openness of systems.
Filtering	Does not appear in existing MBL frameworks	Identifies filtering behaviours at individual and group levels. Observes anxiety among managers that impacts on managers' confidence and effectiveness.
Transforming	Does not appear in existing MBL frameworks	Managers transform data into "packets" that can be stored or shared, involving up to four methods or behaviours.
Disseminating / sharing	Treats sharing of the explicit portion of insight through formal approaches and only rarely considers the tacit portion and associated informal approaches. Studies do not look at the mechanisms involved in insight sharing.	Observes different approaches that construe formal or informal ways of sharing insight that managers adopt in dealing with explicit and tacit customer insight.
Analysing / interpreting	Rarely focuses on individuals' analysis and interpretation. Interpretation rarely seen as a collective behaviour (Rollins *et al.*, 2012; Smits and Kok, 2012)	Identifies two types of analysis behaviours as well as a range of collaborative approaches that brings managers together in interpreting insight to reach a collective understanding. Distinguishes analysis as individual level behaviours and interpretation as group level behaviours.
Acting	Deals with three forms of use – instrumental, conceptual and symbolic.	Observes managers applying collective understanding in four types of decisions. Distinguishes behaviours at individual and group levels.
Storing	Rarely considered – and typically looked at as the organizational repository of information stored in firm's systems.	Observes managers storing lessons learnt from their dealing with customer insight and its application explicitly in repositories and tacitly in their own memory.

This view is in stark contrast to the prevailing parsimony in cross-sectional MBL literature that typically measures the effects of a narrow selection of influences and their impacts on specific customer insight use steps.

Fourth, this study emphasizes the role and importance of feedback that managers expect and share with each other throughout all stages of their engagement with customer

insight. Feedback takes the fore in closely-knit user communities and is less evident between distant teams and groups, possibly as a result of different influences and organizational and individual characteristics, such as culture, tolerance to ambiguity of roles and context, job involvement and the individual's self-confidence.

Finally, whereas MBL literature superficially deals with the role of memory in customer insight use, this study offers a fine-grained view about the individual level manifestation of transactive memory (like managers' own mental models or managers' cognitive maps and framing). Experience and feedback update individual-level mental models and cognitive maps continuously, cumulatively and tacitly, equipping managers to better deal with overload, correct interpretation and efficient insight application.

The observations that this study makes on managers' use of customer insight lead to the following eight propositions. These propositions address each of the two research questions in separate ways, as set out in Table 1-3.

Table 1-3 Propositions emerging from this study (Source: Author)

Research question		Proposition	
1	How do managers use customer insight?	1	Managers reduce the potential complexity of large quantities of information by filtering information that is perceived as valuable for themselves and the organization.
		2	Perceptions of information overload may drive managers (consciously or unconsciously) to adopt behaviours to block information sources.
2	What is the process of customer insight use in an organization?	3	The customer insight use process is a feedback loop involving seven behaviours. This process is perpetual and is a core part of an organization's learning from its experience in markets. Stages in the insight use process include acquiring, filtering, transforming, sharing, interpreting, actioning and storing.
		4	The customer insight use process involves behaviours at two levels – individual and collective. *Individual* behaviours are particularly notable during the acquiring, filtering, transforming, analysing and storing stages. *Collective* behaviours are particularly notable during the interpreting and actioning stages.
		5	Individuals may choose to "store" insight as the next step after any of the acquiring, filtering, transforming, sharing or analysing/interpreting stages.
		6	In organizations, individuals' limitations in information processing capabilities and perceptions of information overload may limit the organization's ability to generate and respond to customer insight.
		7	Organizational memory plays a central role in the customer insight process as a repository for insight storage and as a source of insight for decision making.
		8	To prevent blockages and enable effective sharing of insight as volumes of data increase, organizations need individuals to develop new information processing competencies and need to re-think the structures and processes that support information flow across the organization.

1.6.2 Contributions to practice

Practitioner literature typically conceives the customer insight process as the linear process that starts with the customer insight agency proposal and goes down to the preparation and delivery of the report to the client firm (like Hague, 2002; Malhotra and

Birks, 2007; Zikmund and Babin, 2007). This study offers a contrasting portrayal of the customer insight process and is consistent with Tuli *et al.*'s (2007) view about solutions provision in two ways. First, customer insight suppliers provide only part of what customer firms expect. Second, supplied customer insight (or a "solution") has a far longer effect (after delivery) than what typical customer insight suppliers may sense. This study indeed shows how customer insight has a longer-lasting use (and effect) beyond that last encounter between the supplier's consultant or expert and the client firm counterparts. An insight provided by a supplier enters a perpetual process of learning that involves multiple users in the client firm as well as a comprehensive meshing of behaviours.

This thesis exposes four problems that insight supplying firms need to address in augmenting their value propositions to client firms. First, supplier firms lack awareness about who is involved in a customer insight process within client firms and are being unable to build deep relationships with customer firms. Second, supplier firms need to be conscious of the range of insight sources their client firms use along with the insight supplied. In trying to reduce uncertainty, client firm managers validate incoming insight with prior knowledge and other sources of insight before they consider interpreting and actioning. Third, customer insight provided by external agencies loses its visibility as it sinks in the information overload users face every day. Fourth, client firm users choose what and how incoming insight is shared with colleagues, impacting on the users' perceived service and reputation of suppliers.

This thesis also exposes five ways for customer insight firms to offer better value propositions to their clients and reduce the dividing distance from the client firm's boardroom. Customer insight suppliers need to look beyond the contractual boundaries around the relationships with their client firms and move towards multipoint relationships. Multipoint relationships help insight suppliers garner a true understanding about the diverse needs of the client firm users' and their decision contexts, lighting up the path to effective knowledge co-creation by the two parties.

From a user firm perspective, there is an opportunity for organizations to amplify the value-in-use of customer insight when customer insight is kept moving across the entire

organization. Successful dissemination of insight relies on two important strategies that the insight-using firm needs to execute: (a) honing the listening capabilities of the individuals who connect the firm with its context, and (b) encouraging users to respond to customer insight regardless of their status in the organization's hierarchy or location.

1.6.3 Contributions to method

There are three key challenges that hamper the validity of findings emerging from participant observation methods. First, the physical presence of observers in organizational settings discourages organizations from agreeing to take part in observational studies. Second, in overt observational studies, organizational settings may obstruct the complete membership of the observer, limiting the achievement of the desired depth of inquiry. Third, organizational members championing the observational studies are likely to direct the investigation to their own specific areas of interest, potentially limiting the resultant study's comprehensiveness, variation, objectivity and audience orientation.

This study employs real-time experience tracking (Baxendale *et al.*, 2015; Macdonald *et al.*, 2012) as an attempt to overcome the limitations of traditional participant observation in organizational settings. This approach is a first in organizational studies, capturing a rich view of the participants' engagement with customer insight during specific encounters.

The use of real-time experience provides a methodological contribution in two key ways. First, the absence of observers within the context studied is a source of two important advantages: that researchers keep a more or less marginal position, minimizing the likelihood of over-rapport (Hammersley and Atkinson, 2007), and that organizations are better motivated to participate in organizational studies. Second, real-time experience tracking offers the opportunity to study larger numbers of participants without increasing observer requirements.

1.7 Dissemination of research

1.7.1 Peer-reviewed conference papers

The following peer-reviewed conference papers emerging from this thesis research have been accepted to UK and international conferences:

Said, E., Macdonald, E.K. and Wilson, H.N. (2014) 'How organizations translate customer insight into marketing action'. *Academy of Marketing Conference*. Bournemouth: Academy of Marketing.

***Winner of "Best in business-to-business track" award ***

Invited to the Special Conference Issue of the Journal of Marketing Management (Cranfield 3-star; Association of Business Schools 3-star)

Said, E. and Macdonald, E.K. (2013) 'Generating value from market research use: Doing more with less?' *Academy of Marketing Conference*. Cardiff: Academy of Marketing.

Said, E. and Macdonald, E.K. (2012) 'A study of market research information use by clients of market research providers'. *Australia New Zealand Marketing Academy Conference*. Adelaide, Australia: Australia New Zealand Marketing Academy.

Said, E. and Macdonald, E.K. (2012) 'A study of market research information use by clients of market research providers'. *Academy of Marketing Conference*. Southampton: Academy of Marketing.

1.7.2 Practitioner conference papers

A conference paper was submitted and accepted at a UK practitioner conference at Cranfield in 2013:

Said, E. and Macdonald, E.K. (2014) 'Insight into action'. *Cranfield Customer Management Forum*, Cranfield, UK: Cranfield University School of Management.

Dr. Emma K. Macdonald also presented the emerging conceptual model as part of a keynote speech delivered at the Market Research Society's "Customers Exposed" conference in October 2014, London, UK.

1.7.3 Journal article acceptance

The following journal article has been accepted:

Said, E., Macdonald, E.K., Wilson, H.N. and Marcos, J. 'How organizations translate customer insight into marketing action'. Submitted to the *Journal of Marketing Management*.

1.8 Thesis structure

Chapter 2 surveys the key literature domains that inform this study. Chapter 3 conceptualizes the process wherein users engage with customer insight, drawing from MBL and organizational learning/KP literature, formulating the research questions that inspire the rest of this study.

Chapter 4 sets out the philosophical considerations governing this study, moving from a critical realist ontology and epistemological relativism to adopt a retroductive research strategy. This strategy is explicated in the following sections that describe the processes adopted to generate strategy and the quality criteria governing the study. A detailed description of the operationalization of the study follows in Chapter 5, where details of the units and level of analysis, sampling approaches, data collection and analysis approaches are set out.

The third part of the thesis starts with Chapter 6, which describes the pilot and key case studies, including a description of the participating organizations and individual users as well as the key empirical and methodological observations emerging from the pilot case study. The empirical findings from the key case study (and in some instances from the pilot case study) follow suit in Chapter 7, explaining the mechanisms deduced from the observations made from RET, in-depth interviews and validating seminar.

The fourth part of the thesis starts with a discussion of these findings in Chapter 8, setting out the key deductions emerging from the findings in the previous chapters. The customer insight use process conceptualization is compared with earlier literature about the use of customer insight. The theoretical and practice contributions emerging from this study are discussed in Chapter 9. This concluding chapter follows with a discussion

about the study's limitations as well as a cautious evaluation of the opportunities for future research. Finally, a personal reflection on the PhD and research process experienced is offered.

PART I

LITERATURE INFORMING THE STUDY

2 THEORETICAL POSITIONING

This chapter presents a review of the relevant marketing and organizational learning domains to express this study's theoretical positioning before leading to the development of the study's research questions. After discussing the nature of customer insight, this chapter positions this study within three theoretical domains that are relevant to the processes and influences on customer insight use at organizational, group and individual levels (see Figure 2-1).

This literature review starts by taking the "funnel" approach to appraise marketing literature that may inform the use of customer insight, looking at this phenomenon from two opposing points of view. The first involves the use of customer insight from the *suppliers'* point of view, examining supplier-oriented literature that relates to market orientation and solutions selling. The chapter then moves to appraise the use of customer insight, taking the *customer's* point of view as it reviews industrial buying behaviour and customer experience literature.

The examination of these opposing views to customer insight use shows that marketing literature offers only a partial explanation about how managers use customer insight. Tentative answers that address questions emerging from the apparent limitations of marketing literature may be borrowed from organizational learning literature, such as knowledge processing, absorptive capacity and MBL studies. An appraisal of these domains is set out in the second part of this chapter, showing how these domains also offer a partial explanation about how managers use customer insight.

Table 2-1 summarizes the key observations emerging from this review about these literature domains, as well as the key implications/limitations that each reviewed domain bids on the phenomenon of interest. The review in this chapter shows that none of the domains examined offers a full explanation about how customer insight is used at the individual manager's level of analysis. Indeed, explaining how managers use customer insight can at best be conceptualized from ideas derived from the different literature domains. Chapter 3 portrays this theme in the form of a tentative

conceptualization for this study. This conceptualization is an integral part of the development of the study's research questions.

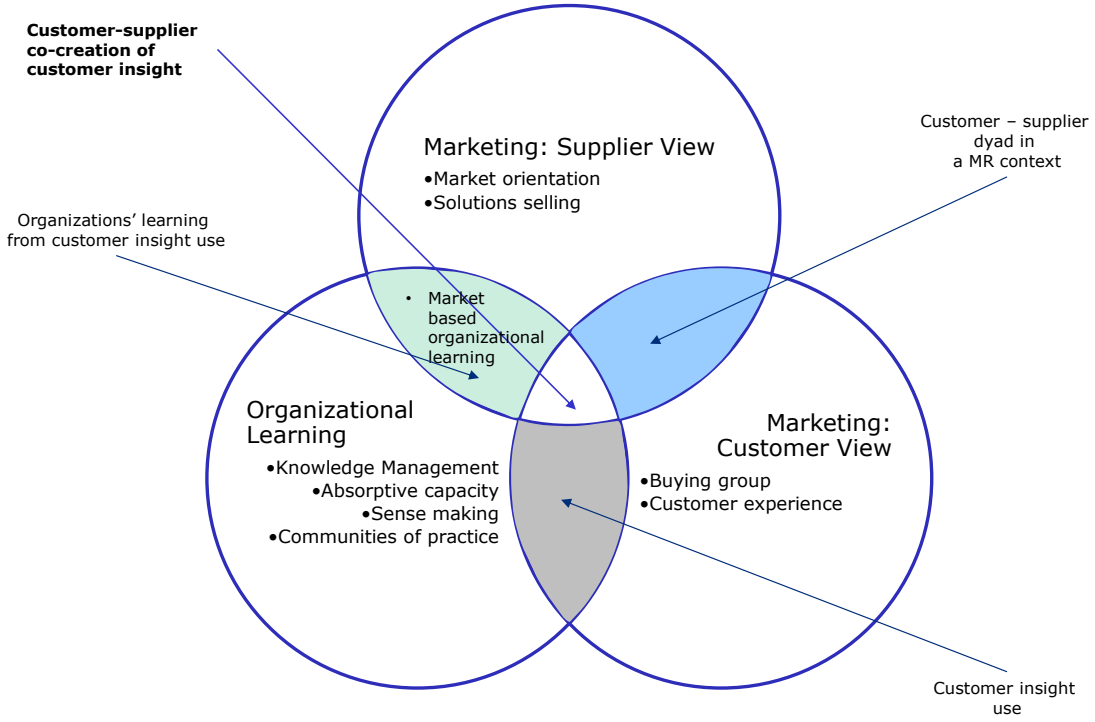

Figure 2-1 A map of literature domains that inform the research question (Source: Author)

2.1 What is customer insight?

An appraisal of different studies in marketing offers a theoretical definition of customer insight for use in this thesis. Wills and Webb (2007) consider customer insight a strategic asset, and it is valuable, rare, difficult to imitate and of use to the organization (Smith, Wilson and Clark, 2006). Managers aggregate information from multiple sources, including market research, database analytics, customer and market intelligence into a *believable* "big picture" (Smith and Culkin, 2001; Wills and Williams, 2004). Customer insight envelopes domains like market research, segmentation and customer analytics, combining transactional and external customer data (Bailey *et al.*, 2009). Ultimately, customer insight supports the firm's response to environmental change (Smith and Raspin, 2008) helping establish profitable, customer-focused growth (Langford and Schulz, 2006) as a result of an organization's understanding of present and future customer behaviour (Macdonald *et al.*, 2012).

Table 2-1 Features of the different literature domains reviewed in this study.

Literature domain	Examples	Perspective		Focus			Process relevance			Implications for use of customer insight	Limitations of application
		Supplier	Customer	Organization	Group	Individual	Customer purchasing	Customer usage	Supplier-customer co-creation		
Marketing											
Market orientation	Kohli and Jaworski (1993); Narver and Slater (1990)	✓		✓			✓			Proposes use of customer insight for orienting of marketing efforts. Process involves acquisition, aggregation and exchange of different types ofmarket information (Kohli and Jaworski, 1990)	Treats organizations as originators of customer insight and does not answer how organizations and individuals use customer insight. Organizations seen as creators/suppliers of customer insight
Solutions selling	Tuli et al. (2007)	✓		✓			✓	✓	✓	(Looks at organizations as originators of customer insight solutions for clients – but not users' application of customer insight).	Product centric views on servitization of products: neglect the nature of customer insight. Scope of solutions treated wider than just MR firms - customer dyads.
Buying group	Robinson et al. (1967); Spekman and Ford (1977)		✓	✓	✓		✓			Suggests mechanisms for cross functional teams formation during the use of supplier related information.	(Looks at organizations as buyers of customer insight but not users' application of customer insight)
Customer experience	Cova and Salle (2008); Lemke et al. (2011); Prahalad and Ramaswamy (2003); Shaw and Ivens (2004)		✓			✓		✓	✓	That customer organizations co-create value through supplier-customer interaction (experience). Because interaction happens between individuals (within supplier and customer locations), value co-creation happens at an individual level.	(Looks at organizations' members experiencing customer insight as a service.) Largely relates to consumer experience. Does not look at team or organizational levels as units of analysis
Organizational learning											
Knowledge processes	(Beyer and Trice 1982; Boisot 1998; Choo 1998; Crossan et al. 1999; Nonaka 1991; Nonaka and Takeuchi 1995)		✓	✓	✓	✓		✓		(That organizations learn through individuals' sharing of tacit and explicit knowledge, involving a feedback loop mechanism).	Relates to transfer of knowledge between and within organizations, typically in R&D contexts. The impact of client values on client-supplier relationship across the relationship lifetime is not expounded.
Absorptive capacity	Cohen and Levinthal (1990, 1994); Zahra and George 2002)	✓	✓	✓				✓		(That organizations need absorptive capabilities in creating and using customer insights effectively). Deals with R&D knowledge in partner organizations (not supplier-customer dyads).	Avoids discussion on processes at team or individual levels.
Market based learning	Sinkula (1994); Sinkula et al. (1997); Slater and Narver (1995)		✓	✓				✓		That organizations seek and use customer insights as part of a learning process.	Looks at entire organization as unit of analysis, neglecting the role of teams and individuals. Assumes knowledge is a transferable asset rather than a process.
Sense making	Weick (1995); Weick and Roberts (1993)		✓	✓				✓		(That organizations rely on customer insights in making sense of a complex market context)	Provides reasons for seeking MR information and customer insight but no explanation about how this is exploited.
Communities of practice	Lave (1991); Wenger (2000)		✓	✓	✓			✓		(That groups of users share skills and approaches in creating and using customer insights)	Suggests conditions that support formation of teams where individuals learn from each other, but not about their interaction during the use of customer insight.
This study		✓	✓		✓	✓		✓	✓		

This study distinguishes information, intelligence and customer insight. Information represents the lowest level of complexity and integration of market, customer and competitor data, whether externally sourced or internally generated, as exemplified by sales and customer profitability data (Deshpandé and Zaltman, 1987) (see Figure 2-2). Information is data that is structured and organized, placed in context and bestowed with meaning (Glazer, 1991). Customer, competitor or market intelligence lies at the next level of complexity and is obtained when customer, competitor or market information is extracted, analysed and integrated with other pieces of information derived from different sources. Customer insight represents the next level of integration and abstraction, emerging as a result of the cognitive processing of customer, competitor and market intelligence, along with other internally or externally sourced, tacit or explicit information. The tacit portion of insight involves experiences that are translated into an understanding about prevailing mechanisms, influences and conditions impacting customer behaviour. The explicit portion involves the codified aspect embodied in reports, databases and other formal information that managers find easy to share.

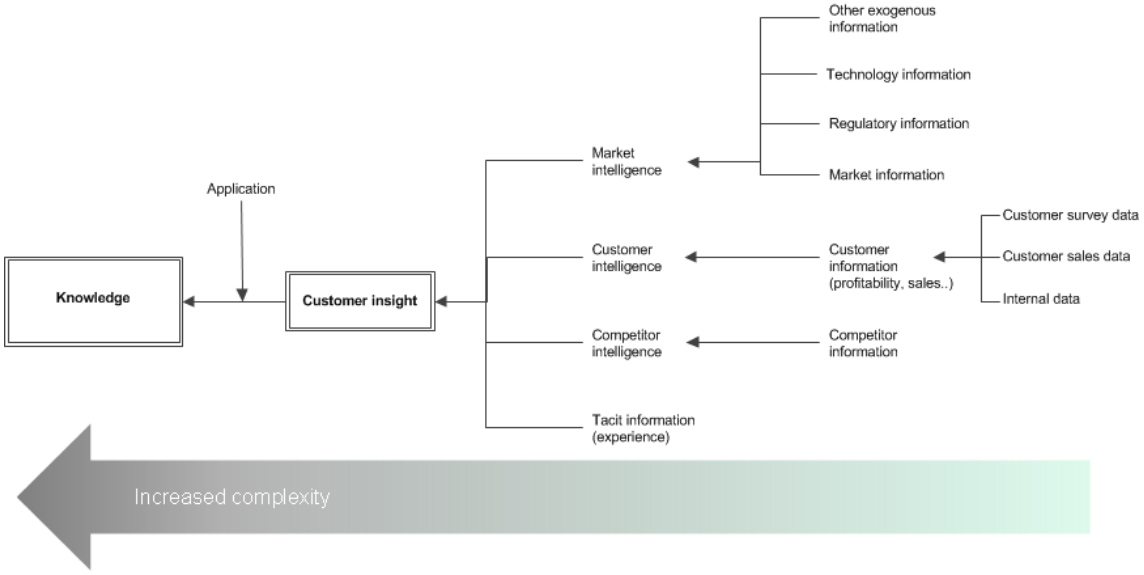

Figure 2-2 Hierarchical distinction between knowledge, insight, intelligence, information and data (Source: Author)

This description of customer insight has two connotations:

1. Customer insight involves knowledge processes within organizations;

2. Customer insight helps organizations change behaviour in dealing with customers, markets and competition.

Whereas marketing literature tends to deal with customer insight as an *asset*, this study takes a different approach by looking at the *processes* that lead to the development of customer insight happening at the individual manager's level of analysis.

2.2 Marketing literature

This review appraises marketing literature about how managers engage with customer insight from two opposing viewpoints. The first relates to the knowledge service supplier's perspective about the use of customer insight, critiquing the ability of two pertinent empirical domains, market orientation and solutions selling literature, to explain how organizations engage with customer insight. An evaluation of two further empirical domains that take a contrasting customer oriented perspective follows, critiquing the ability of B2B (or industrial) buying behaviour and customer experience literature to explain how organizations and managers experience customer insight.

2.2.1 Supplier-oriented literature

Two domains of literature are relevant for understanding the supplier perspective about organizations' engagement with customer insight from a knowledge services provider point of view. The first, market orientation, is an empirical domain that focuses on the firm's readiness to orient its offering to the real needs of the customer segments it serves. The second, solutions selling, is an empirical literature domain that focuses on the process of suppliers' selling of complex solutions.

Market-orientation literature

The market-orientation literature (Deshpandé and Webster, 1989; Keith, 1960; Kohli and Jaworski 1990; Kohli and Jaworski, 1993; Kotler, 1972; Narver and Slater, 1990) proposes two relevant notions for the organizations' use of customer insight:

1. Successful market-oriented organizations generate and use market insight to best exploit opportunities in the markets tapped (Kohli and Jaworski, 1990); and
2. organizations create their own customer insight through the acquisition, aggregation and exchange of different types of market information,[2] whether tacit or explicit (Kohli and Jaworski, 1990).

Market-orientation literature offers an insufficient answer about the use of customer insight due to two limitations:

1. It views organizations as *suppliers* of goods and services to their customers; and
2. It deals with mechanisms and systems that enable organizations to respond to marketing stimuli (exemplified by Day, 1994; Deshpandé and Zaltman, 1982; Kohli and Jaworski, 1990, 1993) at an organizational level.

Solutions selling literature

Because the contracting out of customer insight involves the purchase of a "solution" from a provider firm, then literature on solutions selling might extend existing understanding about the use of customer insight.

A solution is "a customized and integrated combination of goods and services for meeting a customer's business needs" (Tuli, Kohli, and Bharadwaj, 2007, p. 1). In a customer insight context, insight produced adopts a solution character intended to answer diverse and specialised questions customer organizations have about specific marketing issues. Solutions selling literature emphasizes the need for suppliers to orient their offerings to solve "end-to-end" customer problems or provide an "integrated

[2] Customer or trade partner meetings, sales report analyses, customer database analysis and formal market research like "customer attitude surveys, sales response in test markets, and so on"(Kohli and Jaworski, 1990, p. 5).

combination of products and services customised for a set of customers that allow customers to achieve better outcomes than the sum of the individual components" (Sawhney, 2006, p. 369). Solutions exploit longitudinal processes of collaboration across different functions in supplier and buying organizations (Storbacka, 2011) to "enable improved value creation for the customers" (p. 701).

Scholars tend to be divided in how they look at the value of solutions. Proponents like Cannon and Perreault (1999), Galbraith (2002) and Sawhney, Wolcott and Arroniz (2006) offer a product-centric view about value, embedded in the supplied customised goods and services. Others, like Cova and Salle (2008); Evanschitzky, Wangenheim, and Woisetschlaeger (2011); Macdonald *et al.* (2011); Szwejczewski, Lemke and Goffin (2005) as well as Tuli, Kohli and Bharadwaj (2007) look at value located in the use of solutions, arising from "longitudinal relational processes, during which a solution provider integrates goods, service and *knowledge* components into unique combinations that solve strategically important customer specific problems, and is compensated on the basis of the customer's value-in-use" (Storbacka, 2011, p. 699. Emphasis by author).

Only a partial understanding about how organizations and individuals use customer insights can be extended from solutions selling literature as a result of two limitations. First, the solutions literature largely relates to the servitization of products, where suppliers offer products *bundled with services*. In the customer insight context, the "product" may well be the "information" supplied by the insight firm to the client organization, with anything else being "service" forming part of the solution. The exception is Galbraith (2002), who considers "support, education and consulting" integral aspects of a solution. In practice, customer insight is the result of a process involving the systematic design, gathering, analysis and interpretation of information from multiple sources. This process happens within the customer's organization.

Second, integrated solutions comprise "longitudinal processes of collaboration that involve several functions of both the buying and the selling organizations" (Storbacka, 2011, p. 699). Because insight firms are typically considered an extension of the client organization's marketing function (Gummesson, 1999), literature on integrated

solutions offers only limited applicability. Integrated solutions literature focuses on the relationship between the selling and buying firms, rather than how the members of the client firm interact with multiple sources of insight.

2.2.2 Customer-oriented literature

From a contrasting, customer-oriented perspective, two further literature domains are relevant for understanding how managers may engage with customer insight in marketing decisions. The first, business-to-business buying group behaviour, is an empirical field that relates to how organizations and managers engage in buying knowledge services. The second, which relates to customer experience, looks at how managers may engage with customer insight as individuals.

B2B buying group behaviour literature

The use of customer insight involves the creation of cross-functional teams (Kohli and Jaworski, 1990; Moorman *et al.*, 1993; Moorman, 1995; Zaltman, 2001) and is a phenomenon that MBL literature only investigates rarely.

One domain of empirical studies that explore cross-functional teams and their use of information relates to industrial buying (such as Brennan *et al.*, 2011; Johnston and Bonoma, 1981; McCabe, 1987; Spekman and Ford, 1977; Stoddard and Fern, 2002). Industrial buying (or B2B purchasing) often deals with the "buying centre" concept (Robinson, Faris and Wind, 1967) and may thus explain how organizations initiate their engagement with customer insight.

The buying centre is involved in the purchase decisions for the organization by "acquiring, importing and processing of relevant purchasing-relating information" (Spekman and Ford, 1977, p. 395). While individuals' roles are relatively constant, the members of the buying centre change as companies move from one purchase to the next, occasionally involving outsiders such as advertising agencies or accountancy firm members (Johnston and Bonoma, 1981).

Buying centre members employ formal and informal communication and networks to share insight (Spekman and Ford. 1977). Five dimensions seem to be widely accepted

as descriptors about how buying centres function in organizations: *vertical involvement* (or the level of authority); *lateral involvement* (the different organizational functions involved in the buying centre), *extensivity* (the size of the buying communication network); *connectedness* (persons involved in the buying communication network) and *centrality* (the location of the purchasing manager in the buying communication network) (Johnston and Bonoma, 1981).

The buying task and degree of perceived uncertainty shape the functioning of buying centres (Wilson *et al.*, 1991). Indeed, Robinson *et al.* (1967) distinguish three types of buying tasks (and processes[3]) depending on the level of familiarity that buying centre members have with the product/service purchased. To manage uncertainty, buying centres adopt mechanisms at two levels. The first, happening at a *task level*, involves buying group members adopting flexible, less bureaucratic ways to enable the unreserved flow of non-routine and novel information about the environment (Spekman and Stern, 1979). The second, at an *organizational* level, involves the organization pushing the purchase decision into the domain of a centralized purchasing function (Corey, 1978). In "new buy" occasions (where uncertainty is highest), there is a deeper involvement of senior management (Cardozo, 1980), attracting increased forms of rigidity and reliance on group leaders (McCabe, 1987; Staw *et al.*, 1981).

Three limitations prevent the buying group behaviour literature from offering a valid explanation about how managers use customer insight. First, most studies in this domain rely on single informant survey approaches investigating the role of the entire buying group, a drawback that various critics describe as a key weakness of literature in this domain (like Johnston and Bonoma, 1981; Sheth, 1996; Silk and Kalwani, 1982; Wind, 1978). Second, while literature in this domain looks at different industrial and service contexts, none considers the purchase or use of customer insight, focusing instead on information relating to the environment and suppliers. Third, studies in this domain emphasize the role of individuals in a *purchase* process rather than decisions

[3] Robinson *et al.*, (1967) distinguish three different buying tasks: new task, modified rebuy and straight rebuy. Each of these tasks justifies different levels of insight requirements to be used by the members of the buying centre.

involving implementation of marketing strategies as a direct outcome of the use of customer insight.

Customer experience literature

Customer experience literature is relevant because it offers some understanding about how organizations experience customer insight provided as a service by insight suppliers. Customer experience studies typically relate to the interaction between the customer and the brand (LaSalle and Britton, 2002; Shaw and Ivens, 2004) and focus on the customer-supplier interaction at an individual level of analysis (LaSalle and Britton, 2002; Prahalad and Ramaswamy, 2004; Schmitt, 1999, 2000). A dominating inference in customer experience literature is that customers co-create their experiences (and value) with their suppliers (Carù and Cova, 2003, 2006; LaSalle and Britton, 2002; Pine and Gilmore, 1998, 2001; Smith and Milligan, 2002; Verhoef *et al.*, 2009).

Customer experience literature, unlike B2B buying group behaviour studies, focuses on the individuals' experience in *using* a brand rather than just the *buying* process. Studies in this literature subset rarely look at B2B phenomena and remain largely relevant to *consumer* experience of brands (whether products, as in Gentile *et al.*, 2007, or services, as in Arnould and Price, 1993 and Lemke *et al.*, 2011). While customer experience literature remains focused on a phenomenon at an individual level of analysis, it offers only a limited understanding about how managers and their organizations experience customer insight.

2.2.3 Limitations in the marketing literature

Both customer- and supplier-oriented literature domains can only extend a partial understanding about how organizations create value from their use of customer insight.

Supplier-oriented literature about market orientation may explain why organizations engage in the acquisition of customer insight from the users' points of view. However, market-orientation literature remains more relevant for suppliers and their orientation of resources in *supplying* customer insight to organizations. Literature about solutions selling focuses on how suppliers arrange and mobilize resources in providing a solution

to their customers. Literature typically focuses on the servitization of goods that involves the integration of supplier and customer firm resources. Thus, supplier-oriented literature shuns the use of customer insight but remains relevant to the supply of insight by supplier firms, thereby offering a limited interpretation about how organizations may use customer insight and co-create value.

Unlike supplier-oriented literature, studies taking a customer's point of view may offer an initial grasp about this study's phenomenon of interest. Indeed, B2B buying studies relate to how customer organization members organize themselves in buying a solution or service but offer little explanation regarding how managers or organizations use customer insight. Also, studies on B2B buying often focus on teams of managers as the level of analysis, contrasting with empirical studies in customer experience. Indeed, studies of customer experience underscore the individual as the level of analysis and rarely relate to experience from organizational or group perspectives.

2.3 Organizational learning literature

Managers' use of customer insight constitutes a knowledge process. Organizational learning literature may thus offer initial explanations about how managers use customer insight to a further extent than does the marketing literature.

Three organizational learning literature domains are relevant to the use of customer insight: KP, MBL and absorptive capacity, each of which will be discussed in the next sections.

Two further organizational learning literature domains provide an additional yet very limited view about how managers, individually or in groups, use customer insight: organizational sense-making and communities of practice. These two domains are briefly considered in the following paragraphs.

First, organizational sense-making literature (exemplified by Weick, 1995; Weick, Obstfeld and Sutcliffe, 2005; Weick and Roberts, 1993) examines how organizations and executives structure the unknown to make sense of events. Sense-making literature proposes (a) why organizations may turn to external information providers, and (b) how

managers (as groups) use information and interpret the world around them to construct "realities", particularly during specific events or crises. Sense-making literature, however, does not relate to the use of customer insight.

A second literature domain relates to communities of practice (after Lave, 1991; Lave and Wenger, 1999; and Wenger, 2008, 2010). Empirical studies propose how learning happens in situ among learners who observe each other. Customer insight users may form temporary communities where marketing decisions and interpreting customer insight are a common, shared interest. Empirical studies in this domain focus on the conditions that promote the formation of communities of practice, the life cycle of these communities as well as how knowledge is kept alive among these community members.

Literature in either sense-making or communities of practice is limited in its potential explanation about how managers, individually or as groups, use customer insight. While sense-making literature provides an initial overview about why executives may turn to customer insight to appraise market dilemmas, it does not discuss how managers use customer insight. Contrastingly, literature on communities of practice explores the conditions that support the formation and functioning of groups of managers who share one common interest but *does not* provide direct answers as to *how* managers interact within and across groups in their use of customer insight.

2.3.1 Knowledge process theory

The processing of market, customer and competitor information for the generation and use of customer insight is akin to a knowledge process. KP literature describes how information evolves into knowledge through a cognitive process. The *sharing* of knowledge is a dominant theme in this literature, which remains relevant to the organizational and individual level of analysis, recognizing that knowledge transfer "transcends the individual level to include transfer at higher levels of analysis, such as group, product line, department or division" (Argote and Ingram, 2000, p. 151).

Conceptual studies propose how individuals *intuit* patterns or possibilities by relating to personal experiences, and *interpret* these intuitions in ways that render them explicable to themselves and to others (Crossan *et al.*, 1999). In so doing, individuals transform

previously tacit knowledge into an explicit form and exchange interpretations through a *socialization* process (Nonaka and Takeuchi, 1995) to *integrate* them into one shared understanding. This common understanding guides mutual adjustment and behaviours in organizations. Individuals embed this understanding in organizational and individual routines, rules and procedures through *institutionalization* (Crossan *et al.*, 1999), remaining explicit in the form of reports, plans, manuals and presentations through a process of *combination* (Nonaka and Takeuchi, 1995).

Literature makes a clear delineation between

- *tacit* knowledge: the "personal" or unstated knowledge held in one's mind (after Polanyi, 1962) or "know-how" that is revealed by application (Grant, 1996); and
- *explicit* knowledge: the overt "impersonal" scientific knowledge (after Polanyi, 1962) or "know-what" that is codified and easily transferable (Grant, 1996)

and proposes processes constituted of behaviours that transform explicit knowledge into tacit knowledge and vice versa in the form of a feedback loop mechanism, where memory plays a role at the individual level of analysis. This observation invokes a further organizational learning literature subset relating to *organizational memory* (e.g., Walsh and Ungson, 1991) to which MBL literature refers (Baker and Sinkula, 1999; Day, 1994b; Day, 2002; Huber, 1991; Slater and Narver, 1995).

Studies on inter-organizational knowledge transfer may suggest an explanation for the donor and recipient organizations' features, inter-organizational dynamics and the nature of knowledge that influences the knowledge transfer process. However, these studies offer little explanation about how organizations engage with customer insight as a result of two key limitations.

First, KP studies focus on organizational internal boundaries (horizontal and hierarchical) and their limiting effects on intra-organizational knowledge transfer. There is a lack of understanding about how such limitations of intra-organizational knowledge transfer manifest at the individual level of analysis.

Second, individuals' engagement with customer insight depends on a set of beliefs, norms and assumptions that accrue from experience, observation and reflection, or what

Choo (1998) terms *cultural knowledge*. Cultural knowledge is akin to organizational memory that builds from individuals' experiences and impacts their perspective about work, purpose, perceived problems and opportunities, aside from their assessment about "the value and potential of new knowledge" (Choo 1998, p. 144). Observations about cultural knowledge typically relate technological and R&D knowledge and thus have limited direct relevance to the use of customer insight.

2.3.2 Absorptive capacity

Absorptive capacity is the "ability to recognise the value of new, external information, assimilate it, and apply it to commercial ends" (Cohen and Levinthal, 1990, p.128) and influences organizations' take-up of knowledge from the industry or sector in which they operate to apply knowledge in the elaboration and implementation of strategy. Empirical studies on absorptive capacity relate to both individual and organizational levels of analysis and suggest how absorptive capacity enhances organizations' power to predict the nature of future technological advances and the potential for commercialization of such advances (Cohen and Levinthal, 1994). Such capability relies on the cumulative effect of three stages (that may not be sequential): *recognizing value*, *assimilation* and *commercialization* (or the application) of knowledge (Cohen and Levinthal, 1990, p. 128).

Absorptive capacity influences the effectiveness of knowledge transfer between organizations (Lane and Lubatkin, 1998), supporting the *student* firm's absorption of knowledge from the *teacher* organization. Knowledge transfer and learning can involve any of three types of methods: *passive*, *active* and *interactive* (Lane and Lubatkin, 1998). But for any further absorption and application of knowledge into action to happen, an organization needs to have an initial level of capacity (Zahra and George, 2002).

Conceptual literature in this domain proposes two types of absorptive capacity: *potential* (that is relevant to an organization's *acquiring* and *assimilating* new knowledge) and *realised* (that is relevant to organization's ability to *transform* and *exploit* knowledge) (Zahra and George, 2002). However, conceptual and empirical literature on absorptive capacity is divided in relating to the process of knowledge

utilization. A first strand aligns with Cohen and Levinthal (1990; 1994) to offer a three-step process: *recognise* → *assimilate* → *apply*. A second strand follows Zahra and George's (2002) reconceptualization of absorptive capacity to propose a four-step model: *acquire* → *assimilate* → *transform* → *exploit*.

Absorptive capacity literature is only partially relevant to the use of customer insight in as a result of two limitations.

First, empirical literature on absorptive capacity focuses on the partner dyads of organizations (as in strategic alliances, parent-subsidiary or joint venture arrangements) that share R&D knowledge or technical know-how. These partnerships are typically governed by agreements relating to joint interest or shareholding to ease and promote knowledge exchange. This aspect offers a distinct difference from the typical reality between customer insight providing firms and their customer organizations, where the insight is exchanged for monetary sums.

Second, most absorptive capacity empirical studies focus on the organizational level of analysis without offering some understanding about how firms organize and rely on their members to effectively create and apply knowledge. The exceptions are Matusik and Heeley (2005) and Griffith and Sawyer (2010), who relate to absorptive capacity at individual and team levels of analysis, respectively.

2.3.3 Market-based learning

MBL literature looks at how organizations, motivated by a market-oriented learning culture, engage in making sense of their marketing context (Argyris and Schön, 1978). Market orientation is an organizational philosophy in which organizations are committed to learning. This commitment stimulates organizations to generate market information (Sinkula, Baker and Noordewier, 1997) through "market focused generation", "collaboration", "experimentation" and "repetitive experience" (Slater and Narver, 2000, p. 121). MBL relies on the dissemination of "information about customers' expressed and latent needs, and, competitors' capabilities and strategies", or customer insight (Slater and Narver, 2000, p. 121), across all managers, helping them plan and execute marketing decisions.

Organizations use customer insight to respond to market changes, employing any one of three different types of insight use: "action-oriented use",[4] "knowledge-enhancing use"[5] or "development of intelligence for affective use" [6] (Slater and Narver, 2000). These usage behaviours echo Beyer and Trice's (1982) propositions about the uses of social research: *instrumental*, *conceptual* and *symbolic*.

Two key organizational tenets motivate the generation and use of customer insight:

- a commitment to learning that renders organizations able to process market information (Morgan and Turnell, 2003; Sinkula *et al.*, 1997), and
- an excellence orientation at a strategic level that pushes an organization's learning ability (Zahay and Griffin, 2004).

Two strands of works characterise this theoretical niche. The first focuses on dissemination and learning processes (like Day, 2002; Kohli and Jaworski, 1993). The second emphasizes the relationship between the insight supplier and customer organizations along with the influences impacting this relationship. Empirical works within this strand look at how customer insight flows from the insight supplier to the customer organization *(Moorman et al., 1993; Moorman et al.,* 1992) and how such insight flows across the customer organization's users (e.g., Deshpandé and Zaltman, 1982; Moorman 1995).

MBL can offer only a partial explanation about how organizations use customer insight, which is a result of three key weaknesses. First, most empirical studies focus on the marketing function as the level of analysis, thus offering a partial explanation about how insight is shared and used across the entire organization as proposed by market orientation literature. That most studies on the use of insight employ cross-sectional surveys using a single-informant design is a factor that stages this limitation to a higher level of prominence.

4 Or, the direct use of knowledge in business
5 Laying the foundation for future behaviour change
6 Intended to increase satisfaction or decrease dissonance with a change already undertaken

Second, knowledge is a *process* embedded in action. Organizations develop knowledge in retrospect by making sense of action and judging the acceptability of rationales (Daft and Weick, 1984). Contrastingly, MBL studies relate to knowledge as an asset, almost tangible in nature that can be transferred from one individual to another easily.

Third, knowledge constitutes tacit and explicit portions (Grant, 1996; Polanyi, 1962) that are present at individual, group and organizational levels. MBL literature typically focuses on the explicit portion of customer insight, possibly as a result of the prevailing positivist approaches employed in this literature domain. In this way, MBL studies do not explain how organizations and individuals exploit the tacit portion of customer insight that is composed of users' construction (from experiences) about prevailing mechanisms, influences and conditions impacting customer behaviour.

2.4 The ontological tension in the literature domains review

The theoretical positioning of this study further considers two aspects of the literature domains reviewed above. First, organizational learning literature that informs this study adopts a largely *social constructionist* perspective. The exceptions here are MBL and absorptive capacity empirical works. By contrast, marketing theory takes a largely *positivist* view. Table 2-2 summarizes the ontological perspectives of these different literature domains.

Table 2-2 Ontological perspectives of the literature domains reviewed

Theoretical Domain	Literature sub-domain	Prevailing Ontological Perspective
Organizational Learning	Know ledge process	Social constructionist
	Market Based Learning	Positivist
	Absorptive Capacity	Positivist
	Sense-making	Social constructionist
	Communities of Practice	Social constructionist
Marketing	Market Orientation	Positivist
	Solutions Selling	Positivist
	Buyer Group	Positivist/Social constructionist
	Customer Experience	Positivist

These ontological differences create considerable tension that hampers the reconciliation of the different views into one understanding about how organizations create value from their use of customer insight in two ways.

1. Empirical studies in market orientation, solutions selling, buyer group behaviour, and customer experience domains as well as those within MBL and absorptive capacity fields discuss *influences* impacting a process that is separately dealt with by scholars investigating knowledge processes;
2. The few social constructionist studies about buyer-group behaviour, absorptive capacity and MBL literature may inform about insight use *processes*. However, these studies deal with insight use at an organizational level and do not relate to the processes happening at the individual user's level of analysis.

2.5 Summary

Relevant organizational learning and marketing domains were introduced to describe this study's theoretical positioning. This overview highlighted how conceptual and empirical studies in both theoretical domains offer only a partial explanation of how organizations use customer insight.

The next chapter appraises these literature domains in further depth to propose a conceptualization to explain how individuals and groups use customer insight.

3 CONCEPTUAL DEVELOPMENT

3.1 Overview

This chapter reconciles the different theoretical views that were presented in Chapter 2 into one conceptualization of a process that describes managers' use of customer insight. It attempts to resolve the ontological tensions that mark the distinctive qualities of organizational learning and marketing theory as described in Section 2.4. Rather than focusing on the influences impacting the use of customer insight, this chapter proposes a process that happens at the individual and group levels of analysis, suggesting behaviours involved in the use of customer insight.

3.2 Knowledge: Nature and processes

KP literature suggests six aspects relevant to organizations' use of customer insight:

1. There are two prevailing views about cognition and the nature of knowledge: the *cognitivist* view, where knowledge consists of correct *representations* of the world as objects or events, after von Krogh (1998), and the *constructionist* view, where knowledge is a construction of *various* representations, after von Krogh (1998). Scholars avoid arguing about their adopted view by providing neutral descriptions of the nature of knowledge, like "justified true belief" (Nonaka and Takeuchi, 1995) or the convergence between plausible worlds ("beliefs that strike an individual as being true") and probable worlds ("beliefs that have to be justified to others") (Boisot and Macmillan, 2004, p. 509).

2. Knowledge is either tacit or explicit. *Tacit* knowledge is that *personal* or unstated knowledge held in one's mind (after Polanyi, 1962) or *know how*, revealed through application (Grant, 1996). It is viscous and difficult to transfer or flow (Boisot, 1998, p. 120). Conversely, e*xplicit* knowledge is overt *impersonal* scientific knowledge (after Polanyi, 1962) or *know what*, that is codified, fluid, free from extraneous data and easily transferable across individuals and organizations (Boisot, 1998; Grant, 1996). *Explicit* and *tacit* knowledge represent

the two epistemological extremes of knowledge (Nonaka, 1991) along the "viscosity" dimension (Boisot, 1998).

3. Knowledge transfer happens when one unit (department or division) influences another (Argote and Ingram, 2000). Although most literature seems to address knowledge transfer at an organizational level, the underlying premise is that knowledge transfer spreads beyond the individual to manifest effects at group or organizational levels of analysis (Argote and Ingram, 2000). At an organizational level, knowledge transfer happens when the receiving unit experiences changes in knowledge or performance. The notion of *levels* concurs with the ontological dimension of knowledge that Nonaka and Takeuchi (1995) propose, distinguishing between individual, group, organizational and inter-organizational levels of knowledge transfer.

4. Effort (in terms of cost and difficulty) is a characteristic of the social process through which knowledge is exchanged. Effort determines the extent of knowledge sharing that can happen between and within organizations (Argote and Ingram, 2000; Jensen and Szulanski, 2004; Szulanski, 1996; Szulanski and Cappetta, 2003). Nonetheless, studies in KP theory often assume knowledge transfer to be *effortless* and *costless*.

5. *Stickiness* describes the difficulty that hampers knowledge transfer (Jensen and Szulanski, 2004; Szulanski and Cappetta, 2003). Empirical studies on knowledge transfer identify four key themes as sources of stickiness (Easterby-Smith *et al.*, 2008): the characteristics of the *donor* (supplier) and *recipient* (customer) firm, inter-organizational dynamics and the nature of knowledge involved.

6. Knowledge processes follow feedback loop patterns (Beyer and Trice, 1982; Crossan *et al.*, 1999; Nonaka and Takeuchi, 1995). Individuals *intuit* patterns or possibilities by relating to personal experiences, and they *interpret* these intuitions in ways that help them explain the relevant phenomena to themselves and to others (Crossan *et al.*, 1999), transforming the tacit into the explicit. Individuals *integrate* these interpretations by sharing and exchanging (or socializing) with peers to form a shared understanding (Nonaka and Takeuchi, 1995). Formed

> common understanding aligns individuals' mutual adjustment and behaviours in organizations. Eventually, these behaviours become embedded in routines, rules and procedures through *institutionalization* (Crossan *et al.*, 1999). The explicit portion of this common understanding (like reports, plans, manuals and presentations) arises from a process of *combination* (Nonaka and Takeuchi, 1995), but the organization's knowledge is incomplete without other tacit aspects like routines, procedures or rules that organizations keep alive in their members' minds.

Crossan *et al.*'s (1999) 4I model offers an initial inspiration to propose how individuals engaging with insight *intuit* their needs for information and appraise content. Users exchange information with each other during a socialization stage (Nonaka and Takeuchi, 1995) and adopt their comprehension (Beyer and Trice, 1982) into their construction of *interpretations* (Crossan *et al.*, 1999). Users form an initial understanding by combining information (Nonaka and Takeuchi, 1995) from various sources within and outside their organization (Crossan *et al.*, 1999). By producing reports and presentations, users render their understanding explicit (Nonaka and Takeuchi, 1995), sharing it with peers within the organization. Peers accessing or receiving this understanding would apply it in marketing decisions, although this step may involve additional merging of other relevant pieces of information. Marketing decisions lead to changes in organizational behaviour that *institutionalize* this understanding (Crossan *et al.*, 1999), which is in turn *internalized* as changes in routines, structures or procedures (Nonaka and Takeuchi, 1995) or *implemented* as part of the organization's processes (Beyer and Trice, 1982). A graphic conceptualization of this process as inspired by KP literature is set out in Figure 3-1, while Figure 3-2 offers a multilevel perspective of this model.

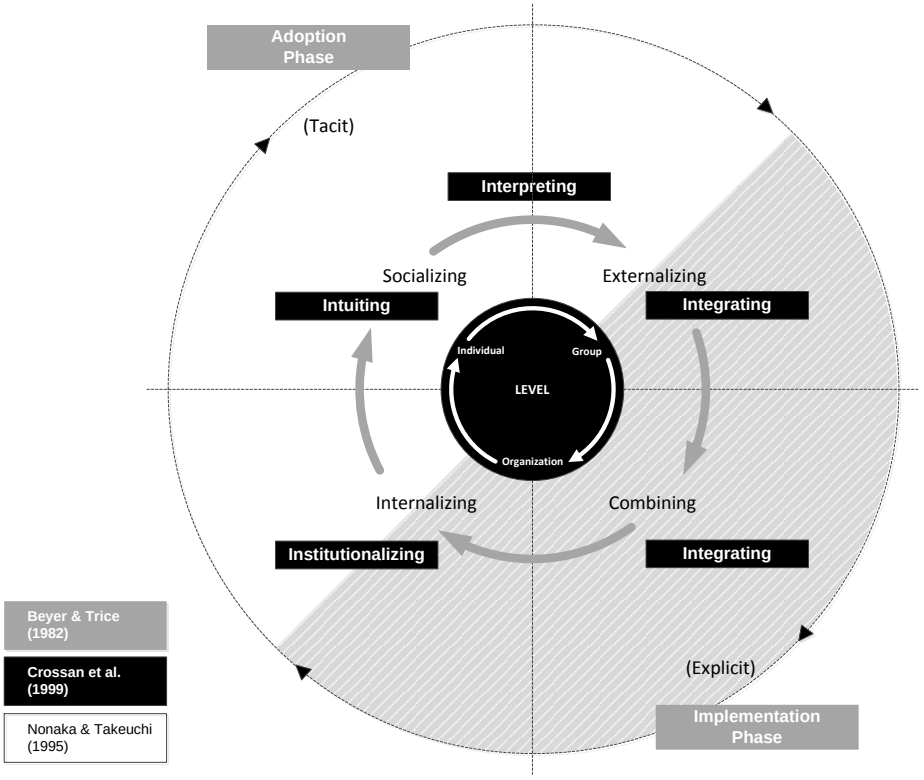

Figure 3-1 A conceptualization of organizational knowledge processing (Source: Author)

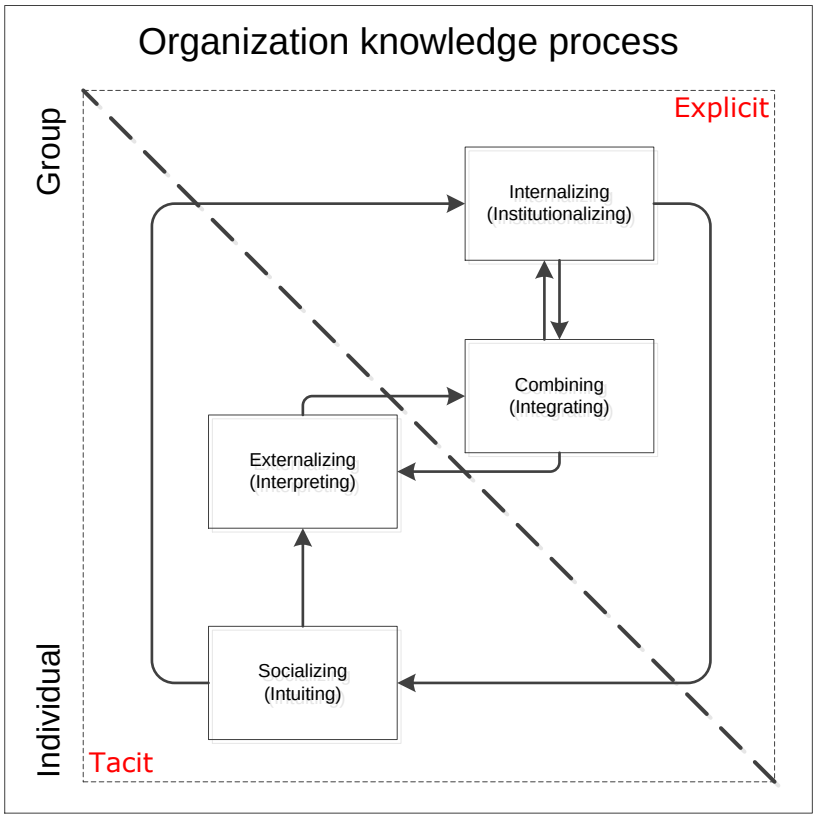

Figure 3-2 A multi-level perspective of organizational knowledge processing concept (Source: Author)

The propositions that Beyer and Trice (1982), Crossan *et al.* (1999) and Nonaka and Takeuchi (1995) offer on knowledge processes do not relate directly to the use of customer insight. Hence, the conceptualization above may only suggest what happens during the creation, sharing and application of customer insight. Suppliers provide explicit information in the form of data, reports and presentations, among others, that flow directly to customer organizations. Suppliers may also share a level of tacit knowledge as experts from both supplier and client organizations exchange interpretations, advice, opinions and suggestions (Figure 3-3).

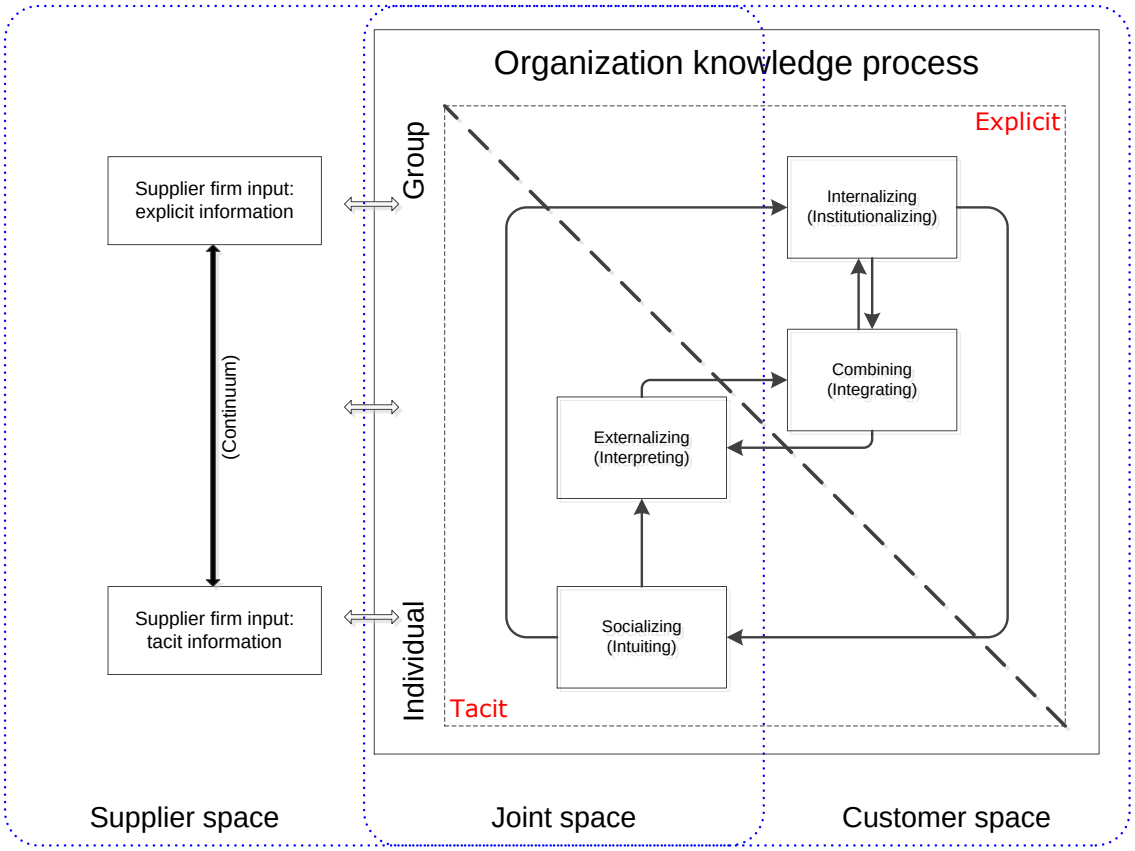

Figure 3-3 Experiencing customer insight: Proposed mechanism where supplier firms transfer insight to client firms (Source: Author)

Three key limitations prevent the conceptualization in Figure 3-3 from providing a complete understanding about the customer insight process.

1. This conceptualization assumes that customer insight flows unhindered between supplier-customer organizations and within the customer (recipient) organization.

Rather, the flow between supplier and customer organizations is restricted as a result of four internal and inter-organizational relationship factors:

i. the power asymmetry between the two firms (Inkpen, 1998; Inkpen and Beamish, 1997; Kale and Anand, 2006; Mason and Leek, 2008; Uzzi and Lancaster, 2003);[7]

ii. the trust and associated risk as perceived by both supplier and customer organizations (Maltz and Kohli, 1996; Moorman *et al.*, 1992; Moorman *et al.*, 1993);

iii. the organizational structure, like horizontal and vertical boundaries or the "distances" between different groups and individuals exchanging insight, as in Deshpandé (1982); Diamantopoulos and Horncastle (1997); Kohli and Jaworski (1990); Zaltman and Deshpandé (2001), as well as cultural dissimilarities between the supplier and customer organizations. Organizational structures and cultural differences prevent decision-making groups from accessing externally acquired insight;

iv. the absence of social ties (such as social cohesion, common language and geographic boundaries) between supplier and customer organization members that can facilitate communications. Social ties are important and relevant to customer insight processing at the individual user's level of analysis (Moorman *et al.*, 1992; Wills and Williams, 2004; Zaltman and Deshpandé, 2001).

2. This conceptualization ignores the effect of individuals' past experiences, organizational culture, absorptive capacity (see Section 3.3) and knowledge-retaining capabilities in the knowledge transfer process and knowledge diffusion within the insight user organization (Huber, 1991; Menon and Varadarajan, 1992; Moorman *et al.*, 1992; Sinkula, 1994; Slater and Narver, 1994, 1995; Toften and Olsen, 2003; Wills and Williams, 2004).

[7] Literature here relates to knowledge of a general nature, rather than MR information and customer insight.

3. This conceptualization overlooks the effects of knowledge ambiguity, complexity and tacitness (Deshpandé and Zaltman, 1982; Maltz and Kohli, 1996; Menon and Varadarajan, 1992; Moorman *et al.*, 1992; Moorman *et al.*, 1993; Souchon and Diamantopoulos, 1996; Toften and Olsen, 2004).

The considerations above suggest that the transfer of tacit and explicit insight between the insight supplier and customer organizations happens at individual and group levels. Factors, conditions and mechanisms like organizational characteristics of the user firm, the characteristics of the supplier firm and the dynamics governing the relationship between supplier-user organizations impact the effectiveness of insight transfer from supplier to user organizations. One of the user firm characteristics influencing this process is absorptive capacity, which affects the user organization's ability to acquire and use customer insight at organizational/group and individual levels.

3.3 Absorptive capacity and co-creating knowledge

Absorptive capacity is the firm's ability to exploit external knowledge, relying on pre-existing knowledge in the form "basic skills, a shared language and a knowledge of the most recent scientific or technological developments in a given field" (Cohen and Levinthal, 1990, p. 128). Absorptive capacity:

- accounts for a *property* and *process* that *enhances* the transfer and diffusion of knowledge between and within organizations (Easterby-Smith *et al.*, 2008); and
- enables the organization recognizing the "value of new external knowledge, [to] assimilate it and apply it to commercial ends" (Cohen and Levinthal 1990, p. 128) by identifying, selecting and converting valuable new knowledge into usable knowledge (Cadiz, Sawyer and Griffith, 2009).

Absorptive capacity involves two types of capabilities (Zahra and George, 2002): (a) *potential* absorptive capacity, or the proficiency enabling organizations to value and acquire external knowledge that can be assimilated internally, and (b) *realized* absorptive capacity, or the organization's capability to transform and exploit acquired and assimilated knowledge. Absorptive capacity is a dynamic capability relevant to the entire organization as the level of analysis, extending from the individuals to the entire firm (Cohen and Levinthal, 1990; 1994). As absorptive capacity impacts any

knowledge process across the entire organization, its influence is likely to manifest at group and individual levels of analysis during the use of customer insight.

Three limitations prevent the literature on absorptive capacity from fully explaining how organizations use customer insight as empirical studies on absorptive capacity. This literature

1. investigates the phenomenon at an organizational level, except for rare contributions like that by Matusik and Heeley (2005), who relate to the individual level of analysis;

2. is divided in how it conceives absorptive capacity, concurring with the propositions of either Cohen and Levinthal (1990; 1994) or Zahra and George (2002). None of these empirical studies in this domain consider absorptive capacity as a process, but rather, they see absorptive capacity as a *capability* underlying a firm's competence in acquiring, creating, sharing and exploiting knowledge. When relating to a knowledge process, empirical studies on absorptive capacity consider knowledge processes to be constituted of four types of behaviours: acquisition, assimilation, transformation and exploitation, each conceived as a phase of a learning process (Zahra and George, 2002) without explicating actions that happen at group or individual levels of analysis; and

3. treats absorptive capacity as a static property rather than a process. Studies examine extra-organizational, inter-organizational and intra-organizational level phenomena, treating absorptive capacity as a variable in quantitative cross-sectional investigations that involve single-informants. These observations raise concerns about how much absorptive capacity studies offer a true understanding about a knowledge process;

4. ignores the role of organizational memory in the knowledge processes, leaving important gaps in our understanding about absorptive capacity and the exploitation of knowledge owned by the organization.

By contrast, this study focuses on the knowledge processes involved in customer insight and considers absorptive capacity an influencing factor at the individual manager level

of analysis. Absorptive capacity is seen as a dynamic phenomenon happening within and among individuals, justifying approaches that involve multiple informants as opposed to single, key informants within an organizational setting. This study also seeks to answer important questions that literature about absorptive capacity is unable to resolve. For instance, how do individuals store and retrieve customer insight? How does absorptive capacity interrelate with organizational memory in the context of customer insight at individual and group levels of analysis? The next section seeks to address these questions.

3.4 Market-based learning

MBL empirical studies draw from a management science perspective within organizational learning theory (like Huber, 1991) to explain market orientation as an organization-wide phenomenon. Market orientation:

1. involves an organization-wide commitment to the generation, dissemination and use of market intelligence to respond to current and emerging customer needs (Kohli and Jaworski, 1990); and

2. drives organization-wide learning from the organization's interaction with its markets .

This section reviews current MBL thinking, relevance and capability to explicate how organizations use customer insight in pursuing market orientation.

MBL relies on robust norms that guide information sharing and integration among organizational members, exploiting customer and competitor analyses (Slater and Narver, 1995). These norms are relevant to a process of inquiry initiation, information dissemination, information utilization and evaluation of outcomes to feed into organizational memory (Baker and Sinkula, 1999; Day, 1994; 2002; Huber, 1991; Slater and Narver, 1995). MBL studies see organizations as interpretation systems dependent on beliefs and assumptions about the environment, often concurring with Daft and Weick's (1984) view that organizations choose how to engage in the interpretation of their environment.

A systematic review of MBL empirical studies provides a perspective on how organizations use customer insight (Table 3-1). Under this perspective, the key steps in the organizational learning process start by (1) *generating* or *acquiring* the needed customer insight. This insight is (2) *disseminated* among all organizational members, who in turn, process information and construct a shared (3) *interpretation* (Slater and Narver, 1995).

Lessons emerging from the firm's response to market and customer realities that arise are (4) *shared* or (5) imprinted into the organization's *memory*. Organizational memory is a critical *asset*, accumulating the firm's market knowledge as well as facilitating feedback mechanisms (Sinkula *et al.*, 1997) and norms that guide information sharing and integration among organizational members (Slater and Narver, 1995).

MBL literature also distinguishes between three *uses* of customer insight. The first is *instrumental* use, where managers apply insight in direct ways (Beyer and Trice, 1982) in marketing decisions that influence external constituencies (Moorman, 1995). Instrumental use is specific, involving insight that helps solve a particular problem or informs a particular decision (Maltz and Kohli, 1996) about an immediately exploitable opportunity (Diamantopoulos and Souchon, 1996). By contrast, *conceptual* use involves insight that influences actions in less specific, more indirect ways than instrumental use (Beyer and Trice, 1982). Insight here changes the thinking processes without any immediate concrete marketing action (Maltz and Kohli, 1996) that happens at a strategy level (Moorman, 1995) but without "putting information to any specific, documentable use" (Diamantopoulos and Souchon, 1996, p. 120). A third type of insight application is *symbolic* use, where managers select or distort information to justify or legitimate predetermined positions (Beyer and Trice, 1982) or to justify decisions already made with retrospectively-acquired information (Diamantopoulos and Souchon, 1996).

This systematic review of 43 MBL empirical studies notes that most studies conceive insight use as a process involving between three and five steps. Almost three quarters of the papers identify the *acquisition* (Step 1), with its importance particularly emphasized in the works of Kohli and Jaworski (1990) and Moorman (1995).

Table 3-1 Use of customer insight: A systematic review of empirical studies of market-based organizational learning (Source: Author)

	Approach		Sample size	Informant		Industry context	Level of analysis		Customer insight use process – steps studied				
	Quantitative	Qualitative	(n=)	Single	Multiple		Individual	Collective	Acquire	Disseminate	Interpret	Use	Store
Deshpandé (1982)	✓		92	✓		Mfg	✓			✓	✓	✓	
Lee *et al.*, (1987)	✓		120	✓		NA	✓				✓	✓	
Zaltman & Moorman (1988)		✓	170		✓	All	✓		✓			✓	
Hill (1988)		✓	4 firms			NPD, UK		✓	✓			✓	
Diamantopoulos *et al.*, (1990)	✓		33	✓		Design exporting		✓	✓			✓	
Kohli & Jaworski (1990)		✓	62	✓		All		✓	✓	✓		✓	
Sinkula (1990)	✓		195	✓		Various	✓		✓	✓		✓	
Moorman *et al.*, (1992)	✓		779		[a]	All	✓		✓		✓	✓	
Moorman *et al.*, (1993)	✓		779		[a]	All	✓		✓		✓	✓	
Hart, Webb, & Jones (1994)	✓		50	✓		UK exporters		✓	✓			✓	
Moorman (1995)	✓		92	✓		All		✓	✓	✓	✓	✓	[b]
Diamantopoulos & Souchon (1996)		✓	12	✓		Various	✓	✓	✓	✓	✓	✓	[b]
Maltz & Kohli (1996)	✓		788	✓		High tech mfg.	✓		✓	✓		✓	
Diamantopoulos & Horncastle (1997)	✓		50	✓		NA	✓		✓		✓	✓	
Souchon & Diamantopoulos (1997)	✓	✓	39	✓		Export firms	✓		✓		✓	✓	[b]
Hurley & Hult (1998)	✓		9,468 (10 firms)		✓	R&D firms		✓				✓	
Diamantopoulos & Souchon (1999)	✓	✓	198	✓		Export firms		✓	✓			✓	[b]
Perks (2000)		✓	4 firm dyads		✓	NPD dyads		✓	✓	✓		✓	✓
Low & Mohr (2001)	✓		421	✓		All	✓	✓				✓	
Maltz *et al.*, (2001)	✓		718 (265 firms)		✓	High tech mfg.	✓			✓		✓	[b]
Zaltman & Deshpandé (2001)	✓		176	✓		Cons. mfg / services	✓	✓	✓		✓	✓	
Diamantopoulos & Siguaw (2002)	✓		71	✓		NA	✓					✓	
Campbell (2003)		✓	14 (5 firms)		✓	Canadian fin. servs.		✓	✓	✓	✓	✓	
Souchon *et al.*, (2003)	✓		992	✓		Exporters, 5 cntries		✓	✓			✓	
Souchon *et al.*, (2004)	✓		253	✓		NZ Mfg firms	✓	✓				✓	[b]
Toften & Olsen (2004)	✓		125	✓		Seafood		✓	✓			✓	[b]
Wills & Williams (2004)		✓	1 firm		✓	Various		✓	✓	✓	✓	✓	[b]
Atuahene-Gima *et al.*, (2005)	✓		175	✓		Mfg		✓	✓	✓		✓	
Ryals & Wilson (2005)		✓	3 firms		✓	Services		✓	✓		✓	✓	✓
Toften (2005)	✓		125	✓		Seafood		✓			✓	✓	✓
Santos-Vijande *et al.*, (2005)	✓		272	✓		Mfg		✓	✓	✓		✓	[b]
Maltz *et al.*, (2006)	✓		221	✓		All		✓	✓	✓	✓	✓	
Citrin *et al.*, (2007)	✓		150	✓		Software		✓				✓	✓
Maklan *et al.*, (2008)		✓	1 firms		✓	Online betting		✓	✓		✓	✓	[b]
Bailey, Baines, Wilson, & Clark, (2009)		✓	25 from 5 forms		✓	Service firms		✓	✓			✓	
Kim & Atuahene-Gima (2010)	✓		157	✓		Mfg		✓	✓			✓	✓
Cillo, De Luca, & Troilo (2010)		Mixed	30 (qual), 143 (quant)	✓		Fashion		✓	✓	✓	✓	✓	[b]
Korhonen-Sande (2010)	✓		228	✓		Various Mfg	✓		✓	✓		✓	
Sampaio *et al.*, (2011)	✓		234	✓		All	✓					✓	
Wei & Wang (2011)	✓		180		✓	Various		✓	✓	✓		✓	
Hodgkinson, Hughes, & Hughes (2012)	✓		275	✓		Public leisure		✓	✓	✓		✓	
Rollins *et al.*, (2012)		Mixed	114 firms		✓	Various		✓	✓	✓	✓	✓	
Smits & Kok (2012)		✓	21 (1 firm)		✓	Chemical		✓	✓	✓	✓	✓	✓

[a] = dyads

[b] = treat "embedding" of lessons as conceptual use of customer insight

Few studies investigate *dissemination* (Step 2) in the insight use process (as in Maltz and Kohli, 1996, for example). Fewer than half of the papers discuss *interpretation* (Step 3). The exceptions are Diamantopoulos and Souchon (1996), Moorman (1995) and Sinkula (1994), all of whom accentuate the role that interpretation plays in the insight use process.

All of the studies reviewed identify the *use* or *exploitation* (Step 4) of customer insight, with papers like Deshpandé (1982), Menon and Varadarajan (1992) and Souchon and Diamantopoulos (1996) making a special emphasis. Less than one fifth of the papers reviewed deal with organizational memory (Step 5) as described by Huber (1991), with rare studies like Perks (2000) and Toften (2005) making reference to insight storage.

Despite Kohli and Jaworski (1990) proposing market orientation and associated customer insight use as a process as involving the *entire* organization, this review identifies four key limitations in MBL studies in their relating to the use of customer insight.

a) The meaning of "use" is not free from ambiguity. "Use" is either undefined or else presented tacitly if not implicitly assumed. This lack of clarity renders the concept of "use", "using" and "usage" an ontological oversimplification. Most MBL authors deal with this oversimplification by specifying the type of use: *instrumental*, *conceptual* and *symbolic* use. Instrumental use is a *direct, short-term* outcome of customer insight, whereas conceptual use is an *indirect, longer-term* outcome of customer insight, relying on organizational memory. By contrast, symbolic use relies on customer insight to justify previously-held positions/decisions. The distinction between instrumental and conceptual use is often blurred or contended to be aspects of the same dimension of use (as in Diamantopoulos and Souchon, 1999; Souchon *et al.*, 2003; Toften, 2005; Toften and Olsen, 2003).

b) Most empirical studies in this review apply cross-sectional surveys using a single-informant design (Seidler, 1974; see Table 3-1). This means that current understanding of how organizations acquire and use customer insight is incomplete (Rollins *et al.*, 2012).

c) MBL studies typically relate to the explicit portion of customer insight, treating knowledge as that fluid entity that organizational functions or members can disseminate with relative ease. In contrast, studies rarely relate to customer insights' *stickiness* (after Szulanski, 1996) or *viscosity* (after Boisot, 1998) as well as the processes relevant to tacit portions of customer insight across individual users (potentially inspired by Nonaka and Takeuchi, 1995).

d) Empirical MBL studies seemingly relate to four or five steps, where use of customer insight ends with lessons being stored into organizational memory (see Figure 3-4). However, only rarely do MBL scholars discuss the role of organizational memory in customer insight use. Organizational memory facilitates feedback mechanisms (Sinkula *et al.*, 1997), enabling organizational members to use preserved knowledge (Sinkula, 1994).

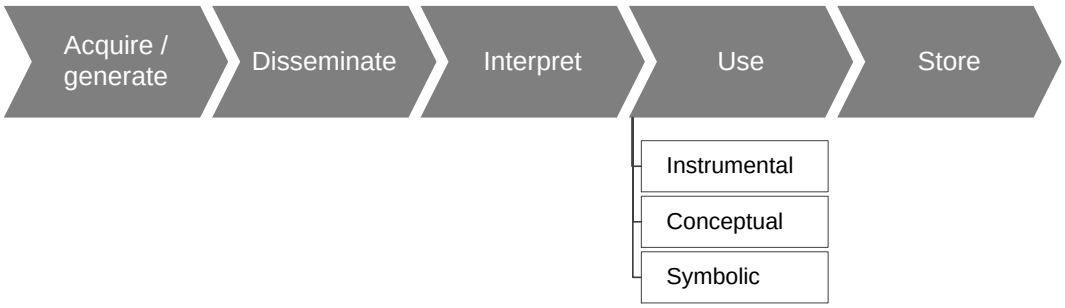

Figure 3-4 Customer insight use as implied in MBL empirical works (Source: Author)

Moorman and Miner (1997, 1998) propose that organizational memory augments the levels of reliability and continuity of business decisions, especially when decisions call for improvisation. This long-term effect of organizational memory supports an organization's competitive advantage as a result of sociocultural memory relying on intra-channel relationships and cultures (Deshpandé and Webster Jr., 1989; Lukas *et al.*, 1996).

This systematic review finds that MBL studies typically identify the following antecedents of the customer insight use process. A good proportion of these studies look at how *organizational* level factors such as organizational culture (Maltz *et al.*, 2006; Moorman, 1995; Wills and Williams, 2004) and philosophy (Kohli and Jaworski,

1990) influence an organization's capability to acquire and disseminate customer insight across the entire organization. Other studies focus on the effect of organizational level factors like strategy (Citrin *et al.*, 2007) , structure (as in Deshpandé, 1982; Diamantopoulos and Horncastle, 1997; Kohli and Jaworski, 1990; Zaltman and Deshpandé, 2001), change (Maltz *et al.*, 2001) and trust (between researcher and insight users, Moorman, 1995 and Moorman *et al.*, 1993) on the extent of acquisition, dissemination and use of customer insight in an organization. At yet another level, other studies examine the impact of *individual* level factors like users' characteristics (Kohli and Jaworski, 1990) and supplier-user interaction (as in Deshpandé, 1982; Moorman *et al.*, 1992; Wills and Williams, 2004; Zaltman and Deshpandé, 2001) on the extent of individuals' use of customer insight.

This review does not explain *how* individuals and groups store, access and retrieve customer insight when relating to organizational memory. Nor does this review offer answers about how absorptive capacity interrelates with organizational memory mechanisms. A tentative conceptualization in the next section seeks to resolve these gaps in our understanding about the role of organizational memory in customer insight use.

3.5 Conceptualizing the customer insight usage process

The observations from the systematic review in Section 3.4 suggest that extant MBL studies about customer insight use offer an incomplete construction. This limitation justifies additional research to offer a better understanding about how multiple individuals work together in customer insight processes.

This study starts by proposing a tentative conceptualization that is derived by matching and aggregating partial explanations from the different theoretical domains reviewed in Sections 3.2 and 3.3. More specifically, superimposing the key process steps in Figure 3-4 onto the behaviours and phases outlined in Figure 3-1 results in a tentative feedback type of process for customer insight use, as set out in Figure 3-5.

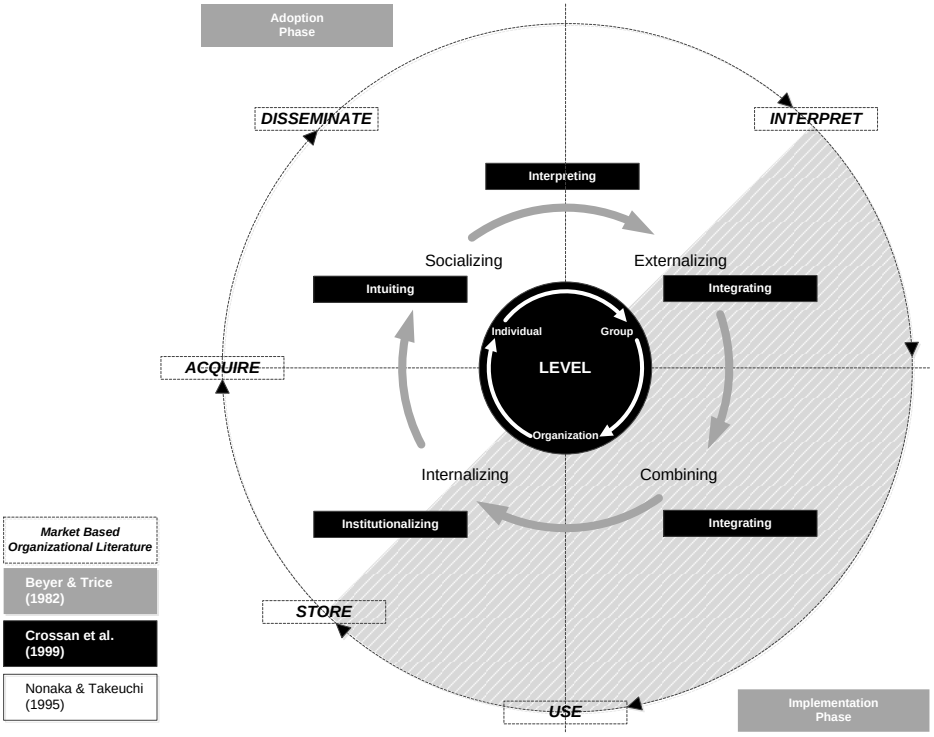

Figure 3-5 A tentative conceptualization of the customer insight process that merges the concepts from organizational learning and market-based learning (Source: Author)

The conceptualization Figure 3-5 starts by closing the linear MBL customer insight use process into a feedback loop type of process to match the propositions emerging from organizational learning literature. The five different MBL process steps may be matched with the four stages that Crossan *et al.* (1999) offer in their conceptualization of organizational learning. For instance, interpreting, or "the explaining through words and/or actions of an insight or idea to one's self and to others" (Crossan *et al.*, 1999, p. 525) matches the same "interpret" step in MBL's customer insight process. This "interpret" step is consistent with Nonaka's (1994) "externalizing" processes where individuals render tacit knowledge explicit. Such is also the case of *integrating*[8] and *institutionalizing*[9] processes (Crossan *et al.*, 1999) that broadly match MBL's description of the instrumental and conceptual use of customer insight. Institutionalizing is also consistent with MBL's "store" step in customer insight use process. Here, managers embed their lessons learned from marketing action in an

8 "developing shared understanding among individuals and taking coordinated action through mutual adjustment" (Crossan *et al.*, 1999, p. 525)

9 "ensuring that routinized actions occur… tasks are defined, actions specified and organizational mechanisms put in place to ensure certain actions occur" (Crossan *et al.*, 1999, p. 525)

organization's memory, consistent with the "internalizing" behaviours described in Nonaka (1994).

There is difficulty in matching *intuition*[10] processes (Crossan *et al.*, 1999) with MBL steps, although a tentative accord may relate to the "acquire" step in MBL's customer insight use process. This match is further supported by:

1. Beyer and Trice's (1982) conceptualization of social science research utilization, as *sensing* behaviours (manifest during the adoption phase) concur with the "acquire" step in MBL's customer insight use process;

2. Nonaka's (1994) conceptualization of the "socialization" process that relates to organization members' continued seeking, accessing and acquiring of tacit knowledge from different sources, consistent with an aspect of the "acquire" step in MBL's customer insight use process that is relevant to tacit knowledge.

In a similar fashion, matching MBL's customer insight process's "disseminate" step with organizational learning processes is challenging. Crossan *et al.* (1999) offer no direct description of a process wherein members of an organization share insight, skimming this mechanism when dealing with the "interpreting" process. Rather, it is Nonaka (1994) that offers some support about the location of the "disseminate" step in this tentative conceptualization, as that step is joining the "acquire" and "interpret" steps within the MBL customer insight use framework. The "disseminate" step would logically be located between the "acquire" and "interpret" steps, since interpretation is likely to happen among multiple users. Dissemination happens through the interaction between individuals in "communities of interaction" (Nonaka, 1994, p. 15)[11] involving both tacit and explicit forms of knowledge through:

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10 "*preconscious recognitions of the pattern and / or the possibilities inherent in a personal stream of experience*" (Crossan *et al.*, 1999, p. 525)

11 Note that Nonaka's (1994) "socializing" "externalizing" "combining" and "internalizing" behaviours do not have a prescribed and fixed sequence, and a knowledge process may move between any type of behaviour depending on the context. The process may accelerate to the extent that different behaviours may happen concurrently across different individuals in the group or organization or across organizations, reflecting an upward spiral process that moves from the individual level of analysis to the group and then organizational levels.

a. *Socializing*, involving conversion or sharing of tacit knowledge through interaction between individuals, and

b. *Combining*, involving "social processes that combine different bodies of explicit knowledge held by individuals" (Nonaka, 1994, p. 19).

This conceptualization is, however, inadequate to fully explicate the use of customer insight due to two important gaps. First, if customer insight users disseminate or share insight across their communities in both tacit and explicit forms (Nonaka, 1994), then it is likely that individuals engage in some insight transformation process to facilitate the different forms of insight sharing behaviours. MBL's process *does not* deal with users' transformation of customer insight except for the "interpret" step. In response to this observation, this study proposes a "transform" step that happens after the "acquire" step and before the "disseminate" step.

Second, a rarely-mentioned phenomenon in MBL literature is the users' reliance on organizational systems for their own generation and application of customer insight. Such systems are an explicit manifestation of organizational memory that individuals access to acquire specific insight related to marketing decisions. Furthermore, the rare examples that deal with organizational memory (Perks, 2000; Toften, 2005) refer to insight storage but do not delve into the specific manifestation of such memory at individual, group or organizational levels. This study proposes that individuals rely on their access to organizational systems (and memory) as one way of acquiring customer insight.

The above considerations lead to the proposition of a tentative, simplified customer insight use framework, set out in Figure 3-6.

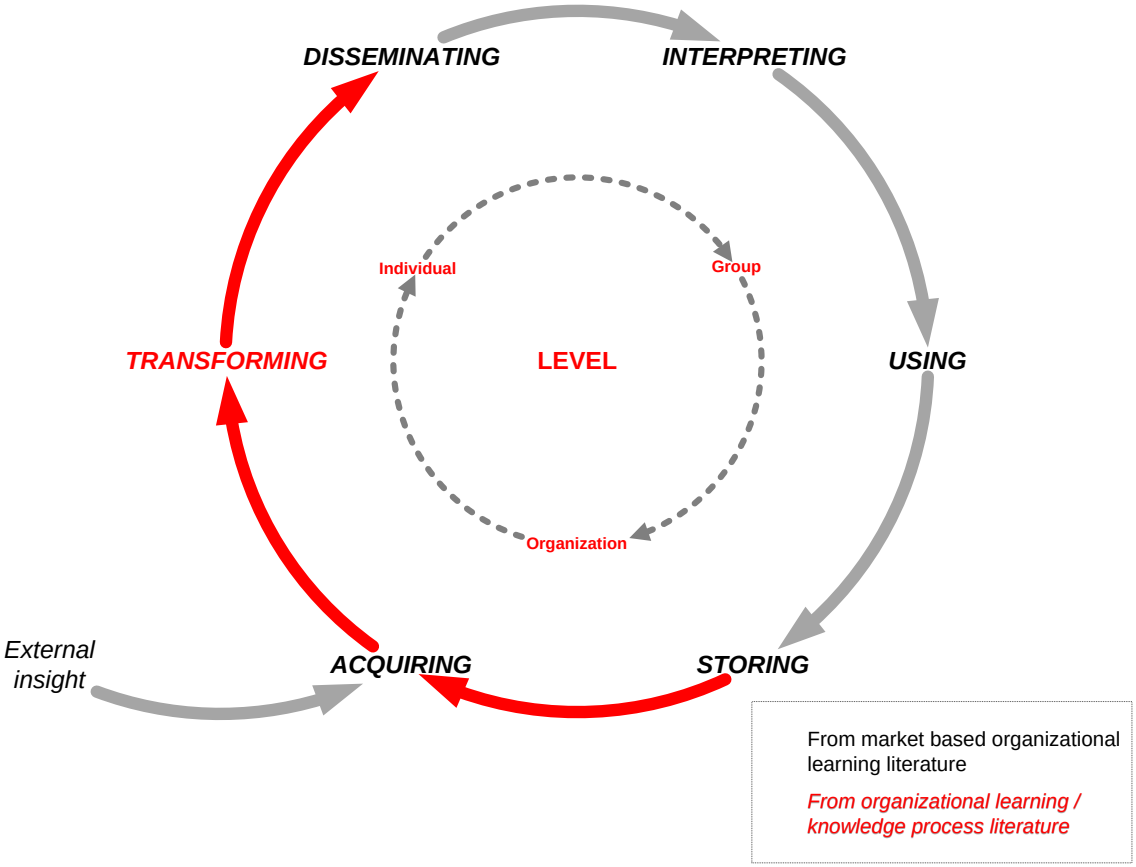


Figure 3-6 A tentative simplified conceptualization of the customer insight process (Source: Author)

Users access and acquire pieces of information from different sources, including information systems that are housed and maintained within the organization. In developing a message that can be disseminated among colleagues, users transform these pieces of information into one *insight packet*. An *insight packet* is an artefact made up of meanings that users derive from encountered documentary evidence or other knowledge users experience during their interaction with other individuals within and outside the users' organization. Users share customer insight packets with colleagues who, in turn, engage in interpreting the content and context relevant to impending (foreseeable or unanticipated) decisions. Users apply insight in specific decisions, observing and embedding the outcomes of such decisions in their own and in their organization's memories.

The tentative conceptualization is, nonetheless, limited in two ways because organizational learning and KP literature:

a) suggests that customer insight is composed of tacit and explicit portions (after Polanyi, 1962). The proposed tentative conceptualization in Figure 3-6 does not advance specific steps dealing with these portions of customer insight separately; and

b) distinguishes between individual-level and group-level behaviours. For instance, Crossan *et al.* (1999) and Nonaka (1994) echo Daft and Weick (1984) in their arguing that the "interpreting" step is a group-level phenomenon. This notion is reflected in Day's (1994) conceptualization of the market-driven firm and articulated in a small portion of MBL empirical works, such as Korhonen-Sande (2010), Ryals and Wilson (2005), Santos-Vijande *et al.* (2005) and Wei and Wang (2011). By contrast, there is support from KP literature for the "acquiring" step as an individual-level manifestation (Crossan *et al.*, 1999). The tentative conceptualization in Figure 3-6 does not clearly distinguish between individual-level and group-level behaviours.

The present empirical study of the use of customer insight addresses two important questions that have emerged from this literature review:

Research Question 1. How do managers use customer insight?

Research Question 2. What is the process of customer insight use in an organization?

3.6 Summary

A tentative conceptualization that explains the behaviours and sequences involved in the use of customer insight is offered in this chapter, drawn from the combination of concepts from four different, yet related, literature domains. The conceptualization is only tentative, as it leaves a number of questions about individuals' use of customer insight unanswered. More specifically, these questions relate to individuals' behaviours in their engagement with customer insight, ranging from accessing and retrieving

insight from organizational memory to the actual exploitation of customer insight in groups.

The next chapter describes the philosophical underpinnings that this study assumes as well as a detailed description of the method applied in answering these research questions.

PART II

INVESTIGATING THE USE OF CUSTOMER INSIGHT

4 METHODOLOGICAL CONSIDERATIONS

4.1 Overview

Part I of this thesis set out the following research questions:

Research Question 1. How do managers use customer insight?

Research Question 2. What is the process of customer insight use in an organization?

The same chapters set out the research problem, demonstrating how MBL studies inadequately explain how managers use customer insight. A tentative approach in addressing some of these gaps is also offered in these chapters, borrowing ideas from KP and organizational learning to tentatively conceptualize how managers engage with customer insight in marketing decisions.

This chapter examines the ontological, epistemological and methodological assumptions underpinning this study before moving on to explain the research strategy employed in answering the research questions. Next, the chapter sets out an appraisal of the research method's validity and associated quality criteria adopted.

This chapter is followed by a description of the method employed in collecting and analysing data as a core part of this thesis (Chapter 5), preceding the next section of this thesis, in which the findings are reported (Chapters 6 and 7).

4.2 Philosophical perspective

While answering the research questions, this study aims to generate knowledge that has:

1. theoretical relevance to the academic world;
2. practical relevance to both customer insight supplying organizations as well as to organizations that use customer insight in the design and implementation of marketing strategies; and

3. methodological relevance to the academic and practitioner worlds (Hodgkinson *et al.*, 2001; Pettigrew, 2001 and Van de Ven and Johnson, 2006).

4.2.1 The nature of the research questions

The research questions focus on managers' use of customer insight as the phenomenon of interest (Figure 3-6). Users' engagement with customer insight is an organizational learning process (Cohen and Sproull, 1991; Fiol and Lyles, 1985). Customer insight engagement involves exploratory[12] (Kang *et al.*, 2007), exploitative[13] (Argyris and Schön, 1978; Eisenhardt and Martin, 2000; March, 1991) and transformative[14] (Garud and Nayyar, 1994; Lane *et al.*, 2006) actions. In essence, users' engagement with customer insight is a dynamic process, made up of events that require direct examination in order to extract a theory (Pettigrew, 1992, Van De Ven, 1992; Van de Ven and Huber, 1990).

Managers' use of customer insight involves interactions at two levels, within and between individual users, justifying this study's focus on individual and group levels. Individuals interact to co-create customer insight, resulting in a common understanding about current and future customer behaviours (Huber, 1991; Sinkula, 1994) (Figure 4-1).

This study

- ☐ adopts a *behavioural* and *social* view in examining the users' engagement with customer insight;
- ☐ focuses on the processes involved in the use of customer insight from a *temporal development perspective*[15] rather than through categories of concepts that explain actions or causal relationships (after van de Ven, 1992), and
- ☐ involves multiple informants (using customer insight) within case organizations.

12 Exploratory actions involve the acquisition of external knowledge (Zahra and George, 2002)
13 Exploitative actions involve the application of acquired knowledge (Zahra and George, 2002)
14 Transformative action linking exploratory and exploitative actions, leading to the maintaining of knowledge over time (Garud and Nayyar, 1994)
15 Where the CI usage process and value perceptions are considered as a sequence of events, where meanings and perceptions change over time

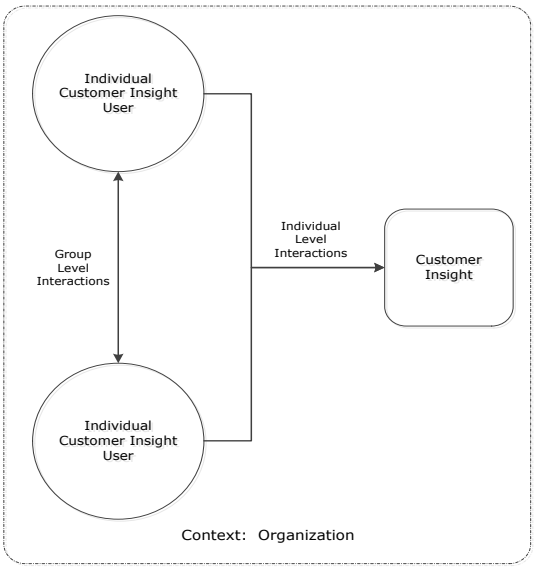


Figure 4-1 CI users and interactions

4.2.2 Ontological assumptions and philosophical positioning

Two extremes characterize a continuum of different assumptions about the nature of reality.

- An objective end that assumes *reality is independent of human perception and involvement*. Reality has a concrete structure, guiding social science approaches to construct positivist science (Morgan and Smircich, 1980);
- A subjective end that assumes *human bias itself generates reality* or that reality is a projection of human imagination. This ontology guides social science approaches to obtain phenomenological insight and revelation (Morgan and Smircich, 1980).

Each of these two extreme views of reality is linked with particular epistemologies that lead to the contribution of accurate knowledge, dividing scholars as communities calling themselves "positivist" or "social constructionist", respectively.

In *positivism*, knowledge is scientific, outcome-based and the result of an information process (Easterby-Smith *et al.*, 2002), where

- events are explained in the form of models articulating deductions about relationships between variables, drawn from universal laws;
- generalizability and directly observable phenomena are emphasized, relying on robust sampling procedures and statistical analysis of survey data (Hammersley and Atkinson, 2009; Potter, 2000); and
- approaches are incapable of supporting knowledge about process or meanings, and they are thus inflexible, artificial and unable to generate theory (Easterby-Smith *et al.*, 2012), rendering them unfit for this study's research questions' requirements.

By contrast, social constructionism aims at creating theory (Easterby-Smith *et al.*, 2012) by recognizing the reflexive character of social research (or that the social researcher is part of the phenomenon investigated). Unless experienced, an object of knowledge cannot be generated. Experience is structured in the minds of researchers and formed by the effects of time and space as a form of perception (Kant, 1787), turning things-in-themselves into a world of experience. Social constructionist epistemologies dismiss the notion that researchers are passive observers or knowers, suggesting that social researchers make sense out of meanings, drawing from reflexive approaches to generate understandings as a basis for theory creation (Easterby-Smith *et al.*, 2012).

The implications of social constructionism are that objective and value-free research are impossible to conduct. Social constructionism justifies the sufficiency of small samples and qualitative designs with an emphasis on knowledge creation through understanding and exploration (over explanation) of a phenomenon. Reflexivity thus becomes an essential part of the research process, requiring the social constructionist to acknowledge the researchers' orientations as influenced by their socio-historical context (Hammersley and Atkinson, 2007). Without reflexivity, social constructionist research remains sensitive to the researchers' own interests and values.

In answering the research questions, this study cannot ignore the need to offer objectivity, as this is one key requirement for a quality contribution. Neither can the study's approach overlook the potential effect of the researcher's own values and interests in the phenomenon studied, as a result of his background and past experience

(as an independent provider to customer organizations) and use of customer insight. However, this study acknowledges that the use of customer insight is intrinsically meaningful, justifying approaches that lead to the understanding of meaning rather than measurement or counting meaning (Sayer, 2010). This objective fits the critical realist position of the researcher or is a conciliation between the two extreme positions described above (positivist vs. social constructionist) (Easterby-Smith *et al.*, 2012). Critical realism accepts the vulnerability of knowledge about reality when reality is abstractly resolved and theory-laden (Easton, 2010) yet accentuates the need for empirical evidence in the generation of theory (van de Ven, 2007). This position rationalizes the need for criticality as an objective; generating an explanation and an understanding about how individuals make use of customer insight involves a critical evaluation of the phenomenon of interest (Sayer, 2010).

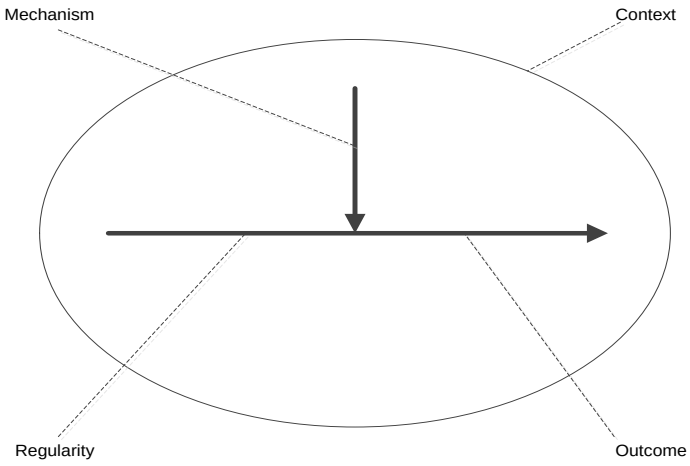


Figure 4-2 Basic elements of a critical realist ontology (Pawson, 2006)

Indeed, by focusing on the process of knowing and the capability to act within the socially-embedded context of practice rather than on knowledge *per se* (after Brown and Duguid, 1991), this study acknowledges that customer insight use happens

1. in a world that is differentiated and layered, consisting of objects and structures that generate events. Structures are present even where events do not follow a regular pattern (Easton, 2010);

2. as a result of actions, texts and institutions that are concept-dependent, requiring the researcher to read and interpret their meaning as well as what *produces* them and *their effects* (Easton, 2010) as a basis for theory creation;

3. through the involvement of "objects" and "entities", exemplified by the customer insight (such as reports, customer data, market information and other such "objects" described in section 2.1), systems (such as sales systems, customer feedback systems and market research databases, among others) and sources (such as third-party research organizations, customer insight sources or departments within the firm and any other such "entities"). This consideration is in stark contrast with positivist approaches (that relate to variables) (Sayer, 2010). Causal analysis is thus focused on recognizing processes and mechanisms that generate the objects, actions and events (Blaikie, 2007); and

4. involving events and outcomes. This study focuses on the external and visible behaviours of users as well as the customer insight and systems with which they interact.

The causality in point (2) above implies that this study takes an explanatory focus on the mechanisms that generate processes, relations and events that characterize the use of customer insight at the individual user and potentially, at the group of users' level. Interacting with other generative mechanisms, the mechanisms investigated are embedded in socially and temporally dynamic situations (Reed, 2009). Thus, the generation of theory from a critical realist position relies on a continued iteration that involves moving from theoretical model generation and empirical data collection in order to expose the phenomenon's mechanisms, processes and structures (Sayer, 2010).

4.2.3 Methodological fit

A valid contribution to theory and practice also requires *methodological fit* as "an overarching criterion for ensuring quality field research" (Edmondson and McManus, 2007, p. 1155). Methodological fit is the consistency of research design with the state of prior relevant theory. This study's research design needs to be consistent with the maturity of two key theoretical domains: *market-based learning* and *knowledge process*.

While both MBL and KP theoretical domains are still evolving (Easterby-Smith, Lyles, *et al.*, 2008; Easterby-Smith, Graça, *et al.*, 2008; Morgan, 2004 among others), a level of maturity is evident from the increasing attention scholars devoted to this area since the late 1980s (Easterby-Smith *et al.*, 2000; Easterby-Smith and Lyles, 2005; Rashman *et al.*, 2009). The use of customer insight is thus an *intermediate* concept in terms of maturity (according to Bacharach,1989), justifying a hybrid approach that draws from separate bodies of literature to propose new constructs and/or provisional theoretical relationships (Edmondson and McManus, 2007).

Research for intermediate theory typically integrates qualitative and quantitative evidence as a means of triangulation. Triangulation enables the ascertainment of external and construct validity from a critical realist point of view (Easterby-Smith *et al.*, 2012). Often, investigating intermediate theory involves a reinvestigation of some aspect of theory in order to challenge or modify prior work (Edmondson and McManus, 2007). To answer the research questions, this study challenges the customer insight process characteristics as proposed by MBL by drawing from organizational learning and KP theory. In so doing, this study attempts to generate theoretical propositions as an output (as in Eisenhardt, 1989).

4.3 Research strategy

To answer the research questions posed earlier, this study adopts a research strategy that reconciles choices relating to three strategic dimensions:

1. Method of discovery about the phenomenon of interest;

2. Research design, or, the approach involved in collecting and analysing data; and

3. Generating theory about the customer insight use process.

4.3.1 Method of discovery

To investigate the use of customer insight is to consider the users' interpretation of a social world, their understanding, their experiences or their constructions. These constructions lie in a context outside the researcher's control, yet they require a focus on

contemporary events, justifying a case study technique (Yin, 2009). Of the four different research strategies (Blaikie, 2009, pp. 81-92 – see Table 4-1), a *retroductive strategy* is preferable because

- it relies on continued iterations between theoretical models and empirical data to expose fundamental mechanisms, structures and mechanisms in defined contexts;
- structures and mechanisms are unavailable to the observer; therefore, a conceptual model is constructed for eventual explanation of causality;
- models are tested for their existence and relations, with observers working on further consequences of the models conceptualized; positive tests offer support for existential claims; and
- repetition of the above steps are intent on explaining structures and mechanisms uncovered (Blaikie, 2007).

Table 4-1 A comparison of research strategies (adapted from Blaikie, 2009)

	Inductive	Deductive	Retroductive	Abductive
Aim	To establish universal generalizations to be used as pattern explanations	To test theories, to eliminate false ones and corroborate the survivor	To discover underlying mechanisms to explain observed regularities	To describe and understand social life in terms of social actors' motives and understanding
Ontology	Cautious, depth or subtle realist	Cautious or subtle realist	Depth or subtle realist	Idealist or subtle realist
Epistemology	Conventionalism	Falsificationism, Conventionalism	Neo-realism	Constructionism
Start	Accumulate observations of data	Identify a regularity to be explained	Document and model a regularity	Discover everyday lay concepts, meanings and motives
	Produce generalizations	Construct a theory and deduce hypotheses	Construct a hypothetical model of a mechanism	Produce a technical account from lay accounts
Finish	Use these "laws" as patterns to explain further observations	Test the hypotheses by matching them with data	Find the real mechanism by observation and/or experiment	Develop a theory and test it iteratively
Questions answered (purpose)				
What (exploration)	***			***
What (description)	***			***
Why (explanation)	*	***	***	
What (prediction)	**	***		
Why (understanding change)				***
How (understanding change)		*	**	**
What & why (evaluation)	**	**	**	**
What and why (assess impacts)	**	**	**	**

The close examination of particular cases thus leads to the development of explanatory or theoretical ideas (Dawes Farquhar, 2014) through continued movement between evidence and theory (Dubois and Gadde, 2002), or a "recursive cycling among the case data, emerging theory, and later, extant literature" (Eisenhardt and Graebner, 2007, p.

25). This continued movement is at the basis of the systematic combining where "theoretical framework, empirical fieldwork, and case analysis evolve simultaneously… [employing] matching theory and reality… [and] direction and redirection" (Dubois and Gadde, 2002, p. 554) and is also consistent with the critical realist positioning of the researcher.

Customer insight's use is an everyday phenomenon, explained by concepts that relate to individuals' behaviour. Managers' behaviours are guided by their motivations and the meanings they draw from their context and customer insight experiences. Retroductive strategies are relevant to every day lay phenomena, capable of generating theory by explaining the mechanisms that produce observed outcomes and regularities (Pawson, 2006). Users' customer insight experiences constitute the empirical domain, whereas users' encounters with other users and customer insight exemplify the actual domain of reality as advocated by Bhaskar (2009). Mechanisms that generate the outcomes represent the domain of the real.

4.3.2 Research design

This study answers two key questions that are open in nature and that are related to a phenomenon where knowledge is still evolving. There are five research designs (Bryman, 2012) that may assist in maximizing learning about a researched phenomenon: experimentation, cross-sectional, longitudinal, case study and comparative designs.

While restricted in nature, experimentation and cross-sectional studies answer specific research questions and are thus suited for research that builds on mature theoretical foundations (Edmondson and McManus, 2007). By contrast, a case study approach is flexible in nature, accommodating a variety of data collection methods and different sources of data, and it can envelope longitudinal as well as comparative approaches (Bryman, 2012; Robson, 2011). A case study approach thus best suits the requirements of the "how" and "what" exploratory type of questions that guide this study.

Indeed, various scholars claim that case-study approaches can maximize the learning from the generation of theory (such as Dawes Farquhar, 2014; Eisenhardt, 1989; Yin,

2011), particularly where existing knowledge and theory are still evolving, and where phenomena happen in complex contexts (Yin, 2009; 2011). The phenomenon studied in this thesis is one such instance, as the use of customer insight is a process that

a) happens in a complex context governed by organizational factors and its surrounding environment;

b) is poorly understood, partly due to the difficulties that researchers encounter in accessing organizations and partly because the MBL assumes that knowledge is a fixed asset.

Indeed, both research questions require a longitudinal approach when investigating the processes and associated steps that describe the use of customer insight. Moreover, the "what" question (Research Question 2) also justifies the adoption of exploratory approaches, aiming to generate theory for further research (Yin, 2009; 2011). These reflections justify a case study approach involving longitudinal exploration, intended to refine existing theory about how individuals use customer insight.

Further, this thesis proposes a conceptual framework about managers' use of customer insight in Chapter 3 (see Section 3.5). Investigating this conceptualization empirically justifies substantiation in a real-life context. As a minimum, Yin (2009) proposes the single-case design (as opposed to multiple-case designs) for such purposes (that he calls "representative" or "typical" cases), where the study captures the "circumstances and conditions of an everyday or commonplace situation" (Yin, 2009, p. 48). In satisfying the requirements posed by the research questions, this study undertakes an intensive examination (Easton, 2010) of the case by looking at different customer insight packets and different customer insight users within the same case organization rather than relying on large-scale surveys and statistical analyses. This approach is equivalent to what Yin (2009) identifies as the "embedded" single-case design, which would contain different embedded units of analysis that support this study's subsequent engagement in theoretical analysis and analytic generalization.

4.3.3 Theorizing strategy

This study generates theory by aggregating a picture composed of observations and conversations with customer insight users, who reflect and share thoughts by

- providing accounts in their own language, containing concepts that participants employ to structure their world and interpret what goes on;
- accounting for much of their routine activity that they conduct in an "assumed" unreflective manner; and
- consciously searching for or constructing meanings and interpretations about the users' behaviour when their social life is disrupted or ceases to be predictable.

This study considers the seven sense-making strategies (Langley, 1999) as alternative approaches to generate theory about a process. Langley (1999) distinguishes between two extreme types of process data and associated data. The first involves "coarse-grained" longitudinal time series and associated event-history methods, addressing process dynamics by testing a priori process theories. The second involves the collection of fine-grained qualitative data (often in real time), intended to support theory building from the "ground up", producing a true understanding of how and why events occur over time. Table 4-2 appraises these strategies' suitability to answer this study's research questions.

Whilst acknowledging a strong element of overlap among these strategies, Table 4-2 shows that none of these strategies can be an exclusive approach for theorizing how managers use customer insight. Rather, this analysis suggests that a *balance* between simplification of data and accuracy of representation relies on fine-grained data collection, enabling the answering of the research questions through *grounded theory*, *quantification* and *visual mapping* approaches. A graphic representation of the overall suitability and granularity of these approaches to answer the research questions of this study is set out in Figure 4-3.

Table 4-2 Suitability of sense-making strategies for use in theorizing processes (Source: Author)

Strategy	Suitability to answer research questions?		Granularity requirements and fitting time horizons	Applicability for this study
	How do individual managers use customer insight?	What is the process of customer insight use?		
Narrative	**Moderate** Addresses individuals' motivations and objectives for their use of customer insights	**Moderate** May address contextual aspects that impact on users' engagement with customer insights	**Coarse** Fits long duration phenomena	**Moderate** Needs complete, detailed process and contextual data about particular customer insight use processes at individual and group levels
Quantification	**High** Addresses need to establish sequences of behaviours in customer insight use lifecycle and associated patterns	**High** Addresses need to establish sequences and stages of actions in customer insight trajectories across individuals and functions	**Fine** Fits short duration phenomena	**Moderate** Relies on detailed event data and statistical simplification to generate patterns.
Alternate templates	Moderate Identifies most probable sequence of behaviours in a customer insight use lifecycle	**Moderate** Identifies most probable sequence of actions customer insight trajectories across different users and functions	**Variable** (from moderate to fine) Fits long duration phenomena	**Moderate** Requires one extremely richly described case - fitting theory generation at organizational level
Grounded theory	**High** Addresses individuals' motivations and objectives of their behaviours in using customer insight	**High** Addresses contextual aspects that impact on customer insight trajectories across individuals and functions	**Variable** (from moderate to fine) Fits phenomena of medium to long durations	**High** Requires fairly large number of comparable incidents that are all richly described. Theory generated at individual and group level
Visual mapping	**High** Addresses the need to establish a sequences of behaviours in a customer insight use lifecycle	High Addresses the need to establish sequences of actions in customer insight trajectories across individuals and functions	**Variable** (from coarse to fine) Fits phenomena of medium to long durations	**High** Requires many observations of similar processes, making visual mapping suitable for analysis of multiple holistic or embedded cases.
Temporal bracketing	**Low** May address individuals' sequence of behaviours in a customer insight use lifecycle if this process is complex enough to allow bracketing approaches	**Low** May address the sequence of actions that customer insight packets encounter while traversing individuals in an organization, only if encounters produce enough complexity to allow bracketing approaches	**Variable** (from coarse to fine) Fits long duration phenomena	**Moderate** Transforms process data into a series of more discrete but connected blocks. Generates theory at group or organizational level
Synthetic	**Moderate** Focuses on the variation of individuals' sequence of behaviours in a customer insight use lifecycle	**Moderate** Focuses on variation of actions customer insight packets induce in traversing individuals and functions	**Fine** Fits phenomena of medium to long durations	**Moderate** Provides "variance" theories and causal models that explain process characteristics at group and organizational level

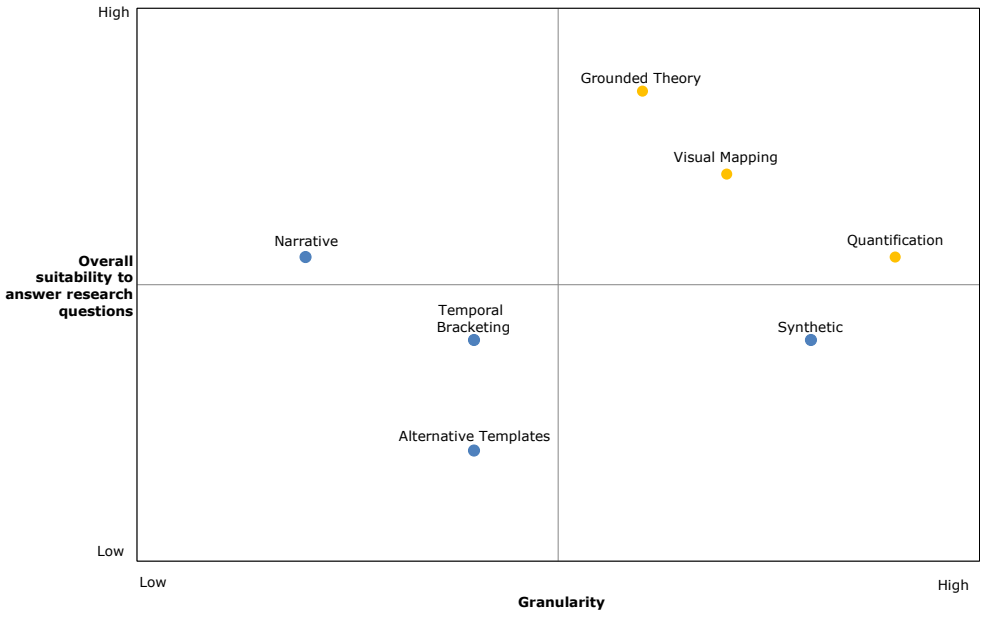


Figure 4-3 Suitability of process theory strategies and associated granularity (Source: Author)

4.4 Quality criteria governing this study

This study aims to generate a *quality* contribution to a theory, method and practice. In so doing, the design of the study's research efforts considers a set of methodological safeguards to ensure that the resulting contribution resonates with readers' life experiences in their engagement with customer insight (after Corbin and Strauss, 2008).

This study considers a limited literature review of the fifteen best-cited[16] research methods contributions that deal with empirical qualitative social research (see Table 4-3).

Each of these contributions takes a naturalistic or social constructionist point of view at qualitative inquiry. Scholars traditionally pin *quality* of empirical qualitative research to three key constructs: validity, reliability and objectivity. Largely "overrated" (van Maanen, 2011a), these constructs address research quality within a "rationalistic paradigm" (Guba, 1981; Guba and Lincoln, 1982) and are potentially detached from the scope and purposes of a naturalistic inquiry.

Table 4-3 Quality criteria in qualitative empirical research (Source: Author)

		Quality criteria addressed										
Qualitative research methodology works	Times cited (Google scholar in Nov 2012)	Internal validity / credibility	External validity / trasnferability / generalizability	Reliabilty / dependability	Objectivity / confirmability	Carefulness / systematic	Cross-cutural (comparative)	Holistic (contextual)	Integrity	Originality	Replicability	Utilizability / applicability
Bryman (1988)	2,500	✓	✓	✓							✓	
Bryman (2008)	6,873	[a]	✓	✓	✓						✓	
Charmaz (2006)	5,744	✓	[b]					[c]		✓		
Corbin and Strauss (2008)	18,942	✓		✓					✓			✓
Glaser and Strauss (1967)	47,605	✓	✓	✓	✓					✓		✓
Guba (1981); Guba and Lincoln (1982)	572 / 30,172	✓	✓	✓	✓							✓
Gummesson (1991)	2,473	✓	✓	✓	✓	✓		✓				
Hammersely and Atkinson (2009)	7,903	✓		✓	✓	✓						
Kirk and Miller (1986)	2,532	✓	✓	✓	✓							
Miles and Huberman (1994)	34,779	✓	✓	✓	✓							✓
Morse et al (2002)	1,040	✓	✓	✓								
Shipman (1997)	277	✓	✓	✓								
Silverman (2009)	5,318	✓	✓	✓								
Steinke (2004)	70		✓	✓	✓						✓	[d]
Stenbacka (2001)	248	✓	✓	✓		✓						
van Maanen (2011)	4,089	✓	✓	✓				✓				
Wolcott (1999)	719	✓	✓	✓	✓		✓	✓				
Yin (2009)	65,403	✓	✓	✓								

Key
[a] authenticity; [b] usefulness; [c] resonance

16 As reported on Google Scholar in November 2012.

This is view about validity, reliability and objective that Corbin and Strauss (2008), Glaser and Strauss (1967) and Steinke (2004) echo by noting the "quantitative implications" of such terms (Corbin and Strauss, 2008, p. 301).

The above review suggests that "trustworthiness" is an overarching quality characteristic, comprising four dimensions: "credibility", "transferability / generalizability", "dependability" and "confirmability". These traditional yet encompassing quality criteria are not free from criticism. If trustworthiness is *the* encompassing factor, composed of "variables" that largely find their roots in positivist work, what qualities truly emerge from a social constructionist stance?

In answering this question, this thesis considers a simplification and refinement of the above quality dimensions through a thematic analysis of the methodological safeguards that each of the above fifteen works propose for each of the dimensions listed in Table 4-3. This thematic analysis involved two key steps. First, the quoted safeguards were distributed across the four relevant phases of the research process: research design, data collection, data analysis and theory building. Second, an analysis of the themes revealed nine alternative quality characteristics that describe a *good* qualitative investigation. Defined in Table 4-4, these nine properties are relevant to the different phases of the research process in specific ways.

Table 4-4 Alternative dimensions that govern quality in qualitative investigations (Source: Author)

Alternative quality "themes"	Definition: a study that…	Total observed suggestions / recommendations*
Comprehensiveness	addresses all aspects of a set of specific research questions	56
Consistency / coherence	features converging contributions resulting from logical consistency of derived theories and employed approaches	55
Objectivity	presents contributions from investigations with minimum and acknowledged researcher bias	52
Logic	follows a rational approach in devising a research method leading to data and associated theory generation that answers the research questions	43
Conformity	features results obtained through a pre-outlined approach as "promised" to the audience	35
Audience oriented	presents a contribution that convinces the reader by offering interpretations that relate to the readers' everyday world	34
Variation	attempts to capture maximum variation within a sample of research participants and settings	32
Clarity	presents arguments and contributions in an unambiguous manner	20
Originality	presents a contribution that is unique and different from any previous contribution related to the subject matter investigated	13

* frequencies do not add up to 167 as some suggestions/recommendations related to one or more research process phases

For instance, methodological suggestions relating to data analysis most often are relevant to the study's consistency, coherence and conformity characteristics. Methodological safeguards targeting a study's explicit and clear methodologies are most relevant to a study's research design. Precautions relevant to data collection most often have implications for a study's comprehensiveness and logical flow, whereas specific methodological suggestions to improve a study's theory building most often affect the study's comprehensiveness, logical flow, clarity, originality and orientation towards the target audience.

This analysis helped this study adopt various measures intent on executing a good quality study. For instance, addressing the study's consistency calls for the concurrent collection and analysis of data (Corbin and Strauss, 2008; Morse *et al.*, 2002). Such a measure allows the systematic comparison of observations and categories (Charmaz, 2006), enabling dynamic interpretations and motivating purposive sampling (Morse *et al.*, 2002). The end result of this process is meaningful parallelism across data sources (Miles and Huberman, 1994) and maximized comprehensiveness.

Explicit, detailed and complete accounts about a study's methods and procedures (Glaser and Strauss, 1967; Miles and Huberman, 1994; Steinke, 2004) also allow researchers to make systematic comparisons between observations and categories (Charmaz, 2006).

Presenting a fully-studied phenomenon relies on the capture of a wide range of empirical observations (Charmaz, 2006). Capturing extensive observations relies on a research process that encapsulates maximum variation within a sample's participants and settings. Variation assists in the generation of rival explanations (Yin, 2009) that in turn justify their plausibility testing through further theoretical sampling (Corbin and Strauss, 2008; Glaser and Strauss, 1967).

A further relevant note here is that mixed methods render the cycling of research tasks[17] more effective in capturing maximum variation while reducing the study's dependence on continued sampling until theoretical saturation is attained (Glaser and Strauss, 1967).

[17] From collection to coding to analysis over a period of observation.

Mixed methods help capture categories that portray the fullness of the studied experience (Bryman, 1988; Charmaz, 2006).

Ensuring variation in the sources of information and convergence of emerging findings (Miles and Huberman, 1994) relied on a number of different strategies, including

- the appropriate sampling of people who best represent or have knowledge about the phenomenon of interest (Morse *et al.*, 2002); ideally, this would involve the sampling and comparison of two or more groups of participants (Glaser and Strauss, 1967);
- exploiting researchers' lived experiences in making comparisons (Glaser and Strauss, 1967); and
- advancing formal theory through use of field and literature data (Glaser and Strauss, 1967).

Employing analytic induction (Steinke, 2004) where generated theory is constantly subjected to falsification[18] is one important way to address the study's logic in generating theory. Analytic induction in this study required detailed strategies for collecting, coding, analysing and presenting data (Glaser and Strauss, 1967; Gummesson, 1991) by

- relating findings to prior literature and theory (Glaser and Strauss, 1967; Miles and Huberman, 1994),
- justifying observations and deduction with solid support (Morse *et al.*, 2002), and
- subjecting the research process and findings to peer reviews (Miles and Huberman, 1994).

A logical study also requires theoretical / purposive sampling (Glaser and Strauss, 1967; Guba and Lincoln, 1982, 1985) to be consistently aligned with the research objectives and questions. In this study, this consistency was possible through:

[18] By refuting assumptions against data (Silverman, 2009)

- constant theoretical thinking during data collection and analysis (Corbin and Strauss, 2008; *Morse et al.*, 2002);
- continued systematic comparison between observations and categories (Charmaz, 2006); and
- continued linking between larger institutions and individuals (Charmaz, 2006).

Equally important were the steps that address this study's objectivity. Minimizing and acknowledging bias is challenging, and complete removal of bias is impossible (Bryman, 2012). Making explicit the researcher's values, assumptions, biases and affective states, as well as any changes in these over the course of the research, is an important aspect of explicit application of researcher reflexivity (Guba, 1981; Guba and Lincoln, 1982, 1985; Gummesson, 1991; Miles and Huberman, 1994; Steinke, 2004). Minimizing bias relies on scrutinizing data (field and literature) before using it in analysis (Glaser and Strauss, 1967) as well as on employing peer reviews of the research process and findings (Miles and Huberman, 1994). To address bias, the author adopted approaches to remain conscious of his own biases throughout the entire research process (Alvesson *et al.*, 2008; Harley *et al.*, 2004), exercising reflexivity by constantly reminding himself about

1. his motivation to engage in this research;
2. the underlying assumptions that he brings to the study, and
3. the effects emerging from the connection between the author and the study from a theoretical, experiential and emotional perspective.

This study's appeal to an audience depends on the presentation of a sufficiently general account that applies to a diversity of daily situations (Glaser and Strauss, 1967). Appealing studies (Miles and Huberman, 1994) emerge from accounts that

- are intellectually and physically accessible to potential users;
- stimulate "working hypotheses" on the part of the reader as guidance for future action;

- ☐ impart a sense of empowerment or sense of increased control, if not new capacities among users; and
- ☐ deal with context of explicitly stated value-based or ethical concerns.

These precautions were in turn entrenched in the method designed to answer the research questions of this study, described in the following chapter.

4.5 Summary

This chapter reviewed the two opposing ontological assumptions that this study may adopt in answering the research questions set out in Chapter 3. An appraisal of the nature of the research questions justifies the adoption of a social constructionist ontology in building a processual view about how managers use customer insight.

Managers' uses of customer insight as well as the influences impacting such a process justify an approach that is sensitive to the actors' interpretation about a social world, their understanding, their experiences or their constructions. A case study approach adopting an retroductive strategy (Blaikie, 2009) best addresses the capture of these constructions in the form of process data. These constructions lie in a context that cannot be controlled by the researcher but that requires a focus on contemporary events (Yin, 2009). Equally, a case study approach (involving multiple informants and mixed methods) best enables associated theory-building on a phenomenon that currently can only be explained by evolving theory (Edmondson and McManus, 2007). Grounded theory, quantification and visual mapping approaches are most appropriate for the generation of new theory from process data about the use of customer insight (Langley, 1999).

This chapter also reviews the quality characteristics that a good contribution needs to feature. These characteristics are, in turn, addressed through a number of safeguards and measures that are embedded in the method that is developed in Chapter 5.

5 METHOD

5.1 Overview

After analysing the nature of the research questions and this study's philosophical underpinnings, this chapter develops an operationalization of the study by describing a method that captures data for interpretations that answer the research questions. In choosing the elements of operationalization, this study focuses on individuals' behaviours as well as the meanings they construct when interacting with customer insight.

This chapter starts by defining the units of analysis and observation, moving on to describe the key phases of the employed retroductive research strategy. This chapter then moves on to describe how this strategy was operationalized in terms of types of data required as well as how this data was collected from the two sampled organizations and the individuals from those organizations. A description of the quantitative and qualitative analyses is also described.

5.2 Units of analysis

Customer insight is the result of members' abstraction and processing of customer, market and competitor information from different sources. In a market-oriented organization, customer insight is located across the entire firm (Kohli and Jaworski, 1990). Individuals exchange insight pieces to help peers augment their understanding of customer needs, potential customer behaviours and competitor response. Because insight is tacit and resides in the individual managers' minds, it poses various challenges when examining how individuals build and use customer insight in marketing decisions.

In addressing this challenge, this study focuses on the customer insight packet as the simplest unit of analysis. A customer insight packet is constituted of meanings, drawn from explicit and tacit knowledge. As tacit knowledge is differentially distributed across an organization in layers or circles, customer insight is bound to carry different

meanings across different individuals in an organization. Equally, as tacit knowledge is influenced by the unfolding of events and changes in an organization's circumstances, customer insight may purport different stimuli and associated interpretations within and across different individuals as events unfold. This description points at the temporal nature of customer insight.

In engaging with customer insight, users participate in *objective* events like meetings, workshops and presentations. Agendas, hand-outs, meeting notes and other artefacts provide documentary (*empirical*) evidence of experiences as do databases, reports or other hard-copy correspondence provided by the customer insight supplier. These artefacts constitute the most straightforward units of observation: customer insight in the form of an *insight packet*. This insight packet is relevant to the second research question.

From another perspective, this study also examines how individuals engage with different customer insight packets as a further level of analysis—the individual manager—and addresses the requirements of the first research question.

5.3 Approach

Operationalizing a retroductive strategy requires engaging in an iterative approach between theory generation and empirical evidence collection until theoretical saturation is achieved. In this study, two case studies were conducted sequentially, as set out in Figure 5-1.

The first case study served as a testing ground for the method before the actual implementation in an organization as the key case study that answers the research questions. The key case study allowed the testing of alternative and tentative predictions generated in the first case. Equally, the second case study enabled the detailed exploration of the variation in meanings and behaviours of individuals using customer insight. This approach addresses the variation requirements of this study to produce a quality contribution.

No one sense-making strategy suffices to provide a *comprehensive* view about temporal patterns and mechanisms involved in the use of customer insight. The generating theory in each case study may thus involve quantification, grounded theory and visual mapping of sense-making strategies (Langley, 1999) (see Table 4-2).

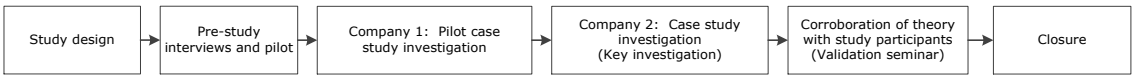


Figure 5-1 Phases of the study's retroductive approach (Source: Author)

To capture maximum variation of categories, meanings and processes, this study employs methodological and data triangulation. Triangulation is also a key requirement for the generation of theory from a critical realist perspective (Easterby-Smith *et al.*, 2012). In this study, methodological triangulation involved the concurrent use of quantitative and qualitative data capture approaches from specific people in different situations across the case study organizations. Data triangulation involved the concurrent examination of different customer insight sources, participants and settings.

In answering the research questions, this study adopts a longitudinal approach to determine the nature of the emerging meanings qualitatively and the behaviours and motivations that drive managers at each step of the customer insight use process. This longitudinal investigation established the meaning, temporal patterns and mechanisms that drive managers in their engagement with customer insight, and it is tantamount to an ethnographic inquiry (Hammersley and Atkinson, 2007; Miles and Huberman, 1994; O'Reilly, 2005). There are four objectives that guide ethnographic inquiries (Table 5-1) yet collectively address the research study's two objectives.

The data requirements for answering the study's research questions suggest that no single data type suffices. In ethnographic approaches, data capture ranges from fully-immersed, direct observation of research participants engaging with customer insight to less-immersed approaches, where research participants complete diaries or participate in interviews. Firms participating in the study oppose the application of direct observation methods, largely as a result of concerns about confidentiality. From a different perspective, direct observation also means that study participants may change

behaviours as a result of social desirability bias. Social desirability bias also impacts the validity of methods relying on self-completion surveys as well as self-initiated web diary approaches where participants discuss their engagement with customer insight.

Table 5-1 Research focus and ethnographic objectives for this study (Source: Author)

Ethnographic method objective (after Brewer 2000; Hammersley and Atkinson 2007; O'Reilly 2005)	This study's research objectives		
	Meanings	Temporal patterns	Mechanisms
Direct and sustained contact with research participants to give a longitudinal view about changes in (pre-existing) knowledge		✓	✓
Appraise research participants' context (daily lives) at work including language and interactions with each other in sourcing, selecting, structuring and exploiting customer insights	✓	✓	(✓)
Produce a rich account about "what goes on"		✓	✓
Interpret research participants' meanings and perspectives	✓	✓	

By contrast, participating firms accept researcher-initiated evidence collection methods such as in-depth interviews and periodic surveys. Social desirability bias impacts periodic surveys, whereas in-depth interviews remain sensitive to participants' willingness to discuss issues and rely on participants' memories.

A mixed methods approach mitigates the different weaknesses that characterize each of the above data collection approaches, whilst offering an opportunity to collect data that answers the research questions concurrently. Real-time experience tracking (RET) was the ultimate choice. RET involves the collection of a mixture of participant-initiated text messages and diary submissions (Baxendale *et al.*, 2015; Macdonald *et al.*, 2012). RET is used widely in research about consumer encounters with brands as an everyday experience (Macdonald *et al.*, 2012).

Combining RET and qualitative interviews addresses the study's theory generation and quality requirements in terms of temporal patterns and mechanisms. The complementarity of both approaches means that RET captures the behaviours managers adopt in their engagement with customer insight as well as the counterparts with whom they interact during their engagement with insight. Through the corroboration of RET findings, qualitative interviewing addresses RET's limitations by providing data that enables a first-hand understanding of

- meanings of customer insight as it is received, shared, modified and talked about by users in the organizations studied;
- the reasons and motivations that drive customer insight users into specific types of behaviours; and
- the sequence of stages and steps involved in the customer insight usage process (temporal patterns) at micro and macro levels (Bryman, 1988).

Table 5-2 summarizes the ways in which the two types of field inquiry employed in this study support the three process theory sense-making strategies used in generating theory. RET provides quantitative data enabling visual mapping of processes, as well as quantitative theory-building strategies, focusing on temporal patterns and mechanisms. Qualitative interviews support grounded-theory theory-building strategies addressing the *meanings* dimension of the research questions.

Table 5-2 Study's sense-making strategies, field inquiry type and associated focus (Source: Author)

Focus	***Sense-making strategy***	***Field inquiry type***	
		Qualitative interviews	Real-time experience tracking
Meaning	Grounded theory	✓	
Temporal patterns	Grounded theory	✓	
	Visual mapping		✓
	Quantitative		✓
Mechanism	Quantitative		✓

5.4 Sampling

This section considers the various aspects of sampling involved in this study. It considers the choices involved in adopting theoretical sampling (after Glaser and Strauss, 1967), and describes how the study addresses the sufficient diversity (Miles and Huberman, 1994) requirements in terms of research participants who best represent or have knowledge about the phenomenon of interest (Morse *et al.*, 2002). This section also sets out the sampling strategies adopted in this study that consider organization routines (Glaser and Strauss, 1967).

Four considerations shape this study's sampling approaches (after Creswell, 2012):

1. The levels and dimensions of sampling;
2. The participants in the sample;
3. The sampling strategy best fitting the research inquiry approach; and
4. The size of the sample to be studied.

Levels of sampling

This study relies on three levels of sampling that include (a) the customer insight-using organization, (b) the individuals engaged with customer insight, and (c) the customer insight *packets* themselves. As this study proposes a theory about a process involving multiple units of analysis and actors, two further sampling dimensions are relevant to the research questions. These are (1) time and (2) context and are discussed below.

First, users' attitudes and activities vary over time in ways that are significant across the lifetime of a customer insight (after Hammersley and Atkinson, 2007). This study samples users' organizational lives during different times of activity and different forms of interaction while encountering customer insight. The nature and frequency of users' encounters with customer insight are likely to vary across the different phases of the business year.

Second, individuals' behaviours vary across different organizational settings and contexts. Formal (offices or meeting rooms) and informal (coffee areas or canteen/restaurant areas) settings may impact individuals' behaviours during their engagement with customer insight (after Bryman, 1988). This study's RET assists by encouraging participation across all settings.

Sampling at these levels is less concerned with statistical criteria and more oriented towards the adequacy of the study's theoretical framework (Bryman, 1988; Glaser and Strauss, 1967). This study thus involves as many individuals and customer insight packets as required to achieve "theoretical saturation" (after Glaser and Strauss, 1967).

Study participants

Study participants qualified for recruitment and participation provided they conformed to two key criteria. The first required individuals who had experienced customer insight and who were thus able to contribute to theory generation (after Corbin and Strauss, 2008; Creswell, 2009). The second criterion required participants to be involved in marketing decisions.

Selecting individuals relied on information provided by key informants approached at the beginning of each case study. Whilst being acquainted with most members of a group (Creswell, 2009; Hammersley and Atkinson, 2007), key informants helped identify individuals for RET and interview participation. A variety of participants was desirable to ensure that the study moved away from homogeneity and accounted for a range of customer insight usage behaviours and users' held meanings.

Case study organizations

Organizations participating in this study were required to conform to four qualifying criteria. The first required organizations to be engaged in markets with different levels of turbulence, dynamism and complexity (thereby maximizing variation within the sample) (after Kohli and Jaworski, 1990; Slater and Narver, 1995; Souchon and Diamantopoulos, 1996). The second criterion required participating organizations to be involved in providing services in domestic markets (rather than export-oriented firms that are the subjects of extant literature on CI use; e.g., Bierly *et al.* (2009); Diamantopoulos *et al.* (1990); Maltz *et al.* (2001); Souchon and Diamantopoulos (1997)). The third criterion required organizations to rely on multiple users of customer insight, located in different functions within the organization, while the fourth meant that organizations needed to depend on multiple sources of customer insight. The organizations participating in this study are described in Chapter 6.

Sampling types

A purposeful selection of insight packets, individuals and sites/organizations for this study best addressed the requirements of the research questions.

In the pilot (exploratory) case study, the nature of the phenomenon was still to be determined, justifying a criterion sampling approach in selecting customer insight packets, as well as snowballing in selecting study participants (after Creswell, 2012). Selecting study participants relied on the undertaking of initial interviews of 8 to 10 key informants in the organization that were initially named by the organization's key representative (project champion) (after Bryman, 2012; Paulhus, 1991).

The key case study focused on the explanation of processes, mechanisms and structures. These objectives meant that a maximum variation sampling approach was required in selecting customer insight packets to appraise the typical processes, users and meanings (after Miles and Huberman, 1994). By contrast, selecting customer insight users in the organization justifies a stratified purposeful selection intended to illustrate manager subgroups and to facilitate comparisons across individual users (Miles and Huberman, 1994).

Sample sizes

To answer the research questions, this study required a balance between the variation and depth/detail that describes the use of customer insight (after Creswell, 2012) as well as recruitment of suitable numbers of individuals who experience sufficient encounters with a sufficient number of insight packets from different sources.

Because this study is about customer insight users who form part of a limited pool of subjects and constitute groups that are difficult to discern (owing to lack of explicit characteristics), small sample sizes (n = 12 to 20) allow for effective grounded-theory approaches (after Adler and Adler, 2012 in Baker and Edwards, 2012). By contrast, a sample of n = 100 ~ 200 RET responses supports adequate quantitative treatment (like latent class modelling) in investigating temporal patterns and mechanisms relevant to users' engagement with customer insight (Nylund *et al.*, 2007; Vermunt and Magidson, 2002). Larger samples (ranging between n=500 and n=1,000 observations) do not allow for any improvement in solution stability or do not lead to deterioration of acceptance of tests (Nylund *et al.*, 2007). A more detailed account about the sample size considerations above is set out in Appendix A (page 304).

5.5 Data and collection methods

Data collection involved the design and administration of a sequence of activities for each case organization, intended to establish the customer insight users, sources and the insight packets they encounter. This sequence of activities also needed to establish access to customer insight users as well as capture core evidence and data, enough to determine how managers use customer insight. The collection methods also need to ensure ways to validate the observations and findings about managers' use of customer insight.

These goals justified a sequence of four different types of encounters between the researcher and this study's units of analysis:

1. qualitative interviews with organization members involved in customer insight processes;
2. self-initiated simple text (SMS) messaging responses;
3. self-completion online diary (complementing the SMS responses); and
4. validation seminar with customer insight users.

Figure 5-2 summarizes the above data collection sequence, showing how each case (pilot and key study) started with initial qualitative interviews, intended to establish a direction for the rest of inquiry as well as rapport with study participants. Participants in these initial qualitative interviews included

1. a key representative and project champion of the case organization (involving a key customer insight user and member of senior management) who can promote the project throughout the case study organization, and
2. key customer insight users leading their own departments or teams where customer insight use is a core aspect of the departments' functioning.

RET data collection work followed, gathering and analysing data that in turn was used as material for validation through further qualitative interviews at a third stage. In this third stage, participants corroborated on

- ☐ processes and stages involved in the use of customer insight, and
- ☐ motivations that guide behaviours and meanings emerging from the use of customer insight.

These considerations are particularly relevant, as they are *framing* the entire case study field work in a way that keeps all data collection approaches specific to the research questions.

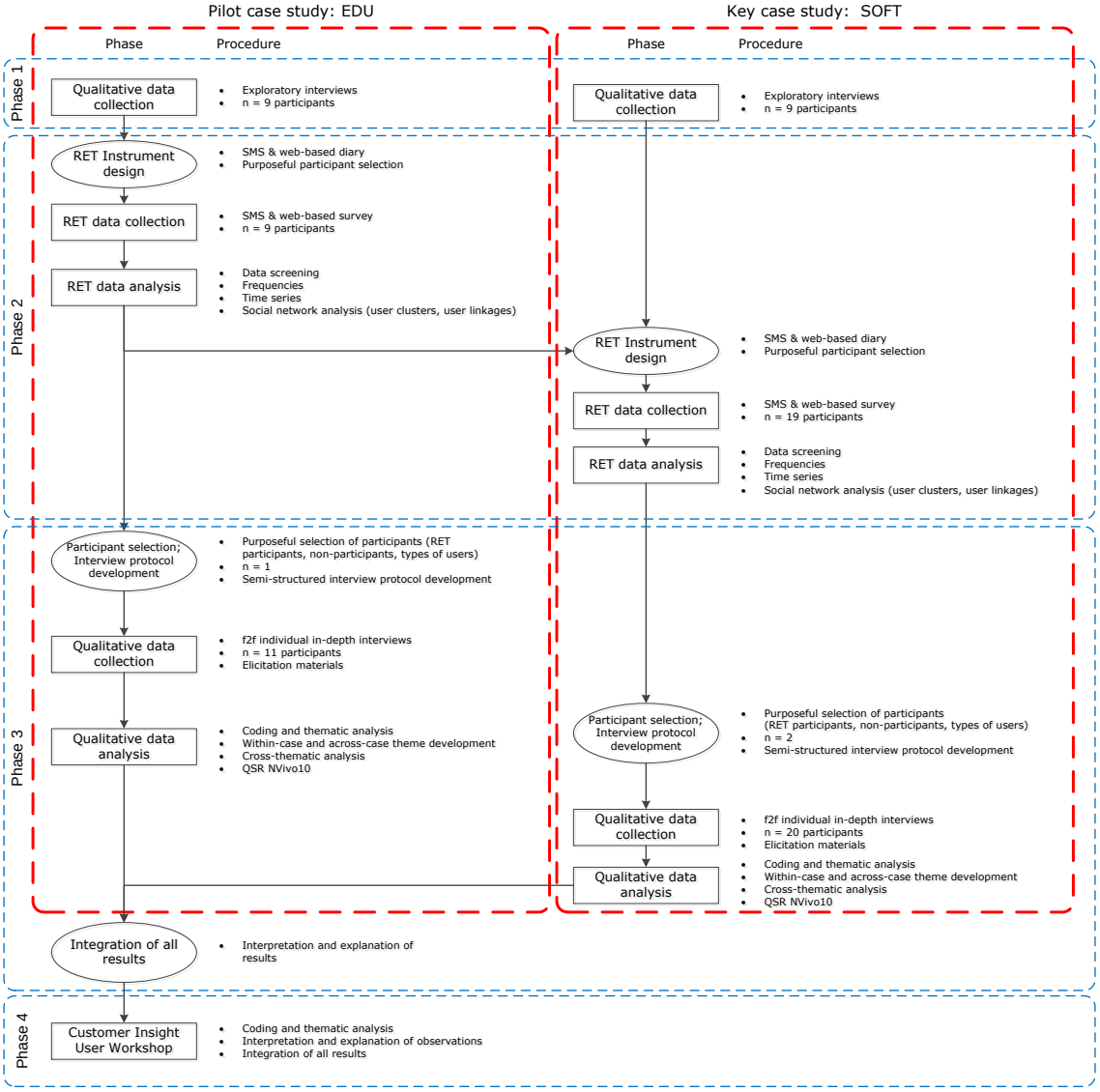


Figure 5-2 Sequence of data collection and analysis phases for each case organization (Source: Author)

5.5.1 Confidentiality

This study conforms with various confidentiality commitments towards the case organizations and their members. Thus, all names of companies and individual participants were changed. The pilot case organization is hereafter termed EDU, and its members participating in this study are named EDU01, EDU02 and so on. The key case organization is hereafter termed SOFT, and its members participating in the study are named SOFT01, SOFT02 and so on. A description of the case study organizations and their participating members is set out in Chapter 6.

5.5.2 Qualitative interview protocols

Each case study involved four different types of interviews, carried out with three types of participants. Table 5-3 summarizes the objectives of each interview type.

Table 5-3 Interview objectives in this study (Source: Author)

	Participants		
	Key representative / champion	**Key users**	
		Pre-case	Post-case
Objectives	***Identify***	***Explore***	***Corroborate on***
	Key customer insight sources and providers	Role of participant and associated colleagues (roles, numbers)	Key customer insight user types/patterns
	Customer insight *packets* as known or referred to in the organization	Organization's key customer insight providers	Sequence of steps in customer insight usage processes
	Organizational functions/groups engaged in customer insight use	Engagement of participant with customer insight packets	Motivations for engagement with customer insight
	Members of each function/group		Meanings emerging from customer insight engagement
Duration (mins)	60 mins	60 mins	60 mins
Audio recording?	Upon consent by participant	Upon consent by participant	Upon consent by participant

Pre-RET Interviews

Requiring about 60 minutes and held at a time and location selected by the participant, all interviews were digitally audio-recorded up to a point participants allowed. Participants were also allowed to withdraw from the interview at any point, in accordance with Cranfield University ethics. All interview recordings were transcribed

verbatim following Du Bois *et al.* (1993). Appendix B (page 307) outlines each pre-case interview protocol used in this study.

During the first case study (EDU), nine managers participated in interviews. One, a senior manager at the central administrative function, acted as project champion and key representative for the rest of the case study work. Each interview took an average of 44 minutes. None of these interviews were recorded or transcribed, but notes taken during the interviews allowed for subsequent analysis.

In the second case study (SOFT), nine managers were interviewed. One of the participants occupied a senior management role in the marketing function and acted as champion and key representative for the rest of the case study work within this organization. Interviews lasted an average of 39 minutes (ranging from 1¼ hours to around 25 minutes) and produced 151 pages of transcribed text. Transcribing was commissioned to an external transcribing service provider that was engaged to follow Du Bois *et al.*'s (1993) transcription guidelines. Each transcript was in turn verified by comparing it with the original audio recordings before its eventual use in analysis.

Post-RET interviews

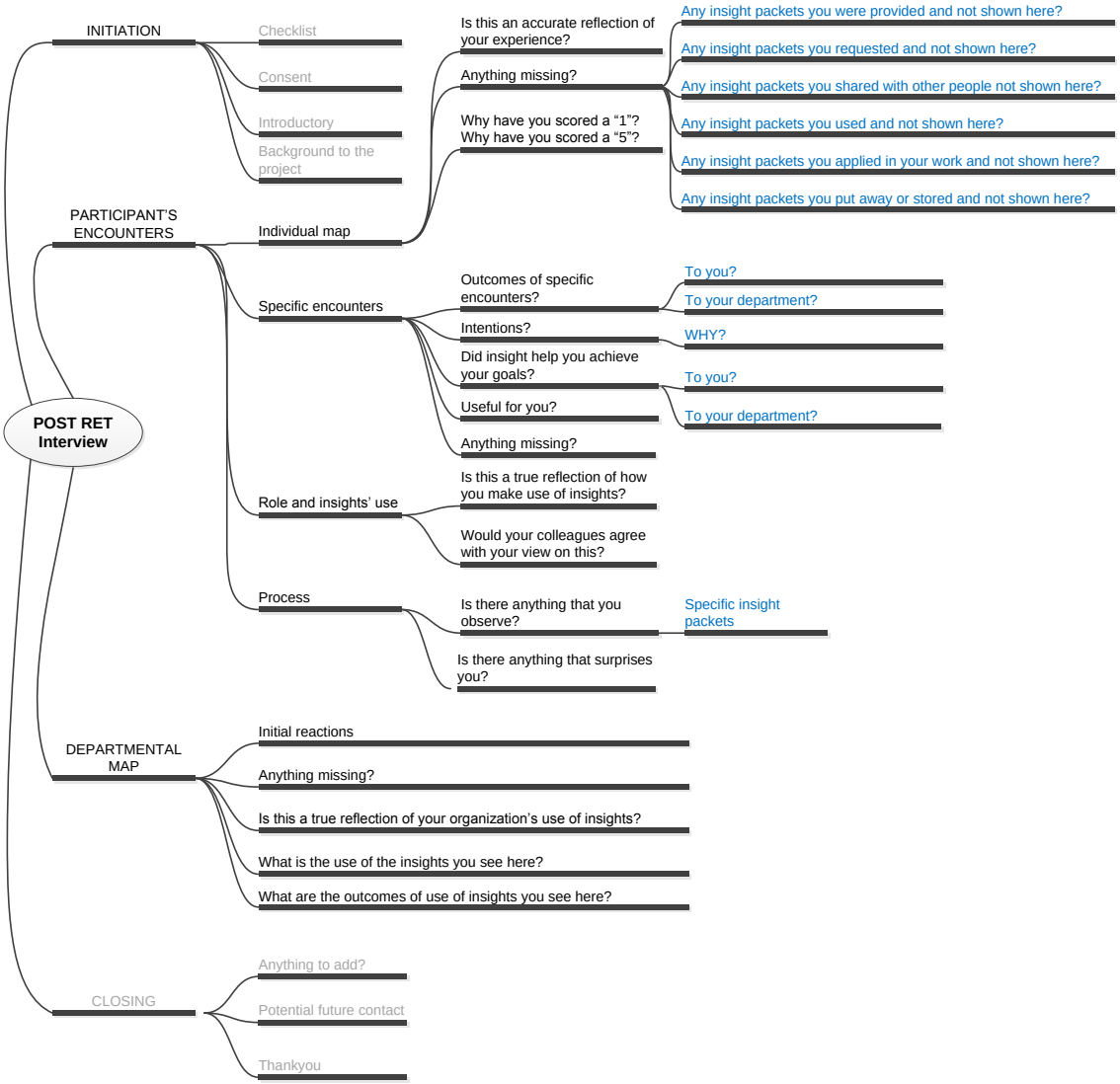
This stage involved the exploration of meanings, perceptions and interpretations that organization members hold in their engagement with customer insight. Using semi-structured or unstructured interviewing to allow participants to

- (jointly with researchers) reflect on life-world issues and discuss insights (Cunliffe, 2011; Kvale, 2007),
- corroborate RET findings (which include process maps at individual, group and organizational levels).

This study employed an interview guide that just outlined the topics covered in post-case interviews (after Kvale, 2007) (see Figure 5-3), rather than limit the interview to a

sequence of questions.[19] This guide assisted in keeping interviews at this stage as close to normal conversation as possible. Semi- or un-structured interviews

- helped to access people's "meaning-endowing capacities", producing rich, deep data that came in the form of "extracts of natural language" (Brewer 2000;, p. 21); and
- are fit for use in nascent theory studies (Edmondson and McManus, 2007; Maznevski and Chudoba, 2000), although they follow a pre-determined direction, like structured interviews (Davies, 1999).



19 Appendix C appraises the questions' relevance to the research questions.

Figure 5-3 Post-case qualitative interview guide

A total of eleven managers participated in these interviews at EDU. Each interview lasted an average of 57 minutes, was entirely audio-recorded and was then transcribed following the transcription guidelines of Du Bois *et al.* (1993). All transcribing was commissioned to an external transcribing service provider and verified by comparing texts with the original audio recordings before eventual use in analysis. A total of 244 pages of transcript were produced.

A further twenty managers participated in post-RET interviews at SOFT. As in EDU, each interview was audio-recorded and transcribed by an outsourced transcribing service provider, following the same transcribing guidelines of Du Bois *et al.* (1993). On average, interviews lasted 55 minutes (ranging from a maximum of 2½ hours to a minimum of 28 minutes) and produced a total of 503 pages of transcript. All transcripts were verified before use in analysis procedures.

5.5.3 Real-time experience tracking

RET relied on closed-ended data collection approaches involving SMS and an online diary in a sequence, as set out in Figure 5-4 below. Both SMS and online diaries captured a view of the participants' engagement with customer insight packets during specific "encounters".

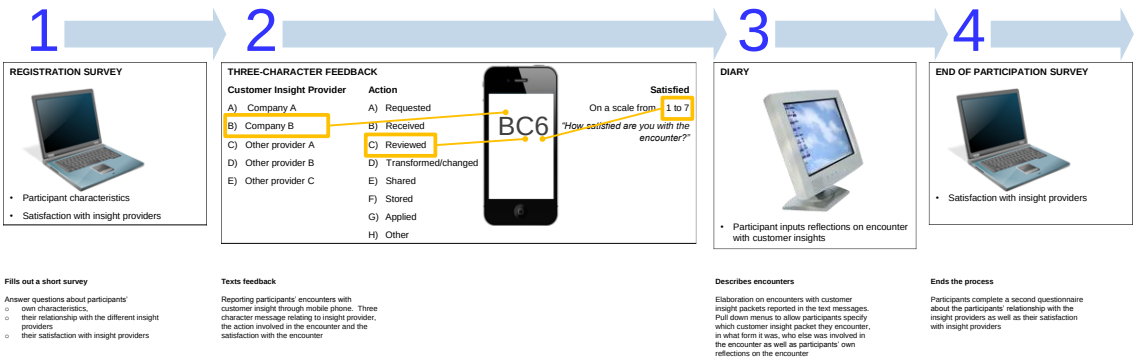


Figure 5-4 Sequence of RET data gathering tasks (Source: Author)

Here, research instruments elicited responses about customer insight users' experience.

Appendix D sets out a description of the SMS and online diary instruments administered in this study. A third-party firm was hired to administer the collection of all text messages and online diary data. Appendix E includes a sample of screen shots that show how participants experienced the RET instruments administered in this study.

Both SMS and online diaries captured a longitudinal view of the participants' engagement with customer insight, helping plot specific "encounters" on a four-week timeline map.

5.5.4 Validation seminar

In the last phase of the data collection process, a workshop was organized to validate findings emerging from the study with practitioners involved in the use of customer insight. The workshop was held during one of a series of fora organized by the Cranfield Customer Management Forum in February 2014.

The workshop started with a 30-minute presentation about the key findings emerging from the study. This presentation included key points about the process stages of customer insight use, as well as key influences that block or facilitate this process.

Participants were separated into five groups, each including five or six participants. Each group selected one employing organization represented by each of the members within that group as a case, and they discussed the process steps and associated conditions that hinder or facilitate the use of customer insight. Members annotated points on a purposely prepared A0-size poster (see Appendix F, page 324), provided to each group by the forum organizers.

All groups were invited to make a short presentation on their own discussions, with four groups making a presentation about their selected case. The entire session was audio-recorded and transcribed. The case studies' "completed posters" were photographed and annexed with transcripts for eventual qualitative analysis.

5.5.5 Recruiting participants and encouraging participation

To attract and motivate research participants' engagement with the study, a series of recruitment and stimulating efforts were undertaken for each of the RET and qualitative interviewing phases.

In engaging subjects with the RET phase, each case study's project champion circulated an invitation email among identified customer insight users who fit the criteria set out in Section 5.4. Invited participants were required to answer the email invitation, confirming their intent to participate in the study for a period of four weeks.

A purposely developed presentation setting out instruction on how participants could participate in RET data collection was produced for each case study. This recorded presentation (in the form of a short video clip) was made available online to all confirmed participants, who were then invited to log on to a purposely built website (that eventually hosted the web diary). Weekly text message reminders were sent to all registered participants by the RET administering firm to encourage participants to send text message responses as well as to visit their respective online diary.

Consistent with common RET practice (in consumer research), some incentives were offered for participants. At EDU, the five participants who sent the most text messages were offered a bottle of sparkling wine. A final drawing of a monetary voucher redeemable at one of the organization's own cafés was offered to one participant at the end of the RET data collection phase. At SOFT, participants were entered into a weekly drawing, winning a bottle of champagne and a final award of dinner for two at a restaurant.

As in the RET phase, post-RET qualitative interview participants were also invited by each of the case study's project champion. Upon confirming their intention, direct contact with participants was made to agree on a convenient time and place for the interview. No incentives were offered for interview participation, but all interview participants were invited to attend the validation workshop described in Section 5.5.4. Of the 31 post-RET interview participants, two participated in this workshop.

5.6 Data analysis

The following paragraphs summarize the approaches applied to develop an understanding of the data that answers this study's research questions. The analysis process included a series of iterations between field data collection and analysis steps, involving the sequence set out in Table 5-4, consistent with the retroductive strategy planned.

The process in Table 5-4 is also consonant with Miles and Huberman's (1994) recommendation for the investigation to cycle back and forth between mulling over collected data at each step and the strategies to be adopted in forthcoming data collecting steps to generate better data. Indeed, initial analysis from RET data helped identify the data requirements to be collected during the post-RET interviews to fully answer the research questions guiding this study.

Table 5-4 Sequence of preparation, field work and analysis steps involved in this study

Step	Field work preparation	Field data collection	Analysis
01 Developing exploratory interview protocol for use in interviewing the organization's key representative and project champion, as well as key customer insight users	✓		
02 Interviewing the organization's key representative and project champion as well as key customer insight users, with the interview audio recorded and transcribed (where permitted)		✓	
03 Initial coding of transcripts identifying emerging (initial) themes and patterns			✓
04 Devising RET instrumentation and participant briefing material	✓		
05 Piloting of RET instrumentation		✓	
06 Recruiting and briefing RET participants	✓		
07 Administration of RET instrumentation for four weeks		✓	
08 Compiling RET data to produce visual rendition of customer insight encounters across individual research participants, functions and organizaton			✓
09 Developing corroborative interview protocol for use in interviewing customer insight users (both RET participants and not)	✓		
10 Recruiting interview participants	✓		
11 Interviewing customer insight users (using protocol in 09 above) with interview audio recorded and transcribed		✓	
12 Initial coding of transcripts identifying emerging (initial) themes and patterns			✓
13 Devising a presentation of findings for validating seminar along with other stimulus material in the form of A1 posters	✓		
14 Delivering a presentation of findings during the validating seminar and encouraging participation		✓	
15 Recording and transcribing participant contributions in validating seminar		✓	
16 Coding of validating seminar transcript and merging with previous coding			✓

The following two sections summarize the quantitative and qualitative analysis approaches adopted in this study, with the results obtained discussed in the next part of this document.

5.6.1 Quantitative data analysis

At a descriptive level, data captured through RET approaches (both SMS and online diary approaches) was collated to produce a visual map of the encounters customer insight users experience on a timeline (see Figure 6-2 through Figure 6-7). These maps provided a picture of the journey of customer insight at the insight packet, individual manager and group levels of analyses, and helped answer, in part, the research questions of this study (see Table 5-5).

Table 5-5 A summary of the analysis techniques and relevance to research questions studied (Source: Author)

			Research question	
			How do managers use customer insight?	What is the process of customer insight use in an organization?
Aspect of phenomenon studied and focus of approach	Temporal patterns	Unfolding of user/insight encounters	✓	✓
		Actions involved in use of customer insight at individual and group levels	✓	✓
	Mechanisms	Typologies of customer insight usage behaviours	✓	
		Stimuli that trigger customer insight usage steps	✓	
Quantitative analysis step		Timeline visual mapping	✓	✓
		Cluster analysis	✓	✓
		Social network analysis		✓

At a more detailed level, the three text message data variables describing each customer insight encounter (insight source, action and satisfaction level) were subjected to clustering approaches intended to segment individuals or customer insight sources according to the types of behaviours reported, producing a view at the individual managers' level of analysis.

A final approach involved the use of the online diary data, particularly data relating to the other persons involved in the encounter along with the individual participant, to build a network view of the paths of different customer insight packets. Using NodeXL™ add-on application on MS Excel™, this study involved social network

analysis (Hansen *et al.*, 2010; Smith *et al.*, 2009) to cluster the different organizational functions in their engagement with customer insight.

5.6.2 Qualitative data analysis

Qualitative data from online diaries, interviews (formal or casual) and other observations in this study were translated into document formats and compiled into one NVivo™ 10.0 project file for subsequent coding and analysis. Analysis involved a total of eleven coding steps as described below, with each step leading to a partial interpretation of data.

Initial analysis of qualitative data captured from exploratory interviews was coded into three major units of social organization (after Lofland *et al.*, 2006) that included practices (like routines and tasks), individuals' roles and social relationships between individual across functions and with customer insight providers. A further step involved adopting an open approach to the coding of exploratory interview data (Charmaz and Mitchell, 2001; Charmaz, 2006; Corbin and Strauss, 2008; Glaser and Strauss, 1965; Strauss and Corbin, 1994) with a particular focus on users' description of the content or attributes of specific customer insight packets.

A third step involved adopting a focus on *process* (after Charmaz, 2006; Corbin and Strauss, 2008; Saldana, 2009) in analysing users' accounts of their engagement with specific customer insight packets described during the exploratory interviews that preceded the RET phase. This coding step led to the creation of nine process categories, each describing different types of observed behaviours users imply when talking about their engagement with customer insight.

The interpretations emerging from the above analysis helped not only in the design of the RET data collection instrumentation but also in the development of the qualitative interview schedule used during the third phase of fieldwork (in-depth corroborative interviews).

Interview data collected after the RET phase was treated differently from the interview data collected during the pre-RET phase. Initial analysis of post-RET interview

transcripts involved a *template* approach (after King, 2004) by coding users' accounts of their engagement with customer insight onto the previously developed customer insight use *process step* categories. Despite its relative flexibility, template coding remains highly structured in approach, as developed themes remain relatively stable (Miles and Huberman, 1994). However, template coding assists in the grounded theory process as it opens opportunities for further detailed coding structures (Corbin and Strauss, 2008; Strauss and Corbin, 1994) through iterations of coding. Indeed, during a further step of coding, the *polyvocality* of data (King, 2004) in each insight use process step category allowed the same pieces of data to be further coded into three types of themes:

- the level of analysis (customer insight packet, individual or group), or the ontology of the process (after Lam, 2000),
- the explicit or implicit conditions impacting the users' engagement with customer insight; and
- the attributes that describe the organizational context of the conditions that impact users' engagement with customer insight. These attributes were largely inspired by the 7S framework (after Peters and Waterman, 1982; Venkatraman and Camillus, 1984; Waterman, 1982; Waterman *et al.*, 1980).

A look at the emerging codes demanded further analysis of the behaviours observed in each of the process step categories. A *focused* coding approach was adopted in searching for the mechanisms that research participants made implicit in their descriptions of behaviours, following the suggestions of Charmaz (2006) on grounded theory approaches. This step expanded the original set of nodes (within the nine process categories) from 102 to 268 nodes. As a way of interpreting this multitude of nodes, *pattern coding* of all nodes within the process categories (after Miles and Huberman, 1994) helped pull together most of the nodes into a more meaningful and parsimonious collection of 49 major themes. Pattern coding also resulted in the aggregation of four process categories into two more meaningful process categories, ending in a structure comprising seven process categories.

In validating the sequence of process steps emerging from RET data analysis, process category data was further *pattern* coded for links between specific steps. For instance, participants' description of "receiving insight as part of a massive amount of incoming information that they have to filter through" implied an "acquire – and – filter" sequence linking the "acquire" and "filter" process step categories.

A final step of *axial* coding (Charmaz, 2006; Glaser and Strauss, 1967; Strauss and Corbin, 1994) helped bring out the dimensions and properties relating to different types of behaviours, motivations and influences affecting the customer insight use process. This approach resulted in the creation of three different levels of nodes within the process categories.

The gradual organization of nodes into categories and sub-categories at different levels also indicated a relative ripening in abstraction and interpretation of data (Miles and Huberman, 1994).

Further analysis involved the creation of queries (in NVivo) that uncovered the occurrence of behaviours at different levels of analysis (individual vs. implied or explicit groups) and the distribution of the different influences impacting the customer insight use process at different process steps. Table 5-6 summarizes the above qualitative analysis process account.

Table 5-6 Summary of coding steps, analytic approaches and data (Source: Author)

Step	Coding type	Categories in focus (description)	Data used			
			Pre-RET	RET Diary	Post-RET	Validating seminar
1	Open	(Initial coding)	✓			
2	Open	Practices, roles and social relationships	✓			
3	Open	Insight content and attributes	✓			
4	Open	Process behaviours	✓			
5	Template	Process behaviours		✓	✓	✓
6	Open	Level of analysis, explicit/implicit conditions of engagement , organizational context (7S)	✓	✓	✓	✓
7	Focused	Process behaviours – mechanisms	✓		✓	✓
8	Pattern	Process behaviours	✓		✓	✓
9	Pattern	Process behaviours sequence	✓	✓	✓	✓
10	Axial	Process behaviours, explicit/implicit conditions of engagement	✓		✓	✓
11	Axial	Distribution of process behaviours across levels of analysis,	✓		✓	✓
		Distribution of influences across process behaviours.	✓		✓	✓

The final hierarchical coding structure allowed an interpretation of behaviours and influences along different dimensions, such as the role of the individuals, process step, organization and level of analysis. This interpretation is discussed in the next part of this document.

Were it not for constant reminders about the research questions (in the form of a highly visible print-out of the research questions), it is likely that this analytic process would have lost focus and a level of parsimony would not have been attained.

5.7 Summary

This chapter analysed the implications of the research questions in terms of units of analysis and relevant research approaches. The study's research approaches are consistent with the philosophical positioning of this study as well as its methodological fit in an evolving theoretical domain. Indeed, this chapter translates these implications into a feasible research design, described in terms of sampling and approaches in data collection. The latter involved a sequence of four phases where quantitative and qualitative data supported three process theory generation approaches. Generating theory also meant the utilization of various quantitative analyses on RET data collected during the second phase of research, coupled with various qualitative data analyses on interview and observation data collated during the first (exploratory) phase, the third (corroborative) phase and the fourth (validating) phase of data collection.

The next chapter describes the case organizations from which the data was gathered.

6 THE CASE ORGANIZATIONS

This chapter sets out a description of the pilot and key case studies in which the use of customer insight was investigated. An outline of each organization is set out, along with a description of the individuals participating in this study. An appraisal of the key customer insight packets tracked in the RET data collection phase follows. Apart from describing the key outcomes from each case study, this chapter also accounts for the key methodological observations emerging from the pilot case study that helped in the optimization of approaches implemented in the key case study.

The descriptive nature of this chapter is intent on outlining some key differences of the two organizations in their engagement with customer insight. This chapter also shows how the selection of these organizations complies with the case selection criteria set out in Section 5.4 (page 87). A description of the customer insight users and their organizations participating in the validation workshop is also presented at the end of the chapter.

6.1 Case 1 - EDU

EDU's study addressed two key objectives. First, the case study helped appraise the feasibility of RET data collection in an organizational environment as well as RET's ability to answer the research questions. Second, the EDU's study was also intended to help develop initial answers to the research questions. These initial answers enabled further testing and refining during the key case study investigation.

A private institution, EDU provides higher education through five colleges. Figure 6-1 sets out a summary of the organizational structure of EDU.

EDU's income comes mainly from tuition and education services as well as research in different areas. EDU largely serves UK public and private organizations, ranking among the top five UK-based institutions that serve this specialized market.

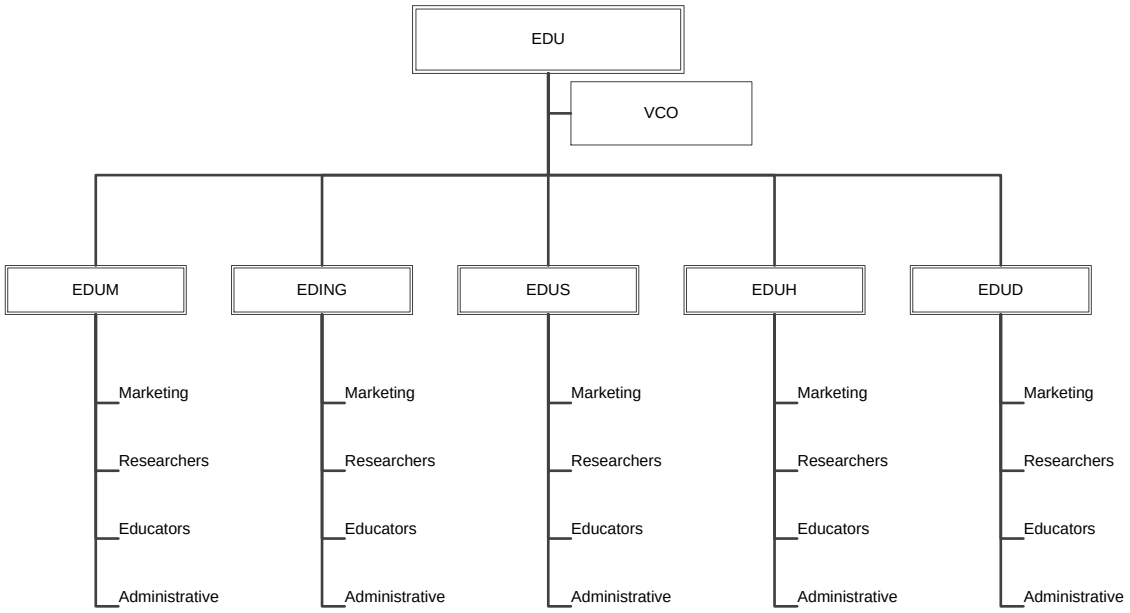


Figure 6-1 Summary organizational structure of EDU (Source: Author)

EDU's marketing activities target funding for research projects as well as attract individuals to participate in a diversity of training programmes. A central communications business unit (VCO) provides a supporting and coordinating role, especially during initiatives targeting key customers that involve different colleges within EDU concurrently.

These observations suggest that EDU is fit for this study, as it satisfies all selection criteria in Section 5.4. Indeed, EDU:

- is engaged in a competitive market featuring its own level of turbulence, dynamism and complexity;
- provides services to largely domestic customers (although a portion of its revenues are sourced from education services to international customers);
- relies on multiple users of customer insight, located in different business units across the organization; and
- relies on outsourced customer insight from a number of providers. Outsourced customer insight is shared by a number of users across the organization.

6.2 Addressing the comprehensiveness requirements

Developing a quality contribution involves observations and data interpretations that answer the research questions comprehensively. In so doing, interpretations need to feature a rich account that emerges from the variation within the sample of units of observation and units of analysis. The following paragraphs offer an account of EDU's participants as well as the customer insight packets they encounter in this study, underscoring the variation within the sample.

6.2.1 Participants – A brief description

Table 6-1 describes the 17 insight users participating in this case study across the different data collection phases.

Table 6-1 Summary description of case participants: EDU (Source: Author)

Participant	Function or College	Age	Gender	Role	Education	Pre-RET Interview	RET Participation	Post-RET Interview
EDU04	EDUM	35-44	Male	Service /operations	Undergraduate degree (or equivalent)	✓	✓	✓
EDU05	EDUM	35-44	Female	Marketing / communications	Undergraduate degree (or equivalent)		✓	✓
EDU06	EDUM	25-34	Female	Marketing / communications	GCSEs (or equivalent)	✓	✓	
EDU07	VCO	45-54	Male	Marketing / communications	Postgraduate degree (or equivalent)	✓	✓	✓
EDU08	VCO	55-64	Female	Marketing / communications	Undergraduate degree (or equivalent)	✓	✓	
EDU09	EDING	35-44	Male	Marketing / communications	Postgraduate degree (or equivalent)	✓	✓	✓
EDU10	EDUM	55-64	Male	Other	Postgraduate degree (or equivalent)		✓	
EDU11	EDUM	35-44	Female	Marketing / communications	Undergraduate degree (or equivalent)		✓	✓
EDU12	EDUM	65+	Female	Marketing / communications	Undergraduate degree (or equivalent)	✓	✓	
EDU13	EDING	45-54	Female	Marketing / communications	Undergraduate degree (or equivalent)	✓		✓
EDU14	VCO	45-54	Female	Marketing / communications	Undergraduate degree (or equivalent)	✓		
EDU16	VCO	25-34	Female	Marketing / communications	Postgraduate degree (or equivalent)			✓
EDU18	EDUD	45-54	Male	Marketing / communications	Postgraduate degree (or equivalent)			✓
EDU24	EDING	45-54	Female	Marketing / communications	Undergraduate degree (or equivalent)			✓
EDU27	EDUM	35-44	Female	Marketing / communications	Undergraduate degree (or equivalent)			✓
EDU28	EDUH	55-64	Male	Marketing / communications	Postgraduate degree (or equivalent)	✓		✓
EDU29	EDUM	35-44	Male	Marketing / communications	Postgraduate degree (or equivalent)	✓		

Participants varied in terms of gender, age, education, roles (senior or middle executive levels) as well as their engagement with different business units within EDU.

This spectrum of participant types meets the variation requirements of this study in terms of roles (particularly orientation and goals) as well as associated contexts/settings:

- VCO (engaged in organization-wide marketing) and
- EDUM, EDING and EDUH (where marketing activities target *college-specific* participant recruitment and research funding).

Marketing activities across these business units involve different types of individuals, ranging from established researchers (acting as key "touch points" coordinating research projects) to media executives who design and coordinate web communications targeting prospective programme participants.

6.2.2 Customer insight packets tracked (RET)

Initial qualitative (and informal) meetings/interviews explored the different types of customer insight sources and packets that were eventually tracked through RET.

Table 6-2 Summary of customer insight sources and packets tracked in RET along with frequency of encounters (n = 9 active participants)

Source	Description	Customer insight packet tracked	Description	Total encounters
ESP1	external agency specialising in online media and communication data	ESP1 Periodic Update	email update relating to social media, online and print communication statistics/analytics	40
		ESP1 Database	web supported database service. Users access data about social media and print communication analytics directly from their location	
ECD	a team specialising in communications at a University wide	Opportunities database	data relating to funding opportunities for research and training	40
EDUAS	a department facilitating the smooth progress of the student experience at Cranfield University. It collects student recruitment and experience data as part of this role	Participant recruitment report	A survey about the perceptions and experiences of programme participants before engagement into various programmes administered by EDU	5
		Participant survey	A survey about the perceptions and experience of programme participants during their studies at EDU. Administered annually.	
EDUWS	a central function to provides IT support services to all University schools	ESP2 Insight	Web analytics data available on request through subscription. Information is about site traffic, traffic sources and usage	2
		ESP3 Insight	Web analytics data available on request through subscription. Information is about site traffic, traffic sources and usage	
Own College	The participant's own school as a source of customer insights	Focus Group Research	Research about programme participants' experience at the respective college while pursuing studies	6
		Participant Recruitment Survey	Research about programme participants' decision to join EDU and the respective college.	
		Prospect Decline Survey	Research about prospective participants' decision to refuse an offer for studies at EDU	
Other	Other sources and customer insight packets encountered by the participant			1

These discussions suggested that ten different customer insight "packets" from five different sources (Table 6-2) were most commonly in use. Of these, two key sources (ESP1 and ECD) accounted for over 85% of the encounters reported by participants.

6.2.3 Participation in the project

The RET data collection attracted nine participants who would submit text message and online diary accounts about their engagement with different customer insight packets. However, overall participation remained modest, warranting an evaluation after the four-week data collection period expired (see Section 6.4.2).

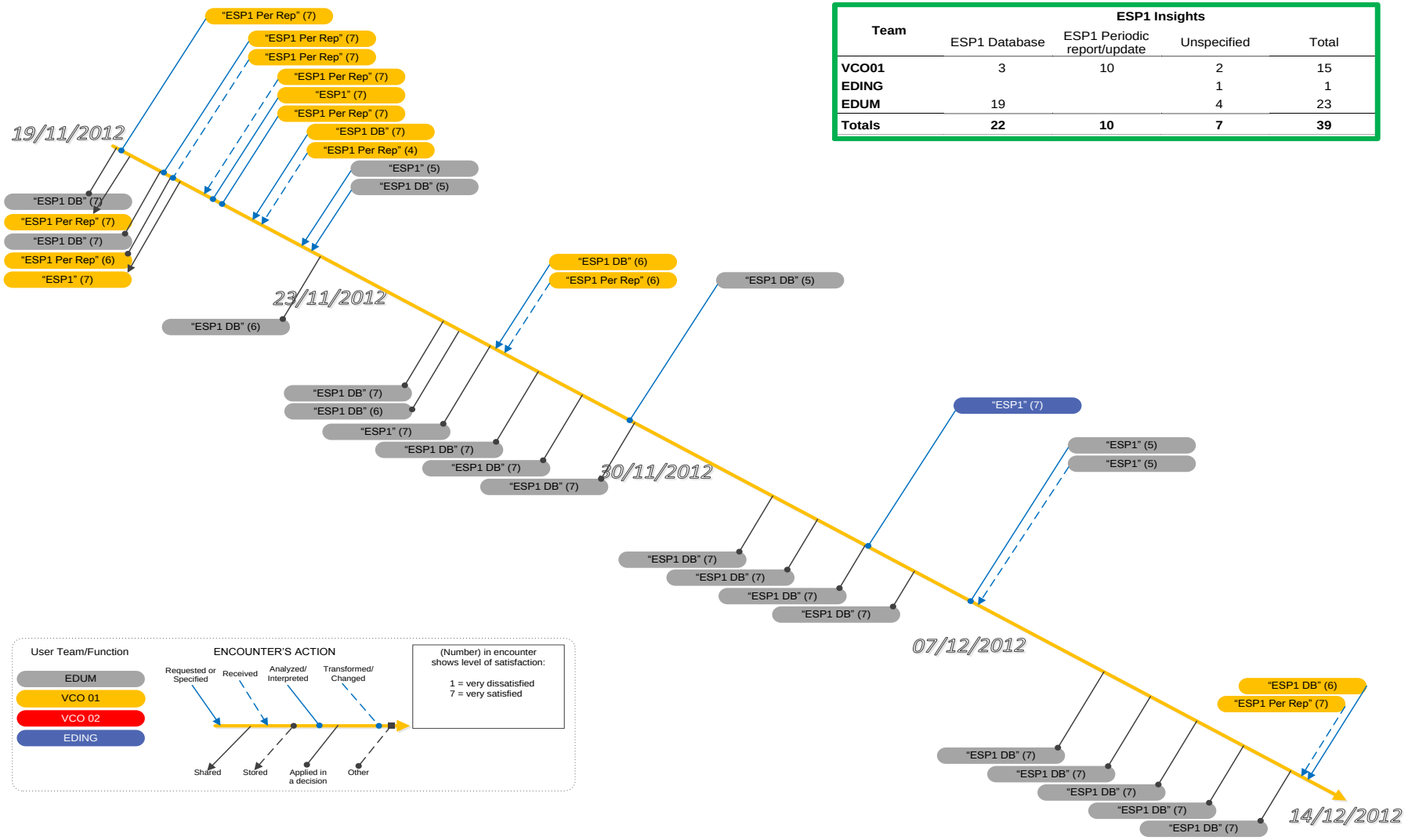
Interviewing involved nine exploratory meetings with key customer insight users (including the project champion) between October and November 2012 prior to the administration of RET study. Between 19 June and 8 September 2013, eleven qualitative interviews, each about 60 minutes long, were conducted with various customer insight users (including both RET participants as well as others). These interviews relied on the use of anonymized demonstration material depicting timeline maps at three levels of analysis: (1) customer insight source, (2) individual participant and (3) participants' group level as defined by their business unit or function. These timeline maps are described in the following section.

6.3 Representing encounters in maps

The customer insight encounters captured in the RET method were mapped out on timelines in three ways (Figure 6-2 to Figure 6-7), each representing a different level of analysis:

a. At customer insight level, where different packets from one source are encountered by different research participants across all business units and locations (see Figure 6-2 to Figure 6-4);

b. At the individual participant's level, where the participant's encounters with different customer insight packets are set out on a single timeline, representing the individual's experience over the four-week period (see example in Figure 6-6);



Team	ESP1 Insights			
	ESP1 Database	ESP1 Periodic report/update	Unspecified	Total
VCO01	3	10	2	15
EDING			1	1
EDUM	19		4	23
Totals	**22**	**10**	**7**	**39**

Figure 6-2 Customer insight encounters' trajectory at insight level of analysis: ESP1 insight packets (Source: Author)

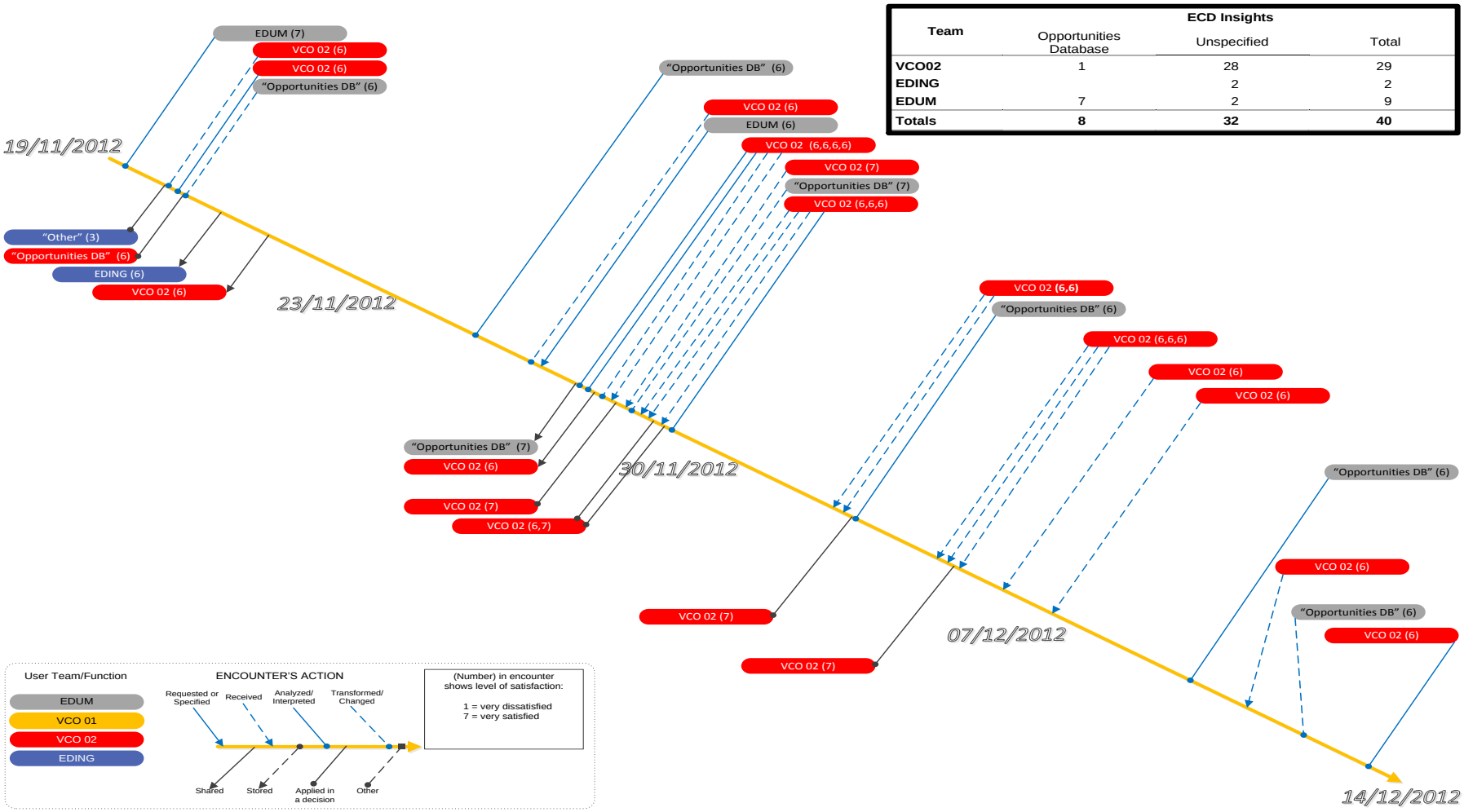


Figure 6-3 Customer insight encounters' trajectory at insight level of analysis: ECD insight packets (Source: Author)

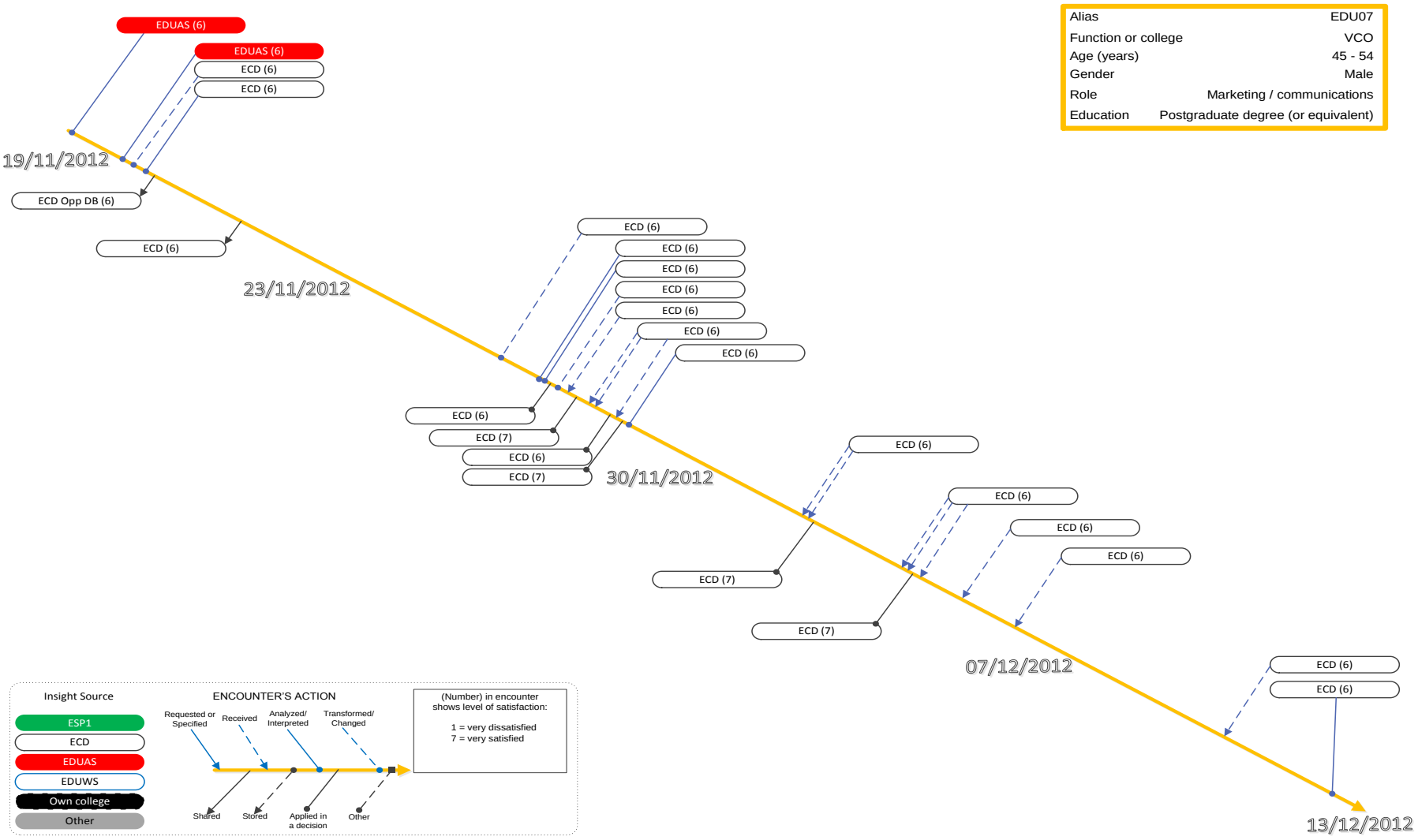


Figure 6-4 Customer insight encounters' trajectory at an individual participant level: An example (Source: Author)

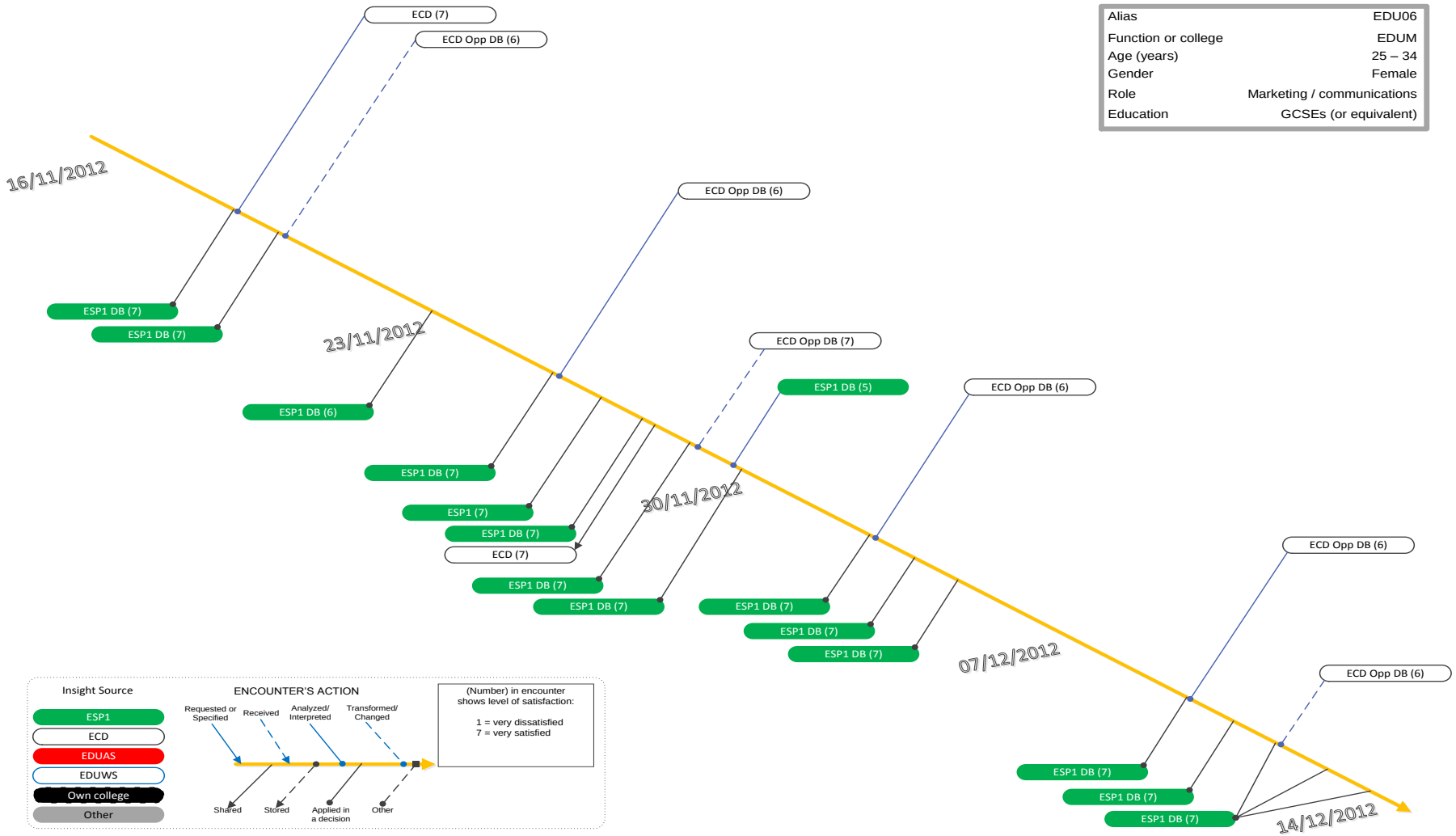


Figure 6-5 Customer insight encounters' trajectory at an individual participant level: A second example (Source: Author)

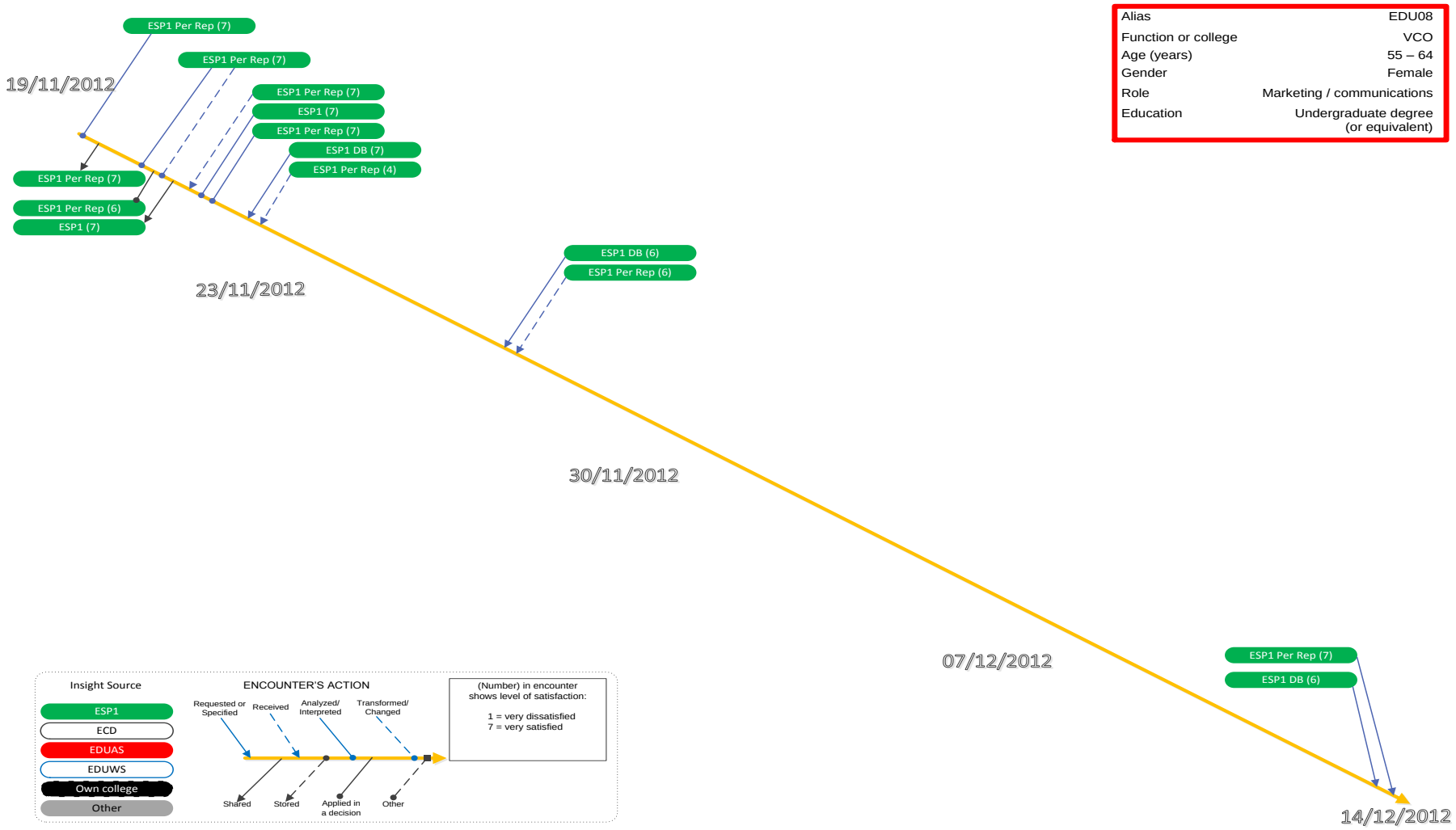


Figure 6-6 Customer insight encounters' trajectory at an individual participant level: A third example (Source: Author)

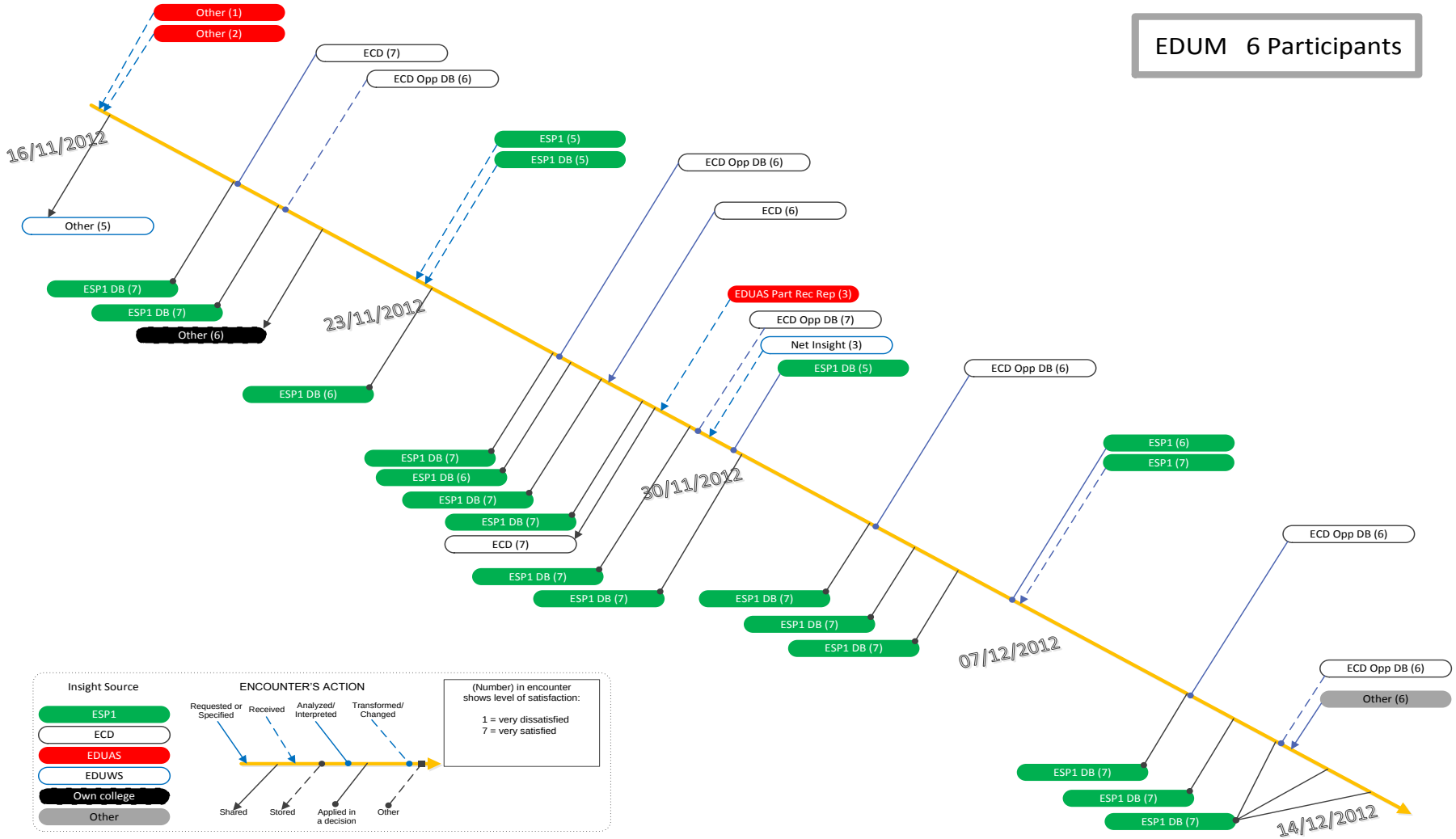


Figure 6-7 Customer insight encounters' trajectory at a user group (business unit) level: An example (Source: Author)

c. At the customer insight users' group level (defined by business unit), where different insight sources encountered by the group are represented on one timeline in the same fashion as (b) above (see example in Figure 6-7).

Each map depicts all relevant encounters on a timeline (orange arrow in each diagram) spanning the entire RET study period. Encounters are divided as "above" or "below" the orange line. *Above* the line encounters represented events where participants received, requested for or analysed or transformed the customer insight packet involved. *Below* the line encounters represented events where participants shared, stored or applied the customer insight packet involved.

6.4 Initial findings from the pilot study

The observations made during the pilot study not only provided initial picture about users' engagement with customer insight but also offered some important methodological issues that needed to be addressed before undertaking the key case study.

6.4.1 Empirical observations

RET observations supported the existence of all the seven steps proposed in Section 3.5 (see page 58) for customer insight use process. Twenty-eight percent of the encounters were about participants applying customer insights that they had received earlier. A further 25% of encounters related to participants receiving insight from different sources while another 21% of encounters related to participants engaging in analysing or interpreting insight.

Just over 12% of the observed encounters involved users sharing customer insight packets with other colleagues, while a further 6% of encounters related to users' producing further messages to pass on to colleagues or people with whom they would be dealing.

Participants generally felt more satisfied about customer insight provided by external contractors than about customer insight generated internally within EDU. Participants tended to express more positive feelings when they used customer insight as a means to

interact with other colleagues, with responses tending to evidence stronger (perceived) relationships with colleagues as well as a generally clearer direction to reach and execute decisions.

RET observations also offered evidence for all the three types of use reported in earlier empirical studies (see Section 3.4). Customer insight users tend to define and seek specific information for immediate decisions (instrumental), evident from the reliance on self-initiated queries for data from databases. Similarly, conceptual use featured as "food for thought" or past information was kept in mind for eventual use. As for symbolic use, the observations from this pilot study offered support through participants' reflections in their web diary, suggesting:

a) *social use* (or visible use of customer insights to consolidate relationships with information providers), and

b) *legitimating use* (or use of customer insights to justify decisions made on the basis of intuition or preconceptions prior to objective analysis) (Sabatier, 1978).

The use of the timeline maps shown earlier helped uncover other aspects of customer insight use among EDU's study participants during subsequent qualitative (corroborative) interviews. For instance, on acquiring customer insight, users discuss how they subscribe to digital feeds or request specific pieces, particularly from specific providers like ESP1. However, a few of the users lamented the deluge of customer insight in terms of quantity and variety of sources. As one participant put it, some insight users acted as a "filter" for colleagues, shielding them from this informational deluge:

> During the banking crisis when there was literally hundreds of articles on it… would our faculty or finance experts appreciate hundreds of articles? That's when we would sort of *summarize*… and it depends what's going on that day *(EDU11, Middle Manager).*

"Finely-tuned" individuals like EDU11 above would filter incoming information to select the "nuggets" from known and trusted sources and then share those pieces of information with colleagues. Users talked about how they aggregate pieces of information from different sources to transform them into a refined message to share:

> I think this was taking customer information from some of our management systems here and... and from the financial package and that kind of stuff and putting it together in a way that reflects our activity… (EDU07, Senior Manager).

Other individuals would regularly share with others to "close off" their task:

> I won't bother modifying... I would just give them as I... got them. (EDU04, Senior Manager).

The sense that there are blockages to insight sharing was a theme in some interviews. Users see it as detrimental to customer insight use across the organization. Organizational structures hamper the ability of customer insight users to question, interpret and engage in sense-making as a group. For instance, one individual reported that she felt her efforts to share insight were unwanted:

> Some managers might perceive that as quite irritating… like a fly in a windscreen… "She's making the noise again. Just stop it."(EDU05, Middle Manager).

Another participant believed that the organizational will for genuine sharing was lacking because, even if individuals genuinely desired to share insight, competitive processes render sharing uncertain:

> …sharing information. Why are you doing that? Why are we doing that? But it becomes quite competitive because of how [colleges] are set up because they are business units. So, they will say, "well, we need to get more [participants]. I am sorry, I don't care… I don't care really about your targets… I need to get mine am going to get mine". So then it becomes a competitive situation within the [colleges]. That's the culture. (EDU13, Senior Manager).

Participants mentioned the pivotal importance for teams of forming a common understanding in order to lead to effective action

> So, we kind of work around the team, have a lot of discussions around it, wipe forward some information... So, once we have kind of gone through that process then it kind befalls into an ice berg. We are not going to do it at this stage… no use for it. Or it falls into that "yeah we can take that forward" and begin doing something with it with one of the clients (EDU04, Senior Manager).

The importance of using insight in decisions was evident in participants' discourse – particularly with respect to reaching informed decisions:

> So, using this information helps us to do that [deal with prospective customer] as effectively as we can and to try and pull together all of the relevant bits of activity to help us to do that more realistically. (EDU07, Senior Manager)

> Of course you need all the information to act efficiently, make correct decisions to be able to decide what's the best thing to do. And if you are missing a piece of information… we are talking about sharing of information… then you could make the wrong decision because you don't know the full facts of whatever it maybe. (EDU13, Senior Manager)

As for storing, participants' discourse offered three key observations. First, a dominating theme that emerged in most interviews was the personal character of insight storage approaches adopted by participants:

> I'm going to keep that and put it into my good ideas folder… (EDU05, Middle Manager).

> I would only store emails that I can't access from somewhere else. So, mainly emails between individuals. If I get something that is coming of a database then no. So if I had someone in my own school email me... I will store it 9 times out of 10 but if it comes from a database which I can log in and get, no (EDU09, Senior Manager).

EDU09's words also reflect a second theme, where organizational level systems and individuals acted as repositories of insight for future use:

> Definitely we just tend to rely on the materials that we have got to kind of reuse. So if somebody asks for something and you know… [when] we have got a case study… we would send the case study (EDU04, Senior Manager).

The last observations also meant that users rely on stored insight that they would access and acquire at a later stage, starting the insight use process all over.

6.4.2 Methodological observations

The study's RET collected a total of 87 text message and 2 online diary submissions from nine participants (see breakdown in Table 6-3).

The relatively poor RET response did not permit any of the multivariate analysis or clustering approaches initially planned for this method. A social network analysis intended to appraise how customer insight use happens at a group level could not be effected, as this pilot study captured only a small number of complete RET encounters as reported by participants. This small number of RET observations, however, offered

support for the existence of all seven steps describing the customer insight use process, but it did not offer a complete appraisal of the sequence of these steps.

Table 6-3 Participants and experiences reported (Source: Author)

Respondent	Experiences reported		
	SMS	Diary	Total
EDU04	1		1
EDU05	1		1
EDU06	26		26
EDU07	31		31
EDU08	16		16
EDU09	8		8
EDU10		1	1
EDU11	3	1	4
EDU12	1		1
Total	**87**	**2**	**88**

An examination of the participation suggested that individual participants discontinued their submission of text messages or online diary reflections during and after the second week of the observation period. Diminishing participation is a common aspect in RET field work, with consumer RET studies reporting as much as 50% of original participants discontinuing their participation within the first week of study (Macdonald *et al.*, 2012).

An equally important observation was that, out of the 24 originally recruited participants, only 9 effectively participated in the RET phase during any of the four weeks of observation. A series of post-hoc telephone discussions with 14 individuals originally recruited for RET phase suggested that the study:

1. was ill-timed. Happening between mid-November and mid-December 2012, this phase of field work coincided with the annual planning period that requires most marketing people to engage in the completion of budget and marketing plans for the following academic year. Such engagement usually required most participants to devote additional hours daily to their planning duties (often outside the normal work routines) and divert any attention that may otherwise have been devoted to the RET study. Another three participants originally recruited for this phase of field work were away from work for most of the time;

2. related to customer insight not in use at the time of study. Participants who sent only a small number of text messages or online diary submissions claimed that the observations related to customer insight packets that were not used during the time of study, leaving them with nothing to report;

3. was poorly promoted after the start. Participants who sent only a small number of text messages or online diary submissions observed that reminder calls or text messages were received after they had left work for home (usually while driving). Also, a small minority (two participants) claimed that they had lost the link to the online podcast that contained instructions for participation.

The observations helped optimize the approach used during the second and key case study.

6.5 Case 2 – SOFT

SOFT's study served as the key case for this investigation. Indeed, this case study sought to answer all research questions that relate to the use of customer insight as well as to determine the influences that impact insight usage process.

A private firm, SOFT is the UK subsidiary of a multinational software developer and publisher, headquartered in the USA. The multinational firm earned just under £2 Billion and employed in excess of 13,000 people in over 50 countries during 2013. Of these employees, just over 50% are located in North America. Banking and governmental bodies are the key sectors that SOFT targets for its products and services. The multinational prides itself with outstanding working conditions, recognized across the world through a collection of workplace awards, which are likely the cause of the low turnover of employees that is characteristic of SOFT.

In the UK, SOFT operates a site in South East England, with some 500 employees. The UK arm focuses operations on the customization of software solutions for large UK corporate customers (typically banking, finance and retail businesses) as well as the provision of training and consulting services to these firms. The majority of the employees at SOFT are engaged in customer relationship management roles, involving

identification of sales leads, prospecting, software needs analysis, offer development, sales and after sales tasks. SOFT's customer-oriented strategy is reflected in its organizational structure (summarized in Figure 6-8) that comprises a strong marketing and communications team, a large sales function and a robust operations team.

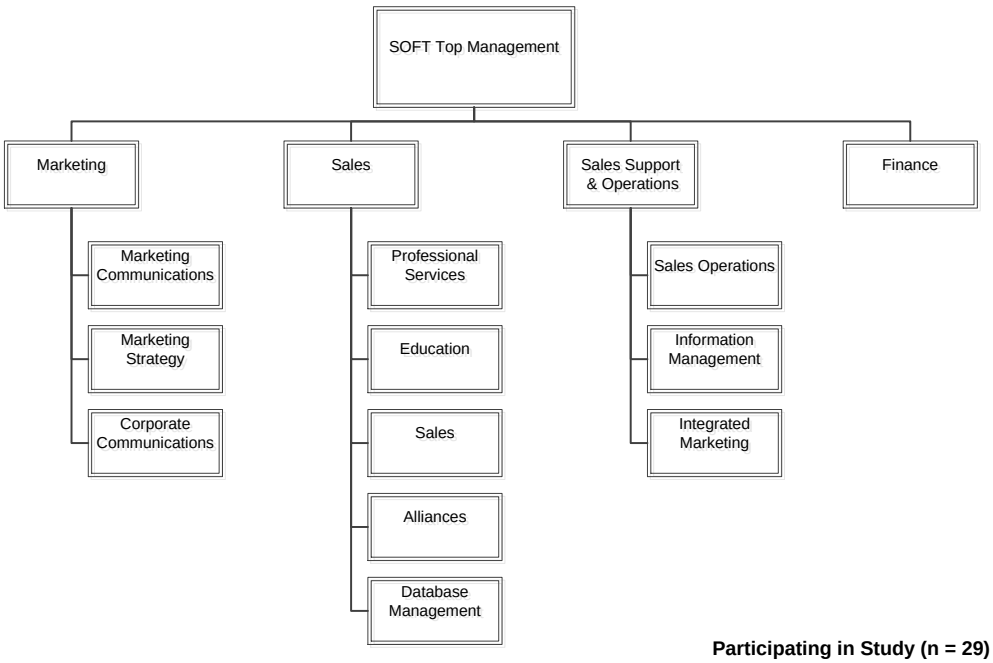


Figure 6-8 Summary organizational structure of SOFT (Source: Author)

The conduct of this study involved the implementation of improvements that counteracted the weaknesses evident in the EDU study. For instance, the administration of the RET field work happened at a time that was just between busy periods for the firm.[20] RET data collection also followed a more inclusive approach in dealing with a bigger diversity of customer insight packets than EDU's case, in order to keep the data collection process relevant to most of the participants as possible. The administration of the RET also included augmented promotional efforts. One such effort meant that the transmission of reminder text messages happened every other day at around 15:00 (or before participants would leave the workplace), rather than having messages sent twice weekly at around 19:00. Reminder text messages also contained a link to the online

[20] Typically about the end of each quarter, with the busiest times of the year happening around the end of November until end of December

podcast that set out instructions for participation. On a weekly basis, an email message was sent to all recruited participants, encouraging them to submit text message and online diary reports while reminding them about the incentives offered.

6.5.1 Participants – A brief description

Table 6-4 summarizes the customer insight users from SOFT participating in this case study. This summary shows how participants in this case study varied in terms of gender, roles (type and level in the organization) as well as the functions they were engaged in. Participant variation is also evident from the participants' educational background (ranging from GCSE A-level to Doctoral qualifications) and ages.

Table 6-4 Summary description of case participants: SOFT (Source: Author)

Participant	Business Unit	Age (years)	Gender	Managment Level	Education	Pre-RET Interview	RET Participation	Post RET Participation
SOFT01	Finance	45 - 54	Female	Middle	A level (or equivalent)		✓	✓
SOFT02	Sales	45 - 54	Female	Middle	Undergraduate degree (or equivalent)		✓	
SOFT03	Marketing	35 - 44	Male	Middle	Doctoral degree (or equivalent)	✓	✓	✓
SOFT04	Sales	35 - 44	Male	Senior	Master's degree (or equivalent)		✓	✓
SOFT05	Sales	45 - 54	Male	Middle	Undergraduate degree (or equivalent)		✓	
SOFT06	Sales	55 - 64	Male	Middle	A level (or equivalent)		✓	✓
SOFT07	Sales	45 - 54	Male	Senior	Other - Please Specify		✓	✓
SOFT08	Sales	35 - 44	Female	Middle	Undergraduate degree (or equivalent)		✓	
SOFT09	Sales	35 - 44	Male	Senior	None of these	✓	✓	✓
SOFT10	Marketing	45 - 54	Male	Senior	Undergraduate degree (or equivalent)			✓
SOFT11	Sales	35 - 44	Male	Middle	Undergraduate degree (or equivalent)		✓	
SOFT12	Sales	35 - 44	Female	Middle	Undergraduate degree (or equivalent)		✓	✓
SOFT13	Sales	45 - 54	Male	Middle	Master's degree (or equivalent)		✓	✓
SOFT14	Sales	35 - 44	Female	Senior	A level (or equivalent)		✓	
SOFT15	Sales	45 - 54	Male	Senior	Undergraduate degree (or equivalent)	✓	✓	✓
SOFT16	Sales	55 - 64	Male	Middle	GCSEs (or equivalent)		✓	✓
SOFT17	Sales	35 - 44	Male	Middle	Master's degree (or equivalent)		✓	✓
SOFT18	Sales	45 - 54	Female	Middle	A level (or equivalent)		✓	✓
SOFT19	Sales	45 - 54	Female	Middle	Master's degree (or equivalent)		✓	✓
SOFT20	Sales	25 - 34	Female	Middle	Master's degree (or equivalent)		✓	
SOFT21	Sales	45 - 54	Male	Senior	Undergraduate degree (or equivalent)			✓
SOFT22	Sales	45 - 54	Male	Senior	Undergraduate degree (or equivalent)			✓
SOFT23	Sales	45 - 54	Male	Middle	Master's degree (or equivalent)			✓
SOFT24	Sales support	35 - 44	Male	Senior	Undergraduate degree (or equivalent)	✓		✓
SOFT25	Finance	35 - 44	Male	Senior	Master's degree (or equivalent)	✓		✓
SOFT26	Marketing	35 - 44	Female	Middle	Undergraduate degree (or equivalent)			✓
SOFT27	Sales support	35 - 44	Male	Senior	Undergraduate degree (or equivalent)	✓		
SOFT28	Marketing	45 - 54	Male	Senior	Undergraduate degree (or equivalent)	✓		
SOFT29	Marketing	45 - 54	Female	Senior	Undergraduate degree (or equivalent)	✓		

As in the pilot case (EDU), this variety of participant types met the variation requirements for this study in terms of roles, contexts and settings. Participants in this case study also featured a strong customer management focus largely as a result of their sales and service operations roles. However, a proportion of participants were

particularly engaged in purely marketing roles involving a range of decision areas exemplified by campaign sizing and budgeting, campaign content, new product development, software customization, marketing or business alliances and customer feedback.

6.5.2 Customer insight packets tracked (RET)

Table 6-5 summarizes the types of customer insight tracked during the RET phase of the SOFT case study.

Table 6-5 Summary of customer insight sources and packets tracked in RET in SOFT (Source: Author)

Customer insight source	Description	Location of source	Insight packets tracked	Encounters Reported	Customer insight packets reported
SOFT Corporate Communications	Corporate updates about new customers, industry statistics, customer strategies, customer service policies, new product development and specific product updates	HQ	20	69	Daily sales newsletter, Industry newsletters, SOFT social media, Product newsletters
SOFT Operations Department	Updates on sales prospects and sales agreements, customer service and product utilization	SOFT UK	8	22	Sales pipeline, Project status reports
SOFT Finance Department	Updates on costs and revenues, outstanding debt, budgetary comparisons (overall and by function) and order cancellation analysis	SOFT UK	16	10	Monthly revenue reports
SOFT Marketing Department	Updates on marketing campaigns, product launch and update plans, customer intelligence	SOFT UK	3	14	Different reports
External Insight Providers	Various reports sourced from external agencies about market segment trends, industry developments and specific customer developments. Includes periodic monitor update on social media	External	23	77	Various industry trends updates, Various customer trend updates, Various customer specific updates, LinkedIn, Twitter
SOFT Professional Services	Updates about customer product utilization, customer projects, bids and contracts, project resourcing	SOFT UK	12	9	Project resourcing updates, Service pricing changes
Other sources	Other information not identified above	Varied		8	Internally generated reports not identified above, External sources not identified above

In total, 82 different customer insight packets (from six different sources) were tracked during this RET phase, all previously identified during qualitative exploratory interviews with eight key customer insight users.

6.5.3 Participation in the project

RET participation

RET participants reported a total of 209 customer insight encounters during the four-week monitoring period starting 27 February 2013. In total, 19 participants (from the originally recruited 29) submitted text message and online diary reports about their encounters with customer insight. The 209 submissions included 75 complete online

diary reflections about the customer insight and colleagues involved during the encounter. From these complete online diary submissions, 52 "paired" encounters could be extracted, with a complete identification of the source from where the participant acquired or received the insight as well as the destination involved when participants shared or transmitted specific customer insight packets.

Participation peaked during the second week of the RET phase., with submissions increasing from a total of 60 in the first week to 99 in the second week, dropping off to just over two dozen encounters in each of the ensuing weeks. Although participants in the RET investigation were located in five different functions across SOFT, participants within the marketing function reported the highest number of customer insight encounters (n = 83). The encounters were largely related to insight arriving from external sources or SOFT's corporate headquarters in the USA. Indeed, SOFT's daily sales newsletter was the most often encountered customer insight packet, followed by updates about specific products also issued by the corporate headquarters.

Encounters mostly related to the receipt of specific customer insight packets (103 encounters), followed by analysis and interpretation actions (54 encounters). Customer insight packets most often travelled across SOFT in email form, and chat or phone discussions were the least-reported form. Table 6-5 summarizes the format of customer insight packets encountered as well as the actions involved during the encounter, as reported by participants.

Table 6-6 Reported encounters, action involved and customer insight packet formats (Source: Author)

Action during encounter	Format of Insight packet						Format not disclosed
	Electronic File	Email	Online Info	Phone Call	Talk	**Total**	
Requested or specified the insight needed		4		1		5	17
Received insight	1	31	1			33	70
Analyzed or interpreted the insight	3	15			1	19	35
Transformed / Changed (used insight)	1	2				3	1
Shared insight with someone else		2	1	1		4	7
Put it away/stored it		3	1			4	2
Applied insight to a recommendation/decision		3			1	4	
Other (deleted)		3				3	2
Total	5	63	3	2	2	75	134

Qualitative interviews

There were two phases of qualitative interviewing in this case study. The first, involving exploratory qualitative interviews with key insight users at SOFT (including the project champion), were conducted in two waves: the first one happening in April 2012 and comprising four interviews and a second wave during the first week of February 2013 and involving four interviews.

The second phase of interviewing involved 20 corroborative interviews with customer insight users across a diversity of SOFT functions and levels (see Table 6-4 for a summary description). These interviews were held on SOFT's premises between 5 August 2013 and 16 September 2013.

As in EDU's case, these interviews relied on the use of anonymized demonstration material, setting out timeline maps at customer insight source, individual participant and participants' group levels, as described by the participants' business unit or function. A sample of these timeline maps are set out in Figure 6-9 through Figure 6-15.

6.6 Using RET data to build an organizational picture

The text message and online diary data enabled the construction of a picture of how customer insight travels across SOFT in three different ways. The first approach involved a cross tabulation of the different users as described by their location in the firm (business unit or department) and the sources of customer insight these users encounter. The first approach involved the construction of various frequency cross tabulations (using MS Excel™ software) to identify focal interests in specific types of insight across the different functions at SOFT (see Table 6-7). This analysis showed that members of the sales team most often encountered insight from external providers, contrasting with users in the service/operations function, who most often encountered corporate communications relevant to their roles. A second approach involved the use of the 52 paired encounters as reported in the text message and online diary submissions (see description in Section 6.5.3) to construct an organization-wide view of customer insight trajectories between and within functions/departments. An example of this view appears in Figure 6-15.

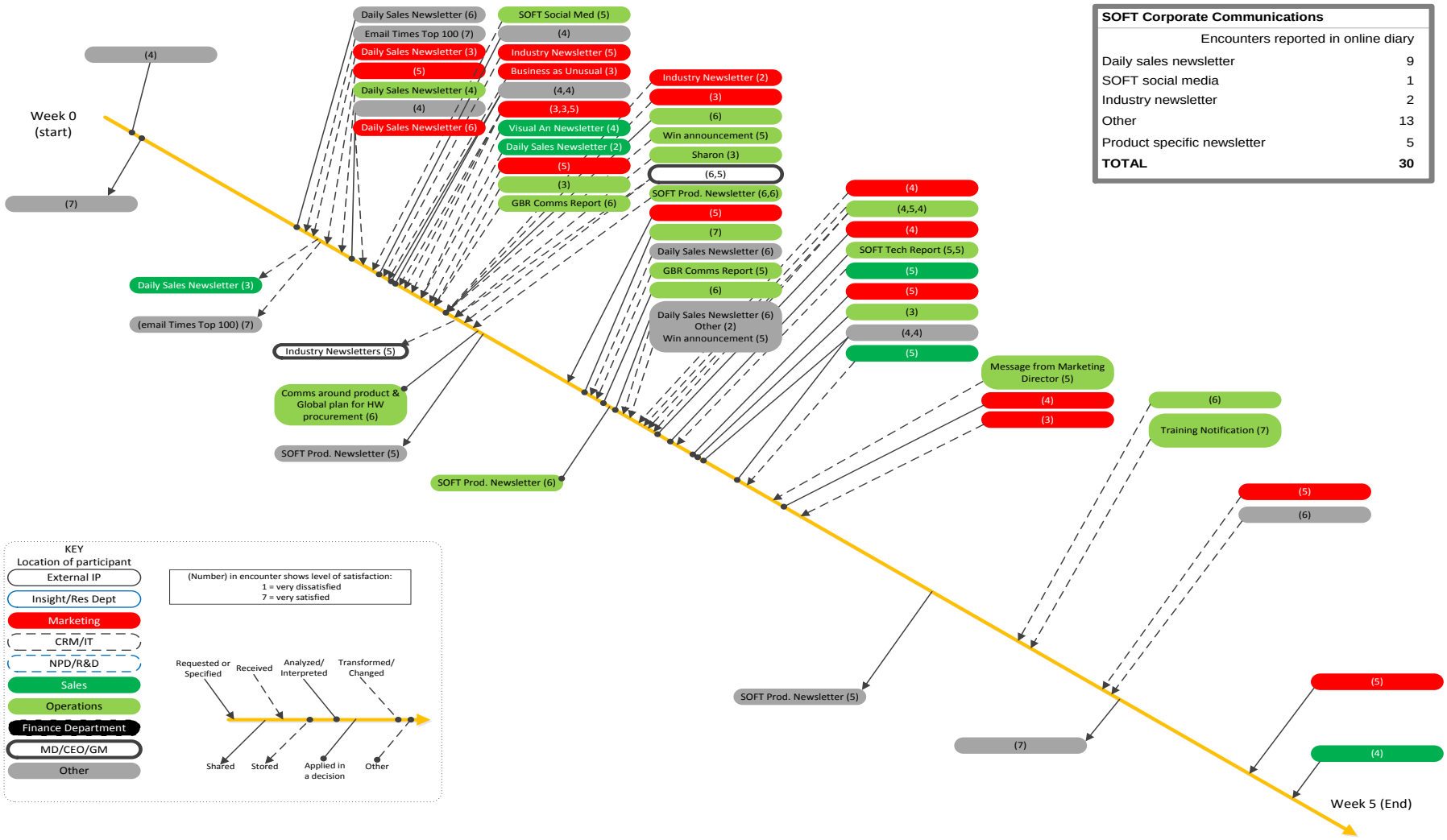


Figure 6-9 Customer insight encounters' trajectory at insight level of analysis: SOFT corporate communications insight packets (Source: Author)

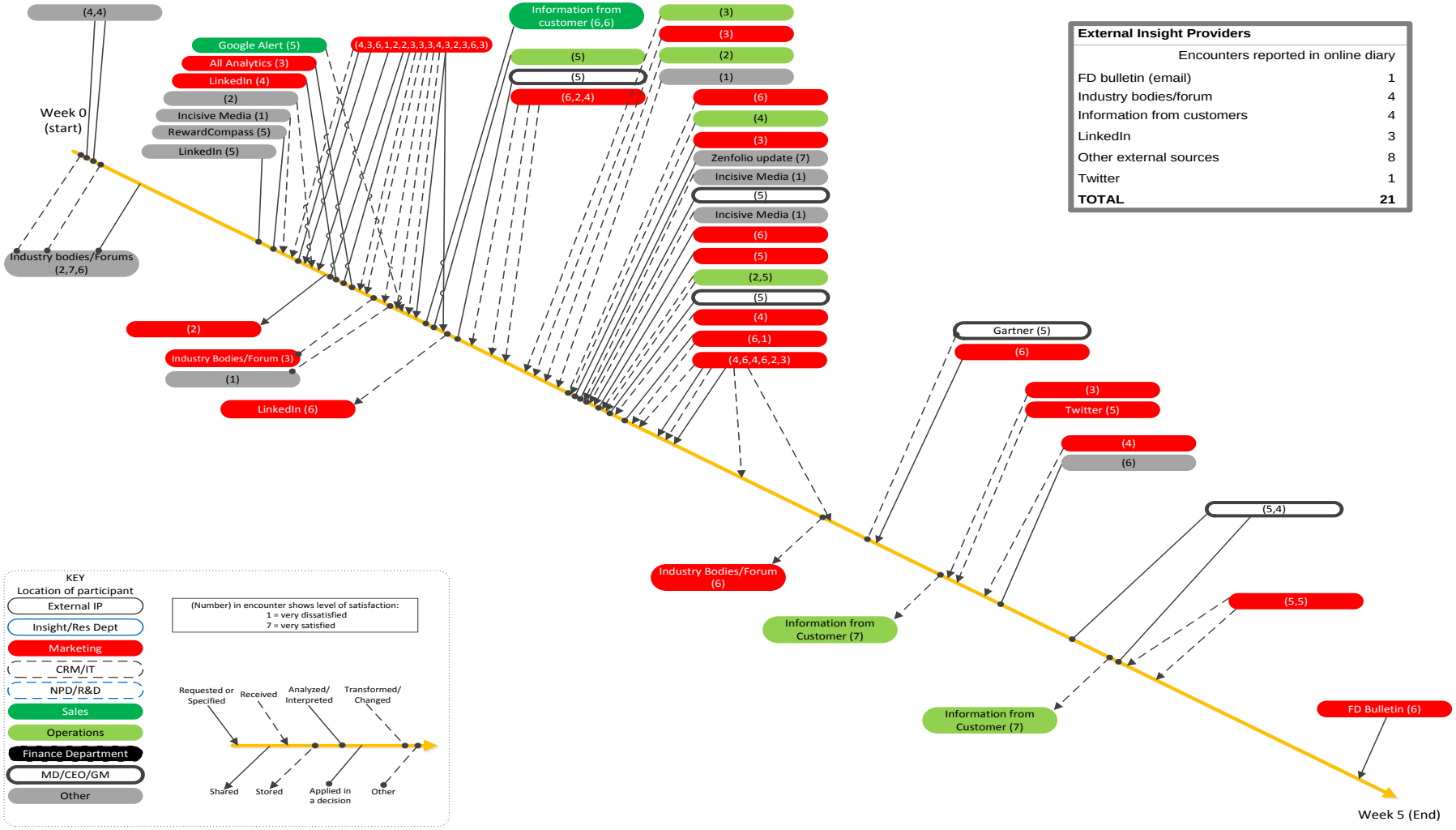


Figure 6-10 Customer insight encounters' trajectory at insight level of analysis: External insight provider packets (Source: Author)

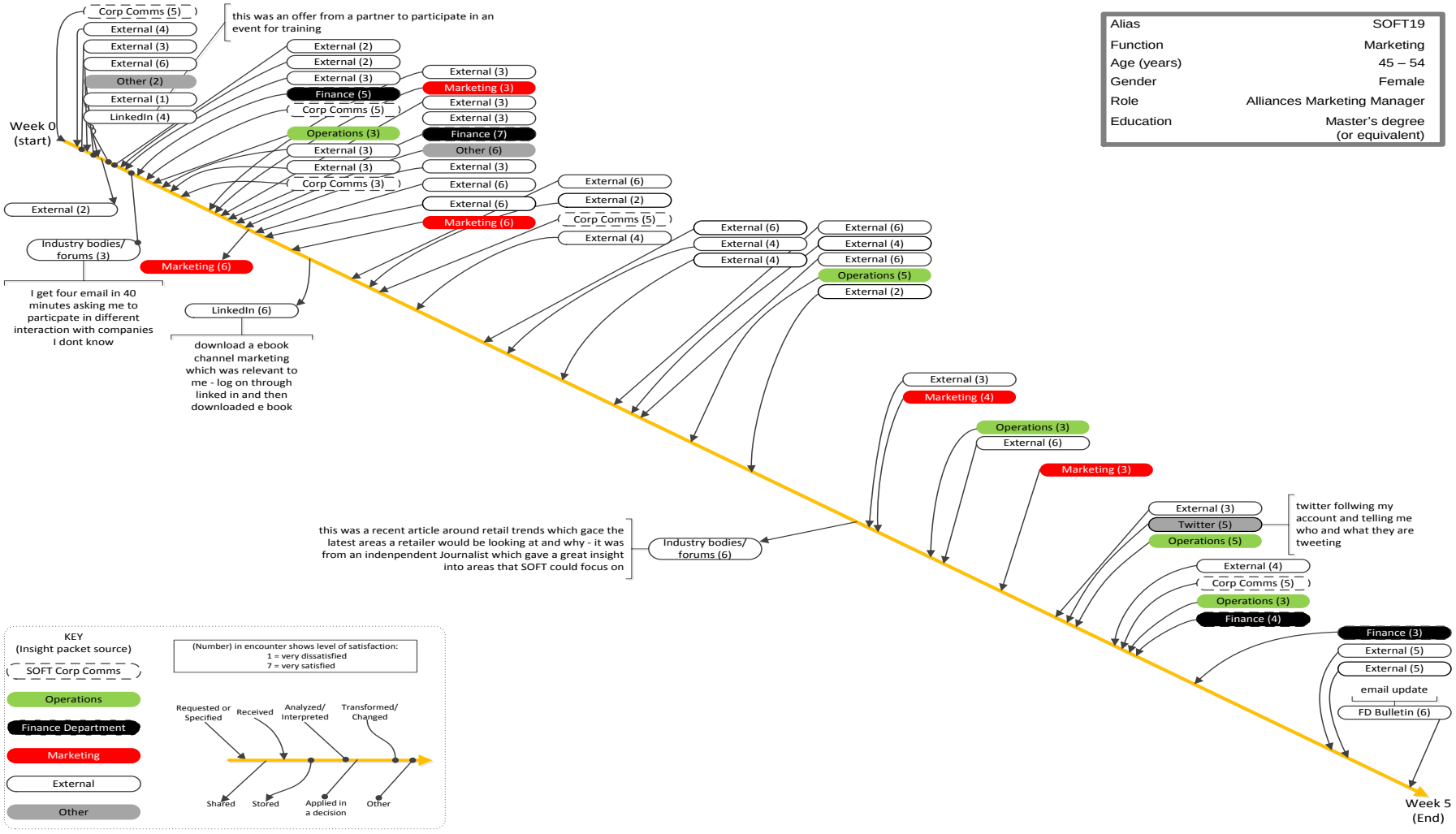


Figure 6-11 Customer insight encounters' trajectory at an individual participant level: An example (Source: Author)

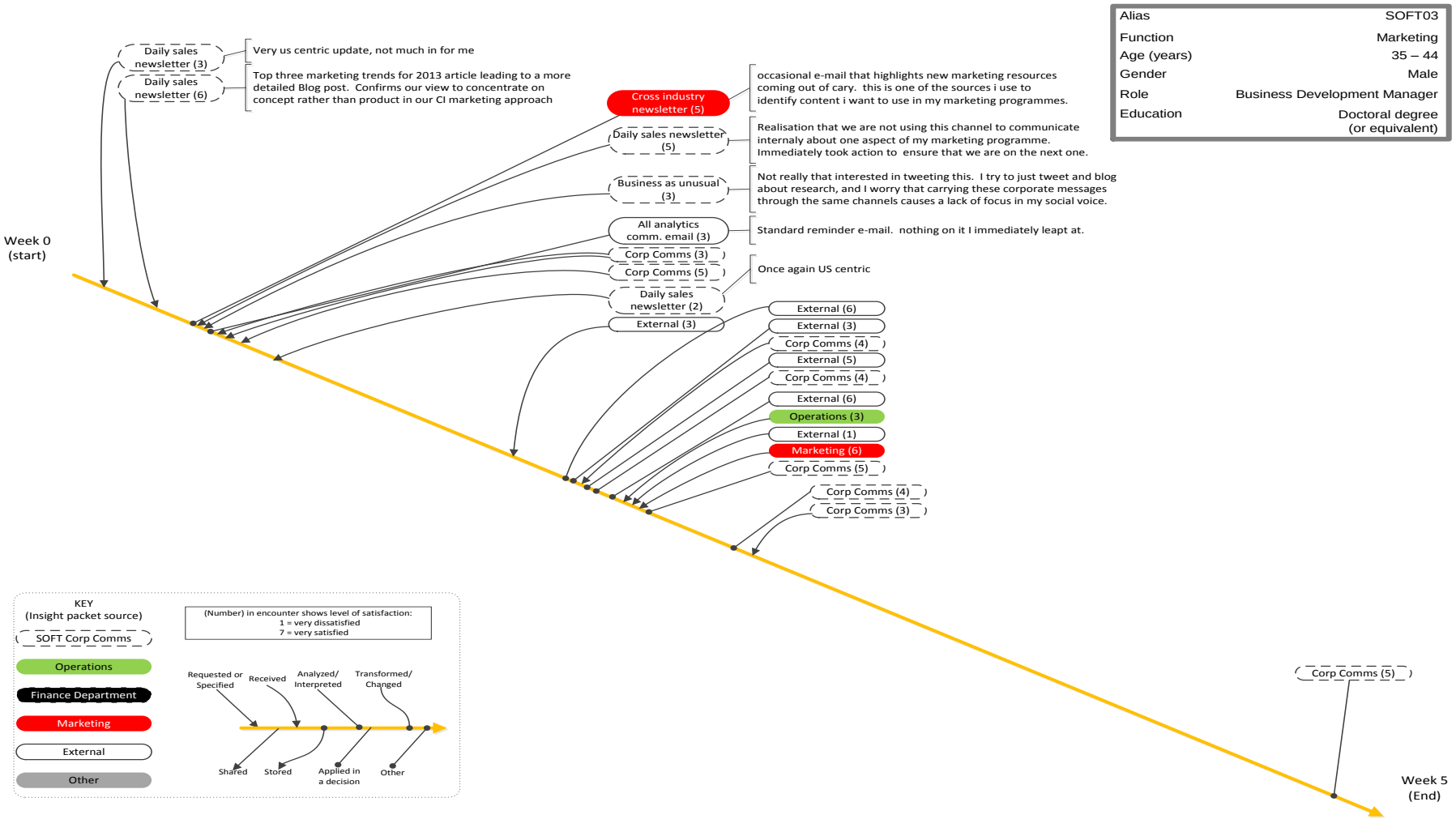


Figure 6-12 Customer insight encounters' trajectory at an individual participant level: An example (Source: Author)

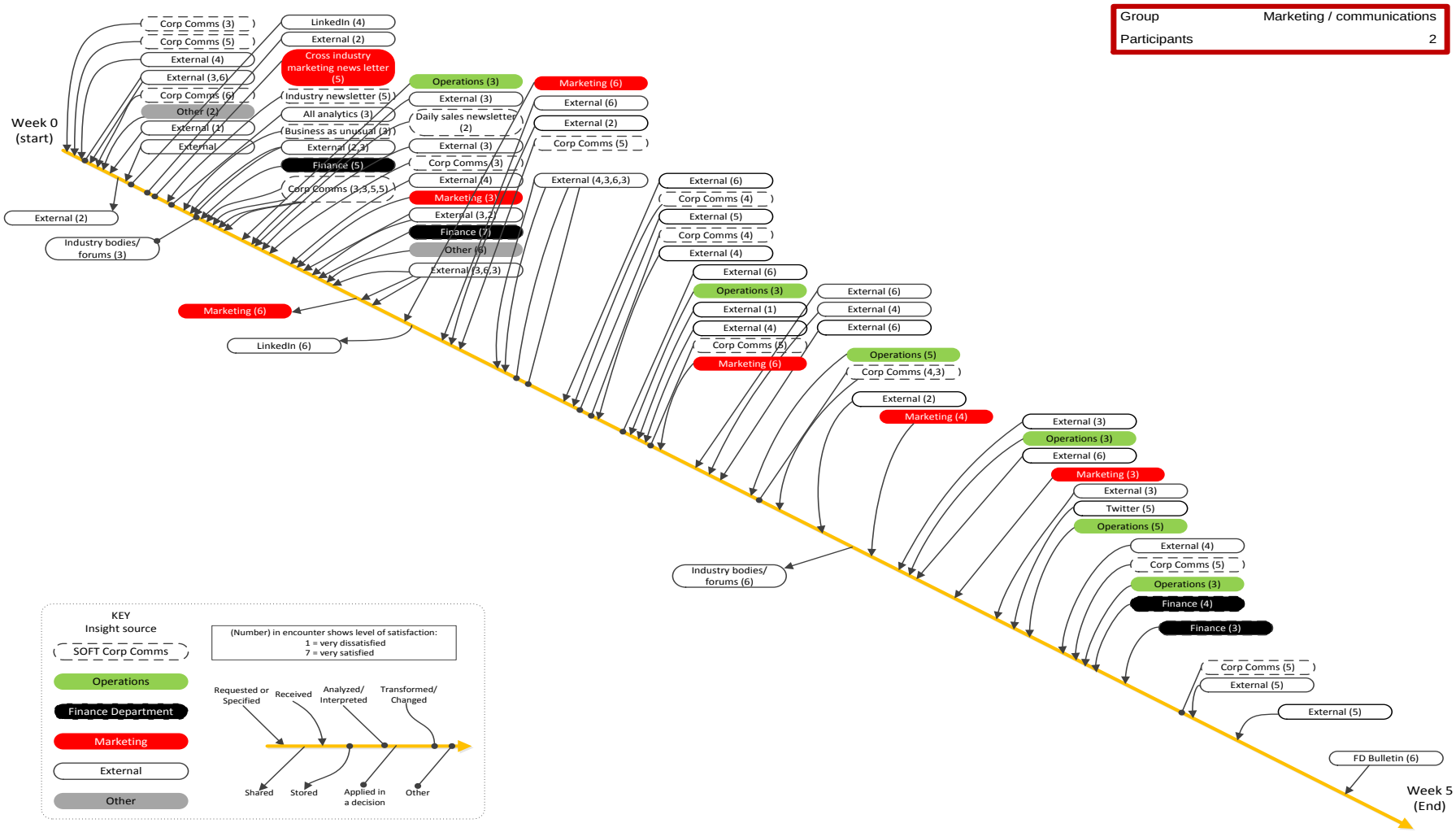


Figure 6-13 Customer insight encounters' trajectory at a user group (business unit) level: An example (Source: Author)

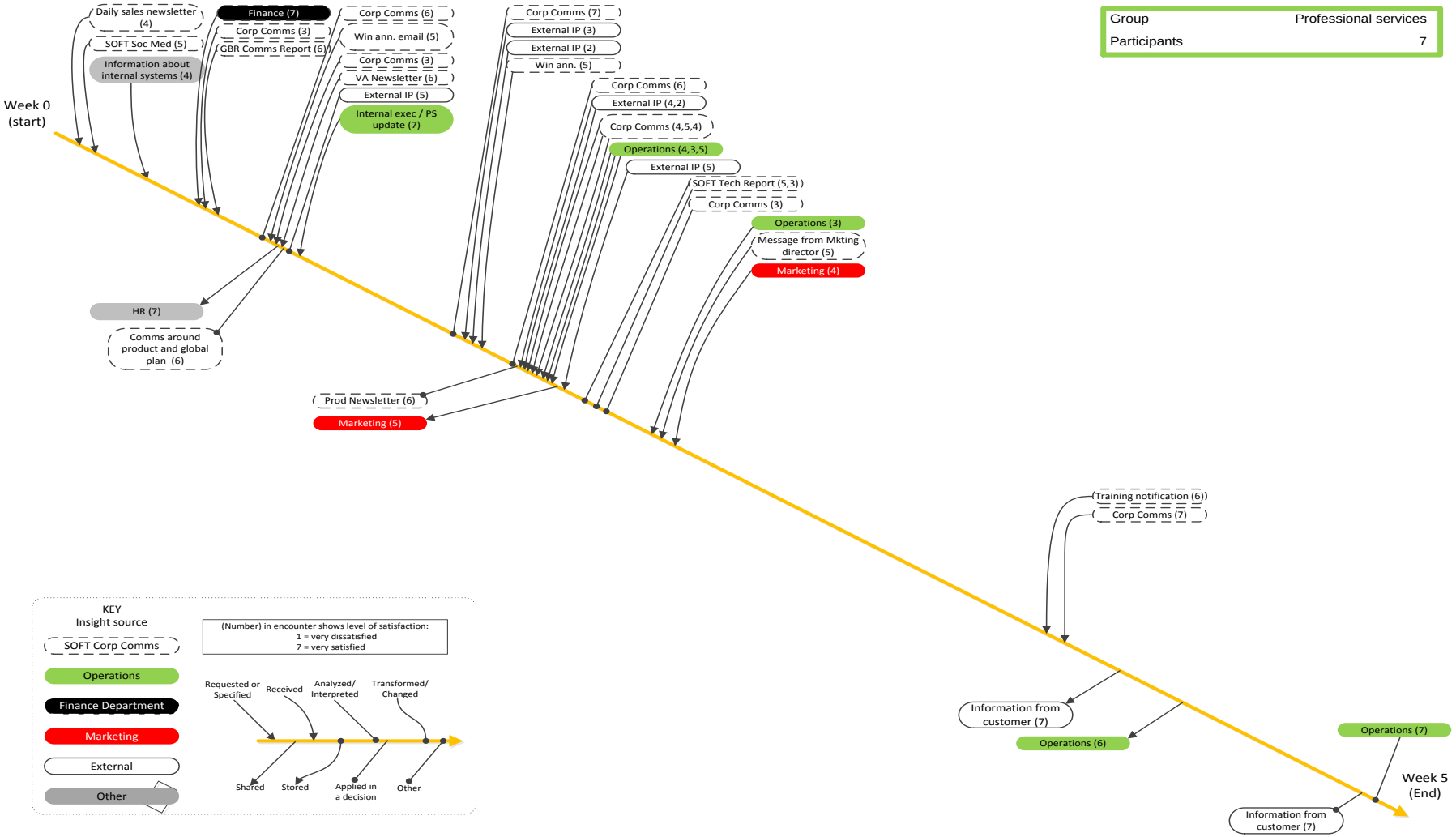


Figure 6-14 Customer insight encounters' trajectory at a user group (business unit) level: An example (Source: Author)

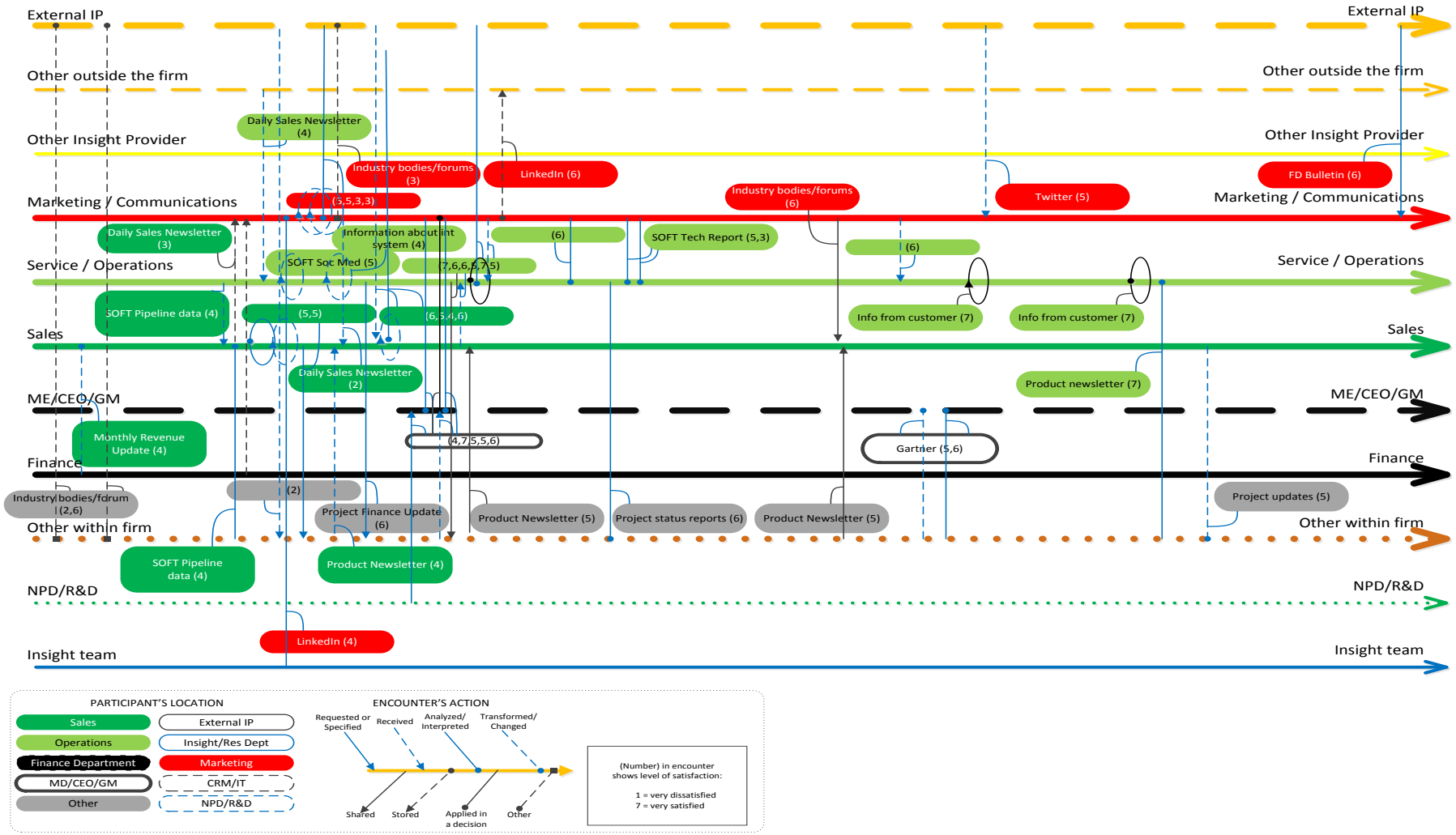


Figure 6-15 Customer insight encounters' trajectory at organizational level: An example (Source: Author)

Table 6-7 Summary of distribution of encounters across customer insight users (by department/function) and source (Source: Author)

Participant's Function	Insight provider							
	SOFT Corporate Communications	Operations	Finance	Marketing	Professional services	External insight provider	Other insight provider	**Grand Total**
Sales department	11	10	7	8	5	41	2	**84**
Service /operations department	32	7	2	2	3	17	3	**66**
Marketing/communications department	14	1		2		7		**24**
Managing Director/Chief executive/General Manager	5	3	1	2	1	6	2	**20**
Other	7	1				6	1	**15**
Grand Total	**69**	**22**	**10**	**14**	**9**	**77**	**8**	**209**

A final approach involved the analysis of the 52 paired encounters using social network approaches (using NodeXL™) to build a social network view of how the different functions share customer insight. This analysis meant that every participating function in this study was treated as a "vertex" of its own, whereas each of the 52 paired interactions was treated as an "edge".

Figure 7-2 sets out a key output from this social network analysis. The use of the Clauset-Newman-Moore (2004) algorithm revealed how three functions in SOFT (sales, top management and service/operations) played a core role in the generation and sharing of customer insight across the entire UK firm. This analysis also helped in identifying three customer insight using clusters, each composed of different functions based on various measures of betweeness and closeness centralities. A more detailed discussion of these observations appears in Chapter 7, which provides an account of both qualitative and quantitative findings.

6.7 Initial findings from SOFT case study

Concurring with the results emerging from the pilot case study, the RET results above also supported the existence of all the seven stages in the customer insight use process. However, in SOFT, results showed that receiving or acquiring insight is a far more common encounter (compared to other actions) than in EDU. Indeed, receiving or

acquiring insight accounted for almost 6 out of 10 encounters reported by participants (59.8%), whereas analysis or interpretation accounted for just over one quarter of the encounters observed (25.8%). Of the encounters reported by participants, 5.3% involved participants sharing the insight with colleagues, while a further 1.9% involved participants using the insight in some marketing decision.

While participants generally felt satisfied about their experiences with customer insight, there was a generally higher level of "satisfaction" about an encounter when participants actively interacted with the customer insight or colleagues, such as when participants requested specific insight, shared the insight or applied the insight in a marketing decision (see Table 6-8). No significant differences in perceived satisfaction could, however, be noted across the different sources of insight encountered.

Table 6-8 Summary of mean response and variation in satisfaction across the different types of customer insight encounter (Source: Author)

Action during encounter	Satisfaction		
	Mean	N	Std. Deviation
Requested / specified insight needed	5.18	22	1.532
Received insight	3.96	103	1.455
Analyzed or interpreted insight	4.72	54	1.188
Transformed / changed	5.00	4	.816
Shared insight	5.55	11	1.440
Put it away / stored	5.50	6	1.517
Applied insight in recommendation / decision	6.50	4	.577
Other	3.80	5	2.588
Total	**4.48**	**209**	**1.523**

			F	Sig
ANOVA	Between Groups	(Combined)	5.727	.000
		Linearity	7.193	.008
		Deviation from Linearity	5.483	.000

The timeline maps (set out earlier) as stimulus material during the corroborative interviews helped to unearth new themes, in addition to those that had emerged from the pilot case study. A full comparative account of the themes emerging in both studies is set out Chapter 7.

6.8 Validation workshop with practitioners

This workshop involved the participation of 29 senior and middle managers coming from a range of organizations and industries:

- 25 (86%) participants occupied senior roles in their organization;
- 15 (52%) were women;
- 10 (34.5%) were employed in banking/financial services firms. Another 5 (17.2%) were engaged in marketing services, while a further 3 (10.3%) were employed in healthcare services.

Following a brief presentation about the key findings emerging from the two case studies, participants were invited to form groups of five or six participants and discuss a case organization chosen from the organizations represented in each group.

Groups discussed the customer insight use processes within the selected organizations as well as the impacting conditions and mechanisms. Four groups then delivered short presentations, aided by a self-completion poster to illustrate specific points. All of these interventions were audio-recorded and transcribed verbatim for further qualitative analysis.

Intent on protecting the identities of these organizations, the following paragraphs set out descriptions of the organizations, presented with the original names screened, named AGENCY01, BANK01, BANK02 and LOCAL COUNCIL01, respectively.

AGENCY01 is a full-service customer insight provider that works with clients to establish and maintain "strong and enduring" relationships with current and prospective customers. The B2B firm operates worldwide with a relative focus in Europe, North America and Australia. AGENCY01 offers customers advisory and insight services that lead to the optimization of customer firm customer relationship centres, customer experience design and social media. As a core part of these offerings, AGENCY01 provides customers with customer loyalty and experience metrics, as well as ongoing analysis, reporting and advice.

A significant multinational bank, BANK01 employs a large workforce spread out over 7,500 offices in over 80 countries worldwide. In the UK, the bank has over 1,800 offices that offer a range of banking services like commercial banking, private banking, consumer finance and investment banking.

By contrast, BANK02 is one of the oldest banks in the UK, employing over 140,000 employees in a network of 700 offices in its domestic market. One of the bank's senior executives described how the bank relies on a small specialist team of experts that help different divisions within the bank to generate, share and use customer insight. This team employs its own diagnostic tools to analyse and interpret different metrics about customer experience, as well as to devise recommendations for action to the bank's different divisions.

Providing local government services in the mid-west of England, LOCAL COUNCIL01 manages a budget of £500 million in an area that is home to 250,000 people. A senior executive at the council discussed how her organization is fraught with challenges that affect the use of customer insight as described by BANK02 executives, adding themes like employee accountability, alignment between vision and systems (that support accountability and rewards), acquisition of wrong metrics (rendering insight irrelevant) and a silo culture that prevents insight sharing.

6.9 Summary

This chapter described the key features of both case studies. EDU is large domestic British institution characterized by a divisionalized organizational structure where customer insight use is dispersed across a small proportion of employees located in the different business units. Customer insight is employed in a variety of research funding and programme participant recruitment campaigns. By contrast, SOFT is the UK arm of a US-based multinational software firm, employing a relatively smaller work force that is almost entirely engaged in the marketing, sales and servicing of large corporate software users. SOFT's workforce is largely concentrated in a central location at the heart of a region in the UK renowned for its concentration of technology firms. In SOFT, customer insight is relevant to virtually all employees and is used across the entire sequence of customer experience phases, ranging from the designing and

implementing of communications campaigns and events to the prospecting of customers, the development of customer specific offers and the execution of after-sales service like professional training and continued consulting. SOFT's insight users rely on relatively open systems that support the generation and sharing of customer insight, which is typically created internally or acquired from third-party sources like formal industry reports or informal insight on media or customer developments.

Apart from describing the key tasks and outcomes of both case studies, that chapter also set out an account of how methodological lessons emerging from the pilot case study enabled the optimization of the methodology employed in the key case study. The account set out in this chapter also shows how the quality criteria set out in Chapter 4 are addressed. For instance, variation is addressed through the use of mixed methods as well as by involving a variety of participants, contexts and customer insight sources. The concurrent collection and analysis of data, as well as the validation workshop, helped this inquiry address the consistency/coherence quality requirements. The use of documented procedures before the undertaking of field work, as well as the strict compliance with such procedures, ensured conformity with the study's quality criteria.

An important step in this inquiry was the validation workshop, intended to address various quality considerations. An appraisal of the organizations participating in this validation workshop suggests that the key findings of this thesis are relevant and experienced by different customer insight using organizations in different sectors. These observations suggest that the contributions of this thesis, whilst difficult to generalize for all customer insight relying organizations, offer an interpretation that is relevant to the readers' everyday engagement with customer insight.

The following part addresses the findings emerging from this study, offering a comparative view of the two case studies to answer the research questions.

PART III

WHAT THE STUDY SAYS

7 FINDINGS

7.1 Overview

This chapter sets out the findings emerging from the analysis of the pilot and key case studies. Adopting a retroductive strategy (see Chapter 4), this analysis exploited methodological and data triangulation from a critical realist perspective. Producing a theoretical contribution about customer insight users' behaviours and motivations involved various iterations between empirical data collection, analysis and associated theory generation. Saturated theory generation employed grounded theory, visual mapping and quantitative sense-making schemes, leading to the construction of a processual framework of customer insight use. This processual framework (set out in Section 7.2) makes it possible to offer a structured description of the behaviours and motivations relevant to each of the seven steps involved in the use of customer insight. These behaviours, motivations and associated activity are, in turn, described for each step in the ensuing sections.

7.2 A processual framework of customer insight use

This study's analysis of the case studies finds evidence of the existence of the five stages of insight previously identified in the MBL literature (acquisition, dissemination, interpretation, and use or storage). However, due to the longitudinal and in-depth nature of this study, this inquiry offers more granularity of understanding of the sub-processes within each of these stages. For instance, this analysis identifies additional stages and sub-processes, including a stage of data filtering that previous research appears to have missed (Table 7-1). The observations reported in this study also involve the categorizing of managers as "senior" or "middle" managers. This categorization follows an appraisal of the organization's reporting lines (organizational chart) and was confirmed by discussions with participants during in-depth interviews.

Because the employed method includes tracking of insight use over time and across multiple users, it finds evidence of the actioning of insight in marketing decisions. While the focus of this research is customer insight, in examining the stages of insight

use, the gathered data touches on a multitude of issues related to the core building blocks of management strategy, including processes, resources and systems, skills and competencies, culture, leadership, structure and policy. The emergent framework of customer insight use in Figure 7-1 will be the basis of this discussion in the following sections.

Table 7-1 Stages of insight use in each case study (Source: Author)

		Case 1: EDU		Case 2: SOFT	
		RET	Post-RET Interviews	RET	Post-RET Interviews
	Participants	*n = 9*	*n = 19*	*n = 19*	*n = 27*
Accessing and acquiring					
Accessing	Accessing data on competition, markets and customers from different sources	4	7	4	14
Acquiring	Acquiring or retrieving competitor, market and customer data from different sources	5	15	17	20
Filtering	Selecting competitor, market and customer data from the overload of information received	--	4	2	20
Transforming	Transforming information into a deliverable - a customer insight "packet" or a message	3	10	4	18
Distributing and sharing	Distributing customer insight to colleagues and other customer insight use process participants	5	14	6	18
Analysing and interpreting	Analysing and interpretating shared customer insight	5	11	17	15
Acting	Applying customer insight in marketing decision	5	7	3	15
Storing	Storing of information and customer insight	--	5	5	13

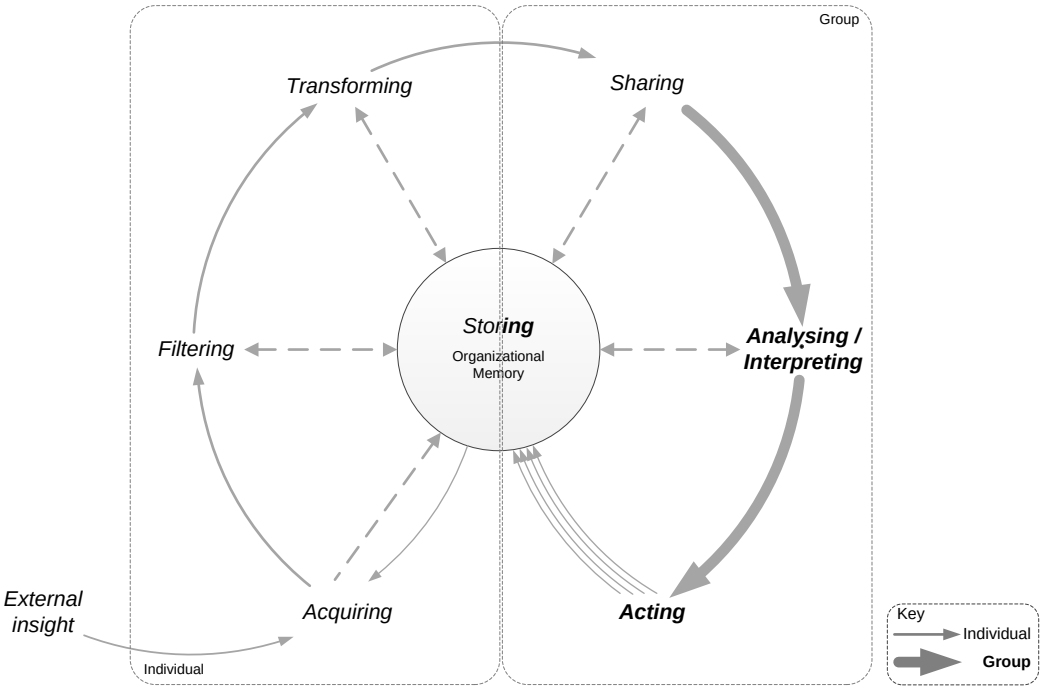


Figure 7-1 Emergent framework of customer-insight use process (Source: Author)

The following sections discuss the each stage individually by relating each stage to the themes that emerge at the individual manager level. The reporting of these observations starts with managers accessing and acquiring customer insight.

7.3 Accessing and acquiring customer insight

This section discusses the themes emerging from the observations made about managers accessing and acquiring customer insight. It starts by noting how managers recognize their customer insight needs and respond by seeking different sources from which they can acquire insight. This section then moves on to describe how managers access and acquire insight, discussing some conditions that impact on these behaviours.

Managers respond to emerging special needs (such as new customer solutions or special marketing decisions) by exploiting the available sources of customer insight. At an individual level, managers in both organizations rely on various sources, to acquire pieces of customer insight. Sources accessed ranged from public, open systems (using the internet) to internal, exclusive systems maintained by the organization or individual managers themselves. Observations from interviews also suggest that senior managers have wider levels of access to customer insight sources, which they often exploit to share insight with middle manager colleagues who would otherwise have no access to such insight.

> So... to my line managers what I think is pertinent to them I will pass on electronically, but then go through verbally at a monthly team meeting (SOFT07, Senior Manager).

> I can go and find out what a specific area is… so I can go and disseminate that amongst the guys (SOFT09, Senior Manager).

Access to customer insight varies across the two organizations, largely as a result of the different levels of openness of systems in each of the organizations. There is a relatively "open system" in SOFT where managers access the customer insight they need when required. Systems employed at SOFT assume a social media character as different portals encourage managers at SOFT to share insight. Openness of systems is further evident in the RET data, which suggests that at least half of the managers' encounters with customer insight involve the "receipt" of insight in SOFT. By contrast, at EDU, RET data suggests that "receiving" insight accounts for only about a quarter of

managers' encounters with customer insight. EDU's systems do not offer such a high level of openness, and managers have access to a narrower range of customer insight sources, often relying on colleagues for access to specific pieces of customer insight. These observations suggest that organizational culture is a key determinant to insight access, epitomized by the character of the different systems that an organization employs.

Two sub-categories of acquiring of customer insight emerged from the analysis of RET and interview data. The first of these is where managers *receive* insight. Receiving is a passive in nature and involves obtaining regular updates from typically external providers (e.g., via ad hoc reports or regular alerts). A second observation is that where managers *actively* seek insight in response to specific queries.

> So, then at that point we then have to dive into the data and statistics and say okay, "Can we get access to the information we need and can we provide that response in the timescale they want effectively?" Usually, the answer to that is 'Yes' but that then sometimes relies on us having to deal with you know people from [EDU] and other areas to say, "Well, actually, we haven't got access to this information, can you provide it to us?" (EDU04, Senior Manager)

> But I had to go online to find it. No one told me about it. I was not informed about it. I had to go online to find that (SOFT09, Senior Manager).

A more salient issue is the identification of skills and competencies, in oneself or in one's colleagues, to quickly and efficiently acquire insight.

> I used to subscribe to a lot of information. I used to have a lot of stuff coming into my inbox so I couldn't make decisions on funding stuff like that. I don't have time for those emails anymore. I have had to unsubscribe to everything or pull it all in my junk and just ignore it (EDU16, Middle Manager).

RET and interview data further reveal another important difference between senior and middle managers in that they rely on different mixes of systems and individuals as sources of insight. In both case studies, senior managers are more likely to rely on "tagged" reference individuals (peers or subordinates) as their key sources of insight, whereas middle managers are more likely to rely on systems (whether internal or external).

One important observation is that SOFT's open system is designed to capture and collate insight for use across the organization; however this open system can become a barrier to insight acquisition due to the volume and difficulty in accessing information once it enters the system. This complication arises in two key ways. First, the social media character of SOFT's systems impacts the temporal character of customer insight. Insight "packets" sink in the volume of information hosted in these media, requiring managers to mount search-and-retrieve efforts to assemble customer insight from older pieces of information.

> I guess the [SOFT] culture is fairly open… there is a lot of information that's shared. We have something that is called the [named system], which is where most of the stuff goes… When it first comes out, it's visible. So if you haven't caught it in the first week then it could disappear off the radar …. Once it's disappeared …then you'd have to go hunting for it. And if you don't know what you're hunting for, you'll never find it. (SOFT15, Senior Manager).

In summary, the observations about managers' access and acquisition of insight suggest that there are two types of insight-acquiring behaviours: active and passive. Managers' roles are also related to the sources managers access, and that organizational culture (reflected in the systems the organization provides for manages to access and share insight) impacts managers' access to insight. An open type of system (as at SOFT) may easily encourage too much information generation and transmission, resulting in managers' exposure to information overload.

7.4 Filtering

An emergent finding from this study, which seems to be missing from existing MBL frameworks, is the stage of data filtering. This process has been recognized in KP theory since the 1960s (Eppler and Mengis, 2004) and involves managers selecting those pieces of insight that offers utility to the organization or the managers themselves.

Research participants talk about their "filtering" activities concurrently while discussing at length the challenges "information overload" creates for them. When discussing challenges, they make a particular reference to their inability to make effective decisions and the confusion they experience in dealing with overload.

Indeed, this study observes a number of related phenomena that collectively are referred to as 'overload', with managers' discussions offering five key themes about the nature of 'overload'. First, overload is perceived to be caused by receipt of too many *irrelevant* information messages:

> A good example I guess is… the very small [named insight] for very minor customers. So, you know… tiny customer X has paid 20,000 pounds to do this that or the other and that's probably not relevant (SOFT23, Senior Manager).

A second theme is that relating to *duplication of content* (often from different sources), while a third theme is about *conflicting messages* that jeopardize the data's validity and credibility. A fourth theme related to the nature of overload is about unprocessed data that is *not distilled enough* to be of any use.

> And it's conflicting!... So we get conflicting, confusing, not-always-believable information…
> …I asked her for a simple synopsis of the – of a piece of research. She sent me a spreadsheet, which was a thousand columns by eight thousand rows of numbers….
> Now, clearly I need to do lots of pivot tables – and kind of stuff like that. This is not the question I asked (chuckles). I didn't say, "Send me the raw data." I just wanted to know a quick answer to what I thought was a relatively quick question (SOFT10, Senior Manager).

> I think it is a very much a part of working in the 21st century… that the amount of information that you receive is gone up, massively therefore… the process of filtering deciding what to do with that information it's become more critical to everyone's daily job (SOFT23, Middle Manager).

A final theme that transpired from the discourse of a proportion of managers was that about colleagues who *thoughtlessly shared* information, which others link to organizational systems that need to be improved in order to collate information more usefully.

> You have so little time, generally speaking, to think about modifying filtering things. So, the easiest thing to do is just to say, "Here is the information. I know I have got that. I know how to put that across to people and I won't bother modifying it. I would just give them as I kind of got" (EDU04, Senior Manager).

The excerpts above suggest that some new skills are necessary to deal with increasing data inundation. An analysis of managers' discourse identifies four different types of filtering behaviours where managers select information that is relevant, timely, accurate,

accessible, scarce and which offers guidance (particularly about specific problems and related solution). Evidence suggests that managers deal with overload individually through two types of behaviours. The first involves managers dealing with the source, by unsubscribing from the source. This option carries no effect on colleagues within the same organization. An alternative behaviour observed in both RET data and interviews is where a proportion of managers harness the work of colleagues who act as buffers from overload or undertake the role of protecting colleagues from overload. In both organizations, individuals would only pass information that is seen as "useful" to their colleagues, especially if such customer insight is not available to them.

> We are selective and we are aware that the people are busy and they can't read everything…we would be selective …just select a sentence or a paragraph and then you put the hyperlink in. So it's at their discretion if they want to read more, they can click on the link and read more (EDU11, Middle Manager).

> I try to be a filter in terms of what is going to be useful to them, what is going to be of interest to them, what would help them in their day-to-day activities and the last thing I want to do is forward them all of the junk that I was getting at one point. So, I try to provide that filter (SOFT17, Middle Manager).

> I don't need the hoodoop stuff, I need the stuff that's filtered out of the doop and staged in a data warehouse (SOFT21, Senior Manager).

Two further behaviours involve managers who deal with the information coming in rather than the source itself. Managers would choose between deleting or storing the information immediately upon receipt, depending on the value they perceive.

Selecting between "deleting" or "storing" strategies involves managers following guidelines or rules that they *construct through experience*. On the one hand, managers reported employing "headline", source or content criteria against which they assess pieces of customer insight they receive:

> I suppose for me when I get a customer insight thing it would be... do the first few words do enough catching... my interest to go further with it. I think on balance most probably the majority of them I would delete but occasionally I would keep them because there is something in there that is captured and I have thought that I would need that or potential want that and probably 1 in 50 I would forward on (SOFT01, Middle Manager).

> There are so random and I get some bloody many of them that I would generally ignore them unless it has got a title and then it's going to affect me (SOFT09, Senior Manager).

> I tend to speed read things and… decide at that point okay do I need to action this, do I need to store this for future reference and I am quite an organised person… Or if I feel like it's just not relevant I will put it in the 'deleted folder' (SOFT19, Middle Manager).

A small subset of managers who appeared to be more confident than the norm in their knowledge management skills reported adopting personal information strategies that they found relatively easy to automate.

> I guess for the emails, the stuff that's coming in, I tend to use a lot of filters and stuff that I don't want to get into the details but I try to be a bit more – I try to filter the stuff out into certain folders so that it automatically pops in there and then I'll go in…
> …anything that I am copied on, I filter into a CC box… CC folder. And… I used to have an automatic reply, which will go back to the person that sent to me to say, "Thank you for the email. Because you have cc'd me on it, it means that you don't want me to respond. It's just something for reference and I will read it later… [you know] And if you need me to act upon it, then you need to send it in my In Box" (SOFT15, Senior Manager).

But a general theme that emerged in managers' discourse about filtering is the strong sense of anxiety that deciding to delete or process information evokes. In this context, managers would rather store information (sometimes in their deleted email items folder), hoping it might become useful someday, rather than risk ignoring it completely:

> So, again it's that "what do I really need to know from it" because I think absolutely the hardest thing as you progress through your career is being out to let go (SOFT07, Senior Manager).

The anxiety related to missing important pieces of insight when filtering information was evident in managers' discourse in both organizations at different levels in the organizational structure.

> You don't want to miss that golden nugget which could inevitably lead to a poor customer experience (SOFT07, Senior Manager).

> …and if you are missing a piece of information … then you could make the wrong decision because you don't know the full facts of whatever it maybe (EDU13, Senior Manager).

In each of these behaviours, evidence suggests that managers follow largely tacit guidelines or rules that they construct through experience or from the feedback they receive from their peers with they share information and insight. These guidelines are cumulative (shaped by managers' continued interaction with peers) and individual in the sense that managers have unique rules that they follow in filtering unprocessed

information. Because these are manifestations of organizational memory, these individual guidelines will be dealt with later in Sections 7.9 (memory) and 7.10 (feedback).

Dealing with overload and filtering unprocessed data is a theme MBL literature overlooks, possibly because single-informant approaches that typify this domain are unable to expose filtering behaviours reliably. However, this study offers some explanation about the filtering behaviours observed in organizational learning literature, such as Day (1994a, 1994b), who talks about mutually informed mental models (or the tacit guidelines this study observes) that are formed as a result of individuals interacting together as communities.

In summary, managers face overload as a commonplace reality and respond to it by dealing with either the source or the information involved. Managers employ tacit rules that they construct as a result of earlier experience with overload. There is a strong sense among managers that part of overload is the result of thoughtless sharing by their colleagues. Managers also express a strong sense of anxiety, as they are unable to assure themselves that managers can identify what insight carries value in the overload they encounter.

7.5 Transforming data

Another theme emerging from participants' discourse related to how they *transformed* data into packets of insight that they can store or share with colleagues. The following paragraphs set out how managers engage in a process of "data transformation" for a number of reasons, using up to four types of transformation.

In both organizations, managers transform pieces of information into an insight *packet* that they share with peers or store for future use depending on their assessment of the value of the insight.

> At that stage you think about how valuable is this? How much effort do you want to put in transforming it or if you want indeed diffuse those (EDU09, Senior Manager).

Table 7-2 Transformation behaviours: Forms of transformation as evident in research participants' discourse (Source: Author)

Simple, minimal change	Moderate transformation	High level transformation
But, I generally don't change it… unless there was information in there which I didn't think... which I knew whilst it is confidential and didn't want to be cascaded down (SOFT07, Senior Manager).	Our job is to translate pick out what we think is the news worth the bits working with the academic. (EDU11, Middle Manager).	What I share… with the rest of the team is obviously a distilled version of what I get from Finance (SOFT15, Senior Manager).
I probably add in some note saying that "you probably might be interested in this". I wouldn't do because I am just... because of the type of department that I work in… You should try and keep it quite short to the point. (SOFT01, Middle Manager).	You won't get all the information in the email. So I'll have some more additional information I can share with the team so we can talk about that. But it does depend on the content of the message that we receive that we all talk about it if there is something there to be talked about. (SOFT09, Senior Manager).	Simplify.... Simply simplify…Because if you simplify that then put some mandates.. .put some mandates. If you allow people, you know... too much breath for the interpretation, you will end up with too many people with depths of interpretations and many will be wildly away from the outcome output over there that may be was … the target within the conception of the initial plans. (SOFT22, Senior Manager).
You have so little time generally speaking to think about modifying filtering things. So, the easiest thing to do is just to say, "Here is the information. I know I have got that. I know how to put that across to people and I won't bother modifying it. I would just give them as I kind of got." (EDU04, Senior Manager).	So, there are still articles that will then see, interviews, webinars different other media that [named provider] doesn't pick up that we as members of staff pick up and then ideally we will combine them in one email and forward it on say for interest. (EDU11, Middle Manager).	We get massive spreadsheets and reams of information and in many cases we are taking that information, doing something with it ourselves putting it into a format that we think is therefore useful to share from a communication perspective or to enable us to make the calls we want to make and to the guys in the field and that's what we do. (SOFT04, Senior Manager).
So, I would either 9 times out of 10 I will use documents or reports that are already in circulation… I might delete some of the information I don't think it is pertinent to them. (SOFT07, Senior Manager).	People will still go off and create their own little view of information and I think if you look at how people consume information nowadays you look at where people go for sources of information it's just a platform in which they use to gather information. (SOFT04, Senior Manager).	We have had the ability to contract everything onto a very simple page. One single page of information that allows him to go "I can see how to be successful or I can see the gaps that are going to stop me from being successful. I know what I need to do about them." (SOFT04, Senior Manager).
No, usually I would... this would be quite rare to be completely honest... would be quite rare. And if I did I would be kind of forwarded on as is with my comment as why I think this might be useful and what particularly I have picked out of it. ...but otherwise they are getting just what I think as opposed to kind of seeing the whole picture. (SOFT12, Middle Manager).	And what the member of the Comms team is doing there is really looking and putting that information together say everyday or relatively frequently. (EDU07, Senior Manager).	What might happen is you know, if we had a big customer visit coming up or something else happening I would use a variety of bits of information about that client to draw a picture on what's going on and to share it with other people we are meeting with. (SOFT07, Senior Manager). It's about probably 2 pages of A4 but it's in an email so it uhm… [named colleague] obviously used [named software] to interrogate a… data warehouse somewhere that has all the information and then we'll produce some charts and a bit of a text to go with it as well to supplement it. (SOFT15, Senior Manager).

Observations suggest that managers transform information into a "packet" by engaging in four types of behaviours. In the first instance, managers may deal with information overload by (a) *compiling* a large number of data sources into a manageable "packet". Alternatively, they may aid decision making by (b) *removing redundant aspects* from information they encounter, or (c) *rendering explicit* information that they would have encountered as tacit news or updates. Alternatively, managers may opt to (d) *change content or sense of information* for a variety of symbolic use purposes that are discussed later.

Transforming information into a "packet" was evident among all of the study participants, and yet, this type of behaviour is missing in existing customer insight use frameworks (such as Kohli and Jaworski, 1990, among others). It is possible that the MBL literature has missed the transformation stage because the single-informant survey approaches are unable to observe and measure these behaviours reliably.

Evidence in both case studies suggests that the amount of transformation varies from very simple, minimal change of original pieces of information to more intricate tasks involving deletion of irrelevant information, selecting the true update and aggregating information from different sources (see Table 7-2).

The notion of "value-adding" is a dominant theme for the senior managers in this study when they talk about transforming data into insight:

> When I pull these bits of information together, the collective value of the material is greater to me and I am more satisfied with the information I got and I can use once I have done some processing with it, I have ...something more complete… bringing these together is what...adds some interest, adds some value to it (EDU07, Senior Manager – emphasis by author).

Senior managers are more likely to claim instances of high-level transformation, driven by four types of personal or strategic goals. The first is managers' need to enhance collaboration, whereas a second goal would be that of exploiting apparent personal or business opportunities. In reaching both goals, managers may transform information, using intricate approaches to produce a concise, simplified or distilled version of a more complex picture. Alternatively, managers may build a wide picture by aggregating pieces of relevant information into one insight packet.

> If we had a big customer visit coming up or something else happening I would use a variety of bits of information about that client to draw a picture on what's going on and to share it with other people we are meeting with (EDU07, Senior Manager).

A third goal that drives managers' transformation of data into insight relates to managers' own assumptions about what makes an insight relevant, interesting and useful to colleagues:

> By sharing it you kind of filtered out all the rubbish as it were the other stuff like but this is something that's obviously more interesting and more useful. So, I would say it would elevate it (SOFT12, Middle Manager).

A fourth objective that drives managers' transformation of information concerns managers' own validation of the customer insight treated.

> I took the time to decompile their numbers and I put them out on the table and I realize what they did is they actually did prorate... based upon whether it was a small, medium or a big country. There was no national reflection in there at all (SOFT10, Senior Manager).

Managers' discourse about transforming data into insight concurs with the *symbolic* use that some MBL studies discuss. Symbolic use is where managers select or distort information to justify or legitimate predetermined positions (Beyer and Trice, 1982) or justify decisions already made with retrospectively-acquired information (Diamantopoulos and Souchon, 1996). Table 7-3 summarizes an extract of these observations, showing how research participants engage in at least three types of symbolic use behaviours when developing insight from data.

These observations are in contrast to the dominant notion (in MBL literature) that symbolic use is a distinct type of customer insight utilization (Vyas and Souchon, 2003). Evidence from this study suggests that managers may engage in symbolic use of insight *without* distorting original meaning of data to support pre-held opinions (as suggested by Diamantopoulos and Souchon, 1996). Indeed, study participants engage in different types of symbolic behaviours as part of day-to-day processing of customer insight during the transformation stage, rather than making symbolic use of insight during a wide (and often ill-defined) "use" step, as entertained in MBL literature.

Table 7-3 Evidence of symbolic use of data during transformation step (Source: Author)

Type of symbolic use	Evidence from data	Related to by
Power seeking use	But, I generally don't change it… unless there was information in there which I didn't think... which I knew whilst it is confidential and didn't want to be cascaded down (SOFT07, Senior Manager).	Beyer & Trice (1982)
Affective use	…that you are more comfortable with, because its less challenging, less exposing or whatever… but this is at a very high level... (SOFT22, Senior Manager).	Menon & Wilcox (2001)
Legitimating use	…we would use that for our purpose of building a case, confirming a view right that either we have or it's been put to us that we need to like re-orientate whatever. (SOFT22, Senior Manager). I sometimes take out select bits depending on what I am trying to promote. (SOFT12, Middle Manager).	Sabatier (1978)
Self-promoting use	I think this was taking customer information from some of our management systems here and... and from the financial package and that kind of stuff and putting it together in a way that reflects our activity... (EDU07, Senior Manager).	Feldman & March (1981)

In summary, observations in this study suggest that managers transform information they acquire and filter into an insight packet that can be shared with colleagues. Transformation involves any of four types of managers' behaviours: compiling information from different sources, removing redundant information, rendering information explicit or changing content or sense. There are three levels of transformation that managers would engage in, depending on the goals they are trying to achieve. Indeed, managers may, through transformation of information into insight, try to enhance collaboration with colleagues, exploit opportunities (that are relevant to the organization and/or themselves as individuals), make information shareable based on their own assumptions or validate the insight before sharing. Transformation is also akin to symbolic use of insight, and this study observes four types of instances of symbolic use. The next section deals with how managers share insight across the organization.

7.6 Sharing insight

Customer insight use is a collective process in an organizational context. Managers adopt both formal and informal approaches in sharing customer insight with each other. Formal approaches are those interactions that are organized, structured (after Moorman, 1995) and verifiable by third parties (Maltz and Kohli, 1996). By contrast, informal insight sharing involves managers' interpersonal interactions exemplified by casual conversations (Moorman, 1995) that are spontaneous and cannot be verified (Maltz and Kohli, 1996).

RET data as well as managers' discourse suggest ways in which customer insight (as distinct packets) escalates upwards, cascades down or travels horizontally across teams and business units in both organizations. Managers engage in sharing customer insight packets by acting in a number of formal and informal approaches.

Observations and qualitative interview evidence also suggest that informal approaches often relate to a "way forward" for individuals or teams. In some instances, informal approaches mitigate the structural deficiencies that hinder insight sharing, such as:

> …an active real-time conversation where we can share ideas rather than an email conversation which is usually about, you know… documented actions (SOFT23, Middle Manager),

> I spend a lot of time having informal chats with people because our structure doesn't echo with what we need and it's the same for [EDU]. Unless I met with [named colleague] regularly, I wouldn't know what was happening (EDU05, Middle Manager).

By contrast, data from in-depth interviews suggests that managers employ formal sharing approaches to disseminate "know what" insight that helps other people in their day-to-day jobs.

> So, there are still articles that we'll then see, interviews, webinars different other media that [named system] doesn't pick up that we as members of staff pick up and then ideally we will combine them in one email and forward it on say for interest (EDU11, Middle Manager).

> Just a part of what I do is we come up with new pricing things. We have new pricing information coming from [HQ] and... I would put it together in an email and actually send it out to the sales department. So, just make them aware that this new pricing is there (SOFT01, Middle Manager).

> We pick up bits that are relevant. So, it could be [named colleague] was mentioned in The Times yesterday talking about his research. So, we pick that up and send it to [him]. We would also send it to [named colleague] and people that we felt as relevant. The people that we felt would appreciate reading that article (SOFT11, Middle Manager).

Formal approaches are relevant to the explicit portion of customer insight. Sharing varies from virtually "broadcasting" across the entire organization to targeted insight sharing with a small number of colleagues. Indeed, at the simplest level, managers would share insight by placing a "packet" and making it "available" to colleagues through the firm's internal portal systems, as is typical in SOFT. Placing insight

packets in the firm's social media platforms is akin to "broadcasting", with the insight packet shared horizontally and vertically across the entire organization. Broadcasting is a common practice among senior and middle managers, who may opt to restrict their dissemination by targeting specific groups of colleagues registered in the firm's social media platforms by function, roles or project teams. At a further level, managers may restrict their sharing by opting for the highest level of targeting. This type of sharing typically involves channels like email and is often about escalating insight to superiors.

In contrast, informal sharing is relevant to the tacit portion of customer insight and involves managers specifically targeting colleagues with whom they share insight. Here managers aim to establish a common understanding about emerging customer, offerings or market developments.

Formal dissemination carries an associated risk of insight getting lost in the day-to-day noise. Managers' general laments (particularly in SOFT) related to the profuse un-targeted and unsolicited sharing of pieces of information about customers, markets and competitors, contributing further to the general inundation problem discussed earlier.

> We do tend to work in this broadcast mode while we're throwing it out there, we don't know whether 1, 5, or 500 people read it. Whether anything is changing the results there and then somebody had it does share it with you, I find that very useful, thank you very much (SOFT10, Senior Manager).

Seven different themes emerge from in-depth interviews relating to this lack of value addition in dissemination, happening at individual and group levels (see Table 7-4).

Perhaps it is the open "culture" of the firm that leads to a lack of filtering and transformation (or value addition that is discussed later), encouraging managers to simply "forward" insight packets to colleagues without much thought about the utility or relevance of the content to peers. Political and personality motives may also underlie this behaviour, where managers may attempt to *pass* responsibility to colleagues.

Table 7-4 Challenges to effective sharing (Source: Author)

Type of hindrance	Evidence from data	Related to by
Individual behaviour		
Reckless sharing	...if I get anything every 5 minutes [from top executive] I will never get anything done… because you would have to open and read it. (SOFT12, Middle Manager). …they are very busy... probably too busy actually to be honest but that's another subject and so I try not to send too much of this stuff through to them. (SOFT17, Middle Manager).	Bawden *et al.*, (1999); Bawden & Robinson (2009)
Sharing selectivity	I think the media in which its delivered is also... kind of compounds the problem... because if I am travelling and I am on my smart phone I just want to tap some points out of it. Speed read pick up the points and move on because if I read everything to a level of detail I needed to understand it, I just won't cope… (SOFT07, Senior Manager). So, again it's that "what do I really need to know from it" because I think absolutely the hardest thing as you progress through your career is being out to let go. (SOFT07, Senior Manager).	Bawden *et al.*, (1999)
Lack of information processing capability	But for me... people say why aren't you using our social media hub? A) I don't know how to use it... couldn't use it but B) it's not the way mind works, it's not the way that I operate… (SOFT07, Senior Manager). What strikes me personally is I wish more people would... do a little bit more analysis before they send things through. (SOFT10, Senior Manager).	Eppler & Mengis (2004); Rader (1981); Tushman & Nadler (1978)
Organizational culture		
Lack of email etiquette	Don't do an FYI to me because I will just delete it. I am not interested." (SOFT04, Senior Manager). It's just kind of an automatic blast list as I call it. Just massively gets disseminates which is probably often the way you find it on all major distribution lists. It's not filtered to relevance... (SOFT07, Senior Manager). There is a kind of proliferation of this junk… for want of a better phrase and that was the point when I was kind of reporting quite a lot of the external providers sending me, "Is this insight? Isn't it insight?" I am not really reading this because I am getting so much of it and it actually made me unsubscribe from it because it was literally clogging up my email inbox" (SOFT17, Middle Manager).	Bawden *et al.*, (1999)
Information dumps	I feel we live in an incredibly information rich world and sometimes, it's within that 28-pages of text, there's one paragraph that really counts. If it's on page 28, will I have the stamina to get down that far? No. I wouldn't… In email, everything important that you have to say has to be within the first window. Assume nobody scrolls unless by the point halfway down, they have implicitly given you permission to continue the confession. (SOFT10, Senior Manager).	Bawden *et al.*, (1999)
Overload as part of manager's role	Well I think in my role based on the communication that I get… I am aware that if it is a UK Corporate communication then I am conscious I am not the only recipient. So, there is me, there would be sales people, there would be consultants… . So… I don't think… the effort involved in sending an email back to say "actually I only want this information... please check" would be effective. You know because there is another 300 people in SOFT that might really need that information. And… my role is very different from anyone else's ... (SOFT18, Middle Manager).	Bawden & Robinson, (2009); Eppler & Mengis (2004)
Organizational information processing capacity	But as its community has shrunk then its purpose has shrunk with it. The use of [named system a] has gone away. We haven't replaced it with something that's an easy option subscription model. We have tried with [named system b] but... – and I have asked, a lot of the people that I have asked did not use the [named system b]. (SOFT10, Senior Manager). One of the things that within our organization we do in certain of our operations is to do exception alert reports to individuals within the business. So for example, it's related to a customer where we've got a customer who's got a renewal of their software due, say 180 days down the line. And we haven't entered or confirmed, there is no risk to that renewal of the salesperson onto the system. After an appropriate time we alert the salesperson. Now, if there is a bank of, the mass of salespeople who are not on top of their act… suddenly they are deluged with quite a lot of alert information. So that then doesn't become an exceptional report, it's a normal report …and therefore has no impact, because it's overlapped. And will automatically be grouped and sent to the bin. (SOFT25, Senior Manager).	Galbraith (1974); Tushman & Nadler (1978)

Interview data also suggests four objectives managers try to achieve in their sharing of customer insight (see Table 7-5). Managers may share insight as they seek to enhance collaboration with colleagues, particularly when insight is relevant or useful to colleagues. Alternately, managers may be aware that such insight is simply unavailable to colleagues and try to fill such deficiency. Managers also share insight for further discussion, or finally, they may emphasize a particular message, especially when there is an apparent business opportunity.

Table 7-5 Users' motives to share customer insight with targeted peers (Source: Author)

	Reason	Reference
1	To enhance collaboration (*)	Something that got sent to me, which is around Big Data and I saw it as an opportunity for the sales team potentially to look at because it was a representative from Honda UK speaking at this event. So I said, "Actually, I know that you guys have been trying to speak to these guys here. Here's another name for you." So, maybe you'd see different things and different outcomes coming. (SOFT15, Senior Manager). It's all about collaboration. It's all about keeping the awareness of SOFT high. So… that's why it's an important thing to me. So uhm… and I take this information and generally, when I do an uptake on my team, I will do things like – I will share that information. (SOFT15, Senior Manager).
2	Is unavailable to colleagues	They are the managers of the various units… obviously are our sources of information around the state of their business as are the sales people... being the sources of information around where they are with a particular customer, particular customer strategy, aligning the business within our customers, where they are with their general activities. (SOFT04, Senior Manager). Do I send it to the rest of the team or do I share it? No, because the rest of my team get it. So, we might discuss some of the things that are said on there but I wouldn't share that. (SOFT09, Senior Manager). What I share… with the rest of the team is obviously a distilled version of what I get from Finance. (SOFT15, Senior Manager).
3	For further discussion	The management team will take the burden of gathering the information together into one place, putting into a very simple template and then become a discussion document that we can have with our sales people. (SOFT04, Senior Manager). "Then I start sharing it, analysing it with the faculty then I put in improvement further and then …." (EDU05, Middle Manager).
4	To emphasize a message	It's important for me as a manager to be… communicating with my people and my staff. Sometimes, I do send things they might already get but it's just reinforcing that message. (SOFT15, Senior Manager).

* Cascading approaches only

These "objectives" emerge as manifestations of integrative mechanisms within both organizations. Integrative mechanisms are intent on coordinating the efforts of specialized functions (or business units) in response to stimuli, such as market and customer uncertainty, within a collaborative setting (as suggested Maltz *et al.*, 2001 and Perks, 2000). Organizational manifestations such as cross-functional teams, co-location, customer visits and social orientation enhance the effect of integrative mechanisms (Maltz *et al.*, 2001) and contribute to an organization's market orientation

(Kirca *et al.*, 2005). This study's in-depth interviews reveal all of these manifestations in both organizations (see Table 7-6).

Table 7-6 Evidence of integrative mechanisms in case study organizations (Source: Author)

	SOFT	EDU
Cross functional teams	…formally formed like in the case of a bid management team, where for example we dealt with the [named customer] where we had a very formalised and quite large big management team established for that… (SOFT25, Senior Manager).	…we would look at the background of the activity with [named client] over the last year or so, document that together and then share it with my colleagues that we are meeting with... the individuals at [named client] to give them an understanding what is going on with that client or whatever else. (EDU07, Senior Manager).
Co-location	But then if I needed something around marketing I would just go back to marketing and just say what do you have on…? I need information on X can you point me the right direction? ... the marketing department sits just next to me I will just go in and ask them. (SOFT07, Senior Manager).	We're six in our team…[in] Same location, same place... Open-plan office. (EDU04, Senior Manager).
Customer visits	"we have got the majority of staff within consultancy are all working in customer sites… so it's the outworking" (SOFT18, Middle Manager).	So… we might visit the client as well… or the client might visit us… we had that recently… we had a client come to visit us. We were talking over whether or not there were iPads on their course. So, basically in that 4-hour conversation we were able to flesh out exactly what they meant... by what they were expecting from us and what we were able to deliver as well. (EDU04, Senior Manager). I mean with these academics you are going over to a client and coming back. You are probably meeting an academic or two or perhaps whoever is involved in the specific project. (EDU07, Senior Manager).
Social orientation ([a])	Evident in physical and online interactions: We do staff announcements about people's promotions and appointments in their roles – Irrespective of whether you actually deal with that part of the organization or not. (SOFT10, Senior Manager). It's a social networking site that… we like to call it [named system]… It's a little bit like Facebook. (SOFT12, Middle Manager).	I spend a lot of time having informal chats with people because our structure doesn't echo with what we need and it's the same for the [entire institution]. (EDU05, Middle Manager).

[a] Efforts that help managers "*better understand each others' personalities and preferences, and develop camaraderie and friendship*" (Maltz *et al.*, 2001, p. 72)

Despite these similarities in the two case studies, differences in patterns of insight packet sharing are evident across the two firms. At EDU, a small team of managers within a central marketing function would be aggregating customer insight from various colleagues in different business units, suggesting a rather centralized character. At SOFT, aggregation and sharing of insight packets is widespread across all functions, suggesting a relatively decentralized customer insight setting. SOFT's open-systems approach, well developed information acquisition processes and the application of such information in the firm's campaigns indicate a relatively externally focused culture that supports the organization's interaction with the external environment (Moorman, 1995).

Interview data also suggests that customer insight often finishes stored in "pockets" typified by individuals, their own systems and databases or shared files owned and managed by small groups of managers. Alternately, insight packets in SOFT may get lost in the social media type of systems that are paradoxically intent on enhancing information sharing.

By contrast, at EDU, while noting relatively less openness in sharing of customer insight, in-depth interview data suggests individuals are more likely to rely on one-to-one or an informal style of customer insight sharing, with consequent application of customer insight in product development and campaign management, also suggesting a relatively externally focused culture. Yet, EDU's hampered insight sharing (and associated diminished dissemination efficiency) is evidence of the effect of organizational structure and political behaviours that emphasize proximity of individuals. Proximity may be related to individuals' roles, locations in the organization or even cultural traits, with "closer" individuals affording mutual trust in each other, thereby resulting in improved cooperation and commitment (Moorman, 1995).

Apart from noting decentralized or centralized patterns of customer insight sharing in the two case studies, observations also show that customer insight travels across groups in response to specific stimuli (such as emerging customer or market developments) as well as part of a "system" that involves periodic/regular customer insight routines, as noted in studies like Day (1994b) and Sinkula (1994).

Social network analysis employing a Clauset-Newman-Moore (2004) algorithm on RET data (Figure 7-2) reveals how three functions at SOFT—sales, top management and service/operations—play a central role in generating and sharing customer insight across the entire firm (see Table 7-7). In this analysis, the functions are referred to as "vertices", whereas interactions between functions (such as functions' sharing specific pieces of customer insight) are termed as "edges". "In-degree" and "out-degree" are measures of centrality of vertex (or function). In-degree measures the number of "edges" (or interactions between functions) that point *towards* the vertex of interest.

Out-degree measures the number of edges (or interactions) that point out of the vertex (or function) of interest towards peer functions.

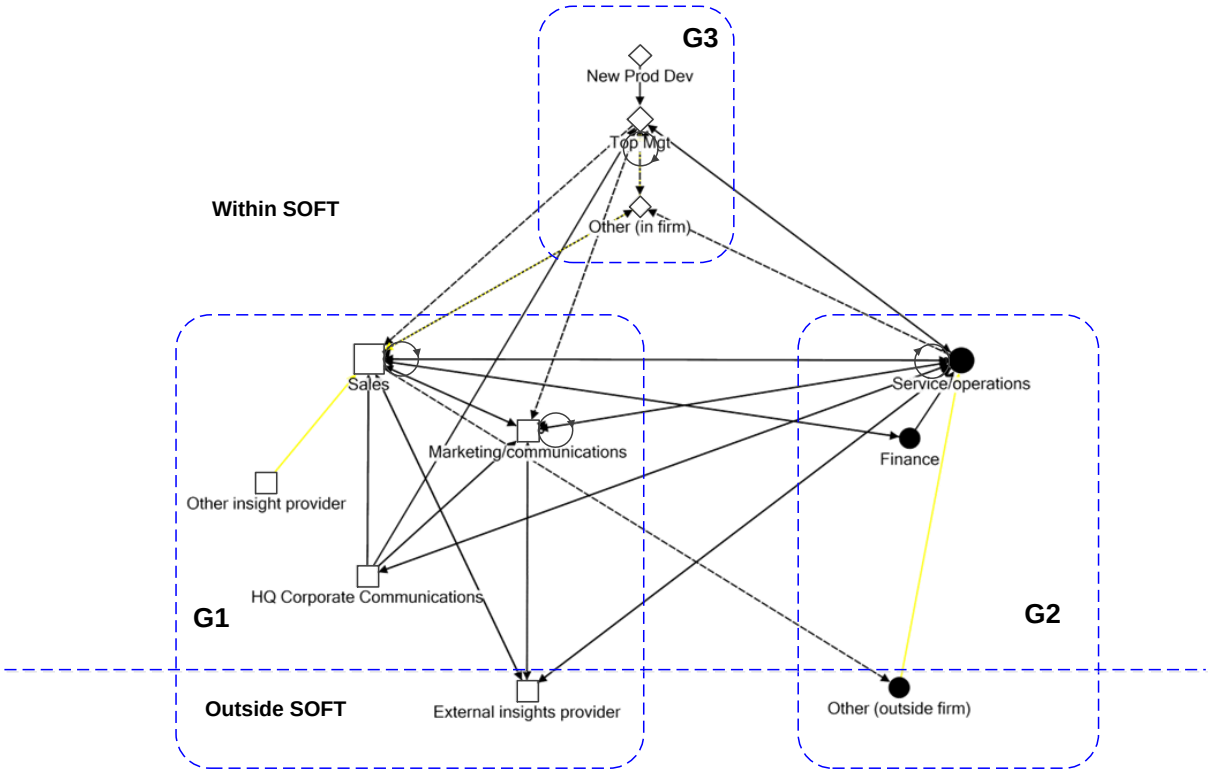


Figure 7-2 Customer insight processes across functions: A social network view at SOFT (Source: Author)

Table 7-7 A social network view of customer insight sharing at SOFT (Source: Author)

Function	Cluster membership	In-Degree	Out-Degree	Betweenness Centrality	Closeness Centrality	Eigenvector Centrality
Sales	G1	9	7	35.333	0.091	0.165
Marketing/communications	G1	6	4	2.000	0.067	0.129
HQ Corporate	G1	1	4	0.000	0.063	0.099
External insights provider	G1	3	3	0.000	0.056	0.077
Other insight provider	G1	0	1	0.000	0.050	0.028
Service/operations	G2	8	7	17.333	0.083	0.160
Finance	G2	1	2	0.000	0.053	0.055
Other (outside firm)	G2	1	1	0.000	0.053	0.055
Top Mgt	G3	5	5	19.333	0.071	0.133
Other (in firm)	G3	3	2	0.000	0.059	0.077
New Prod Dev	G3	0	1	0.000	0.043	0.022

Betweenness centrality measures the vertices' (or functions) roles as a bridge for other vertices. Sales, service/operations and top management have the highest betweenness

centralities and in- and out- degrees. Closeness centrality measures how close a vertex is to its connected vertices (the smaller the score, the closer a vertex is to its connected vertices). New product development, finance, and marketing/communications teams are closer to their respective connected functions then other functions at SOFT, suggesting that these functions are in a good position to initiate insight processes.

Eigenvector centrality considers the number of a connections a vertex has as well as the degree of the vertices to which it is connected. The higher the Eigenvector centrality, the more important a vector has in a network. At SOFT, sales, service/operations and top management have the highest importance for insight packet transmission.

This analysis thus shows how the sales function is at the centre of a closely-knit cluster (termed G1- see the high betweeness centrality Table 7-7) that involves functions such as marketing/communications, corporate headquarters and an external customer insight provider. The cluster around top management (G3) involves new product development as well as other insight providers within the firm, whereas a third and more loosely held cluster (G2 – see the relatively low betweeness and closeness centralities) centres around the service / operations function (G2) and involves finance along with other external and internal insight providers. Sales, service/operations and top management lie at the centre of their own cliques, sharing customer insight primarily with members of their own cluster, apart from sharing customer insight with the respective core functions in the other cliques within the core triad.

This network analysis illustrates how customer insight processes happen across the entire organization, epitomising the essence of market orientation (after Kohli and Jaworski, 1990) while distinguishing between individual-level and group-level processes. Moorman's (1995) study had determined the extent to which cultural types influence the dissemination of customer insight *within* closely-knit groups involving formal and informal approaches and associated conceptual and instrumental use of insight. Unlike Moorman (1995), this study could not link clans or cliques of managers with enhanced conceptual and instrumental use of customer insight as opposed to other types of organizational cultures. But, this study's observations about managers sharing insight to create a wider picture and reduce decision uncertainty (see Section 7.7) reflect

the trust they enjoy among their peers (Moorman, 1995; Moorman *et al.*, 1992; Moorman, Deshpandé, *et al.*, 1993). Equally, these findings contrast those of Moorman (1995), in that this study identifies the functions that lie at the core of cliques, the members of those cliques and how insight is channelled within and across cliques.

In summary, this section established a detailed account about how customer insight travels across the organization. From an individual manager perspective, customer insight sharing happens in all directions across the organization: cascading down or escalating up the organizational hierarchy or moving horizontally across teams or groups of managers. Managers employ formal or informal approaches to share customer insight, and this study notes how informal approaches typically relate to tacit type know-how and is very audience-specific. By contrast, managers employ formal approaches to share explicit know-what type of insight that risks getting lost in the overload that managers face daily. In sharing insight, managers seek to enhance collaboration or make insight available to colleagues (who otherwise have no access), or prompt further discussion or simply emphasize a particular message.

From a customer insight's perspective, this study observes how insight travels within and across groups of managers, showing how sharing is related to perceived distances between insight sources and insight receivers. Customer insight sharing is one of the integration mechanisms that helps an organization muster resources to respond to emerging market, customer or competitor shifts.

The next section contains an analysis of managers' engagement in analysis and interpretation behaviours when dealing with customer insight.

7.7 Analysing and interpreting

MBL literature seldom focuses on individuals' analysis and interpretation behaviours when encountering customer insight, largely because cross-sectional single informant studies focus on instrumental, conceptual or symbolic use rather than on how managers make sense out of the insight encountered.

In-depth interview data reveals that individually, managers *analyse* insight they would receive from colleagues. Contrastingly, *interpretation* of insight involves managers collaborating with each other, sharing judgement and feedback on insight packets, leading to the construction of a common and actionable understanding across the decision-making manager.

This section looks at analysis and interpretation as two separate yet interlinked behaviours.

7.7.1 Analysing

Regarding analysis, managers in both organizations talk about two alternative types of behaviours. The first appears to be engaging and demanding, involving managers dismantling and reconstructing the meaning of the insight received or shared:

> How we can use this data, this is why I think it's shaky, and – I wasn't looking for that relationship. I suspected it was in there because we shared with you some of the numbers. But, what I wanted to do is to actually start to break down and get some correlation between different data sets so that I could work out with the three best fits I can get. Maybe, out of that, I'll get some kind of... basic understanding of where we think that would be. (SOFT10, Senior Manager).

> Well, I validate it… Because I go back to the system and check. I usually know when meetings are coming up. What I do is I usually go in and check what I think where we are. So when I go to those meetings there are no surprises and then if they show something else then we usually have a discussion on when they got the information, from where they got it from (SOFT19, Middle Manager).

A second method involves managers executing additional analysis to extend the utility of the insight they receive, exemplified by the constructing of some customer behaviour predictive model:

> Because the information and the form that was given, my stakeholders wanted to do more with that data than I thought they actually could do...
> …actually, a part of what we do, we push data around and look for patterns so we can do that really, really well… We'll find things in data you never knew were there. We can do that with the context. The rest of it is all the science of how you achieve that. (SOFT10, Senior Manager).

In both case studies, managers talk about analysis as a *skill* at individual and group levels. This skill also emerges as an element of the organization's culture:

> So, one of the things I think we have not done as well as that we could do internally is analysis interpretation and recommendation on the basis of data… [SOFT] is an unusual kind of organization, we're a company full of analysts at heart, people who are used to using data. Sometimes, we are very theoretical about that. There's a great attraction for doing a lot of analysis, with simple analysis. By large, I think we are a pragmatic organization (SOFT10, Senior Manager).

> I think the challenge we have with insight wherever we get it from is typically 'I need to perform additional analysis on the insight' to anything I want to do (SOFT04, Senior Manager).

Analysis manifests among individual managers. However, managers' making sense of customer insight continues to a further stage, where managers aggregate in groups to interpret the meaning of the customer insight they encounter.

7.7.2 Interpreting

Managers' discourse also revealed how interpretation of insight relies on collaborative approaches across a group of insight users involved in the marketing decision. A central theme in managers' discourse about collaborative approaches was related to feedback across and within peer groups.

Managers' discourse also revealed how interpretation of insight relies on collaborative approaches across a group of insight users involved in the marketing decision. A central theme in managers' discourse about collaborative approaches was related to feedback across and within peer groups.

> None of us have the complete information to be able to make… to enable us to do everything we need. And not all information you need is just available. A lot of information you need is in peoples' heads rather than this document (SOFT25, Senior Manager).

Most managers talk about aggregating multiple points of view on a particular problem in their making sense out of the insights they receive or share. Feedback is that mechanism that enables interpretation, thereby resulting in the creation of a meaningful story about markets or customers, the identification of opportunities (whether relevant to managers individually or as an organization) or the uncovering of areas for correcting performance. Feedback also assists users in aggregating multiple points of view of a particular problem (see Table 7-8). Feedback is addressed in Section 7.10.

Table 7-8 Interpreting customer insight collaboratively (Source: Author)

Creating a meaningful story	Identifying opportunities	Identifying areas for correcting performance	Aggregating multiple points of view
There's very good factual nuggets; we can talk to those. We can have very good high-level pictures but we have always been as good as we could be in joining up the blocks. What does this mean? How would this look? How would this work? (SOFT10, Senior Manager).	So I think that's a big question mark for everybody is that with this piece of research are we getting to the right people [clients]? I think that is the biggest problem – are we getting to the right people? (EDU29, Senior Manager).	And they would like to have a meeting about what we have done and how we can improve and things and where we are doing against our KPI's because we have got KPI's on certain things. So, that budget spend about how much lead generation we're doing, pipeline, all that sort of thing. (SOFT19, Middle Manager).	You would have to try and qualify it. So, you could ask a bit from the source but then what you try and do is qualify that from people around you because that would be easiest thing if you could to qualify that information to make you feel that was correct. (EDU13, Senior Manager).
Baked beans or baked beans? Baked beans with reduced salt and sugar, baked beans being sold under own label. They're being made from all of those manufacturers. Baked beans that are included in the all day breakfast in a tin. There are multiple permutations of just baked beans. So it's very difficult actually. So…. You can look at how many beans do Heinz buy and compare it to purchasing. What part baked beans marketing? (SOFT10, Senior Manager).	I'll interpret that maybe slightly different to somebody who is in the… the sales community. Obviously, in the sales community, or the licence sales community, they will see that as a – you know… they'll be looking at the details of how much – what is the first year fee? What's the renewal? What goes with it? Who are the customers; what they've sold; the size of it so. (SOFT15, Senior Manager).		So we can see that over the… over the course of this year, how many discussions have been set up; how many blogs; uhm… what forums uhm and the detail and the activity. And we can compare that to the previous year so we can see whether or not – and we can look to see if there's any… any similarities so that you know, training is a seasonal business so we tend to have dips and it literally does that. (SOFT15, Senior Manager).
So we do get feedback where and we get feedback in two forms. One is feedback which is oh! My God I didn't realise things were that bad. We get feedback which is why doesn't the data show this, this and this... so I know that A) they're reading it and (B) not just reading it they are actually consuming it and understanding from that perspective. (SOFT04, Senior Manager).			So this agency will brief the whole of the team but then I expect to have various individual meetings or groups of two people and delve in much details and this is where the depth comes in with one person or two people within the team to actually get the quality of the information that we're looking for. (EDU29, Senior Manager).
Also, we have very complex sales cycles for our big clients. They don't happen overnight where there are multiple interactions and multiple interventions. People would love to be able to put their finger on one thing and say…"Yes, that was the deal maker or the deal breaker!" But it's not! It's a relationship. There are lots of things going on and it's very complex body as well. (SOFT10, Senior Manager).			And they all will consume that information and go away and do something and then create a feedback. (SOFT21, Senior Manager) . The management team will take the burden of gathering the information together into one place, putting into a very simple template and then become a discussion document that we can have with our sales people. (SOFT04, Senior Manager).

RET and interview data suggests that managers engage in analysis and interpretation of the insight that they receive from colleagues (who would have already removed the "noise" that otherwise contributes to overload), and before the application of any insight into a marketing decision. These observations concur with MBL studies that assume the organization is a rational entity, such as Diamantopoulos and Souchon (1996) as well as sense-making investigations like Daft and Weick (1984) and Huber (1991). That the act of analysis precedes that of interpreting of insight also concurs with the rare studies that make a clear distinction between the analysis and interpretation behaviours like Kohli and Jaworski (1990); Vyas and Souchon (2003) as well as Wei and Wang (2011).

Observations from in-depth interviews also suggest that the interpretation of insight involves a collective effort, concurring with rare MBL studies like Korhonen-Sande (2010), Santos-Vijande *et al.* (2005) and Wei and Wang (2011). Managers involved in interpreting insight provide and share feedback with each other, helping peers update their mental models and frames of cognitive maps, which, in turn, shape individuals' future interpretation of insight (Tindale *et al.*, 2003). Collectively, individuals' mental models constitute the group's frames of mind that, in turn, form part of the task-member and member-member portions of organizational memory (after McGrath and Argote, 2003). Managers employ these frames in their filtering of overload (discussed earlier) and subsequent validation of insight during analysis.

Validated insight helps managers create meaningful stories from the insight they interpret, relying on the aggregation of multiple points of view (from colleagues) to create a comprehensive picture and reduce the uncertainty associated with managers' decisions.

This study's observations at the individual managers' level contrast the findings emerging from single informant cross-sectional studies that look at the impact of trust (Moorman, Deshpandé, *et al.*, 1993) or inter-functional conflict (Maltz *et al.*, 2001). This difference emerges from this study's observing of managers' behaviours rather than measure the likelihood of managers' engagement in such behaviours.

Managers' interpretation of insight to identify market opportunities echoes Cillo *et al.*'s (2010) "forward approach" in market information processing, whereas managers' identification of areas for correcting performance resounds the "retrospective approach" in market information processing. Both types of behaviours invoke notions of formality (Low and Mohr, 2001) and the associated rationality that guides managers to apply insight in an instrumental way (Low and Mohr, 2001; Vyas and Souchon, 2003), which is discussed in in Section 7.8. Formalization reduces the time and creativity managers use in interpreting insight (Hurley and Hult, 1998) as well as promoting the approaches of managers to gather and interpret insight (Low and Mohr, 2001). Rationality galvanises rigorous and thorough insight processing, leading to instrumental use (Low and Mohr, 2001), particularly when insight relates to correction of performance. In this study, formalization is evident in instances where insight interpretation involves inter-organization approaches, exemplified by A19's description of her performance monitoring meetings with SOFT's alliance partner organizations:

> I do, if I am going to a review meeting...so like with [named firm] they are very stringent. They give us marketing funds. So I have to substantiate what I am doing... what, what the leads are, what the activity was, what the results were. So, I have to do quarterly meetings with them and I prepare all my … statistics in that and I give them evidential stuff. So, like I say from the [named source] I get all the information and then I present it back in a factual way (SOFT19, Middle Manager).

A final note is that observations in in-depth interviews help distinguish clearly between not only analysis and interpretation behaviours but also at which level such behaviours happen. This is in stark contrast to previous MBL works that seem to put analysis and interpretation as a single step without much elaboration about the manifestation of such behaviours at individual or group levels (Diamantopoulos and Souchon, 1996). One important note here is that managers only opt to implement action when they have made sense out of the customer insight they would have encountered. The next section sets out the study's findings relating to how managers action customer insight.

7.8 Applying customer insight in accepted marketing action

There is a sense of accomplishment or closure in managers' discourse about acting on the customer insight encountered, even if this means *informed inaction.* As one

participant puts it, inaction (unless desired) carries no value, especially if there is no learning for the managers involved in the customer insight process.

> Understanding something without action doesn't mean to say it doesn't have value… Just as thinking without action is academic. …we have several internal analytical cycles and I do think that all should lead to action (SOFT10, Senior Manager).

The collective involvement of managers in reaching a common understanding dominates participants' discourse about deciding on marketing action. Four objectives emerge from the managers' in-depth interviews about the application of customer insight in marketing action: correcting performance, choosing the least risky (or most sensible) option, tapping a secure business opportunity and justifying or legitimating predetermined positions (Table 7-9).

Evidence from interviews also suggests patterns in decision making and customer insight application. These patterns ranged from making marketing decisions on occasions that are ad hoc and unpredictable to more recurring and possibly predictable occasions that follow business cycles or different phases of a project (such as phases of a marketing campaign or a sales process) (see Table 7-10).

Managers' accounts of their customer insight-based decisions compare with what literature entertains as instrumental, conceptual and symbolic use of customer insight (Beyer and Trice, 1982). For instance, managers' application of customer insight to correct performance reflects an element of *specificity* between the customer insight and the decision involved (Maltz and Kohli, 1996).

> It [named report] tells me what my team are doing, what the pipeline is or deals' status in the pipeline, where it's due to close, what we have got to do to close the deal and so on. I need to understand the status of the business (SOFT21, Senior Manager).

> [named report is] specific to the work I do. I can't do my job without knowing how media are reacting and what they are interested in (SOFT29, Senior Manager).

Table 7-9 Collective nature of marketing decisions observed among study participants (Source: Author)

Correcting performance	Selecting the sensible option	Tapping opportunity	Justifying or legitimating predetermined positions
We would have to spend the first half an hour going through the finances…look at the performance for the UK from a sales perspective, we would look at what priorities are for that quarter from a sales perspective, we would look at the actions that we are looking to take... to underpin support of those priorities in Q3 from a sales perspective, we would look at performance from a business unit year-to-date, we would look at forecasts to the end of the year. We then subdivide that and look at the actions, initiatives we are taking by manager to underpin our forecast to the end of the year. We would look at any initiatives we may need to... look to undertake to address specific concerns within the business. We may look at... start looking at initiatives for next year, early next year. Operationally we would look at... how we are performing. We would also look at any of... any performance criteria around individuals from a point of view of minimised attrition by looking at any specific issues within the group… and we would look through where we have got a project status summary dashboard about key projects, and, risks that could impact our numbers and how we are looking to address those [risks] (SOFT07, Senior Manager).	Lots of decisions about... what goes ahead of your decision making process. How do we monitor whether we're actually on track? How do we test our assumptions and translate belief into science? Because in the early stages when you begin one of the transformation programs, it's all about the belief that it will work. (SOFT10, Senior Manager).	"There are general communications out around new products from a point of view of how do we... what do we need to prepare our teams to be able to implement and enable them…. our focus is around delivering a small portion of the overall number of products that SOFT delivers because we can't be all sorts to all people… In my role I just need to be aware "okay there is a new platform coming out, which will consist of lots of products but then my team below me are structured in such a way that they will own that amount of product", they will own that and they will go to a level much lower than myself. So, for me its awareness... for my managers down it's the good understanding of what needs to be done. (SOFT07, Senior Manager). [I] will look at it in terms of what… what's the knock on effect for me for education? So [you know] I will look in immediately so "is there any services that have been included in that?" Generally, we'll have a services announcement come out from [named function], from [named colleague] … "Is there an opportunity for us to go and new customer, new application, do they need any training?" …So I look at it… and slightly interpret it in a slightly different way to – Sometimes, quite selfishly about what does it mean to me? (SOFT15, Senior Manager).	If you are an Account Director, your job is to sell software. If you… only if you are very much a good corporate citizen will you care about sharing it with anyone else except with the occasions where you want either need to justify why you haven't solved something or get other people to do stuff. (SOFT23, Senior Manager). I think for a lot of people, research is that kind of safety net. So it ensures that that decision that they make, or they can then fall back and say, "Well, I was totally justified in proceeding… in proceeding that way because the research said this." (EDU29, Senior Manager).

Table 7-10 Patterns in managers' application of customer insight in marketing decisions (Source: Author)

Ad hoc	Recurring	
	Follows a project / campaign process phases	Follows business cycle
But the times when it is used is done when there is an interaction with the client or with a meeting about some particular topic. That's when that information gets poured and drawn and used in a particular way. So, for instance if we were evaluating our relationship with a particular client we will pour together that information or extract it from the system at a relevant time to do that. There will be an increased frequency depending on what we are doing with that client at a particular time. (EDU07, Senior Manager).	From my perspective because the marketing is often the leading edge of what we are doing new, of what we are delivering new often from a delivery point of view, we're probably 12 months behind that. So, we might be bringing out new products therefore want to market them. From a delivery point of view could be another 12 or 18 months before we get around… (SOFT07, Senior Manager).	There is a lot of focus in achieving quarterly objectives and as we are getting nearer to that end date I am sure the frequency and intensity increases. (SOFT07, Senior Manager). All the year, so I mean it's, for us, the end of the quarter isn't a huge thing, whereas maybe five years ago quarter four which is, you know, the last quarter of our year… seemed a lot busier and a lot more pressurised than previous nine months. But these days you don't really see any drop off. (SOFT13, Middle Manager).
The outputs from it will vary in frequency depending upon and what's going on and what we need to present and produce and those kinds of things. So, the capturing and building of these bits of information is relatively consistent. But, how we use them what we are collecting for its going to change depending... (EDU07, Senior Manager).	March and April where we would be starting to roll out campaigns, targets would have been assigned or we were going through targets and commission period and its sales. So we should always be busy on the phones. (SOFT09, Senior Manager).	Just into Q2... It does tend to be a relatively flat period in our business cycle you know obviously... Q4 is desperately, desperately busy. If you were to repeat this exercise then it would be blank. (SOFT17, Middle Manager).
But the rest of it kind of just depends on when we land a client really…In terms of a project we would know when we are going to need that information so then we would go and request that point of time. So, I think that's probably how it is here. (EDU04, Senior Manager).		And Q1 tends to be pretty busy as well… quite often in professional services because obviously we do a lot of software deals in Q4 which turn into projects kicking off from Q1. So, from a consulting and professional services perspective that tends to be a pretty busy period and so by the end of Q1 and early in Q2 its relatively flatter that's a general observation.... and.... traditional Q2 from a software sales perspective is one of our least active quarters. (SOFT17, Middle Manager).

It is noteworthy that over 60% of the MBL studies reviewed (see Section 3.4, page 49) relate to instrumental application of insight. However, in all instances, instrumental use is relevant to the organizational level of analysis. SOFT15's words in Table 7-9 expose two levels of relevance: the organizational level as well as the individual level of opportunity and associated profit for the individual manager.

In a similar fashion, managers relate to customer insight as a source of *enlightenment* during their interviews. Here, managers relate to how ideas are *stored* for potential future action in a more indirect way than instrumental use above. One instance is where managers apply customer insight to exploit emerging opportunities, an observation that ties with one of the behaviours managers adopt in their interpretation of insight. Similar to the forward approach market information processing behaviour that Cillo *et al.* (2010) observe in their mixed methods study, these findings also suggest long-term behavioural, cognitive and possibly affective changes among managers as a result of their application of customer insight.

> And there is a lot stuff I get where I think from a rival school and I think "wow that's an amazing marketing survey". I am going to keep that and put it into my good ideas folder and then I might quickly send on to [named colleague] or a few others (EDU05, Middle Manager).
>
> And that helps with future planning, future insights to understand where we get the future demand for particular sectors that demand more professional services type of activity. (SOFT27, Senior Manager)
>
> To me, that's my barometer about what I thought leadership position is in the market space (SOFT29, Senior Manager).

These behavioural, cognitive and affective changes concur with the definitions that organizational learning literature offers, such as "an entity learns, if through its processing of information, the range of potential behaviours is changed" (Huber, 1991. p. 89), as well as the notion of *conceptual* application of customer insight (after Beyer and Trice, 1982).

Managers' talking about their engagement with customer insight to legitimate or justify pre-determined positions, as well as their sharing (or use) of customer insight to consolidate relationships, echoes *symbolic* application (Beyer and Trice, 1982; Menon

and Varadarajan, 1992). These observations link directly with this study's review about managers' transformation of pieces of information into an insight (see Section 7.5).

A further note is that managers apply customer insight to select the *most sensible choice between alternative courses of action*, which echoes the *uncertainty* managers seek to *reduce* by aggregating multiple points of view in their interpretation. This aspect of application evokes Patton's (1978) definition of information use, a definition that only few MBL authors adopt in their work (such as Diamantopoulos *et al.*, 1990; Toften and Olsen, 2004).

In summary, this study uncovers how managers action customer insight through marketing decisions. It observes two types of implementation patterns (ad hoc or periodic, related to project or business cycles) as well as objectives intended to be attained through implementation of customer insight. The study observes the symbolic, instrumental and conceptual application of customer insight concurrently in the same firms and often by the same individuals. Equally important is the notion that managers observe the outcomes of their action and would store the lessons for future action. The next section deals with how managers exploit elements of organizational memory to store pieces of insight and lessons learned.

7.9 Storing customer insight

In both organizations, managers adopt insight storage behaviours that may range from the *occasional* keeping of a file (as a minimum) to the *hoarding* of insight, where managers painstakingly save all insight encountered:

> I know who I need to ask for bits of information I need… I don't need to archive it on and go looking for it (SOFT21, Senior Manager) (emphasis by author).

> I am an information hoarder. I do file everything. My inbox got nothing in it but my filing cabinet is enormous [chuckles]. And I am very good at using knowledge management tools that dig stuff back up again. What often I think we get is a lot of data is being shared or used un-judged. There's very little value added in the raw data (SOFT10, Senior Manager) (emphasis by author).

A common trait among managers is that the storing of customer insight assumes an individual's task, contrasting with the collective participation of managers in previous

insight use behaviours such as *interpreting* or *applying*. Indeed, observations in interviews suggest that managers store explicit pieces of insight on specific systems that other members access, or on their own personal systems that may range from day-books to email archives.

In both organizations, managers adopt mindful tactics in storing insight to ensure easy access at a future point in time. Mindfulness may vary from ensuring open access to all members of the organization or to affording controlled, limited access to specific colleagues through the "storing" user involved (see Table 7-11). Managers' mindfulness of future access to customer insight involves either robust approaches to ease future access by employing intricate knowledge management systems, or it involves simpler approaches, such as straightforward categorizing of insight according to source or relevant product/service (see Table 7-12).

Table 7-11 Embedding insight for open or exclusive access (Source: Author)

Open access	Exclusive access (through manager / insight user)
We use an online tool called [named system] which is basically a...it's a repository of U.K account information. (SOFT09, Senior Manager).	So if somebody asks for something and you know we have got case study you know we would send the case study as opposed to say exactly what they are after and that's the time issue. (EDU04, Senior Manager).
They have to take in the problem from the customer they have to reach a point where it is solved and they might have to store the fact that… other customers might have this problem therefore the [use of] information in… in the knowledge base. (SOFT23, Middle Manager).	The other I think is that I guess a lot of people just store it in their… in their head rather than in any formal system. (SOFT23, Middle Manager).

Table 7-12 Mindful of access: Approaches in embedding of insight (Source: Author)

Smart embedding	Simple categorization
…evolved my thinking over the last years or so where I… started to get in the habit of just filing everything and this is primarily… you know… is primarily just technology thing because I've just set up my shortcuts sorted out to be very easy to just... if its related to customer X… I would say in customer X folder (SOFT23, Middle Manager).	I have got good storage folders you know… quite an organised folder… you know, a folder structure and so I may put in for future reference or I may file it up in global resources file out there if it really leads to something else I will file it there. (SOFT18, Middle Manager).
And I'm very good at using knowledge management tools that dig stuff back up again. (SOFT10, Senior Manager).	So, that gets stored up in our filing structure where I store the emails based on what project and what customer it is for. (SOFT18, Middle Manager).
	I have folders for every single thing that I am working on per project so I can find them if any one if you ask me now then I can find something then I know where it is. (SOFT19, Middle Manager).

Managers adopt storage behaviours in response to three types of motivations. First, managers may need to *fulfil their reference role* within the organization (whether formally or informally recognized by colleagues).

> I mean as to say from a storage perspective for me I always ask myself what I am storing this for. Who is actually accessing this? Or is it just a personal storage or I might try to save and store it for other people. (EDU04, Senior Manager).

Alternatively, managers may need to ensure availability of insight to colleagues who otherwise have no opportunity for access. This motivation is particularly important when insight may only become useful and relevant with time.

> Otherwise you store it away for the point which it becomes, you know… becomes relevant because I think… in what is primarily a kind of sales and service function. If you share information at the wrong time, and it will just disappear and the mountain of stored information will grow without it actually becoming more useful. So I think that's possibly the other thing you are seeing here. (SOFT23, Middle Manager).

A third motivation relates to a matter of habit, where managers see storing insight as a safe approach that is easier than not keeping (or disposing) of information.

> Just habit. It literally comes down to habit, I mean... I think in reality I have got archives for my email going back probably about 10 years I would say (EDU04, Senior Manager).

On storage, managers talk about explicit pieces of insight, often containing "know-what" types of understanding, as well as "know-how" in the form of learned procedures or processes (see Table 7-13).

Table 7-13 Explicit, tacit insight and storage at different levels of analysis (Source: Author)

	Collective	Individual
Explicit ("know-what")	So the database and analytical tool are a repository that are designed to support analysis—transaction has a different shape and purpose and it's design is about learning and analysis. Becoming proactive versus reactive. (SOFT10, Senior Manager). There is a shift towards things like writing more blogs. So I've seen a couple of people would write blogs… I don't do it very often, I did more when we had a conference – analytics conference. And... it is coming to more blogging and I should probably do at least a blog a week or something like that… (SOFT15 Senior Manager).	If I think though that it's something that... could have a potential in the future, I keep it. I may not act upon it; even the cc's get filed eventually into personal folders. It does mean every quarter, I have to archive off my personal folder. (SOFT10, Senior Manager). And there is a lot stuff I get where I think from a rival business school and I think wow that's an amazing marketing survey. I am going to keep that and put it into my good ideas folder. (EDU05, Middle Manager). I do that (store) with some emails I get but I wouldn't do that with [named system] because [named system] is all about using it for a purpose. (EDU05, Middle Manager).
Tacit ("know-how")	Culturally, we have high tenure. We have people who have been here a long time, historically. That's where the repository of institutional learning has been within SOFT. (SOFT10, Senior Manager).	I've been at SOFT for 13 and a half years. People like me suddenly become a fountain of information everybody goes to. Because you've been here long enough, you know what it looked like last time, we've tried that or you've built institutional knowledge. (SOFT10, Senior Manager).

These observations are consistent with the tacit vs. explicit portions of knowledge in KP literature like Nonaka and Takeuchi (1995) and Polanyi (1962), among others. Organizational members share tacit "know-how" or "how-to" insight (Grant, 1996; Simonin, 1999), which is difficult to codify and share and is thus credited as a source of competitive advantage (Wills and Williams, 2004). Tacit know-how predominates among groups of people who are engaged in similar jobs (or tasks) as well as users ascribing a high level of mutual trust. This is the case in communities of practice that Lave and Wenger (1999) or Lave (1991) investigate or the "clans" that Moorman (1995) studies in the use of market information.

Managers' interviews also reveal that this tacit nature of "know-how" in customer insight processes involves individual managers' adopting "go-to" or references roles, relevant to their function, teams or groups.

> I am usually the point of last contact if somebody wants to know who to talk to (SOFT01, Middle Manager).

> So, I am very much *archaic*... if I need the information, whom do I need to go to or... I will kind of work my way through. So, I need information on X. I know the guys who are delivering it and can point you very quickly to where you want it (SOFT07, Senior Manager).

These observations about managers' approaches to embedding of customer insight in organizational memory are consistent with the three basic elements of group processes (McGrath and Argote, 2003) where *networks* of members (or managers), tools (like software and systems) and tasks (that reflect the organization's goals and purposes) interact to form organizational memory. These networks merge into "sub-networks", consistent with *transactive memory* (Wegner, 1987; Wegner *et al.*, 1991). Transactive memory is a key resource and source of an organization's competitive advantage (Argote. 2013). For instance, managers in both organizations point at the relatively long tenure of individuals that contributes to the establishment of "reference persons", recognized as experts in the use of specific systems (tools), sources of customer insight as well as their ability to analyse and interpret customer insight by adopting acknowledged routines.

> Although I work in Commercial and Legal because I have seen the organization grow from about 38 to 40 employees when I started...and I have seen the whole organization grow. So, I had used to in the old days… had a lot to do with the American members of staff...because we were all smaller so we all met each other. As somebody described my role the other day is you don't know it's really hard to give it a job description but if you took me out it would be very obvious very quickly what I do…
> … I am usually the point of last contact if somebody wants to know who to talk to. (SOFT01, Middle Manager).

> I kind of pass that mantle on to the current customer rep manager but continue to support him and give him the benefit of what is probably… 10-14 years' experience in dealing with renewal process here at SAS (SOFT23, Middle Manager).

> [named colleague] obviously the guy … uses [named software] to interrogate a… data warehouse somewhere that has all the information and then we'll produce some charts and a bit of a text to go with it as well to supplement it (SOFT15, Senior Manager).

Beyond the notions of individuals as "reference persons" and the information systems or procedures in which customer insight is embedded, interview data also points at culture as a property that strengthens both organizational memory and the effectiveness of customer insight processes. These findings are consistent with Starbuck's (1992) claim that culture is a key component of organizational learning and memory in knowledge-intensive firms.

> Culturally, we have high tenure. We have people who have been here a long time, historically. That's where the repository of institutional learning has been within SOFT. … We have a lot of new starts that come to the business that do not have the institutional knowledge. What does that mean? I have been at SOFT for 13 and a half years. People like me suddenly become a fountain of information everybody goes to. Because you've been here long enough, you know what it looked like last time, we've tried that or you've built institutional knowledge (SOFT10, Senior Manager).

The above paragraphs set out an account about managers' reliance on organizational memory in their engagement with customer insight. This account showed how managers' storage behaviours may be described in two dimensions. The first relates to peer access to stored insight. Managers may store insight in personal (closed) or formal/open systems. The second dimension relates to the complexity/simplicity of storage approaches that managers adopt in storing insight. Managers store insight in response to three key motivations: that of fulfilling their own "reference person" role, that of ensuring access to colleagues who otherwise cannot access insight and that of habit.

Managers supplement and exploit stored insight depending on feedback that managers share with each other. RET data suggests that feedback is stronger among members of highly trusted individuals or cliques. Feedback is thus a core mechanism throughout the insight use process and is discussed in the next paragraphs.

7.10 The role of feedback in the insight use process

The evidence that will be discussed in the following section underline the importance of feedback in managers' use of customer insight. These observations contrast earlier MBL studies, which only rarely deal with feedback. Traditionally linked with instrumental use (Citrin *et al.*, 2007; Moorman, 1995), feedback is *assumed* to happen in an organization, attracting only contextual (if not marginal) attention, as is the case in Hurley and Hult (1998), Moorman *et al.* (1993) and Wills and Williams (2004). By contrast, organizational learning and knowledge-processing literature provides a deeper comprehension of feedback and offers a more reasoned explanation for this study's observations.

In both case studies, managers talk about feedback they receive from or provide to colleagues in their engagement with customer insight. Observations in interview discourse suggest that feedback happens only when managers interact with each other in their acquiring, transforming and sharing, as well as during managers' analysing and interpreting of customer insight.

There are two key themes in managers' discourse about the role feedback: a) the receiving and sharing of insight, and b) the analysis and interpretation of insight.

The following sections discuss observations about the role of feedback in specific steps during managers' use of customer insight. It starts by discussing the role of managers' feedback during their acquisition and sharing of insight, and then it addresses the role of managers' feedback during their analysis and interpretation of insight.

7.10.1 Feedback on acquiring and sharing insight

Managers contribute feedback about the customer insight they encounter both when requested to do so and not. Often, the latter happens as a natural reaction intended to

help sources in their generation of customer insight. Interviews also reveal a third approach, where insight users offer feedback by participating in internal insight-related blogs.

Table 7-14 Feedback – Requested, unprompted and in blogs (Source: Author)

Requested feedback	Unprompted feedback	Feedback in blogs or systems
Do we get enough feedback? So this is valuable as much. We do start to do it on some of our portals – and I don't know if you're concerned with some of the things like quick find portal [named system] where you bring up assets, you can now star rate them. (SOFT10, Senior Manager).	INT: Will you give feedback to the source? SOFT10: It depends on who it is... If it's an external source and what they're doing is mass communication, I see very little point in doing that because they are feeding their own agenda. If it's an internal source, I do try to. I do give direct feedback.(SOFT10, Senior Manager)	…like our quick find portal [named system] where you bring up assets, you can now star rate them. And I do, do that. I do tell you how it was. How useful is it for me… But when I look at the number of people who star rate them, it's a tiny proportion of the company who rate things. (SOFT10, Senior Manager).
We try and get via the managers when they want to ...they want to understand whether the template approach that we are taking is of use. (SOFT04, Senior Manager). Well, I did try to stop it on the basis that I didn't think anybody was reading it but when I said to them "Does anybody actually read this?" I did get some emails back saying please please don't stop it. (SOFT12, Middle Manager).	Somebody might make a decision that impacts somebody else in the business because they haven't got… they haven't got the as you say, the insight into whether or not it was working in the first place. But you only get it if you speak to them. You get that feedback, whether it's a… a report or the people receive the information. (SOFT15, Senior Manager)	There is a shift towards things like writing more blogs. So I've seen a couple of people would write blogs… including myself. I don't do it very often, I did more when we had a conference – analytics conference. And… it's coming to more blogging and I should probably do at least a blog a week or something like that but… people need to be disciplined about how you actually structure it and what you put in it rather – sometimes less is more. (SOFT15, Senior Manager).

Feedback relates to both the content of insight (know-what) as well as methods related to the generation of insight (know-how), either as a positive response to experienced insight or as corrective feedback to the source (see Table 7-15).

Table 7-15 Nature of feedback on insight (Source: Author)

Valence of feedback (after Kohli and Jaworski, 1994; Tindale, Kulik, and Scott, 1991)

Evaluative content / locus	Positive	Corrective
Know-what	***"More please"*** But on the other hand, it's quite positive when you do get some feedback when you're least expecting it. So when you're sharing something and that somebody actually comes back with a – yeah, this is great. I also noticed this. (SOFT15, Senior Manager)	***"Slap"*** One is feedback which is "oh! My God I didn't realise things were that bad." We get feedback which is why doesn't the data show this, this and this... so I know that A) they're reading it and (B) not just reading it they are actually consuming it and understanding from that perspective. (SOFT04, Senior Manager). For example we get some reports around the leads that we manage and I will feedback on those if I think they are wrong or think they can be improved. In fact I do that every week. (SOFT09, Senior Manager).
Know-how	***"Keep it coming"*** Sometimes it is getting some positive reinforcements you are doing the right thing. (SOFT01, Middle Manager).	***"Stop"*** It's the obvious… "please don't do it anymore" [that would stop me]. (SOFT01, Middle Manager). For me, one of the... the... touch-tones of a good piece of communication is "What will change as a result of this? What action will happen as a result of this?" Not all information requires a direct action but will it affect somebody's attitude? Will as a result of that will they be better prepared to talk to the customer? Will they actually go out and do something differently? (SOFT10, Senior Manager).

Insight users expect and value feedback, but RET and interview data in both organizations reveal that users only *rarely* receive feedback on shared insights.

> My personal experience is that the only time you will ever get feedback is when you make a mistake (SOFT01, Middle Manager).

> Being blatantly honest, we get the blog from [named colleague], the blog from [named colleague] and they will ask for feedback. No one ever does because the feedback that people want to give might not be what people might want to hear… just being honest (SOFT09, Senior Manager).

Managers reflect on why they opt to avoid feedback to their peers:

> Why should I criticise? If it was going to a lot of people it might be relevant to me but it could be relevant to a lot of other people. So, I don't quite see why I will feed... need to make suggestions as to how it could be improved. (SOFT09, Senior Manager).

> How vested am I in doing this, like giving feedback? What's in it for me? That's horrible, isn't it? Why do I give feedback? Intellectually, if I give feedback, it should change the process more again. And the next one is better and get constant improvement. But the reality is, why give feedback if more often, get not augmented and nothing will change, why give the feedback in the first place if nothing would change? (SOFT10, Senior Manager).

Limited opportunity for feedback is also one of the observations Smits and Kok (2012) make about one of their case studies, noting how teams remain isolated and making incorrect assumptions about their insight processing. Evidence in interviews suggests two opposing behaviours as a result of lack of feedback. The first involves users who continue providing insight that is unusable or irrelevant to the target audiences. Alternatively, specific individuals opt to discontinue sharing specific insights in response to lack of feedback.

> I stopped doing that because I wasn't getting feedback. So, I had just sort of left it… …God it's just been a real one to me because I stopped an awful lot of stuff. (SOFT01, Middle Manager).

7.10.2 Relying on feedback in analysing and interpreting insight

Feedback also plays a core role in the development of a shared insight among the involved managers, particularly when insight involves the views of different users:

> And they all will consume that information and go away and do something and then create a feedback. (SOFT21, Senior Manager)

As in acquiring and sharing steps, feedback on the analysis and interpretation of insight may also relate to the content or "how-to" aspects of insight interpretation.

Although this study's analysis of feedback remains rooted at the individual level, the interviewed managers talk about feedback they receive and share as a group, where feedback flows horizontally and vertically across hierarchies. Although there is no reference to feedback in MBL literature, some organizational learning studies may inspire interpretations of interview data, as is the case of Ancona and Caldwell's (1992) investigation of feedback across teams, or Nadler's (1979) study of the relevance of feedback to individuals and groups. Indeed, managers were observed to be engaged in building the *big picture*, relying on peer feedback (Wills and Williams, 2004) which, in turn, feeds into transaction memory (in the form of person-person network, after Argote and Ingram, 2000). This mechanism reinforces the identity of "go-to" or reference persons who act as repositories of organization knowledge, both in the form of tacit sources of customer insight as well as of counsellors on available systems and desirable behaviours (Kohli and, Jaworski 1994; Levinthal and March, 1993). Contrastingly, feedback about insight content and outcomes feeds into the tasks' network portion of transactive memory, influencing individuals' engagement with insight through changes in routines, procedures, standards and rites. Changes are especially pronounced when feedback is specific to the individual, serving a motivational function by helping individual managers assess the causes of their individual behaviours and outcomes (Tindale *et al.*, 1991).

Feedback on new or changed engagement with insight also has similar consequences that manifest as *experiential* learning (Huber, 1991) and improve managers' engagement with insight (after Daft and Weick, 1984; Huber, 1991; Landau, 1973).

Managers talk about their frustrations when they do not receive feedback that they expect and value, suggesting that managers perceive feedback as valuable. Value emerges in the application of feedback by managers to change their behaviours. Observations emerging from managers' discourse on the value of feedback concur with

those of Tindale *et al.*'s (1991) organizational learning study about value of feedback. *Tindale et al.* (1991) propose that value emerges as a result of changed motivations and associated behaviours, concurring with value-in-use notions in marketing (like Normann and Ramírez, 1993; Ravald and Grönroos, 1996; Woodruff and Gardial, 1996). Some explanation may be assembled regarding how managers create value from their application of feedback from the work of Ashford and Cummings (1983), who propose three ways in which individuals use feedback.

First, feedback helps managers assess the importance of individual goals as well as the relevant changes in performance strategies managers apply when dealing with insight (after Nadler, 1979; Tindale *et al.*, 1991). Managers employ cueing mechanisms to change performance strategies, which, in turn, help individuals build competences and associated reputations that are recognised by their peers across work teams and groups. Second, managers use feedback to reach their own and organizational social goals, motivating their own socializing mechanisms as part of the integration of customer insight across and within organizational functions (see Section 7.6). Third, feedback helps managers reduce uncertainties about their roles and job context. Ashford and Cummings (1985) argue that intolerance to ambiguity stimulates managers to seek feedback from colleagues about their own performance and outputs. When unable to seek feedback, managers monitor the environment for signals that help them evaluate their performance (Ancona and Caldwell, 1992; Ashford, 1986; De Stobbeleir *et al.*, 2011).

Managers talk about both proactive and passive approaches in acquiring feedback. Apart from using performance systems (like sales, communications and operations systems), managers discuss their approaches in insight processing (individually or as a team) with colleagues as a means of monitoring their own performance. Such an approach concurs with the propositions of various proactive feedback-seeking behaviour proponents, like Ancona and Caldwell (1992), Ashford (1986) and De Stobbeleir *et al.*, (2011). Observations about individuals *expecting* feedback suggest the passive approaches that Ashford and Cummings (1983, 1985) discuss in organizational learning. Like Ashford and Cummings, interview data in this thesis may indicate that passive approaches prevail among case study participants who have been employed

with their respective companies for a long time and perceive their role in the firm clearly, including SOFT01 and SOFT10.

Indeed, some managers respond to lack of feedback. SOFT10 satisfies his need for feedback through his constant seeking of feedback from his peers and subordinates by exchanging behavioural-oriented feedback. In contrast, SOFT01 takes the initiative to change her performance to become what she perceives as more appropriate, possibly following her picking up signals about her colleagues' own performance in generating and sharing insight.

> I stopped doing that [sending out a named insight packet] because I wasn't getting feedback. So, I had just sort of left it…
> …God, it's just been a real one to me because I stopped an awful lot of stuff. (SOFT01, Middle Manager).

From a different perspective, SOFT01's behaviour may be evidence of feedback avoidance altogether, possibly resulting from her own lack of self-confidence. In circumstances following previous negative feedback, observations would have suggested an ego defence mechanism (Ashford, 1986; Ashford and Cummings, 1983), as is the case of EDU05:

> I am not doing it [sharing a named insight] to get glory… I mean I am doing it because that's my job or I see it's a useful information to pass on. But… some managers might perceive that as quite irritating like a fly in a windscreen. "She's making the noise again. Just stop it." Now, if you get told off once, twice, you are not going to do it a third time so then you stop. (EDU05, Middle Manager).

This section discussed the role of feedback between managers engaged in customer insight use. So far, this chapter has set out a description of a logical and perpetual cycle composed of seven stages. The next part of this chapter discusses the sequence of these stages and how some individuals may differ in this sequence of behaviours.

7.11 Managers' engagement with customer insight: Sequence of behaviours

Evidence of the sequence of behaviours discussed in this chapter appears in both RET and interview data. For instance, out of the 209 encounters that the RET method secured from SOFT participants, 31 provided information about participants'

behaviours that followed (through the online diary contributions). Similarly, participants' discourse relating to behavioural sequences during participants' engagement with customer insight was coded by linking behaviour nodes with directed relationships. A summary of these behavioural sequences is shown in Table 7-16.

Table 7-16 First and following actions observed in interview data (Source: Author)

First Action (Sources)	Following Action (Sources)								
	Accessing	Acquiring	Filtering	Transforming	Sharing	Analyzing	Interpreting	Acting	Storing
Storing	**10**								
Accessing		**10**	2		2	1	2		**4**
Acquiring			**15**	**10**	**8**	**4**	**10**		
Filtering				**5**	**14**		**5**	1	**7**
Transforming					**17**	2	3	3	1
Sharing			**5**	1		**10**	**13**	1	**4**
Analyzing			2	2			**4**	2	
Interpreting				3				**13**	**6**
Acting									**5**

There are two key observations that emerge from in Table 7-16. The first is that there is a "mainstream" process with a cyclical sequence, as discussed in the earlier sections of this chapter. Indeed, the diagonal cells in the table, starting from "storing → access" in the first top-left hand cell, down to "acting → storing" sequence in the last bottom-right cell, show a seven-stage sequence. The two stages in the process are split into two sub-sequences: a) "accessing → acquiring" and b) "analysing → interpreting".

However, a second observation is that managers may depart from this ordinary progression of behaviours. Three key interpretations emerge from a review of this evidence, discussed in the following paragraphs.

Steps following acquiring of insight

Evidence from interviews suggests that, apart from filtering information, managers may opt to transform, share or even interpret insight that has just been acquired. For instance, managers would engage in transforming acquired insight (i.e., "acquiring" → "transforming" sequence) when dealing with specifically requested information that

was either rendered specific ("filtered") by the source or that does not need any filtering.

> We would look at the background of the activity with [named client] over the last year or so, *document* that together and then share it with my colleagues that we are meeting with... the individuals at [named client] to give them an understanding what is going on with that client… (EDU07, Senior Manager) (emphasis by author)

> So, they are monitoring the media for us and each morning they send us a report. (EDU11, Middle Manager).

> Management team will take the burden of gathering the information together into one place, putting into a very simple template and then become a discussion document that we can have with our sales people (SOFT04, Senior Manager).

This study also observed some instances where managers would simply acquire and share insight ("acquiring" → "sharing"). A look at these instances suggests that managers deal with specific insight that does not need any transformation.

> You have so little time, generally speaking, to think about modifying or filtering things. So, the easiest thing to do is just to say, "Here is the information. I know I have got that. I know how to put that across to people and I won't bother modifying it." I would just give them as I kind of got. (EDU04, Senior Manager).

> That's a report that we look at and then act on... that we act on and send it to the relevant people. (EDU11, Middle Manager).

> Something that got sent to me, which is around Big Data and I saw it as an opportunity for the sales team potentially to look at because it was a representative from [named client] speaking at this event. So I said, "Actually, I know that you guys have been trying to speak to these guys here. Here's another name for you". (SOFT15, Senior Manager).

A final observation is where managers would engage in interpreting insight that has just been acquired (i.e., "acquiring" → "interpreting"). As in the previous observation, this sequence relates to insight that managers would have asked for specifically, particularly when engaged in interpretation of a number of insight packets.

> Then the majority of the other interactions I have tend to be requests for resources coming in ... to try and clarify things. (SOFT18, Middle Manager).

This section shows that managers may opt to immediately transform, share or interpret insight just after acquiring it, depending on their motivations or prevailing

circumstances. The next section looks at managers' behaviours following their filtering of insight.

Steps following filtering of insight

There are three key behaviours that managers opt to follow after filtering insight, apart from the "filtering" → "transforming" sequence: sharing, interpreting and storing.

Managers would opt to share filtered insight for three reasons. The first is when managers respond directly to requests by colleagues. A second reason is when managers share filtered insight that is to be assumed valuable to colleagues who, in turn, cannot access this insight. A third reason emerges from managers who are mostly at risk of not coping with overload. They are experiencing insight from other colleagues who add no value to the insight they share in turn.

> I forward on a lot of things which are to do with sort of [named products] type stuff. Which is actually also the kind of stuff I am more likely to be able to search for again later just by remembering a key word or some particular name in it.
> … But generally I would try to match the subject with somebody that I think would be interested in that. So, when I am reading it if somebody's name or names come to mind, I would generally try and forward it on to those people because there is a reason why they came to mind when I was reading it so I think it might be of interest to them. And they are the ones more likely to get some sort of positive feedback from. (SOFT01, Middle Manager).

> To my line managers what I think is pertinent to them I will pass on electronically, but then go through verbally at a monthly team meeting. There is sharing of information but then we debate it and go through it and at our regular team meeting. (SOFT07, Senior Manager).

> A lot comes in. How much of that is actively filtered with a point of view – *"*what should I or could I use this for*"* versus *"*I can pass this to somebody else to action". (SOFT10, Senior Manager).

This study also observes managers interpreting filtered insight. Managers engage in this sequence when they seek insight that is relevant to their group and to a specific situation that demands a decision.

> If the headline is important to me or relevant, great, I will read it or skim read it to see whether there is any knowledge needed to be acquired… and used in our weekly performance meetings. (SOFT09, Senior Manager).

> [I would] see whether there is any interest in stories that day... the figures that I am… primarily interested in… I could just take once a week… but the stories that lie underneath it unless you actually look at them, you don't know whether they are of interest or not. And those stories only come out when I discuss them with [named colleague]. (SOFT18, Middle Manager).

Another behaviour that managers adopt after filtering insight is to store insight. Managers store insight to deal with overload, and they find it a safer option in response to a constant sense of anxiety about missing important pieces of insight when filtering information.

> I will read them and they will get archived off to my... I have a monthly archive. (SOFT09, Senior Manager).

> …on a daily basis I just have a quick flick through that… see if there is anything relevant and then file it or delete [it]. (SOFT18, Middle Manager).

This section dealt with the behaviours that managers may opt to engage in after filtering insight. Instead of transforming pieces of insight, managers may share or interpret (with colleagues) or store filtered insight for future use. The next section deals with the behaviours managers adopt after sharing insight with colleagues.

Steps following sharing of insight

This study finds that, apart from engaging in analysis (individual level) and interpretation (collective level) after sharing insight, managers may opt to filter insight as a means of value addition, to interpret insight with colleagues directly or to store insight.

Managers may opt to filter incoming insight from their colleagues when individuals share or transmit unfiltered or insufficiently filtered insight:

> It's basically with the forward with a cc. This came in and I am not gonna do anything with it and I pass it over to – It's your problem now (SOFT10, Senior Manager).

A second sequence that this study observes is that managers share insight with a number of colleagues to engage them in interpreting as a group, rather than analysing insight individually. Managers opt for this sequence when the insight packet shared is only part

of a bigger picture drawn from multiple sources that the different managers would already have accessed.

> You won't get all the information in the email. So I'll have some more additional information I can share with the team so we can talk about that. But it does depend on the content of the message that we receive that we all talk about it if there is something there to be talked about. (SOFT09, Senior Manager).

> Everyone then went and had a look at it. Everyone interpreted it slightly different so we then spoke about what actually meant to us as a competitor (SOFT09, Senior Manager).

In the third sequence, managers store insight that they share because that insight carries a long-term relevance for marketing action. The case of SOFT23 below illustrates how he would store the insight he shares with colleagues in sales:

> I mean, there is a proportion, obviously, of the information that you store away. Usually… it's the hard factual information related to for example to commitments that you have made either to a customer or somebody in your organization… So, for example… if you commit you will do something for price X, you need to store that… you need to write it down… …Usually things where it's hard to… where you don't foresee an action resulting from the information. (SOFT23, Middle Manager).

This section describes the behaviours managers engage in after sharing insight. Along with analysing insight, managers may opt to interpret (with colleagues) or undertake additional filtering to augment the insight's value. The next section deals with the behaviours managers adopt after interpreting insight.

Steps following customer insight interpretation

Apart from using interpretations to adopt marketing decisions, managers may opt to store interpreted insight for future use. This is a conceptual application of insight, where managers would store valued insight for future application in marketing decisions when the opportunity arises. In these instances, storing happens at the individual level, where managers would embed the ideas in their own systems.

> And there is a lot stuff I get where I think from a rival [institution] and I think wow that's an amazing marketing survey. I am going to keep that and put it into my good ideas folder. (EDU05, Middle Manager).

> But it's useful because then you know who's you kind of keep in your head if you then become involved in that project in some way you at least have an idea of what's going on. (SOFT12, Middle Manager).

Summary

This study finds evidence of a typical sequence of behaviours that managers adopt in their engagement with customer insight. This process takes the form of a perpetual feedback loop. However, this section shows that, in response to specific circumstances or motivations, managers may opt for different sequences of behaviours. For instance, managers may acquire insight and opt to share or interpret it directly with colleagues or to transform or analyse the content. In a similar manner, managers may filter insight to share directly with colleagues. However, managers' inability to cope with overload may result in other managers at the receiving end needing to filter the incoming insight. In other instances, managers may simply opt to store insight that has been interpreted with colleagues, to be employed when the occasion arises. Figure 7-3 sets out a detailed graphic representation of these sequences.

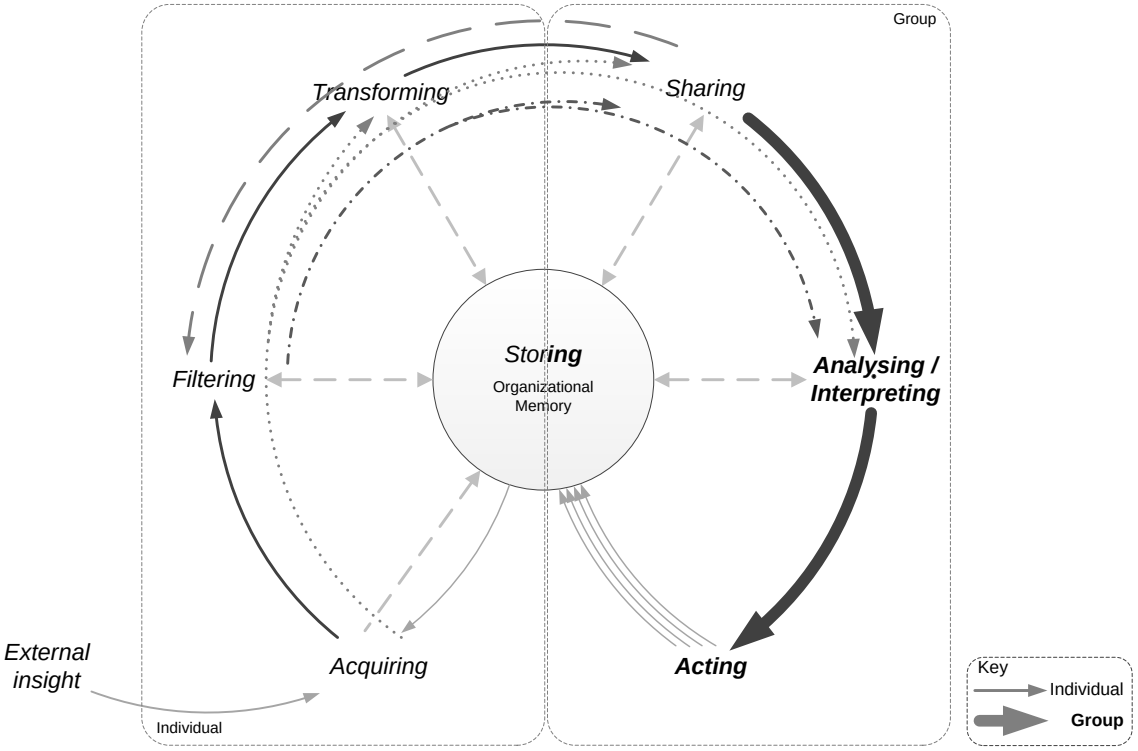


Figure 7-3 A detailed representation of the customer insight use process (Source: Author)

7.12 Summary

This chapter presented the findings emerging from the analysis of RET and interview data in each of the two case studies (pilot and key study). As a result of its longitudinal and in-depth nature, this study offers a more detailed understanding about the steps involved in managers' use of customer insight. Indeed, this study identifies seven stages of insight use, five of which were previously identified in MBL literature. For each stage, this analysis also identifies a number of sub-processes. The analysis also describes the motivations that lead users to engage in specific behaviours.

The use of customer insight is a perpetual process relying on the constant feed of pieces of market and customer information from a multitude of sources. Users *acquire* (by receiving or accessing systems to retrieve) customer insight from a variety of sources. At this stage, users are inundated with information and data, and managers thus adopt several *filtering* behaviours to select valuable pieces of information. There is also evidence that managers aggregate selected pieces of information to *transform* them into an insight packet that, in turn, they *share* with colleagues. Users *analyse* these pieces of insight individually, but they also engage in groups to make sense of and *interpret* the content of insight around an impending marketing decision. This study also finds evidence of users *actioning* insight in marketing decisions. Lessons emerge from the entire customer insight use process being *stored* in organizational memory. Organizational memory is manifest as individual and collective repositories or systems. Feedback from colleagues enables managers' learning, helping them store lessons about how to acquire information, how to filter and transform it into insight, how to adopt focused sharing strategies and how to build skills for validating and interpreting insight.

This study also finds evidence that, apart from a mainstream perpetual process, managers may opt to move to different sequences of behaviours in response to their motivations or specific contexts. A more complex framework for a perpetual process emerges, specific only to the individual manager and the context at a particular point in time.

While the focus of this analysis was customer insight, an examination of the stages of insight use touched on a diversity of issues about the core building blocks of

management strategy, including processes, resources and systems, skills and competencies, culture, leadership, structure and policy.

Having examined each step of this emergent framework for customer insight use, this study moves on to discuss the general implications of these findings.

PART IV

DEDUCTIONS & CONTRIBUTIONS FROM THE STUDY

8 DISCUSSION

8.1 Introduction

Chapter 7 presented the findings emerging from the analysis of two case studies. Apart from a detailed review of these findings, the same chapter also presented an initial comparison of this study's contributions against existing frameworks in the MBL and other organizational learning literature.

This chapter undertakes a further examination of the findings in relation to the research questions that guided this inquiry:

Research Question 1. How do managers use customer insight?

Research Question 2. What is the process of customer insight use in an organization?

In reviewing the study's findings, this chapter discusses the processual framework that has emerged and how this framework differs from extant MBL literature. Section 8.2 deals with how individual managers use customer insight (Research Question 1), while Section 8.3 deals with the process of customer insight use in an organization (Research Question 2). Section 8.4 reviews the implications of this study for customer insight practice, followed by a discussion of the methodological implications that this study offers (Section 8.5). A review of the implications of a critical realist perspective follows in Section 8.6.

8.2 How managers use customer insight

Previous research has observed that organizations can outperform competition if they are good at acquiring and distributing market information (Day, 1994b; Kohli and Jaworski, 1990). However, this study finds that organizations relying on customer insight require a more complex program of behaviours. As a result of the investigation adopted in this study and the fine granularity of data that this investigation allows, this study exposes behaviours that managers adopt as individuals and as groups when

engaging with customer insight. Findings include the identification of a cyclical process that describes use of customer insight (see Figure 8-1).

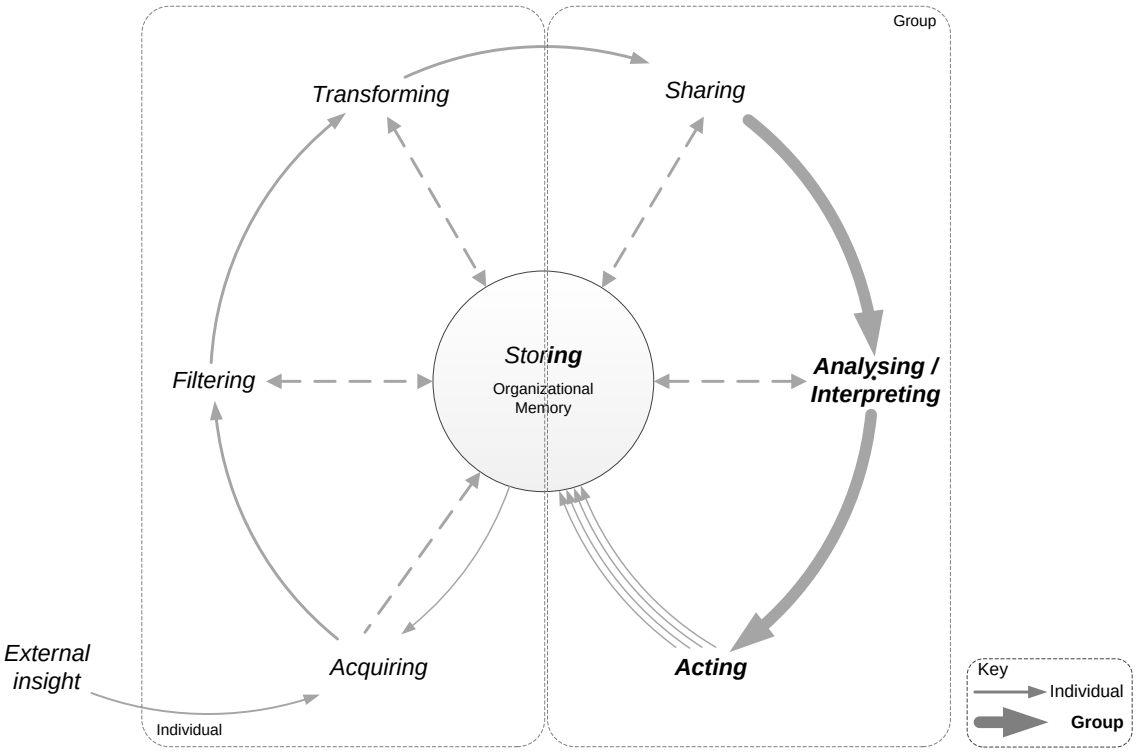


Figure 8-1 Emergent framework of customer-insight use process (Source: Author)

The following sections discuss the contributions this study makes in terms of how managers use customer insight, moving through the stages in the framework shown above.

8.2.1 Accessing, retrieving and acquiring insight

The findings in this study offer a different understanding of how managers acquire pieces of information in their day-to-day marketing roles compared to what the MBL literature offers.

Extant MBL literature focuses on three distinct yet parallel activities that comprise market research (ad hoc projects or continued service provision) (Diamantopoulos and Souchon, 1999; Souchon and Diamantopoulos, 1997; Souchon *et al.*, 2003), market intelligence (often involving managers' engaging in informal exchanges of information

with suppliers, customers and competitors) (like Bailey *et al.*, 2009; Hodgkinson *et al.*, 2012; Maklan *et al.*, 2008; Maltz and Kohli, 1996; Moorman *et al.*, 1993 among others) and market assistance (typically provided by consultants or export marketing agencies) (as in Diamantopoulos and Souchon, 1999; Souchon *et al.*, 2003; Souchon and Diamantopoulos, 1997). Market research (projects) are distinct in terms of systematic and formalized approaches (Souchon and Diamantopoulos, 1996), contrasting the typically formal but less systematic market assistance provided by agencies. Market intelligence is the least formal and systematic, involving contact with customers, distributors and competitors, apart from other activities (Kohli and Jaworski, 1990; Souchon and Diamantopoulos, 1996). Overall, organizations seemingly acquire market information in a typically unsystematic approach, at least according to Diamantopoulos *et al.*, (1990).

MBL literature also contends three views about acquisition of information as a process. The first emphasizes the *inward* direction and intensity of information flow in organizations' acquisition of market information (Moorman, 1995). This is a prevailing view in most MBL literature that focuses on organizations acquiring, disseminating and using customer insight. A second view is that organizations generate information and intelligence from existing customer data (Kohli and Jaworski, 1990) after a phase of information search (Weiss and Heide, 1993). More recently, MBL scholars investigated a third approach that involves organizations exchanging information with different allied organizations as sources of information. Sources may range from customer organizations to suppliers or even stakeholder organizations such as joint venture partners (Korhonen-Sande, 2010; Maltz *et al.*, 2006; Perks, 2000; Smits and Kok, 2012).

This present study, however, relates to the individual manager and the customer insight as the units of analysis. The findings in this study show that managers (in both case studies) rely on a variety of systems and individuals for the day-to-day access and acquisition of customer insight. Different levels of hierarchy enjoy different levels of access to such information – a point that Cillo *et al.*, (2010) and Kohli and Jaworski (1990) only hinted at in their studies.

Access to different sources varied across the two firms studied. At SOFT, an "open system" allowed users to access customer insight when required. Access typically involves formalized and systematic processes. These processes rely on the firms' generous automated systems, which in turn often adopt a social media character. At EDU, individuals face a contrasting situation, relying on a higher level of informal access to information from colleagues for specific pieces of customer insight on top of relatively limited quantities of information that they can access freely. Managers participating in both field interviews and at the validating workshop attribute access to a variety of sources as a function of the organization's culture and structure. Two key implications emerge from these observations. The first relates to the human nature of organizations' information acquisition processes. The second relates to the role of memory in managers' acquisition of customer insight.

The role of the individual in organizations' information acquisition

MBL literature typically distinguishes between *organizations'* informal and formal information acquisition processes (see Cillo *et al.*, 2010; Hart *et al.*, 1994; Moorman, 1995; Perks, 2000; Souchon *et al.*, 2003 for examples). Formal approaches are often linked with inward flow of information. Informal approaches seemingly relate to internally generated and shared information within organizations (Cillo *et al.*, 2010; Diamantopoulos and Souchon, 1999; Hart *et al.*, 1994 among others) and only rarely about organizations' obtaining of customer or supplier information (Diamantopoulos and Souchon, 1999; Souchon *et al.*, 2003). While relying on cross sectional approaches capturing single informants' views, these studies propose deductions about an organizational level process that is almost mechanical, consistent and rational.

The observations in this study offer a more granular view about information acquisition that happens at the *individual manager* as the level of analysis. Managers access, retrieve and gather information through behaviours and processes ranging from simple request-supply mechanisms to more intricate, user-to-user informal exchanges. Informal exchanges depend on the relationships that managers develop and on the trust that managers place in the individual sources and relationships. Trust is a manifestation that reminds us about the works of Moorman and colleagues, who look at trust in

insight supplier-customer relationships (see Moorman, Deshpandé, *et al.*,1993 and Moorman *et al.,* 1992). In this thesis, however, evidence suggests that individuals trust known individuals within and outside the organization. These individuals are managers' sources of *every-day* quality information. Trust is built over time and is especially prominent in older relationships, particularly around employees who have been in their roles for a long time.

Organizational memory and information acquisition

Organizational memory relevant to insight acquisition is manifest in three ways. The first involves the relationships between individuals exchanging insight (Argote and Ingram, 2000; Wegner, 1987) (see Sections 8.2.7 and 8.3.5 for a more detailed discussion). The second relates to the skills that individuals build and employ to seek and acquire customer insight. The third relates to the awareness that managers amass about the different sources of specific pieces of information. Except for Souchon and Diamantopoulos (1997)[21] and Perks (2000)[22], earlier MBL literature shuns the impact of the different components of organizational memory on managers' abilities in acquiring customer insight.

The findings in this study also suggest that the gathering of customer insight is not a stable process but, rather, one that is characterized by evolving behaviours that individual managers adopt in response to a changing environment. This stimulus-response shift is akin to learning at the individual managers' level, and contrasts with Cillo *et al.*'s (2010) observation about organizations' forward-looking insight use as a manifestation of conceptual use of insight.

8.2.2 Filtering information from an inundation of data

MBL literature acknowledges data inundation as a characteristic of market information processes in organizations (such as in Sinkula, 1990; Souchon *et al.*, 2003; Zaltman and Moorman, 1988, among others). Whereas organizations need market information to

[21] Souchon and Diamantopoulos (1997) consider awareness as an antecedent for customer insight use in export firms.

[22] Perks (2000) studies how firms in joint ventures share customer insight know-how

thrive and respond to market shifts (Sinkula, 1994), few scholars study the dilemma of when managers should refrain from simply considering any and all information that they encounter. Souchon *et al.* (2004) find that excessive information has a moderating and *retarding* effect on the link between instrumental/conceptual use of market information and organizations' responsiveness to market information. Rollins *et al.* (2012) find that the *extent* of customer information a firm acquires (and subsequent sharing) promotes direct and indirect information use in marketing, but they avoid discussing when too much is simply too much.

One reason why MBL literature has shunned managers' filtering behaviours is the single-informant approaches that studies in this domain typically adopt, with two important implications. First, Tushman and Nadler (1978) argue that information processing capacity varies across individuals and functions in an organization. However, because MBL studies rely on single informants about the organizations' generation of insight, investigations like those in Diamantopoulos and Horncastle (1997) and Hodgkinson *et al*. (2012) may only assume the existence of overload but not how organizations deal with it. Second, most MBL studies relate to the organizational level of analysis, thereby unable to offer any understanding managers' behaviours or strategies in the face of overload.

KP theory studies may offer some guidance on how managers should manage overload, with scant empirical support. At an organizational level, Bawden *et al.*'s (1999) literature review proposes different mechanisms to reduce the impact of information overload in decision making. In a similar way, other literature review studies (like Bawden *et al.*, 1999; Bawden and Robinson, 2009; Edmunds and Morris, 2000, and Eppler and Mengis, 2004) offer advice for managers to adopt in overcoming or avoiding information overload. Only Simpson and Prusak (1995) offer some guidance to managers on how to add value when dealing with overload, based on outcomes from interviews with managers.

In contrast to earlier MBL studies, this study observes directly the behaviours individuals adopt in dealing with overload. Whereas RET data suggests the extent of filtering behaviours adopted in an organization, interview and validating workshop data

shows the common challenges that managers face in dealing with excessive information and the choices they make to create value in the customer insight process. The notion of value among managers dealing with overload is not new. Simpson and Prusak (1995) propose five dimensions of value addition that managers use to evaluate in dealing with overload: *weight* (in terms of relevance, timeliness and presentation style); *truth* (in terms of accuracy, validity, comprehensiveness and degree of confidence); *guidance* (or problem awareness, diagnosis, options and solution identification); *accessibility* (or knowledge of location, ease of access, ease of use, intelligibility and selectivity) and *scarcity* (or perceptions about the sources' originality and creativity). Interview participants in this thesis offer evidence of all five dimensions in their engagement with customer insight.

Managers opt to store or share any information that is deemed *relevant* to any current or potential marketing dilemma. Storing information for later use is managers' approach for dealing with *timeliness*, as dilemmas may call for information that may have been lost with time. Storage of information is also a way for managers to ensure that relevant information is *accessible* at the opportune occasion and to accumulate pieces of information to assure *awareness* across the firm about potential problems emerging from shifts in customer requirements, markets and competition. Managers were also observed taking steps to ensure validity of information, by accessing only trusted sources (whether colleagues within the same firm, or internal systems or external suppliers) and validating information for its accuracy before storing or sharing.

This thesis further observes a strong sense of anxiety that such value addition evokes in managers. In addition to the evidence from interviews conducted at SOFT, managers in AGENCY01 and BANK01 also talked about two key concerns: (a) not to miss one important piece of information (with associated wrong decision making implications) and (b) a desire to not compound the problem of overload further across the firm. Workshop participants talked about mindful approaches that managers employ to ensure effective filtering by keeping in mind peer managers' insight requirements. The ability of managers to allow just the right information to continue its journey across the firm emerged as one important skill that organizations value and promote.

Managers' anxiety in dealing with overload bears risks and implications on *managers' effectiveness in reaching marketing decisions*. Cavusgil (1985) observes that overload hampers managers' decision making abilities as a result of confusion and their inability to retrieve information quickly when facing emerging dilemmas.

This thesis finds that a continued sense of anxiety is likely to lead to *distorted* filtering of information. Thus managers may produce and share insight that may be biased in content. This biased insight may potentially be oriented to satisfy social, power-seeking, affective, legitimating, self-promoting objectives or symbolic use, as espoused in MBL literature (Vyas and Souchon, 2003). This observation is consistent with Souchon *et al.*'s (2003) claim that symbolic use is more common in instances of overload. However, this suggestion may also explain *why* Souchon and Diamantopoulos (1997) find no empirical support for their hypothesized links between information overload and (a) hindered immediate or future use of export information or (b) non-use of export information. Similarly, the notion that distorted filtering is likely to lead to biased customer insight may explain why Saunders and Jones (1990) find no empirical support for their hypothesis that links overload to hindered decision making.

Distorted information filtering may well follow an imbalance between job demands and managers' information-processing capabilities (Tushman and Nadler, 1978). Thus:

Proposition 1	Managers reduce the potential complexity of large quantities of information by filtering information that is perceived as valuable for themselves and the organization.
Proposition 2	Perceptions of information overload may drive managers (consciously or unconsciously) to adopt behaviours to block information sources.

8.2.3 Transforming information into insight

Kohli and Jaworski (1990) argue that all parts of the organization need to be involved in rallying an effective response to market needs. This response relies on customer insight that is disseminated across all relevant departments and individuals.

However, there is a paucity of research on how customer insight is disseminated. While organizations remain dependent on individuals' exchange of information through verbal communications, the formal element of communication is changing as organizations increasingly rely on channels like email and internal (social) media. Previous MBL research shunned *what* is disseminated across the organization but focused on the factors that impact managers' dissemination of insight.

Individuals' reliance on formal and informal communication channels means that managers do not simply spew unfiltered information to colleagues. Evidence from both case studies and the validation workshop suggest that, to be able to share insight with colleagues, managers transform pieces of information into an insight "packet" that can be transmitted, exchanged or stored, depending on their assessment of the value of the insight. Indeed, managers perceive value of insight at this stage as it relates to any one of four different themes: a) an opportunity to enhance collaboration among peers; b) exploiting apparent personal or business opportunities; c) relevance and utility to colleagues; and d) an opportunity to validate information already in use.

Depending on the perceived value of insight, managers engage in any one of three levels of value-adding actions to transform information into a transmissible insight packet. At the simplest level, managers may simply delete pieces of information that are of no interest to audiences and share the remaining, filtered information. At a more complex level, users may opt to translate information encountered and augment the message with additional information that they have accessed. A more intricate approach involves aggregating information from different sources into one insight "packet" that is then distilled to the extent that the message becomes a simplified rendition of a complex picture. Managers in more senior roles are more likely to adopt the intricate approaches to insight transformation compared to their less senior counterparts.

Three key inferences emerge from these observations. The first is that the goals motivating users to transform information into insight "packets" signal elements of symbolic use of information. Managers' discourse suggests that managers may use customer insight to support pre-held opinions (consistent with Diamantopoulos and

Souchon, 1996) *without* distorting the original meaning of information. Unlike Beyer and Trice's (1982) interpretation of symbolic use, this study finds evidence that managers transform information for different ambitions, such as to strengthen collaboration with colleagues (Menon and Wilcox, 2001), promote self (Feldman and March, 1981), legitimate a previously held position (Sabatier, 1978) or augment their own influence (Beyer and Trice, 1982). Observations from this study also suggest that symbolic behaviours are part of day-to-day customer insight processing (consistent with Bettis-Outland, 1999) and not isolated instances.

The second inference relates to the consistency between this study's observations and the behaviours that KP literature proposes about individuals sharing insight (such as Nonaka and Takeuchi, 1995; Nonaka, Toyama and Konno, 2001). Indeed, KP studies suggest that managers transform information into conceptual explicit insight (articulated through images, symbols and language) and systemic insight (packaged in the form of manuals, documents, specifications and databases, among others) (Nonaka and Takeuchi, 1995). The observations in this thesis are also consistent with the "codification" behaviours that managers adopt in the sharing of information in organizations, as entertained in absorptive capacity literature (like Zahra and George, 2002, for instance). However, absorptive capacity studies are typically relevant only to the organizational level of analysis.

A further observation relates to how managers learn the ropes in dealing with the transformation of information into insight packets. Two mechanisms help managers optimize their transformation of insight. The first mechanism involves the development of information integration skills earned during formal education and training (both before and during their employment with the organization of interest). This is evident in the number of qualified individuals participating in the study (such as Master or Doctoral qualifications). The second mechanism involves cumulative mind-sets that managers build from peer feedback. In both case studies, as well as in the validation workshop interventions, evidence suggests that managers rely on peer feedback to build their own rules for the treatment of information from different sources, evocative of cognitive maps and frames (Huber, 1991; Tindale *et al.*, 2003).

8.2.4 Sharing insight

Although Kohli and Jaworski (1990) argue that organization-wide dissemination of customer insight is critical for an organization's market orientation, less than half of the reviewed MBL studies relate to insight dissemination. Eleven of these studies quantify the impact that certain conditions have on the dissemination of insight (like Moorman, 1995; Moorman, Deshpandé, *et al.*, 1993, among others) or the impact of insight dissemination on marketing performance in several ways (like Hodgkinson *et al.*, 2012; Rollins *et al.*, 2012; Wei and Wang, 2011, among others). The remainder observe the role of dissemination of customer insight at the organizational level of analysis. At best, some of the studies distinguish between formal and informal means of insight dissemination (as in Cillo *et al.*, 2010; Kohli and Jaworski, 1990; Korhonen-Sande, 2010; Maltz *et al.*, 2006; Maltz and Kohli, 1996 and Perks, 2000).

How **managers share insight**

This study moves forward from these views and observes *how* individuals share insight across different functions in three important ways.

First, this study observes four dimensions that describe how managers share insight with each other: style, direction, audience scope and occasion. *Style* involves managers opting to share insight through formal[23] or informal[24] approaches, and is consistent with a number of MBL studies (starting from Kohli and Jaworski, 1990 up to more recent studies like Korhonen-Sande, 2010). *Direction* relates to how customer insight travels from the individual manager, escalating up or cascading down the organizational hierarchy, or moving horizontally across functions. Managers may opt to transmit customer insight to virtually the rest of the organization (*wide scope*) or share an insight with targeted individuals (*narrow scope*). Finally, managers may produce customer insight in the form of periodic packets that they share *regularly and periodically*, or they would be simply working on a particular project and share outcomes with peers *when the need arises*.

[23] Formal approaches as those that are organized, structured (Moorman, 1995) and verifiable by third parties (Maltz and Kohli, 1996) and include simple email, reports and blogging on organizational social media.

[24] Include hallway conversations, impromptu discussions or phone calls.

Second, this study observes some patterns in managers' sharing of insight. For instance, informal sharing often relates to tacit "way forward" for peers as individuals or in teams, and may be intended to mitigate structural deficiencies that hinder insight sharing (such as divisionalized structures, inter-functional distances and a silo culture). This finding is consistent with Korhonen-Sande (2010); Maltz and Kohli (1996). By contrast, managers opt for formal approaches to share explicit, "know-what" types of insight intended to help colleagues in their day-to-day jobs.

Third, this study also uncovers several motivations that push managers to share insight in targeted ways in both case studies. For instance, managers seek to enhance collaboration with colleagues or to open up a discussion about customer, market or competitor signals that warrant specific decisions. Alternately, managers may simply act as a channel for colleagues who would otherwise be unable to access the same customer insight or composing information.

Learning to share

Whereas MBL literature offers little or no interpretation about how organizational memory plays a role in managers' sharing of insight, this study offers some evidence that can be interpreted by invoking KP and organizational learning theory. Indeed, case study and validation seminar evidence suggest two key ways that individuals learn *how to share* insight.

In the first instance, formalization (evident through the explicit procedures and channels/media available for sharing of insight) means that individuals follow a set of procedures to ensure effective insight sharing. At SOFT, these guidelines are evident in the various reporting systems that users talk about as well as in the written procedures and routines that managers deal with in client prospecting, approaching and servicing. At EDU, these guidelines are somewhat less explicit, with a range of organization wide systems accessible to a number of users across all colleges through a central function. Formal approaches epitomize an organization's tasks network (Argote, 2013) that users exploit in their sharing of customer insight with colleagues, particularly when such insight relates to "know-what" qualities.

Second, informal (and tacit) approaches among users in SOFT and EDU are more common and potentially more effective among individuals within the same closely knit teams/cliques. The formation of cliques relies on high levels of trust that individuals ascribe to each other. Trust is a cumulative phenomenon, building on earlier experiences of exchange between individuals (Moorman, Deshpandé, *et al.*, 1993). Trust promotes effective exchange of insight in cliques, rendering cliques examples of highly effective social networks where managers who would know each other as reliable sources of "know-what", "know-how" and *feedback.* Cliques thus offer a powerful instance of transactive memory (Argote and Ingram, 2000; Starbuck, 1992; Wegner, 1987), where members not only learn through tacit exchange but also by observing each other in instances of insight sharing.

8.2.5 Analysing and interpreting insight

Managers' behaviours

There is a dearth of MBL studies that make an explicit distinction between users analysing or interpreting customer insight. For instance, Menon and Varadarajan (1992) propose that managers *analyse* insight by assessing the perceived quality of the insight they encounter. Managers employ specialized skills (Sinkula, 1990) in examining and validating insight, and may engage in a discussion or exchange with sources to challenge validity (Diamantopoulos and Souchon, 1996) *before* managers can apply information in marketing decisions (Moorman *et al.*, 1992). Moorman, *et al.* (1993) note that managers validate only externally sourced insight and that managers' choices are guided by their trust in sources.

MBL literature is divided on how managers analyse insight. Some scholars, like Menon and Varadarajan (1992) and Souchon and Diamantopoulos (1996), tend to attribute analysis to a solitary manager's behaviour. By contrast, Santos-Vijande *et al.* (2005) and Slater (1996) argue that analysis of insight is a collective performance.

However, MBL literature consistently looks managers' engagement in insight interpretation as a *group* phenomenon (Ryals and Wilson, 2005: Wei and Wang, 2011; and Wills and Williams, 2004), inspired by earlier organizational learning literature like

Daft and Weick (1984), Gioia and Chittipeddi (1991) and Weick (1979). Managers engage in giving meaning to insight (Daft and Weick, 1984) by relying on their and their peers' mind frames (Day, 1994b) to reach a common understanding. Together with analysis, managers' skilfulness in interpreting customer insight is the backbone of an organization's competitive advantage (Deshpandé, 1982; Kohli and Jaworski, 1990; Moorman, 1995; Wei and Wang 2011).

This study, however, offers a distinct, detailed account of managers' behaviours during their analysis and interpretation of insight in two key ways. First, evidence from interviews with senior and middle managers in both case studies suggests that there are two behaviours that managers adopt in *analysing* insight. While some managers may simply execute additional computations to extend the utility of the insight they encounter, others would delve deeper, decompiling and reconstructing the meaning of the insight packets they encounter. This observation contrasts with earlier MBL literature that shuns detail on behaviours involved in managers analysing insight.

Second, interviews and validating seminar evidence suggest how *groups* of managers engage in *aggregating multiple points of view* on a particular problem to reach a common understanding from the different insight they receive or share. Groups of managers rely on the feedback they exchange to create one meaningful story about specific issues relating to customers, markets and competition. Exchange is stronger among closely knit groups, like specific project or customer teams, where managers have a set of common objectives, and exchange happens irrespective of individuals' seniority in the organization's hierarchy. These observations are consistent with earlier market-based and organizational learning literature that insight interpretation involves managers' collective behaviour. However, this study differs from earlier MBL literature in finding that feedback (and associated issues about expectation and exchange) has a core role in managers' construing of a unified understanding about a specific dilemma.

Managers' motivations

Evidence from both case studies and validating seminar suggest *four* types of motivations that provoke managers' collective interpretation of insight. The first

involves managers evaluating past performance in terms of achieving previously agreed performance levels. This observation is consistent with the rational manager model that Low and Mohr (2001) espouse. The second relates to managers creating a meaningful story to reduce the uncertainty that emerges from their aggregation of multiple points of view. Managers seek to reduce uncertainty by resolving the multiple views into one simplified view of a reality relating to customers, markets or competition. Reducing uncertainty is also a theme that features in a number of MBL studies like Low and Mohr (2001), Maltz *et al.* (2001) and Moorman *et al.* (1992).

Identifying organizational and individual opportunities is a third motivation. This observation contrasts earlier MBL literature where managers seemingly sought opportunities exclusively for their organization (Souchon and Diamantopoulos, 1996).

A final motivation relates to managers building an aggregation of view-points or stories that are kept alive in managers' minds until further sense-making happens as a result of customer, market or competitor situational shifts. This motivation seems to approach "conceptual use" that some MBL studies deal with (Diamantopoulos and Souchon, 1996; Moorman, 1995; Souchon *et al.*, 2004) and is consistent with Daft and Weick's (1984) sense-making processes in organizations that respond to continued shifts in market realities.

Analysis, interpretation and memory

There are separate interpretations about the role memory plays in managers' analysis and interpretation of customer insight. This section deals with analysis behaviours and their link with organizational memory, followed by a discussion of interpretation behaviours and the role of memory.

MBL literature offers only a limited view on managers' behaviours in analysing insight, typically considering analysis as part of rational decision making that is akin to instrumental use. Customer insight is specifically generated and interpreted in the face of specific dilemmas (such as Low and Mohr, 2001; Vyas and Souchon, 2003), and managers reach decisions using an organized, controlled approach (Hart, 1992), relying on specialized roles (Taggart and Valenzi, 1990).

This thesis finds no direct link between participants' instrumental use of customer insight and their resorting to specialized teams. Rather, evidence from interviews suggests that specialized teams help managers in their interpretation of insight in both instrumental and conceptual application instances. Case study and validating seminar participants talk not only about individuals with specialized analysis skills but also about teams who offer specialized interpretation of different pieces of insight (as would be an "analytics team" at AGENCY01, BANK02 or "specialized project teams" at SOFT).

There are two key implications from these observations about managers' behaviours in analysing insight. First managers learn to analyse and validate insight in formal education or training (both before and during their employment). This observation is evident from the number of highly qualified individuals participating in the study as well as in a widespread claim among interview participants that the organization (SOFT) is a firm of "analysts at heart". Second, analysis is a skill built with experience and feedback from peers, as is the case of transformation skills (see earlier in Section 8.2.4). Peer feedback, whether explicit or tacit, helps managers build their own analysis rulebooks for treating insight, suggesting the role of cognitive frames and maps (Huber, 1991; McGrath and Argote, 2004; Tindale *et al.*, 2003).

Exchange across individuals helps managers increase their perceived validity of insight (Higgins, 1992). Mutually informed interpretations emerge from the managers' application of mental models during "social sharedness" (Tindale *et al.*, 2003) that facilitate learning from undistorted information (Senge, 1990). Interpretation is thus a manifestation of social integration that leads to understanding through conversing and mutual adjustment (Crossan *et al.*, 1999), involving information sharing in meetings, hall talk, as well as expert briefings, to ensure reliable analysis, comparison and interpretation (De Luca and Atuahene-Gima, 2007).

The accumulation of prior knowledge improves individuals' abilities to take in new information about a specific area (Cohen and Levinthal, 1990). If incomplete, un-founded or seriously distorted, these mental models may impede managers' learning because mental models function at the subconscious level and thus are never appraised

(Day, 1994b). Market-oriented organizations encourage managers to collectively exploit an array of tools to articulate, examine and modify (if needed) mental models of how markets behave (De Geus, 1988). Knowledge includes interpretation (Huber, 1991) anchored in beliefs and commitment of individuals (Nonaka *et al.*, 2001). Beliefs and commitment are a manifestation of organizational memory (tacit portion), as would be the skills for interpreting insight among individuals, whereas the explicit portion of memory lies in the shared or private systems (Argote, 2013)

On managers' behaviours adopted during the interpretation of insight, MBL literature is inspired by organizational learning theory. For instance, Sinkula (1994) and Slater and Narver (1995) are inspired by Huber (1991) to propose that cognitive maps and framing, media richness and unlearning impact managers' development of shared understanding and conceptual schemes. However, cognitive maps and framing vary across the different organizational functions and units (Huber, 1991) (including cliques). Such variation explains why individuals (particularly senior managers) remember specific individuals as key sources of insight. Indeed, case study evidence suggests that managers rely on these "tagged" individuals not only because the latter have first-hand access to specific information but also because of their capabilities in processing and interpreting information. This interpretation may well imply that the most central person in cliques or groups is that person with a greater degree of influence, who accrues power from perceptions of expertise among fellow group members and who becomes the cognitively central member in the focal knowledge of domain (Tindale *et al.*, 2003).

8.2.6 Actioning insight

MBL literature suggests two key themes relating to managers' use of customer insight. The first draws from organizational learning theory to construe a meaning for "use" of customer insight. A review of MBL studies suggests that there are three key notions to which scholars normally associate with when defining "use", namely:

- the extent to which an insight is used directly to guide managers' decisions and behaviours (John and Martin, 1984);

- the extent to which customer insight leads to reduced uncertainty among decision makers (Patton, 1978);
- the specific behavioural, cognitive and affective changes resulting from customer insight (Anderson *et al.*, 1981)

These three "definitions" focus on the *outcomes* as a result of the application of insight in managers' decisions. Anderson *et al.*'s (1981) definition is also consistent with the key propositions of organizational learning where customer insight application leads to changes in individuals' ranges of potential behaviours (Huber, 1991).

Anderson *et al.*'s (1981) definition is consistent with Huber (1991, p. 89), who draws from organizational learning theory to state that "an entity learns if, through its processing of information, the range of potential behaviours is changed". By contrast, in proposing his MBL view, Sinkula (1994) avoids "use" in his conceptual work relating to the "processing" of market information, a term that he defines as encompassing the "acquisition, interpretation and storage of market information" (Sinkula, 1994, p. 43). This is a limited notion and leaves out the changes in behaviours as a consequence of this processing.

A second theme that is clear in MBL literature relates to the types of use managers undertake following their engagement with customer insight. Scholars typically draw from Beyer and Trice (1982) to distinguish between three key types of use:

1. Instrumental use that involves action on customer insight in direct and specific ways, entailing the planning and execution of marketing action to influence external constituencies (Moorman, 1995). Instrumental use solves a particular problem (Maltz and Kohli, 1996) about an immediately exploitable opportunity (Diamantopoulos and Souchon, 1996). There are three sub-processes involved in instrumental use: making, implementing and evaluating marketing decisions (Moorman, 1995);
2. Conceptual use that involves the use of customer insight for general enlightenment. Customer insight influences actions in less specific and direct ways than instrumental use, evoking changes in the thinking processes without

immediate definite action (Maltz and Kohli, 1996) but commanding some commitment among managers to the meanings of the customer insight (Moorman, 1995). Diamantopoulos and Souchon (1996) emphasize the implications of memory in conceptual use by relating to managers' desire to keep themselves up-to-date for future decisions;

3. Symbolic use that involves the application of customer insight in legitimating ways to sustain predetermined positions or actions already decided and executed. Vyas and Souchon (2003) review symbolic use in literature and offer six different types of symbolic use, one of which includes the distorting of insight in order to garner support for an opinion or justify already-implemented decisions with retrospectively-acquired information (Diamantopoulos and Souchon, 1996).

Two key concerns restrict this rendition of customer insight use in MBL research. First, MBL scholars are divided on the difference between instrumental and conceptual use. Moorman (1995) proposes instrumental and conceptual use to be different in the sense that the former leads to direct action (hence "action oriented"), while the latter leads to knowledge augmentation (hence "knowledge oriented"). By contrast, several studies like Maltz *et al.* (2006), Maltz and Kohli (1996) and Menon and Wilcox (2001) dismiss the distinction between instrumental and conceptual use and propose "appropriate" use of customer insight that is distinct from "inappropriate" (symbolic) use.

The second concern emerges from scholars' approaches to investigating use. Most survey studies *measure* use via a multidimensional construct. This construct typically captures the extent of application of market information in specific decisions (instrumental) or enhances knowledge (conceptual) (such as Deshpandé and Zaltman, 1987; Maltz and Kohli, 1996; Moorman, 1995). Rollins *et al.* (2012) measure use through a seventeen-item construct of the perceived extent of direct application of insight in action-oriented decisions and (indirectly) knowledge augmenting ways. Virtually all of these studies rely on single informant approaches for data collection, but they offer reflections at an organizational level of analysis.

The findings from this study, however, offer a richer account on the actioning of customer insight by looking at three areas relevant to "use", which are discussed in the following sections.

Outcomes from "use"

Evidence from case study interviews and validation seminar suggests four key reasons that motivate managers to apply customer insight in marketing decisions. The first reason relates to the tapping of business opportunities where individuals would apply customer insight in decisions relating to opportunities for the organization as well as for themselves. Apart from the "traditional" business objectives that earlier MBL literature relates to, this study's observations expose a self-centred motivation for managers to heed customer insight. It is not only the business objectives that matter in managers' application of insight, but also the potential benefits that managers may profit individually from any emerging opportunity. This observation exposes the two levels of instrumental use: one involves the exploiting of opportunities for the general benefit to the organization while a second involves realization of opportunities for an individual's benefit. A further inference about this observation may be drawn from Anderson *et al.* (1981) and Cillo *et al.* (2010), who argue that managers exploit opportunities in a *forward* oriented approach, resulting from their long-term behavioural, cognitive and affective changes following their application of customer insight.

A second reason relates to the management of performance by adopting decisions to correct performance. This observation is consistent with the outcomes notion about insight used directly to guide managers' decisions and behaviours (John and Martin, 1984). This observation is also consistent with the notions relating to instrumental use, where action on customer insight is direct and specific, supporting the planning and execution of marketing action (Moorman, 1995). Cillo *et al.* (2010) contend that instrumental use as advocated by MBL scholars in reality relies on past oriented (or *retrospective*) information that managers systematically review in assuming that they "act in an environment whose characteristics are path dependent and cannot be shaped… design[ing] the best set of actions to prosper in it" (Cillo *et al.*, 2010, p. 1243).

A third reason is managers justifying or legitimating pre-determined positions. This is consistent with one form of symbolic use (Beyer and Trice, 1982), where individual managers would use customer insight to justify decisions made on the basis of intuitions or prejudices prior to unbiased interpretation (Sabatier, 1978).

A final reason for application of customer insight in marketing decisions relates to managers selecting the most sensible option from several choices. The most "sensible" option here is that strategy or line of action that presents the least risks and is consistent with Patton's (1978) outcomes perspective that inspired rare MBL studies like Diamantopoulos *et al.* (1990) and Toften and Olsen (2004). Equally, such motivation may be precipitated by risk avoidance cultures (Ashford and Tsui, 1991; Hofstede *et al.*, 1990) and individual level conditions like managers' tolerance to ambiguity of roles or context, job involvement, as well as managers' self-confidence (Ashford and Cummings, 1985; Tushman, 1979).

Frequency and occasion for use

Patterns of application of customer insight are a further aspect that MBL avoids, possibly because cross sectional approaches (as typically employed in this domain) are unable to offer a reliable, relevant understanding.

This study observes two key types of patterns. The first involves an ad hoc approach where managers apply customer insight in marketing decisions as the need arises. The second is regular and periodic, related to two types of cycles: a) business cycles that involve patterns of seasonality, and b) project or campaign phases. Business cycles entail knowledge oriented activities to heighten during specific periods across the year – with individuals talking about the end of the business year or the end of quarterly budgetary planning periods.

With overload being a tangible reality in the case studies examined, it is likely that the effects of overload become harsher during the busier periods of the firm (e.g. around the end of each budget period and the end of the business year). These busier periods challenge managers' abilities to filter the information inundation. Consequently managers devote inadequate time to decide on what information is stored, shared or

processed into insight, with two important implications on the entire customer insight use process. First, managers may shun the evaluation of potential value of incoming information, opting to store any information they encounter. The result is a larger likelihood that important (and useful) information becomes less accessible as it sinks into the petabytes of worthless data stored in the organization's data warehouse. Second, managers who may be aware of the risks of important information getting submerged and lost, may well opt to share with colleagues, compounding the dangers of overload on other parts of the organization.

Feedback, memory and skills

This study also observes how managers exploit two types of feedback to learn about their actioning of customer insight.

The first relates to formal feedback, which managers collate from different (formal) systems that their organization keeps alive. Performance indicators were observed to be measured in both case studies as well as among validation seminar participant organizations (AGENCY01, BANK01 and BANK02). In all cases, performance indicators offer direct cues about managers' decisions based on customer insight and managers' application of these decisions in specific marketing contexts. Formal feedback may also accrue through verifiable communication from peers and external stakeholders such as alliance partners, customers and, potentially, competition (through observed competitive moves).

The second type of feedback is the informal reactions, opinions or criticism that peers, superiors and subordinates may share with the managers individually. This study observes how managers expect and often seek feedback about marketing decisions that they already implemented based on earlier engagement with customer insight.

There are three important inferences about feedback and managers' learning from prior actioning of insight. First, the measurement of performance is related to feedback involving the capture of formal data (in different ways such as sales systems, leads databases and market performance indicators). Often, performance is measured only after a long lag from the actual actioning (of customer insight) and subsequent

implementation (of marketing decisions). Long sales process cycles involving complex programmes of decisions until the achievement of the sale (especially in business-to-business contexts like those at EDU, SOFT and AGENCY01) prolong this lag and reduce the value of feedback as managers are unable to associate specific outcomes to any particular manager's decision. This observation is consistent with Nadler's (1979) time decomposition of relevance of feedback. Further implications of feedback on managers' learning are dealt with in detail in Section 7.10, while a discussion on the role of feedback is set out in Section 8.3.6.

A second inference is the effect of overload on the use of feedback about customer insight actioning. Managers often receive feedback about decisions implemented from formal systems as part of their day-to-day inundation. Important cues about performance sink into the unfathomable depths of overload, particularly among individuals who adopt passive approaches towards feedback (Ashford and Cummings, 1983, 1985).

A third inference is about the role of memory in managers' learning from their actioning of insight. Two facets of memory play a part in managers' learning: a) the managers' own tacit memory, where managers save lessons about their decisions, actions, sequences and outcomes; b) the systems managers use when sourcing feedback about their decisions, actions and outcomes. The former is likely to be formed from feedback managers receive (passively or actively) from peers, subordinates, superiors or indeed representatives from other stakeholders (like external agencies, alliance partners, experts or indeed competition). The latter involves the information systems employed in the measurement of performance (like financial reporting, sales and other similar systems).

Argote and Ingram (2000) associate these two facets respectively to the members' and tools' networks that compose transactive memory of an organization. Whereas information systems (tools network) is available for most of the organization to exploit (depending on access rights afforded to the different parts or levels of the organizational structure), access to managers' tacit memory is controlled by the owner of those lessons. Transfer of such tacit lessons across individuals is problematic and inhibits the

effectiveness of collective learning in organizations (Argote and Ingram, 2000; Boisot, 2004). From a different perspective, hampered learning offers little or no opportunity to mitigate the limited rationality that characterizes managers' actioning of customer insight.

8.2.7 Storing insight

The earlier sections of this chapter provide an outline of the inter-linkages between the different steps of the customer insight use process and organizational memory. This observation is rarely discussed in MBL literature, and this study offers a contribution in this area.

The discussion in the previous sections illustrates how memory, whether at individual or group levels, shapes the efficiency and effectiveness of an organization's exploitation of insight. This study identifies three important components of organizational memory: the managers (social) network, the tasks network and the tools network. This type of organizational memory is consistent with earlier empirical organizational learning research (like Argote and Ingram, 2000; Wegner, 1987; Wegner *et al.*, 1991). Each of these components has specific linkages with managers' behaviours involved in the access, filtering, transfer/sharing, analysis and interpretation as well as the actioning of customer insight. Table 8-1 summarizes these linkages.

Organizational memory is strongly influenced by the organization's culture at different levels, impacting the customer insight use process in three important ways.

First, managers' approaches in reducing or avoiding risk is a manifestation of an organization's culture through managers' behaviour (Hofstede, 1980). This study observes managers trying to reduce risk and uncertainty in their analysis and interpretation of insight, their application of insight in marketing decisions, as well as in their storing of insight for future access and use. Managers source and acquire information about customers, markets and competition, which in turn leads to managers experiencing information overload. Managers respond to overload by filtering (and possibly storing) insight before any effective analysis and interpretation. Although overload is a manifestation of organizations that are constantly seeking future

opportunities in the market, this study considers inundation to be one result of the uncertainty avoidance strategies that individuals adopt as a result of their commitment to an organization's objectives.

Table 8-1 Organizational memory and its linkages with customer insight process steps. (Source: Author)

Process step	Observed linkages with organizational memory	Managers' network	Tasks network	Tools' network
Accessing & acquiring	Individuals' cumulative skills for access and acquiring insight	✓		
	Individuals tagged as sources of specific information	✓		
	Routines and approaches to capture of information shaped by roles and culture		✓	
	Open type, collaborative behaviours that ease access to insight		✓	
	Firm's and external information systems as sources of information			✓
	Request for access mechanisms			✓
	Source / services subscriptions			✓
Filtering	Cognitive maps and frames from peer feedback	✓		
	Rules on what data to disregard/consider built from peer feedback	✓	✓	
	Store all information is "safest" route		✓	
	Automation of information filtering			✓
Transforming	Peer feedback helps developing methods of transformation/information integration	✓		
	Information processing systems (such as analysis software) available for individuals			✓
Sharing	Closely knit cliques of managers who exchange insight	✓		
	Formalized procedures (codified reporting systems) for information and insight sharing		✓	
Analysing & interpreting	Specialized analysis teams that offer help in interpreting insight	✓		
	Experienced individuals who can analyse insight and exchange interpretations	✓		
	Cumulative cognitive maps and framing of individuals about how to interpret insight	✓		
	Stories and meanings kept alive until further sense-making happens	✓		
	Accumulated prior knowledge about insight interpretation	✓	✓	
	Formalized procedures promote collective insight interpretation		✓	
Actioning	Tacit memory individuals gather through experience and peer feedback	✓		
	Formal feedback systems that help managers correct performance	✓		✓

A second way is the mental models that guide managers in their sourcing and sifting of customer insight, the transformation, analysis and interpretation of insight and the application of insight in marketing decisions. Mental models are a manifestation of transactive memory, residing in individuals and influencing the organization's marketing performance. Experience and feedback constantly update cumulative mental (and tacit) models, which, in turn, help managers to be better predisposed to deal with

increasingly complex customer insight; this notion evokes absorptive capacity (Cohen and Levinthal, 1990; Korhonen-Sande, 2010).

Third, apart from cumulative mental models, individual aspects of memory such as cognitive maps and framing (Huber, 1991; Tindale *et al.*, 2003) are necessary tools to ensure (a) individuals' ability in sourcing and aptly filtering customer, market and competitor information (Smith and Fletcher, 2004), and (b) managers avoiding incorrect and inefficient engagement with insight (Kim and Atuahene-Gima, 2010).

Because cognitive maps and mental models reside, at least partially, in an organization's members, organizations' mechanisms to remember behaviour lessons and insight rely on members' sharing of such skills. Management turnover (that often characterizes accelerated organizational change) as well as team or taskforce disbanding may well become sources of organizational amnesia (Day, 1994a).

8.2.8 Sequence of behaviours

The sequence of behaviours in the perpetual customer insight use process (see Figure 8-1) emerges from evidence that this study gathers from all individual managers participating in the study. However, this study also observes that some managers may follow slightly different sequences during their engagement with customer insight in response to specific motivations or situations. Thus, a more complicated picture of sequences emerges if individual behaviours are taken into account, as summarized graphically in Figure 8-2.

Two key implications emerge from these observations when MBL and organizational learning literature are considered. First, the notion that individuals follow different paths outside a mainstream sequence evokes Beyer and Trice's (1982) comparison between highly rational and less rational complete utilization processes. While distinguishing between adoption and implementation phases (each involving different types of individual behaviours and organizational level processes), Beyer and Trice claim that their proposed sequence of behaviours is flexible and related to the level of rationality adopted by individuals in their engagement with insight.

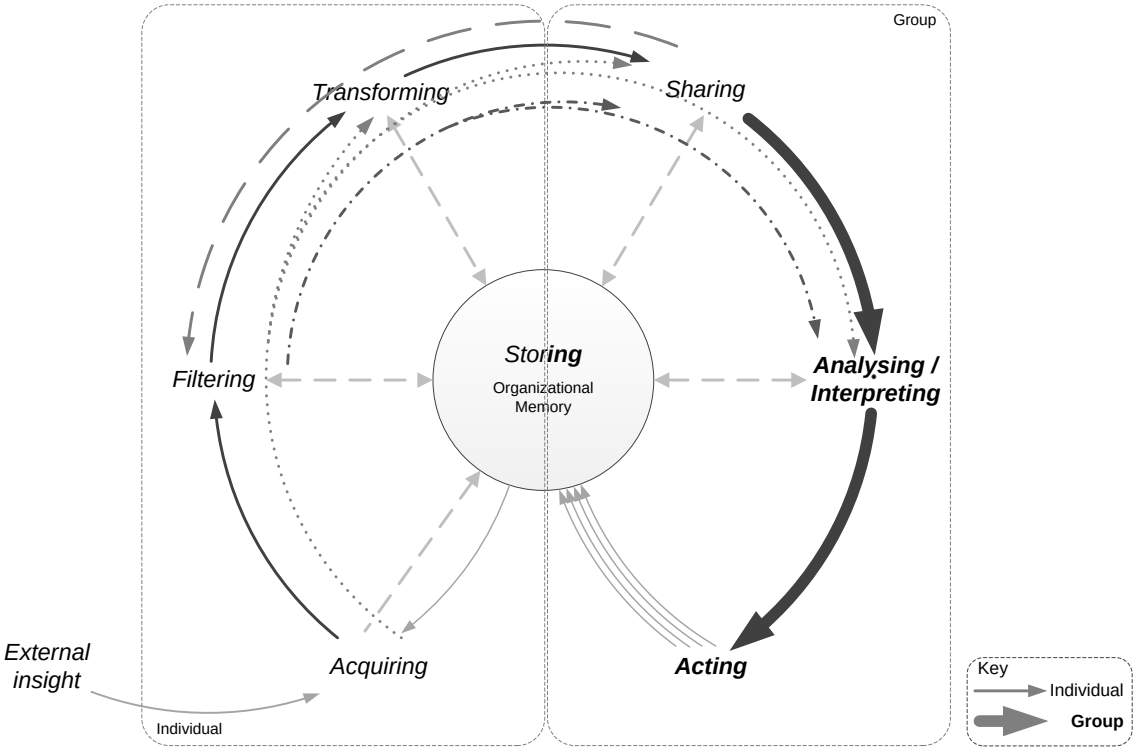


Figure 8-2 A detailed representation of the customer insight use process (Source: Author)

This study, however, does not argue that managers adopt different sequences of behaviours outside the mainstream pattern as a result of their less reasonable behaviour. Rather, managers adopt different sequences of behaviours in response to their own motivations and circumstances prevailing at the moment of the encounter.

This point brings to the fore a second implication about what motivates managers to avoid filtering and transformation behaviours in their "acquiring" → "sharing" or "acquiring" → "analysing/interpreting" sequence. Earlier MBL literature seems to assume rationality in some of the sequences observed in this study. For instance, the "acquire" → "disseminate" sequence (without any "filtering" or "transformation" behaviours) echoes some seventeen MBL investigations reviewed in this study. Some of these studies[25] propose reasons and conditions that precipitate such sequences of behaviours and may explain what this study observes.

[25] typically, survey investigations relying on single informants with an organizational level of analysis

For instance, at an individual level, managers share insight as acquired in response to four conditions. First, managers may be keen to disseminate acquired insight as a result of their desire to ensure coordination and organization-wide participation in the insight process (Hill, 1988; Kohli and Jaworski, 1990). This behaviour would appear especially true when insight is cascaded down the organizational hierarchy (Maltz and Kohli, 1996), where positional power[26] offers insight recipients nuances of competence and trust on senders like senior managers or specific area experts (Moorman *et al.*, 1992; Moorman, Deshpande, *et al.*, 1993). Trust in source is a manager level condition that helps managers feel more confident in the insight they share with colleagues (Moorman, 1995).

A second perspective is that managers share insight to promote relationships and is akin to self-promoting (Feldman and March, 1981) or affective (Menon and Wilcox, 2001; Vyas and Souchon, 2003) types of symbolic use of customer insight. The reverse would also hold in this study: managers share insight with surrounding peers who form part of a network of collaborative relationships (Perks, 2000), as is the case of SOFT.

Third, managers may perceive a high cost involved in their obtaining of insight. They associate insight cost with high priority and relevance to the organization and target audiences (Toften and Olsen, 2004) and would therefore not engage in any behaviours that change the sense or content of insight. Fourth, managers may perceive that the more insight they share, the more their audiences use it, especially if insight is customer specific (Rollins *et al.*, 2012).

This study observes that positional power, specificity of insight and collaboration, are common themes in the discourse of managers relating to sequence of "acquiring" → "sharing" behaviours. Managers at SOFT opt for filtering and transforming of insight in response to the source, its trustworthiness, position and specificity to the decisions at hand. This finding is consistent with the propositions of Maltz and Kohli (1996) on the link between positional power of insight source and managers' use of insight and of Perks (2000) on collaborative relationships as a motivator for managers to share insight.

[26] Or power as a result of location in an organization's hierarchy

From an organizational level perspective, MBL literature suggests six conditions that precipitate the dissemination of unfiltered and unchanged insight among managers. First, organizations may promote immediate sharing of insight as they respond to dynamic and rapidly shifting markets (Atuahene-Gima *et al.*, 2005; Jaworski *et al.*, 2000; Slater and Narver, 1995). A second condition is relevant to organizations that would be implementing high priority projects or serving high priority customers. In these cases, insight takes priority, and managers would share insight without much filtering or transformation (Smits and Kok, 2012). A third condition relates to organizations being oriented towards innovation, thereby promoting information sharing across managers in different functions (Maltz *et al.*, 2006), especially if information is deemed relevant and timely (Moorman *et al.*, 1992; Moorman, Deshpande, *et al.*, 1993). Fourth is a condition where organizations nurture high information sharing environments with little or no conflict between managers and respective functions (Slater and Narver, 1995), thereby augmenting organizations' responsiveness to market shifts (Wei and Wang, 2011). A fifth condition may relate to organizations' cultural overemphasis on insight acquisition and under-emphasis on insight interpretation (Campbell, 2003). A sixth and final condition would be organizations' uncertainty reducing cultures (Diamantopoulos *et al.*, 1990; Hill, 1988).

This study, however, observes that an uncertainty reduction culture predominates at SOFT, which may well be the key precipitating condition that encourages managers to share insight without any previous filtering or transforming. This uncertainty reduction culture also encourages managers to aggregate multiple points of view to create a meaningful story in their interpretation of insight (see Section 8.2.5).

This section discussed some interpretations about managers' sequences of behaviours during their engagement with customer insight and how some sequences are distinct from the mainstream sequence this study proposes. The next section offers an overview of managers' behaviours before moving to discuss the process of customer insight use in an organization.

8.2.9 Summary

This section outlined how managers use customer insight. It described in detail the contribution that this study makes for each of the seven stages that characterize managers' engagement with customer insight in a perpetual learning process. The next section focuses the characteristics of the customer insight use process in an organization, moving to the customer insight as the unit of analysis.

8.3 The process of customer insight use in an organization

This section discusses the customer insight use process in an organization, setting out how the findings emerging from this study contrast with extant MBL theory at the customer insight level of analysis. It starts by summarizing how this study extends current theory about the use of customer insight, distinguishing between individual and collective levels of behaviour. It then moves to compare the characteristics of the process of customer insight use with sense-making and feedback mechanisms. This section then appraises specific stages of the customer insight use process from an organizational perspective.

8.3.1 The nature of the customer insight use process

An important contribution emerging from this study is that customer insight use is a perpetual feedback loop rather than a linear process as espoused in earlier MBL studies. Thus:

Proposition 3 The customer insight use process is a feedback loop involving seven behaviours. This process is perpetual and is a core part of an organization's learning from its experience in markets. Stages in the insight use process include acquiring, filtering, transforming, sharing, interpreting, actioning and storing.

Section 8.2 set out a description of the different behaviours that managers manifest during the different stages of their engagement with customer insight. Of these stages, interpretation and actioning (in part) happen when managers assemble in groups. Managers, collectively, interpret insight and reach a common understanding about the dilemmas at hand, and adopt this understanding in different marketing actions.

The remaining stages are marked with individual behaviours managers display during their engagement with customer insight. These behaviours manifest during managers' access and acquiring of information, selecting valued pieces of information from data inundation, transforming information into insight packets, initiating the sharing of insight and the storing of information, customer insight and lessons on "know-what" or "know-how" into organizational memory (see summary in Table 8-2). Thus:

Proposition 4 The customer insight use process involves behaviours at two levels – individual and collective. *Individual* behaviours are particularly notable during the acquiring, filtering, transforming, analysing and storing stages. *Collective* behaviours are particularly notable during the interpreting and actioning stages.

Evidence about every stage of behaviour also suggests that the flow of the process is not entirely streamlined. On instances, managers may just acquire and transmit information to colleagues without any filtering or transformation, or when managers opt to store information without any filtering or analysis, awaiting the right occasion for any additional treatment (see sections 7.3 to 7.9).

In a similar fashion, managers may just store selected pieces of information they would have filtered from the daily information inundation. Also managers may store any insight they would have received and analysed until the right occasion arose. In other instances managers may collectively engage in interpreting insight but opt not to action that insight. Indeed, this study considers the decision to "do nothing" as an outcome of customer insight use during the actioning stage. Thus:

Proposition 5 Individuals may choose to "store" insight as the next step after any of the acquiring, filtering, transforming, sharing or analysing/interpreting stages.

Table 8-2 Summary of the customer insight use process, the behaviours managers display and the level of behaviours (Source: Author)

Process step	How findings in this study differ from market-based learning literature	Level of behaviour	
		Individual	Collective
Accessing & acquiring	• Relevant to internally generated information and externally acquired • Modes of access and acquisition vary across the organizational hierarchy • Access and acquisition are human behaviours relying on informal and formal approaches to information acquisition ranging from informal exchanges with trusted individuals/peers to subscribed services • Links with organizational memory as managers evolve their skills and awareness to tap sources of information • Influenced by organizational culture – hindered by "silo" cultures and propelled by open systems. • Open systems (if uncontrolled) may expose managers to information overload	Typically	
Filtering	• Exposes managers' engaging in sifting valuable pieces of information from the constant inundation they face on a day-to-day basis. • Constant anxiety and risk avoidance culture limit managers' judgement in their filtering behaviours • Peer feedback builds cumulative mental models, cognitive maps and frames shape managers' approaches to filtering • Overload distorts filtering behaviours impacting on managers' judgement in dealing with customer insight	Typically	
Transforming	• Uncovers behaviours managers adopt in transforming tacit and explicit information into insight "packets" that can be shared with colleagues or stored depending on managers' assessment of value • Transformation involves any of three behaviours: deleting superfluous information, augmenting of message with additional accessible information or aggregation of information from different sources into one "packet" • Information integration skills and peer feedback help managers sharpen their skills used in transforming information into insight • Transformation assists in some types of symbolic use of customer insight	Typically	
Sharing	• Identifies four dimensions that describe the characteristics of managers' sharing of customer insight: style, direction, audience scope and occasion • Lack of email etiquette, information processing capacity, assumed overload and rife information dumping impact on managers' sharing behaviours • Managers act as channels of insight inaccessible to colleagues • Managers organize themselves in cliques where insight is shared. Insight travels within and between cliques • Formalized procedures, observed peer behaviour, peer feedback help managers develop sharing behaviours	Initiated	Receiving
Analysing & interpreting	• Distinguishes between "analysing" and "interpreting" customer insight • Analysing involves additional computations or "decompiling and reconstructing" the meaning of insight packet • Interpretation involves aggregation of multiple points of view through exchange between individuals in a group to build one meaningful story • Interpretation motivated by four key goals – performance correction, uncertainty reduction, exploiting opportunities and keeping stories "alive" until further sense-making happens • Formalization encourages collective interpretation of insight • Overload hampers interpreting capabilities of managers • Formal education and peer feedback/experience help evolving managers' analytic and interpretive skills	Analysing	Interpreting
Actioning	• Identifies four reasons for insight actioning: business/personal opportunities, correcting performance, justifying/legitimating pre-determined positions and selecting the most sensible option • Observes patterns and frequency of actioning (from ad hoc to periodic following established business cyclicality) • Finds limited judgement in individuals' actioning of insight as a result of managers' limited information processing capabilities, overload and personal motivations • Delayed feedback may hamper learning from actioning outcomes	Joint	
Storing	• Identifies three components of organizational memory that have a role at each stage of the customer insight process. • Memory takes the shape of established and evolving routines; systems that organizations operate for the capture of information about performance and developments among customers, markets and competition, as well as individuals' "know what" and "know how" in the form of cognitive maps and framing.	Typically	

8.3.2 It's about making sense

An observation that emerges from this study's findings is that the entire seven-step process resembles sense-making as initially proposed by Thomas, Clark, and Gioia (1993) and Weick (1979, 1995) on two levels. The first resemblance is this study's description of the analysis and interpretation step, where managers engage in interpretation of insight collectively, interacting with each other to answer the "what's going on here?" and "what do I do next?" questions. Managers in both case studies engage in retrospective information to make sense about futures, organizing through communication that is influenced by a variety of social factors, concurring with the propositions about sense-making processes in Weick *et al.* (2005). At a broader level, the seven insight process steps lead to marketing action through a constant interplay between cognition (i.e., acquiring, filtering, transforming, sharing and interpreting insight) and action (applying and storing insight), impacting organizational performance and thus concurring with sense-making propositions about organizational change, as in Gioia and Chittipeddi (1991) and Weick (1979), among others.

8.3.3 Customer insight use is a rational process?

That organizations rely on customer insight to make sensible marketing decisions to respond to emerging opportunities or to correct performance, however, assumes that organizations are rational information processing systems where insight is exclusively involved in instrumental or conceptual use (Diamantopoulos and Souchon, 1999; Low and Mohr, 2001, inspired by Simon, 1976).

Impact of individuals' capability on a logical process

This study observes individuals forming unique pockets of information process capabilities that are shaped by managers' distinct set of skills, cognitive maps and frames as well individual motivations. Individual managers' processing of insight is heterogeneous and offers varying interpretations for the same customer insight. It is only through collective interpretation that this heterogeneity is resolved, leading to a collective understanding in which marketing decisions are actioned. Two challenges affect this rational process.

First, until a collective understanding is formed, individuals may invoke symbolic application of customer insight that may legitimate a particular desired position or previously made decisions, suggesting irrational behaviour of managers within the firm. This study finds that symbolic application is not a rare behaviour (consistent with Vyas and Souchon, 2003) and that it is an integral aspect of a firm's engagement with customer insight as a result of cultural, political and individual managers' motivations.

Second, managers' rational use of customer insight is also susceptible to the rationality of peers involved in the same process. Because information processing capabilities are unevenly distributed across the organizations, the group's insight interpreting capability is only as good as that of the weakest member involved in the customer insight process. Information overload may be inconsistent across the organization and severely impact only specific individuals. The outcome of these factors would manifest in flawed insight that is generated by these specific individuals as a result of their limited filtering, transforming and sharing of insight, with implications on the outcomes emerging from the engagement with customer insight among the rest of the peers.

Symbolic, instrumental and conceptual use

MBL literature has, to date, relentlessly focused on rational behaviours that managers employ in their engagement with customer insight. Rational behaviours are related to the application of insight for purposes for which insight was developed, requiring managers to follow a systematic and logical process of gathering information, evaluating options and making a choice that is based on a collective participation with peers who exchange feedback (Ansoff, 1970; Feldman and March, 1981). MBL scholars look at instrumental and conceptual uses of insight as rational behaviours (Hodgkinson *et al.*, 2012; Maltz *et al.*, 2006; Sinkula 1990) that are a more common manifestation in organizations that face dynamic and complex environments (Goll and Rasheed, 1997). The converse holds for symbolic use, which authors categorize as irrational use (Vyas and Souchon, 2003). Because managers may not even be aware of their symbolic use of insight, or are indeed unwilling to reveal such application of insight to researchers (Beyer and Trice, 1982), rare MBL studies focus on symbolic use.

This study contrasts earlier MBL literature in two ways. First, it finds evidence that all three types of use happen concurrently within the same organization and by the same users. While absent in MBL literature, this notion is only entertained in organizational learning studies like Feldman and March (1981), Glazer *et al.* (1992) and Sabatier (1978). Second, this study finds that managers' use of insight may suffer from limitations and approaches the norms of bounded rationality (Cyert and March, 1963; Dickson, 1992; Simon, 1991). There are three conditions that lead to limited rationality in managers' application of insight:

a) managers are exposed to insight and are required to reach and apply decisions at a far greater level than what they can aptly handle (bounded rationality after Cyert and March, 1963; Dickson, 1992; Simon, 1991);

b) managers are exposed to flawed insight that has been generated by peers who are limited in their filtering, transforming and sharing of insight;

c) managers seek to address personal motivations concurrent to their reaching of marketing decisions as a result of their treating of insight.

Thus:

Proposition 6 In organizations, individuals' limitations in information processing capabilities and perceptions of information overload may limit the organization's ability to generate and respond to customer insight.

8.3.4 Factors impacting on specific stages of the customer insight use process

The following sections outline the more important factors that this study observes regarding the specific stages of the customer insight use process. It looks at how culture impacts customer insight acquisition, filtering, sharing and integration. This section follows with an account about the factors that impact managers' analysis and interpretation of insight as well as managers' symbolic, instrumental and conceptual uses of insight.

Information acquisition and the influence of organizational culture

Another important point that MBL literature tends to avoid is the role of culture in organizations' customer insight acquisition. Moorman (1995) finds that culture has no *predictor power* on the presence and effectiveness of the information acquisition process. By contrast, Santos-Vijande *et al.* (2005) distinguish two types of learning orientations, each linked with different types of information that organizations seek to acquire and use. Maltz *et al.* (2006) note that pro-innovation-oriented organizations tend to promote the acquisition and exchange of customer insight to ensure effective adaptation to market shifts. However, both Maltz *et al.* (2006) and Santos-Vijande *et al.* (2005) do not investigate their conceptualized links between organizational culture or orientation and insight acquisition their empirical works.

This study, however, observes that the open type of insight systems in use at SOFT *is* a manifestation of the organization's culture, along with other artefacts and behaviours. For instance, a key difference between EDU and SOFT is the level of collaboration that happens between functions in the two organizations. At EDU, collaboration is common between the central VCO and the individual colleges, or across smaller teams of managers within the different colleges. Collaboration, however, is less common across the individual colleges and is possibly the key reason why managers claim EDU suffers from a "silo" culture. Managers also claimed that a "silo" culture prevailed at BANK02 and LOCAL COUNCIL01 during the validating workshop, also as a result of the difficulties that managers face in accessing information across different functions.

By contrast, at SOFT, collaboration is exuberant across all levels of the hierarchy and functions. Individual managers can access, retrieve and extract customer insight from a wide variety of sources. These sources range from automated systems to "tagged" individuals known for their own access to specific information or possessing specific skills to generate quality insight.

At AGENCY01 and BANK01, participants contended equally open access to insight for users across the different functions and business units. In both cases, users accessed and retrieved insight from an array of dashboards that rely on internal and external sources of customer insight. As in SOFT, collaboration between individuals in different

functions and business units at both AGENCY01 and BANK01 is commonplace and attributed to the firms' philosophies and cultures.

However, the occurrence of open approaches to information access at SOFT, AGENCY01 and BANK01 leads to a complication that is unseen in EDU, BANK02 and LOCAL COUNCIL01. Indeed, this study observes the high volumes and different types of information that inundate individuals at SOFT, AGENCY01 and BANK01. The next section sets out a comparison of the findings of this study with earlier MBL studies dealing with overload

Influences impacting on storing insight

Storing of information is seen as the safest action when managers engage in transforming insight, as opposed to other behaviours (see Section 8.2.3). Managers store insight to ensure that no potentially important information is lost. This behaviour is a likely result of managers seeking risk avoidance that is deeply ingrained in the organization's values and culture. Hofstede *et al.* (1990) discuss risk avoidance and the unwillingness of managers to accept ambiguity as manifestations of uncertainty avoiding organizational cultures. Such cultures encourage managers to engage with any relevant and accessible information about customers, markets and competitors (Diamantopoulos and Souchon, 1999).

Influences impacting on sharing customer insight

This study observes different conditions that impact on managers' sharing of customer insight. Whereas MBL studies looked at structural, cultural, strategy and relationship conditions that affect customer insight sharing as an organizational-level phenomenon (e.g., Cillo *et al.*, 2010; Deshpandé, 1982; Diamantopoulos and Souchon, 1996; Perks, 2000 and Smits and Kok, 2012), evidence from this study's case study and validation workshop suggests that *structure* (e.g., divisionalized structures, individuals' perceived proximities across functions), *environment* (e.g., politics) as well as *bureaucracy and stiff regulations* (particularly at EDU, BANK01 and BANK02) hinder the effectiveness of *managers*' sharing of customer insight with colleagues.

One contention here is that the main case study related to a firm with an "open" *culture* that encourages managers to share insight of whatever level of added value. There are four cultural depictions that this study observes as manifestations of this culture and associated individual managers' behaviours: 1) a general lack of email etiquette, 2) lack of information processing capacity, 3) widespread belief that overload is a given in any manager's role and 4) rife manifest resorting to information dumps. At SOFT (and at AGENCY01), observations suggest that the profuse sharing of low added value insight supplements overload on peers. Overload at this stage poses challenges on insight interpretation and actioning, as higher added value customer insight sinks into the sheer volume and variety of information that individuals encounter.

Integrating customer insight

This study observes how managers realize integration by sharing insight (Argyris, 1964; Lawrence and Lorsch, 1967). Integration improves coordination of specialized teams or functions in response to market and customer uncertainty within a collaborative setting (Korhonen-Sande, 2010; Maltz *et al.*, 2001; Perks, 2000). Cross functional teams, co-location of specialists, customer visits and extensive social orientation (in various ways) are integrative mechanisms at SOFT and EDU, helping both organizations reach their market orientation goals (Kirca *et al.*, 2011; Kohli and Jaworski, 1990). However, this study contrasts earlier MBL literature in that, rather than measuring integration (Korhonen-Sande, 2010; Maltz *et al.*, 2001) or focusing on inter-organizational cooperation in specific projects (Perks, 2000), it follows the integration process across individuals and respective functions within a market-oriented organization.

One way this study exposes integration across individuals and functions is through the social network analysis of RET data. This analysis helped identify how individuals in sales, service/operations and top management functions form clusters that create and share insight. Although this analysis demonstrates how customer insight travels across the entire market-oriented organization (after Kohli and Jaworski, 1990), it also shows that customer insight sharing is not a streamlined process. Rather, the process relies on a stepwise integration starting from individuals, up to closely-knit groups or cliques, and finally, across functions. These observations about *how* cliques channel insight contrast

Moorman's (1995) measuring of the impact of cliques (as a manifestation of clan cultures) on instrumental and conceptual use of insight.

Influences impacting on managers' analysis and interpretation of insight

Interview and validation seminar evidence suggests that formalization encourages individuals to collectively interpret insight. This is particularly the case when organizations collaborate on specific projects (e.g. the case of EDU in joint research projects with corporate customers, SOFT in solutions projects with corporate customers or SOFT in promotional research projects with alliance partners). Formalization encourages managers in different functions to interpret insight with their counterparts in different organizations. This study also observes how formalized tasks in specific projects would require managers in different functions to collectively interpret insight to evaluate performance. These observations are consistent with Atuahene-Gima *et al.* (2005) and John and Martin 1984. Low and Mohr (2001) who observe that formalization promotes managers' engagement with analysis and interpretation of new and unfamiliar information to reduce uncertainty.

This study's observations about formalization, however, contrast the propositions of Hurley and Hult (1998), who find that formalization inhibits managers' flexibility, thus limiting their time and creativity in analysis and interpretation of customer insight. Evidence from interviews suggests that formalization *precipitates* managers' need to review past performance to devise corrective action, evoking earlier constructs like the "retrospective approach" of market information in Cillo *et al.* (2010) and Low and Mohr (2001), or a need to reduce risks in tapping emerging opportunities, evocative of the "forward approach" in market information processing (Cillo *et al.*, 2010).

This study's participants also claim that information overload disrupts their focus on the insight that matters. This observation reminds us of earlier MBL literature in which overload is proposed as a key hindrance on managers' ability to analyse (Rollins *et al.*, 2012) and interpret insight (Huber, 1991) as a result of diminished information processing capacity. The observations in this study, however, also suggest that managers' awareness about overload *aggravates* their anxiety about their engagement with customer insight, suggesting the significance of overload as a problem.

8.3.5 The role of memory: Not only content

This study uncovers the critical role that organizational memory plays in managers' use of customer insight and contrasts extant literature about organizations' use of customer insight and their reliance on organizational memory. Composed of three types of interlinked networks (managers, tasks and tools), transactive memory (Argote and Ingram, 2000) shapes managers' engagement with customer insight at every stage – from the access to information down to the actioning of insight in different marketing endeavours. Memory is relevant not only to the sources of information and insight but also to the skills and approaches managers employ throughout the customer insight use process. These skills mitigate the limited sensibility that inflicts managers' engagement with insight and the resulting outcomes. The results are reflected in the efficiency and effectiveness of managers' (and organizations') exploitation of customer insight. Thus:

Proposition 7 Organizational memory plays a central role in the customer insight process as a repository for insight storage and as a source of insight for decision making.

8.3.6 The role of feedback in customer insight use process

Feedback materialises at different steps of the customer insight process, particularly when individuals interact together during the insight sharing or interpretation steps. The critical role of feedback in this process is evident in how feedback augments memory at individual and group levels, and is particularly relevant to transaction memory networks.

Feedback augments transactive memory within and among individuals in two ways. The first relates to a cumulative mental model that managers develop in their engagement with insight at the different process steps. For instance, in dealing with overload, managers rely on peer feedback to build a set of unique rules (*mutually informed models*) that they apply when filtering raw data. Mutually informed models (Day, 1994a; 1994b) are a manifestation of person-person transactive memory (Argote, 2013; Argote and Ingram, 2000).

A second way involves managers using feedback to construct their own cognitive maps and frames (Huber, 1991; Tindale *et al.*, 2003) that shape their abilities to engage with insight in different ways, such as filtering the information that they encounter daily (Smith and Fletcher, 2004). Evidence from interviews suggests that such frames and cognitive maps are widespread across managers in different functions. Managers may start developing these frames during their formal training before or during their employment with the firm, or they may acquire them through lessons learned as a result of peer feedback.

This study finds that managers expect and value feedback about insight content and process from peer users, especially among managers who form part of closely-knit teams or groups. Paradoxically, managers hesitate to ask for feedback, particularly when they interact with peers outside their closed group or clique. While MBL literature does not deal with feedback or associated behaviours, this study can propose initial explanations for this phenomenon by looking at organizational learning literature. For instance, a natural hesitation for seeking feedback may be the result of organizational culture (Ashford and Tsui, 1991), tolerance to ambiguity of roles and context (around jobs and organization), job involvement or the individual's self-confidence (Ashford and Cummings, 1985; Tushman, 1979).

8.3.7 A map of antecedents of customer insight use process

Sections 8.2 and 8.3 present an account of the behaviours and associated influences this study observes at each stage of the customer insight use process. This section now further elaborates on this discussion to propose a systematic view of the antecedents impacting on each stage at individual and organizational levels.

Table 8-3 differentiates between the diverse antecedents that this study observes in the case organizations. This analysis categorizes these antecedents across the seven factors that impact organizational effectiveness in the McKinsey framework (Waterman Jr. *et al.*, 1980): strategy, structure, systems, shared values (or culture), skills, staff and style. A further category I have added relates to customer insight as this did not appear to easily fit into a category of the McKinsey 7S framework.

Table 8-3 Antecedents that impact on the customer insight use process (Source: Author)

Process stage	Antecedents							
	Strategy	**Structure**	**Systems**	**Culture and shared values**	**Skills**	**Staff**	**Style**	**Insight**
Acquiring		Centralization vs decentralization Hierarchy		Open systems Collaborative evironment vs silo culture	*Information processing capacity* *Mental models, cognitive maps and framing*	*Trust in insight sources*	Informal communication	*Awareness about insight sources* *Relationship with insight sources*
Filtering		*Sources' positional power*	Data inundation	Overload	*Information processing capacity* *Mental models, cognitive maps and framing*	*Anxiety in dealing with overload* *Symbolic use objectives* *Trust in insight sources*	*Awareness about peers' insight needs*	*Insight quality, specificity, relevance and perceived value characteristics*
Transforming					*Information integration* *Mental models, cognitive maps and framing*	*Symbolic use objectives*	Peer feedback	*Insight quality, specificity, relevance and perceived value characteristics*
Sharing		Cliques and *clique membership* Divisionalized structures Small teams *Positional power of individual as source of insight*	Formal procedures Stiff regulations *Individuals' role in insight channels*	Uncertainty or risk avoidance/reduction Lack of email etiquette Overload is a given Resorting to information dumps		*Collaboration enhancing (self-promoting) objectives* *Trust*	Formal communication Bureaucracy Politics *Coordination and organization-wide participation in insight process objectives*	*Insight quality, specificity, relevance and perceived value characteristics*
Analyzing	Organizational goals				Analytical skills *Mental models, cognitive maps and framing*			*Insight quality, specificity, relevance and perceived value characteristics*
Interpreting		Cliques and *clique membership*	Performance management systems Data inundation	Uncertainty or risk avoidance/reduction	*Mental models, cognitive maps and framing*	*Individuals' motivations*	Formalization *Access to peer mental models / peer feedback*	
Actioning	Organizational goals Business cycles		Performance management systems Data inundation *Feeback systems*	Uncertainty or risk avoidance/reduction *Intolerance to ambiguity*	*Mental models, cognitive maps and framing*	*Self-confidence* *Individuals' motivations*	Peer feedback	Dynamic and complex environments?
Storing				Uncertainty or risk avoidance/reduction Prospector paradigm	*Mental models, cognitive maps and framing*			

Key: Regular font: Organizational level antecedents
Italic font: Individual level antecedents

The analysis summarised in Table 8-3 extends the current understanding of MBL by identifying that two organizational level antecedents influence virtually all stages of the customer insight use: organizational structure and culture. *Organizational structure* including such characteristics as centralization, hierarchy, divisionalization, and, the formation of cross functional teams and cliques, has an important impact on how users engage in acquiring insight, the behaviours they adopt in filtering insight from different sources, the methods they employ in sharing insight with colleagues, as well as the roles and approaches individuals adopt in collectively interpreting insight. These findings extend earlier MBL literature in offering a richer account of the impact of organizational structure on the users' behaviours while engaging with customer insight – and contrast with earlier studies that typically focus on the measurement of the effect of structure on the use of customer insight (Deshpandé, 1982; Diamantopoulos and Horncastle, 1997; Kohli and Jaworski, 1990; Korhonen-Sande, 2010; Zaltman and Deshpandé, 2001).

Organizational culture impacts on the customer insight use process in five key ways. First, a paradigm that upholds risk reduction or uncertainty avoidance is one factor that customer insight users respond to by acquiring any market, customer and competitor information they encounter. Second, risk reduction or uncertainty avoidance also motivates users to share insights within teams and across functions. Third, a risk reduction or uncertainty avoidance paradigm encourages users to engage in collective approaches to establish a common understanding from a diversity of insight that users encounter from all quarters of the organization and beyond. Fourth, the same risk reduction or uncertainty avoidance philosophy shapes users' acting of insight in marketing decisions and (fifth) stimulates users to store insight and lessons learnt from their engagement with insight for future access and use. Saving insight and associated lessons involves users employing three forms of organizational memory: (a) the changed users' mental models, cognitive maps and framing (or *users'/managers' network*), (b) the changed processes and routines (or *tasks' network*) that users employ in future instances when engaging with insight from specific sources, as well as when dealing with future marketing dilemmas, and (c) the changed content and features of systems (or *tools' network*) users employ in their engagement with insight and in

dealing with marketing dilemmas. It is this users' engagement with organizational memory that assists an organization to avoid "forgetting" how to best deal with future uncertainty and risk (Argote, 2013). These findings with regards to organizational structure, offer a richer explanation about the complexity of the organizational level influences on the use of customer insight than has been evident in MBL literature to date, particularly because MBL literature focuses on the effects of culture as opposed to structure (like Kohli and Jaworski, 1990; Maltz *et al.*, 2006; Slater and Narver, 1995).

Risk reduction and uncertainty avoidance are also factors behind users' continued accumulation of market, customer and competitor information, inundating themselves and colleagues across the entire organization. Insight inundation impacts on users' capabilities in interpreting and actioning insight in marketing decisions. Paradoxically, users respond to inundation by adopting filtering behaviours in their encounters with insight coming from a diversity or internal or external sources. These observations offer a new understanding about the causes of overload and the influences impacting on individuals' dealing with insight inundation, extending the current views about customer insight use in MBL literature, that typically acknowledges overload as a characteristic of market information processes in market oriented organizations (as in Rollins *et al.*, 2012; Sinkula, 1990, 1994; Souchon *et al.*, 2003, 2004; Zaltman and Moorman, 1988 among others).

This study also observes the impact of organizational philosophies that promote risk reduction, uncertainty avoidance or opportunity seeking, influence users' attitudes and predisposition to offer, share and accept feedback. Feedback is expected and may be offered through informal or informal modes of communication, depending on how the users are connected together (as a result of organizational structure like membership in specific project or customer teams, clique membership or centralization/decentralization of reporting lines). Format of feedback is also determined by the relevant systems employed (particularly formal procedures and systems involved in performance measurement) as well as the situation or dilemma at hand. These observations add to MBL literature which has traditionally neglected the notion of feedback as an integral phenomenon in customer insight use.

Both organizational culture and users' feedback impact on users' mental models, cognitive maps and framing, which in turn, emerge as key influences in shaping individuals' behaviours at the different stages of customer insight use in several ways. Indeed, individuals' mental models, cognitive maps and framing shape users':

1. decisions about satisficing with the available understanding or intention to seek for more insight (*acquire*);

2. choices between the different sources of insight and what sources to trust (*acquire*, *filter*) or ignore or reject in an attempt to manage overload (*filter*);

3. *filtering* of the insight they encounter in terms of weight (relevance, timeliness), truth (accuracy, validity, comprehensiveness, degree of confidence), guidance (diagnosis, options, solution identification), accessibility (ease of use, intelligibility, selectivity) and scarcity (sources' originality and creativity) (after Simpson and Prusak, 1995). A sense of anxiety prevails among users who try to reconcile their need to minimize the consequences of overload with a need to avoid uncertainty and reduce risks tied with specific dilemmas;

4. choices in how to *transform* different pieces of insight from different sources into an insight packet that they share or store. Choosing how to transform insight also relies on the users' judgement of the perceived characteristics of insight like quality, specificity, relevance and perceived value, as well as users' own motivations (discussed further later on in this section);

5. choices between formal or informal ways of *sharing* insight, particularly when users have to dodge their way through the intricacies of rigid organizational structures like centralization, cliques and clique membership or individuals' positional power. The quality, specificity, relevance and perceived value characteristics of insight along with the nature of insight ("know-what" or "know-how") are further conditions that influence users' choice between formal or informal ways of sharing insight with colleagues;

6. behaviours adopted in *analysing* insight. These behaviours may range from simple computations intended to extend the utility of insight to deeper reverse

engineering of insight to build a new picture that makes sense to the user and associated colleagues;

7. exchange of views, roles adopted and engaging in aggregating multiple points of view on a particular problem during "social sharedness" (Tindale *et al.*, 2003) when *interpreting* insight to build one common understanding;

8. decisions to correct performance (*actioning*) based on the common understanding in (7) above, consistent with the instrumental use notions as entertained in MBL literature (like Cillo *et al.*, 2010; Diamantopoulos and Souchon, 1996; John and Martin, 1984; Maltz and Kohli, 1996; Moorman, 1995), and

9. dealing with the three forms of organizational memory (tools', tasks' and members' networks) in engaging with customer insight (*storing*).

Whilst demonstrating how customer insight use behaviours are subject to a complex web of organizational and individual level antecedents, this account extends the current MBL view about individuals' engagement with customer insight by proposing ways that individuals' mental models, cognitive maps and framing impact on the users' behaviours. Indeed MBL literature gives only little attention to organizational memory (as in Perks, 2000; Smits and Kok, 2012; Toften, 2005) and this typically relates to an organizational level view.

From a different perspective, this study's observations about the effect of culture on an individuals' engagement with customer insight are consistent with institutional logics theory (Friedland and Alford, 1991; Ocasio, 1997; Thornton and Ocasio, 1999). Institutional logics comprise "socially constructed, historical patterns of material practices, assumptions, values, beliefs and rules" (Thornton and Ocasio, 1999, p804) – which constitute manifestations of organizational culture (Geertz, 1973). It is this set of assumptions and values that shape individuals' interpretation of customer, market and competitor shifts, as well as the choices individuals make in the face of uncertainty and risk.

8.3.8 Summary

This section outlined the process of customer insight use within organizations. It described the implications of the characteristics of the feedback loop type of process involved in managers' engagement with customer insight, as well as the implications of feedback and organizational memory on managers' engagement with customer insight. The next section looks at the study's implications from a practice perspective, followed by the study's implications from a methodological perspective.

8.4 Implications for practice

From a practitioner's point of view, this study offers a new view for what happens within the customer insight using organization, behind the walls that divide the organization from its insight supplier firms. Consistent with Tuli, Kohli, and Bharadwaj (2007), this study depicts a more complex picture of processes and behaviours that few insight provider professionals can sense in their serving of customer organizations. Indeed, typical market research practitioner literature is consistent with a linear process—as in practitioner literature like Hague (2002), Malhotra and Birks (2007) and Zikmund and Babin (2007)—that stops at the "report preparation and presentation". This study shows what happens after that *last* encounter between the insight-providing professional and the insight-using customer. There are two important implications emerging from this view.

The first is that insight-providing professionals need to review their customer organization's insight mechanisms and processes. In the case of returning customers, insight providers would benefit from an acute review about how different members of the customer organization engaged with the insight provided (as well as other relevant pieces of information) in the different marketing decisions. It would be helpful for insight providers to establish who is engaged in what pieces of the insight provided, uncovering opportunities for additional value offering through insight that better matches the different individuals' needs. In the case of new customers, insight providers would be better off if they familiarized themselves with the individuals who would engage with the insight offered, particularly with respect to their needs, language

and proximate peers. Equally important, insight-providing professionals need to recognize that whatever form or content the insight they provide has, its effect on both organizations (supplier and customer) is likely to be far-reaching and remain long remembered.

From a user organization firm's perspective, this study shows that the utility of any insight acquired by individuals relies on acute feedback from peer users as well as on effective storage and associated future access. The implications here are that user organizations need to maximize the effectiveness of feedback by enhancing communication across their members. The two case studies offer two extreme scenarios. SOFT relies on open communications systems that support profuse sharing of information across users. An open organizational structure boosts the dissemination of tacit insight across peers through socializing behaviours, complementing the sharing of explicit insight above. These configuration and mechanism aspects lead to a profuse (and often uncontrolled) exchange of information, which often results in members' exposure to information overload. By contrast, EDU relies on less open communication systems and structures, where insight is largely confined within the individual business units and shared less profusely (than SOFT) across the business units. Here, socializing plays a stronger role in ensuring feedback across members and different stages of the insight use process. Thus:

Proposition 8 To prevent blockages and enable effective sharing of insight as volumes of data increase, organizations need individuals to develop new information processing competencies and need to re-think the structures and processes that support information flow across the organization.

8.5 Implications for method

This study also proposes a new approach to investigate organizational phenomena while addressing the various challenges that plague ethnographic methods. RET's capability to concurrently follow large numbers of participants addresses the human limitations of traditional participant observation. RET provides an alternative method that is immune to observer-participant relationships and associated observer selectivity or participants' modified behaviours, as well as to the observers' sensitivity to political processes and

own emotions or to traditional participant observation weaknesses that researchers like Hammersley and Atkinson (2007), Miles and Huberman (1994) and O'Reilly (2005) warn about.

From a different perspective, the operationalization of this study addressed four quality characteristics in an attempt to avoid inappropriate practices that may weaken this contribution (Beverland and Lindgreen, 2010). This study incorporated most of the best in practice recommendations that Piekkari *et al.* (2010) propose on case study research in industrial marketing. For instance, the use of multiple sources of evidence as well as a recorded chain of evidence (by employing multiple researchers in the project) address the construct validity of the research method employed (after Creswell and Miller, 2000 and Yin, 2009). The matching of emerging patterns between cases as well as the adoption of iterative approaches to build explanations ensured that this study attained an adequate level of internal validity (after Eisenhardt, 1989). Employing a case study protocol as well as keeping of all data in one case study database that can be accessed by additional researchers monitoring the research process ensured that this study reached adequate levels of reliability (Halinen and Törnroos, 2005; Yin, 2009). The testing of method and explanations attained in the first case throughout subsequent work ensured that the study attained sufficient levels of external validity (Gibbert *et al.*, 2008; Yin, 2009). Furthermore, the presentation of findings to a selection of practitioners from four large UK corporates during a validation seminar, as well as presentation of findings to a selection of industrial marketing academics, also helped address the study's external validity objectives (after Dubois and Gibbert, 2010; Järvensivu and Törnroos, 2010).

8.6 Customer insight use from a critical realist perspective

The findings and inferences set out in the study so far relate specifically to one key domain of empirical research as well as other relevant literature fields. However, these findings and inferences are subject to the epistemological choices that shaped the design of this study.

Critical realism espouses a social reality that envelopes multiple, overlapping layers of reality: empirical, actual and real. This reality cannot be simplified into a discreet set of

explicit events. Hidden structures and processes govern this reality (Bhaskar, 2009). By capturing the social actors' experiences and accounts about their encounters with customer insight (empirical), the study exposes the mechanisms (real) with managers' use of customer insight (Easton, 2010; Reed, 2009). Uncovering these mechanisms involves establishing patterns of events from the analysis and interpretation of data. Several iterations of analysis and interpretation are required to reveal fundamental generative mechanisms responsible for observed events that describe managers' use of customer insight (Sayer, 2010).

Consistent with this view, this study started with the identification of empirical uniformities in behaviours that managers adopt in dealing with customer insight by employing real-time experience tracking. This approach captured the instances where managers responded to customer insight by manifesting specific, predefined behaviours. These identified regularities or uniformities in behaviours, however, could not sufficiently uncover underlying generative mechanisms that result in the observed behavioural patterns as espoused by a critical realist view. Indeed, through personal interviews, this study uncovered a more complex network of behaviours that managers adopt in their engagement with customer insight as well as the factors that motivate these behaviours. An interpretation of these factors is set out in this discussion chapter, outlining how these factors impact managers' use of customer insight, remaining consistent with the principles of critical realism (Easton, 2010; Sayer, 1997).

This study presents a process framework that is derived from a pool of data gathered from interviews conducted with a number of managers participating in the study from two organizations. This pool comprises a rich account (drawn from managers' own descriptions and reflections about their engagement with customer insight) intended to assist in maximizing the learning resulting from this study. There were differences in the interpretations emerging from the data of the different case studies. For instance, managers adopted different patterns in sharing insight with each other in the different organizations. In SOFT, the larger data set drawn from real-time experience tracking enabled the identification of cliques where customer insight sharing is commonplace. In EDU, managers' accounts revealed that customer insight sharing is thwarted by organizational cultural and structural factors. These examples show that, while the

framework offered in this study comprises a range of recognized constructs, the importance of application of this framework to other organizations and contexts may vary. Nonetheless, the framework set out in this study offers an explanation of behaviours, motivations and underlying mechanisms that are more than just simple descriptions. This approach is consistent with the critical realist perspective (Sayer, 2010).

The implication of this approach, however, is that this study cannot (and was not intended to) predict how all managers would engage with customer insight in all organizations in all circumstances. Rather, the study's critical realist perspective permits the use of observations to explain how and why managers engage with customer insight in the context of analyser service firms, focusing on domestic markets. This claim acknowledges that research participants' accounts are based on their perceptions and experiences of a reality they live in their respective organizations. This perceived reality may only reflect part of the whole reality, and actors respond (through manifest behaviours) to their perceived reality (Mason *et al.*, 2013). The contributions to theory emerging from this study are thus not only contingent on these accounts but also are further shaped by the author's own interpretations of reality (Easton, 2010).

This study adopted three key approaches to minimize this element of bias. The use of a methodology that fits the state of prior relevant theory is the first consideration, and it involved an approach that draws from multiple methods to capture the accounts of multiple actors on one phenomenon within one organization. Second, the author adopted a level of reflexivity, conscious of his own assumptions and meanings that may influence judgement during the interpretation of analyses and associated validity of this study. Practising reflexivity required the author to keep a journal of research developments from the outset of the project, documenting insight emerging from literature and field data as well as changes in research direction and progress. Third, inferences emerging from the case study were presented to an audience of customer insight users in different organizations participating in a validating seminar. This seminar was specifically held to counteract any biases in interpretations and associated theory resulting from the author's own preconceptions.

8.7 Summary

This chapter set out a detailed interpretation of the findings presented in Chapter 7. It described how managers use customer insight and identified the underlying mechanisms that explain managers' behaviours in their engagement with customer insight.

Managers' use of customer insight follows a feedback loop mechanism constituted of seven key steps, and thus, this finding contrasts earlier MBL literature that advocates a linear, five-step process. The interpretations of findings established from this study also reveal five important assertions: a) the importance of managers' filtering of valuable insight from an information inundation; b) managers' engagement in transforming pieces of information into an "insight packet" that can be stored or shared; c) a distinction between individual and collective behaviours across the different steps constituting the insight use process; d) the role of organizational memory throughout the entire process; and e) the importance of feedback.

The proposed feedback loop process relates to a mainstream sequence of behaviours emerging from this study. However, as a result of the granularity of data, other less common sequences of behaviours were observed among managers engaging with customer insight. The conditions and motivations that drive managers into these sequences are discussed in Section 8.3.4.

A discussion about the implications of these interpretations on MBL theory appears in the following chapter, including a discussion of the implications from a practitioner perspective. By discussing the findings of this study from a critical realist perspective, these accounts offer a starting point for an appraisal of the contribution to MBL literature and practice in Chapter 9.

9 CONTRIBUTIONS AND CONCLUDING COMMENTS

9.1 Introduction

This chapter picks up where Chapter 8 left off to demonstrate the contribution that this study makes. It starts by summarizing explanations offered in the previous chapter and then highlights the key contributions that this study makes to MBL literature. It sets out the key contributions the study offers to practitioners involved either in the supply of customer insight or in the use of customer insight. A description of the study's key contributions to method follows. The chapter also discusses the study's limitations and opportunities for future research.

9.2 Research questions and findings

This study addressed two research questions using a mixed methods approach:

Research Question 1. How do managers use customer insight?

Research Question 2. What is the process of customer insight use in an organization?

These questions were addressed through a case study research strategy that included a mix of real-time experience tracking and depth interviews in two organizations.

The study finds that managers use customer insight through a process that comprises a sequence of seven stages, each with a unique set of behaviours. The stages are as follows: acquiring → filtering → transforming → sharing → analysing and interpreting → actioning → storing (see Figure 9-1).

Within an organization, the stages of customer insight use process involve individual and collective behaviours. Individual-level behaviours are particularly observable during acquiring, filtering, transforming, sharing, analysing and storing (of information, insight and lessons) stages. By contrast, collective-level behaviours are observed during the interpreting and actioning stages.

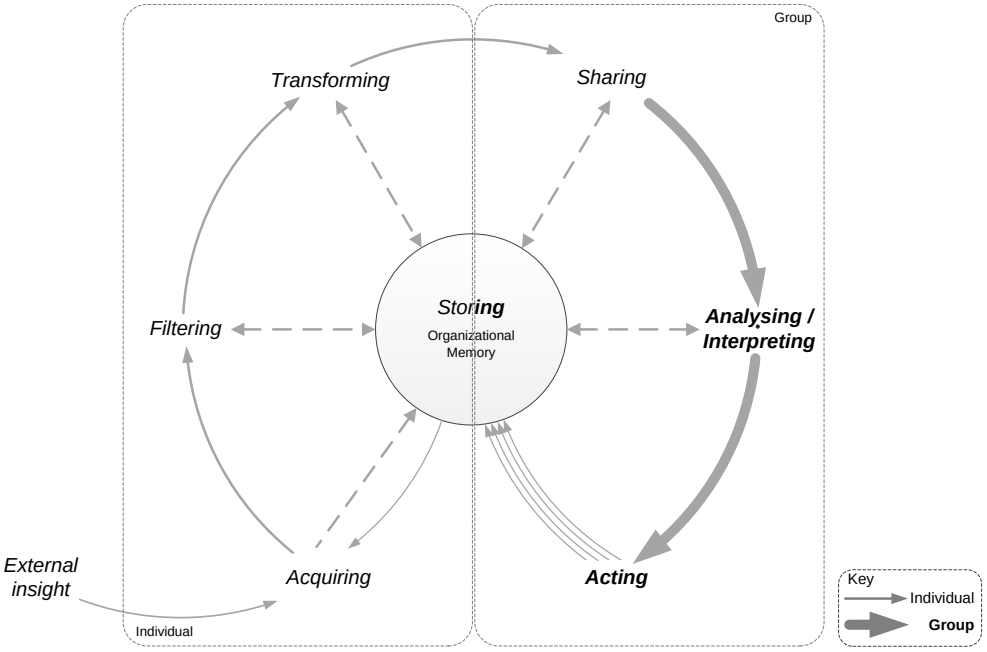


Figure 9-1 Emergent framework of customer-insight use process (Source: Author)

At an individual level, managers may opt to store information or insight following any of the acquiring, filtering, transforming, sharing or analysing stages. Managers may also opt to share just the information as received, without any filtering or transforming. Reaching a common understanding among groups of managers also means that managers may opt to not action any insight but instead to keep lessons emerging from their experience for future application.

Organizational memory plays a core role in managers' use of customer insight. Composed of three types of networks (members, tasks and tools), organizational memory impacts all individual and collective behaviours, determining the efficiency and effectiveness of managers' engagement with customer insight.

This study observes, however, that overload is a significant factor that affects managers' capabilities in engaging with customer insight. Indeed, managers' filtering behaviours are individuals' responses to the day-to-day information deluge that managers face in their marketing roles. Managers were observed selecting information that they consider valuable for insight generation for the rest of the organization and themselves. Information overload drives managers to (consciously or unconsciously) filter

information, potentially resulting in biased customer insight generation and propagation in the organization. Together with overload, limitations in managers' information processing capabilities and (in some cases) their own motivations thwart the rationality of managers' engagement with customer insight.

Managers' effective use of insight relies on individuals' skills in managing their encounters with information and customer insight, individually or collectively. Managers need to be aware that information overload is an issue impacting all of their colleagues. Responding to overload necessitates managers to adopt new competences for effectively sharing information with others and offer timely, relevant feedback to colleagues.

9.3 Contributions to theory

Earlier MBL research about the use of customer insight conceptualized a process based on organization learning theory (see Day, 1994b; Day, 1994a; Day, 2002) without much empirical support. A systematic literature review of 43 empirical MBL journal articles that were published over a thirty-year period observed that most studies conceive insight use as a process involving between three and five steps. *Organizations* (1) acquire or generate customer, market, and competitor information that is (2) disseminated across the organization, (3) interpreted and (4) applied in marketing decisions and/or (5) stored in organizational memory. Except for a handful of studies, they largely assume that insight use is linear, the exceptions being those studies that look at the role of organizational memory as a source of customer insight (like Perks, 2000 and Toften, 2005).

This study *extends current MBL* views by offering a longitudinal interpretation of the behaviours that managers adopt in their engagement with customer insight. Through the use of real-time experience tracking and in-depth interviews, along with the associated analysis, this study offers a rich account and proposes a sequence of behaviours in a feedback loop mechanism that is in contrast with existing MBL literature. This account offers more granular explanation of managers' comportment and associated organizational and individual level influences that impact on specific behaviours at specific stages of the customer insight use process. A further contrast is

the way this study distinguishes between behaviours that managers adopt *individually* (like customer insight acquiring, filtering and transforming) or *collectively* (like interpreting and actioning). The implications of this study construe two key areas of contribution to MBL literature, that are discussed in the following paragraphs.

9.3.1 How managers use customer insight

This study extends MBL's current view about the customer insight use process in a number of ways. First, this study determines that the customer insight use involves a complex program of behaviours in a perpetual process of seven distinct steps. Earlier MBL literature focuses on the *transfer of information* into the organization from external sources (for instance Cavusgil, 1984; Diamantopoulos and Souchon, 1999; Moorman *et al.*, 1993). This study, in contrast, extends MBL's views about customer insight acquisition by offering a *human* dimension to this stage of customer insight use. Managers use informal and formal approaches to obtain information from internal and external sources. Modes of access and acquisition vary across individuals, ranging from informal exchanges with trusted individuals or peers to subscription in specific sources. Managers develop skills and awareness about insight sources, learning to trust specific sources following their experiences and feedback from peers.

In response to overload, managers adopt strategies to identify valuable pieces of information in the constant information flows they face daily. While this type of behaviour has been conceptualised in previous MBL literature (Toften, 2005; Toften and Olsen, 2004) it has not been investigated empirically. This study, by contrast, finds that a sense of overload is associated with a sense of anxiety in managers who are conscious of the risk of potentially disregarding valuable insight ('the nugget') hidden in the vast amount of information they face. A risk-avoidance culture, together with high levels of overload, are additional influences that may prevent managers from reasonably selecting incoming information. Peer feedback helps managers build cumulative mental models, cognitive maps and frames that shape managers' approaches to filtering.

Managers transform selected nuggets of information from different sources into an insight that can be either stored or shared with relevant colleagues. This study exposes

four types of behaviours managers adopt in transforming information into insight "packets". Managers' choice of any of these behaviours depends on their perception of value of insight and, to a certain extent, their own motivations. This finding contrasts with earlier MBL literature, which implicitly assumes transformation happens (like Toften, 2005; Toften and Olsen, 2004). As in filtering, managers learn and augment their skills from peer feedback that helps top up their mental models, cognitive maps and frames, thereby shaping their behaviours.

Managers sharing insight is an area where MBL literature has offered some understanding, but studies typically draw from single informants and relate to the organizational level (as in Diamantopoulos and Souchon, 1996; Kohli and Jaworski, 1990; Moorman, 1995; Sinkula, 1990). This study extends current MBL understanding about insight dissemination by taking a contrasting view to observe how managers share insight with each other, acting as channels to insight that is otherwise not accessible to certain other colleagues. Apart from observing how managers organize themselves in cliques in sharing insight, this study also identifies four dimensions that describe the characteristics of managers' sharing of insight: style, direction, audience scope and occasion. Managers' sharing is influenced by a number of factors: formal procedures, observed peer behaviour and peer feedback. A lack of email etiquette, limitations in information processing capacity, assumed overload and rife information dumping also affect managers' choices and behaviours involved in sharing insight.

MBL literature also seldom focuses on managers' analysis and interpretation of customer insight (like Maltz *et al.*, 2006; Smits and Kok, 2012; Toften, 2005). This study, however, distinguishes analysis and interpretation by noting that analysis is an individual manager's behaviour, whereas interpretation involves a collective engagement of managers in a group. This study also observes how managers analyse insight by either making additional computations on insight or subjecting insight to a decompiling and reconstructing process. This thesis also extends current MBL understanding about customer insight interpretation, observing how managers aggregate multiple points of view through exchange between individuals in a group to build one meaningful story. Four types of motivations drive managers into interpreting insight: performance correction, uncertainty reduction, exploiting opportunities and keeping

stories "alive" until further sense-making happens. Thanks to peer feedback, experience and formal education, managers keep their analysis and interpretation skills sharp. Whereas formalization in an organization drives managers into engaging in insight interpretation cycles, sheer overload prevents managers from interpreting insight effectively.

On actioning insight, MBL literature typically follows Beyer and Trice's (1982) distinction between instrumental, conceptual and symbolic use of customer insight. This study extends this distinction by finding that actioning insight is a behaviour demonstrated by managers engaged in groups, motivated by any of four reasons: profiting from business / personal opportunities, correcting performance, justifying / legitimating pre-determined positions and selecting the most sensible option from a range of decision choices. The granularity of information collected in this study also helps uncover patterns and frequencies of actioning, ranging from the one-off, ad hoc action to periodic applications that follow established business cycles. Delayed or weak feedback from peers hinders the managers' learning from insight actioning outcomes. This study also observes that managers' limited rationality in actioning insight results from limitations in managers' information processing capabilities, overload and personal motivations.

Finally, on the use of organizational memory, there are only rare occasions where MBL research has considered managers' storing of insight in an organizational repository. This study, extends MBL's understanding about the role of organizational memory in customer insight use. Indeed, this investigation observes managers storing lessons learned from their dealing with customer insight and its application explicitly in repositories and tacitly in their own memory. Users are mindful of their storage choices, especially when lessons bear implications on the effectiveness of peers. There are three key motivations for managers to store insight: ensuring access to insight to colleagues, as a matter of habit or to fulfil an individual's role as reference person for colleagues.

9.3.2 Other contributions on the process of customer insight use in an organization

The seven-stage customer insight process observed in this study also offers five additional contributions to MBL literature.

First, this customer insight use process has a close resemblance to sense-making, as proposed by Thomas *et al.* (1993) and Weick (1979; 1995), on two levels: (a) managers engage with retrospective information to understand future customer behaviour, and (b) the entire insight process (like sense-making) involves a continued interplay between *cognition* (during the acquiring, filtering, transforming, sharing and interpreting insight) and *action* (applying and storing insight). This is a stark extension to current MBL literature that conceptualizes customer insight use as a linear process.

Second, the study's granularity of data enables a clear distinction between individual and group level behaviours involved in a social process that comprises formal and informal approaches. This observation concurs with the KP theory propositions (as in Crossan *et al.*, 1999; Nonaka and Takeuchi, 1995) and reveals the tacit and explicit portions of customer insight and is relevant to managers sharing, exchanging and engaging in interpreting insight. This is a contrasting position to what traditional MBL literature considers, where customer insight is assumed to be devoid of a tacit portion (that arises from managers' experiences). This tacit portion is hard to codify and share with peers, or is "sticky" (Boisot, 1998). This stickiness contributes (in a critical way) to the strategic characteristics of customer insight (Smith *et al.*, 2006). Themes of collaboration and competition that emerge in this study echo Inkpen (1998) and Kale and Anand (2006) (among others), about the challenges that impede the smooth flow of knowledge but that are ignored in MBL literature.

Third, the abundance of data that this inquiry's method gathered enabled the generation of a more complete view of the conditions that block or enable the customer insight process at each stage and at different levels of analysis. This detailed view also revealed specific sequences of managers' behaviours that deviate from the mainstream, seven-stage feedback loop process as a result of specific organizational conditions and

individual motivations or contexts. This view contrasts the prevailing cross-sectional MBL studies that measure the effect of a limited number of influences on specific customer insight use steps. For instance, both case organizations sustained analyser strategies (after Miles *et al.*, 1978), had divisional structures, employed team approaches in specific marketing projects/decisions and nurtured close communities of insight users. These factors impact (in different ways) behaviours managers adopt at the different stages of the customer insight use process. For instance, hierarchy, specialization of roles and departmentalization obstruct the use of customer insight, concurring with the findings of Deshpandé (1982), Kohli and Jaworski (1990) and Zaltman and Deshpandé (2001).

Fourth, the feedback that managers expect and value plays a critical role in their engagement with customer insight. Feedback is particularly important during their acquiring, sharing and interpretation of insight in closely-knit customer insight user communities. Organizational and individual characteristics like culture (after Ashford and Tsui, 1991), tolerance to ambiguity of roles and context (around jobs and organization), job involvement and the individual's self-confidence (after Ashford and Cummings, 1985; Tushman, 1979) may explain this observation that, nonetheless, is conspicuously absent in MBL literature.

Finally, MBL literature deals with the role of organizational memory in customer insight lightly. Few contributions (like Perks, 2000; Smits and Kok, 2012; Toften, 2005) devote any attention to organizational memory, with the typical study taking an organizational level view to a phenomenon that involves individuals across the organization. This study offers a fine-grained view about individuals' engagement with customer insight, influenced by individual level manifestations of transactive memory, like managers' own mental models as well as managers' cognitive maps and framing. Experience and feedback constantly update individual-level cumulative and tacit mental models and cognitive maps that guide managers in their engagement with increasingly challenging insight sourcing and filtering. Mental models also help managers avoid incorrect and inefficient interpretation of insight, leading to inefficient organizational responses to emerging market realities.

9.3.3 Summary of the propositions emerging from this study

Two sets of propositions emerge from this study and contribute to MBL theory (see Table 9-1). The first set is relevant to *how* managers use customer insight. This study finds the managers reduce the potential complexity of information inundation by filtering that information that is perceived as valuable for themselves and for the organization. However, managers' perceptions of overload may drive managers (consciously or unconsciously) to block information. These behaviours ultimately result in bias, impacting the information that managers use to generate and disseminate insight.

Table 9-1 Propositions emerging from this study (Source: Author)

Research question		Proposition	
1	How do managers use customer insight?	1	Managers reduce the potential complexity of large quantities of information by filtering information that is perceived as valuable for themselves and the organization.
		2	Perceptions of information overload may drive managers (consciously or unconsciously) to adopt behaviours to block information sources.
2	What is the process of customer insight use in an organization?	3	The customer insight use process is a feedback loop involving seven behaviours. This process is perpetual and is a core part of an organization's learning from its experience in markets. Stages in the insight use process include acquiring, filtering, transforming, sharing, interpreting, actioning and storing.
		4	The customer insight use process involves behaviours at two levels – individual and collective. *Individual* behaviours are particularly notable during the acquiring, filtering, transforming, analysing and storing stages. *Collective* behaviours are particularly notable during the interpreting and actioning stages.
		5	Individuals may choose to "store" insight as the next step after any of the acquiring, filtering, transforming, sharing or analysing/interpreting stages.
		6	In organizations, individuals' limitations in information processing capabilities and perceptions of information overload may limit the organization's ability to generate and respond to customer insight.
		7	Organizational memory plays a central role in the customer insight process as a repository for insight storage and as a source of insight for decision making.
		8	To prevent blockages and enable effective sharing of insight as volumes of data increase, organizations need individuals to develop new information processing competencies and need to re-think the structures and processes that support information flow across the organization.

On the *process* of customer insight use, this study finds the customer insight use is a feedback loop process. This process involves seven types of managers' behaviours (acquiring → filtering → transforming → sharing → analysing/interpreting → acting → storing). These behaviours happen at two levels: at (a) the individual and (b) group levels. Interpretation and acting of insight are behaviours happening at managers'

group level. The emerging customer insight use process relies on organizational memory, which is a core characteristic of organizations' learning from their experience in markets.

During their engagement with customer insight, managers may choose to store insight as their next step after any of the process steps described above. Equally, some conditions or motivations may drive managers to avoid specific behaviours in the feedback loop process, but these deviations from the mainstream sequence are a less common observation.

Limitations in individuals' information processing capabilities as well as perceived information overload impact on organizations' ability to generate and respond to customer insight.

In the face of rapidly increasing data volumes, organizations need to ensure that their customer insight use processes remain effective. Effectiveness of customer insight use relies on individuals' processing competencies that organizations need to be continuously hone by rethinking their organizational structures and processes that support information flow. Ultimately, organizations need to remove or prevent blockages to information flow and enable effective insight sharing between managers.

9.3.4 Invoking other theory to extend MBL views about customer insight use

From a different perspective, this thesis extends current MBL views about how organizations use customer insight by invoking principles and conceptualizations from different bodies of literature in four ways.

First, this study relates to how individuals interact together in their engagement with customer insight within and across teams, cliques, functions and organizations. Together, users interact to create an interpretation of the world around them and the organization, creating knowledge that is manifest as changed justified true belief (Nonaka and Takeuchi, 1995). The creation and use of such knowledge lead to

associated changes in individuals' and organizations' behaviours[27]. This process is a representation of value creation (after Penrose, 1997; Schumpeter, 1980 among others) that happens through the interaction of individuals, within customer insight supplier and customer (user) organizations. This interpretation is consistent the conceptualization of value co-creation that various studies propose (such as Grönroos, 2008, 2011a; Macdonald *et al.*, 2011; Payne *et al.*, 2008 among others) – with value being created in the within the provider and customer spheres jointly and independently (Grönroos, 2011b). Within the customer sphere (and at an intra-organizational level), an organization's members interact together to co-create knowledge (and value) – consistent with the value-in-use conceptualization (as in Grönroos, 2008; Macdonald *et al.*, 2011a, 2011b; Ravald and Grönroos, 1996; Woodruff and Gardial, 1996 among others).

Second, this study also brought to the fore a social view of users' engagement with customer insight, presenting an account about how individuals interact with other individuals within and outside the organization as well as customer insight. A social network analysis revealed how individuals organize themselves in groups (or cliques). Customer insight travels across these individuals and groups. These observations are also consistent with the conceptualizations of actor-network theory (Latour, 2005) that takes a constructionist view to how individuals and objects interact in a knowledge oriented network. Latour (2005) describes how actor-networks involve vast numbers of translations – which in this study are represented by users' filtering, transforming, analysing and interpreting customer insight. For instance, this thesis presents how specific individuals adopt a role as sources of specific insight and skills within a network of customer insight users. Some groups of individuals were also observed to be characterised by high levels of centrality in their own cliques, suggesting their relative importance as customer insight sources and brokers, interacting with closely associated groups or functions. These observations are consistent with the accounts that actor-network studies (often of an ethnographic nature) present about knowledge production processes and practices. Such studies, like this thesis, follow actors

[27] In response to emerging shifts in customer needs, markets and competition.

wherever the action is happening to build an understanding about actors' interactions in a knowledge oriented network (such as Hoholm and Araujo, 2011; Latour, 1987).

However, the consistency that this thesis offers with respect to actor-network theory is only partial as this study deals with users' interactions with colleagues and customer insight without adopting a structure that looks at all five categories of controversies concurrently (Latour, 1987). For instance, this thesis makes no consideration about human and non-human actors involved in what Latour (1987) calls a heterogeneous knowledge network. Neither does this thesis distinguish between types of actors – whether mediators or intermediaries at the individual level, but rather looks at groups of individuals fulfilling these roles. In both instances, further research is necessary.

Third, this thesis presents important analogies from group learning behaviour and learning that is manifest as evolving routines and processes. This investigation tracked how individuals acquire, share and amalgamate customer insight through experience with each other in groups or cliques. Learning happens as groups change routines and processes as a result of individuals' interactions with each other, consistent with the group learning behaviour that McGrath and Argote (2003) conceptualize. In both case studies, this thesis observes changes in routines and processes (that constitute the tasks' network part of organizational memory, after Argote, 2013) as a direct result of individuals' engagement with proliferating sources and bloating volumes of customer insight. Changes in routines and processes are directly linked with changes in mental models, cognitive maps and framing of individuals (or members' network, after Argote, 2013). Also, in both case studies, this inquiry observed both *explicit* (such as formalized distribution lists that outline who are the recipients of specific customer insight, or, documented processes that individuals follow in managing performance of campaigns or marketing projects) and *tacit* routines (such as the informal exchange of insight between individuals, or, the reliance on individuals who are informally entasked with the filtering of incoming insight) (after Nelson and Winter, 2009). In an associated way, this study also observed how individuals learn to select insight sources and choose to discard, transform, share or indeed store pieces of insight from an increasing number of insight sources. Customer insight routines and processes evolve in response to this learning at individual and group levels, and is consistent with the behavioural adaptation

conceptualization that Cyert and March (1992) observe in organizations' response to shifting markets and competition. These links with group learning behaviour and associated manifestation as changed routines and processes are an important attribute that this study uses to extend extant MBL views about the use of customer insight.

Fourth, this study observes how organizational culture, in different ways, shapes the decisions and behaviours users adopt in their engagement with customer insight (see Section 8.3.7, page 231). In many ways, these observations are consistent with Thornton and Ocasio (1999) definition of institutional logics, where "socially constructed, historical pattern of material practices, assumptions, values, beliefs, and rules by which individuals produce and reproduce their material subsistence, organize time and space, and provide meaning to their social reality" (ibid, p804). Individuals engaging with customer insight adopt formal and informal rules that shape their actions, interactions and interpretations to guide and confine managers in implementing marketing decisions. These decisions aim to achieve organizational goals that are shaped by individuals' motivations like social status and incentives in the form of credits, penalties and rewards (Ocasio, 1997). Relying on a set of assumptions and values, individuals follow implicit rules on how:

a) to interpret customer, market and competitor signals (organizational reality after Thornton and Ocasio, 1999)

b) to behave in face of risk and uncertainty (or what constitutes appropriate behaviour after Thornton and Ocasio, 1999), and

c) what constitutes success and how to succeed (after Thornton and Ocasio, 1999)

These three ideas echo this study's observations relating to how individuals build and employ mental models, cognitive maps and framing (see Section 8.3.7) that in turn, shape individuals' behaviours that they adopt at each step of their engagement with customer insight. More importantly, this study follows organizations that employ customer insight to respond to shifts in two core institutions of society: the market and the corporation. This observation is also consistent with the higher order institutional logics that Friedland and Alford (1991) propose. However, this thesis does not gather

and interpret evidence about how other components of core institutions of society, such as the profession, the state, families, democracy and religion (Friedland and Alford, 1991) and can only offer a partial picture about the link between organizations' use of customer insight and institutional logics theory.

9.4 Contributions to practice

Typical market research practitioner literature upholds a linear process that stops at the report preparation and presentation stage, as in Hague (2002), Malhotra and Birks (2007) and Zikmund and Babin (2007), among others. This study conceives customer insight as emerging from a comprehensive process involving multiple users within the user organization. This process happens *after* that last encounter between the information providing professional / agency and the insight-using firm. Customer insight use is perpetual in nature, with any information that suppliers deliver bearing long-term and far-reaching implications as lessons are embedded in organizational memory. This observation is also consistent with Tuli *et al.*'s (2007) view about solutions provision, where suppliers provide only part of what customers expect, and solutions supplied have a far longer effect (after delivery) than what suppliers sense.

The study reveals four problems that impinge on suppliers' role in the co-creation of value with insight using client firms. First, a lack of awareness among supplier firms about who is involved in a customer insight process is often the result of their inability to build deep relationships with customer firms, especially during post-deployment phases of research provision projects. Second, customer firms rarely rely exclusively on one supplier firm. Intent on reducing uncertainty, managers engage with customer insight access and acquire customer insight from a multitude of sources, or what constitutes the customer organization's social network and "ecosystem" (after Gummesson, 2006; Vargo and Lusch, 2008). Managers validate all incoming insight with prior knowledge and other sources before they opt to interpret new insight and action it through marketing decisions. Third, customer insight provided by external agencies loses its visibility as it sinks in the information overload users face every day. Fourth, client firm users choose what and how incoming information is shared with colleagues, impacting on the users' perceived service and reputation of suppliers.

Managers' trust in the provider and supplied information impacts the supplier-user relationship that builds slowly but is quickly destroyed when service provision falls short of expectations.

In responding to these challenges, supplier firms need to evaluate the unique context around every user involved in the customer insight process, thereby assisting in:

1. understanding users' overload and how users undertake to appraise the specificity, relevance, credibility and comprehensiveness of information in their filtering behaviours to extract what is of value for current and future market decisions;
2. transforming sales approaches and understanding what their client organization managers really require from their data services, beyond the facts and figures that supplied data can tell, yet sensitive to the customer organization context;
3. adopting tactics that are relevant to all users involved with the customer insight process, whether such users are direct contact points or members of other business units that engage in a marketing project on an ad hoc basis;
4. adopting measures that demonstrate the transparency and credibility of data generation processes in response to client organization members' needs for express validity and reliability of information; and
5. offering assistance that augments value co-creation by helping in the interpretation of insight and ensure that any integration with other information results in a solution that truly satisfies customer needs across the insight process.

These five points suggest that it is essential for supplier firms to adopt client relationship approaches beyond desk-oriented key account managers who interact with one touch point at the customers' side. Information suppliers—be they market research agencies or specialized consultancies—need to look beyond the contractual boundaries and move towards multi-point relationships with client organizations to garner a true understanding of the diverse needs of groups of users and their decision contexts. Supplier firms need to spend more time with their client firms in research projects, helping client organization members build customer insight more effectively.

Participation in client projects helps supplier firms learn not only *what* but also *from where* and *for what* insight is developed in marketing decisions (Ryals and Wilson, 2005), uncovering opportunities for supplier firms to augment the value of the services provided and close the gap between the research supplier and the client firm's boardroom (Maklan *et al.*, 2008).

From a user firm perspective, there is an opportunity for organizations to amplify the value-in-use of customer insight when customer insight is kept moving across the entire organization. The implications of keeping customer insight moving are two-fold. First, organizations need to hone the listening capabilities of individuals who connect the organization with its context (markets, competition and customers) by supporting and reacting to users' data needs. Second, user organizations must encourage users to respond to customer insight regardless of their status in the organization's hierarchy or location. The implications here point to how organizations:

1. design job roles and responsibilities in the face of increasingly dynamic contexts;
2. ensure top management's commitment to customer insight as a way to inspire organization-wide dedication to customer insight reliance across all users;
3. make channels available for individuals to use in sharing customer insight
4. improve users' capabilities to share insight effectively and selectively rather than add on to existing levels of information noise;
5. expose and promote tacitly established reference persons by formally recognizing these roles;
6. ensure that individuals possess the right mix of skills and attitudes to participate effectively in the insight process; and
7. encourage individuals to seek and provide peer feedback by pledging openness in communication. Individuals' socializing behaviours support profuse sharing of both tacit and explicit insight across the entire organization.

9.5 Methodological contribution

Depending on their manifest character (overt or covert) and the desired level of interaction between the observer and the participant, traditional participant observation methods suffer from three key challenges that hamper the validity of findings. First, various ethnographers (like Charmaz and Mitchell, 2001; Hammersley and Atkinson, 2007; van Maanen, 2011 among others) lament their endeavours to access organizations for their studies, largely as a consequence of the requirement for observers to be physically present in the setting studied. Second, organizational settings obstruct complete membership of the observer (Lofland *et al.*, 2006) in overt approaches, whereas a complete observer approach is limited in achieving any desired depth of inquiry. These problems limit a study's comprehensiveness and audience orientation in organizational settings.

Third, full participation of the observer in a participant observation approach (Bryman, 2012) is also unlikely in organizational settings as organizational members championing the study would (deliberately or unintentionally) direct the investigation into their own specific area of interest, thereby limiting the inquiry's comprehensiveness, variation, objectivity and audience orientation. Organizational research settings thus justify overt, partial participation approaches, relying on a balanced observer involvement during the collection of data (possibly through different techniques).

Attaining a balanced observation remains vulnerable to five further challenges to internal validity that arise from the observer's engagement and personal characteristics, as well as the participants' engagement with the research process:

1. Observation bias may arise due to observers' inability to manage their own relationships with participants (Adler and Adler, 1987; Hammersley and Atkinson, 2007; Patton, 1980);
2. Observation selectivity emerges as a result of an observer's own orientation (Bryman, 2012; Patton, 2002) as well as an inability for any number of observers to comprehensively monitor a large number of participants concurrently (Hammersley and Atkinson, 2007) and thereby capture maximum variation;

3. Diminished observer sensitivity to the phenomena observed in different research contexts (Adler and Adler, 1987; Hammersley and Atkinson, 2007; Schwartzman, 1993);
4. Participants' changed behaviours as a result of their own social desirability (Bryman, 2012; Paulhus, 1991) and participant non-participation (by withholding truth about behaviours or remaining unavailable for the observers) resulting in bias in observation data;
5. Observers' inability to remain immune to the case's contexts, thereby shifting the inquiry's positioning to a lesser degree of participation among observed actors, or risking "going native" (O'Reilly 2005; 2009).

Inspired by earlier consumer behaviour studies that observe how individuals engage and experience brands and ideas over time (Baxendale *et al.*, 2015; Macdonald *et al.*, 2011a, 2012), this study employed real-time experience tracking to overcome some of these limitations of participant observation. It appears that this is the first time this kind of methodology has been applied in an organizational setting. This makes a significant methodological contribution in the following two key ways.

First, reduced observer presence in study helps mitigate sources of bias while motivating organizations to better participate in organizational studies. The absence of observers in the immediate setting studied removes observer-participant relationships as well as bias emerging from observers' sensitivity to political process. Because real-time experience tracking provides some distance between the observer and the participants, this method reduces the risk of shift in degree of participation among observed actors. And as a result of observers' absence in the field, there is also no opportunity for the study to suffer from observers going native. Qualitative in-depth discussions to validate and deepen the findings emerging from real-time experience tracking, however, remain an important adjunct technique.

Second, real-time experience tracking offers the opportunity for larger numbers of participants to be observed concurrently without increasing the number observers. This characteristic addresses the human limitation of traditional participant observation

approaches, helping capture higher levels of variation through larger samples of participants.

Despite these advantages, future application of real-time experience tracking in organizational studies would require some modifications to the method based on the lessons learnt from this study in three key ways.

First, depending on the phenomenon studied, participation in real-time experience tracking may be improved if larger numbers of individuals are recruited to participate for shorter periods of time. Real-time experience tracking participation may be sequenced into shorter periods than four weeks, for instance periods of one to two weeks, with different proportions of recruited individuals participating only for such weekly periods. This approach may improve the study's quality characteristics in terms of completions, variation and comprehensiveness. From a practical perspective, allowing organizational members to participate in a study for a shorter period may overcome the problem of declining participation as experienced in this study. Weekly participation intervals are also characteristic of consumer behaviour studies employing real-time experience tracking (as in Baxendale *et al.*, 2015; Blades, 2012; Macdonald *et al.*, 2011a, 2012).

Second, with smartphone technology becoming increasingly powerful and affordable to the masses, future application of real-time experience tracking may shift from the conventional utilization of short messaging system and web-diary techniques to encompassing apps[28] that help individuals report their encounters (with customer insight for instance) during a study. Such an app would need to be designed, developed, piloted and optimized before utilization in organizational studies, and would offer study participants one mode of interacting with the researchers rather than rely on different approaches (i.e. SMS and web-diary). This solution might also offer researchers more data, such as participants' counterparts involved in the same encounters with the phenomenon studied. Such data presents new opportunities in establishing how

[28] A self-contained piece of software.

individuals interact as groups in phenomena that involve multiple individuals across an organization, supporting more comprehensive social network analysis approaches.

Third, also depending on the phenomenon studied, the focal set of units tracked through real-time experience tracking needs to be honed down to a handful of touch points. In this study, touch points related to the main different sources of customer insight that individuals encounter and engage with. In the main case study, real-time experience tracking participants related to a wide range of customer insight sources, resulting in a study that tracked a large number of insight sources that were only relevant to small portions of participants, limiting the feasibility of mapping longer trajectories for specific insight packets across different individuals, groups and functions. Focusing on a smaller number of insight sources that are relevant to wider audiences helps mapping trajectories that would encompass not only larger numbers of individuals, but also a larger variety of groups or functions within the organization, as well as draw finer grained pictures about sequences of behaviours in a process.

9.6 Study limitations

Relying on a case study approach enabled the researcher to obtain detail that offers a deep understanding about how managers use customer insight. Although this approach is consistent with the retroductive strategy (matching the nature and state of maturity of the theoretical field), this study suffers from four key limitations.

9.6.1 Type of organizations' strategy

The study's inferences were drawn from observations made on organizations pursuing an analyser type of strategy (Miles *et al.*, 1978). The firms' strategy is evident from four key observations. First, as a result of their focus on the domestic markets, both case firms focus on a limited market scope[29]. Second, despite a limited market scope, both organizations still rely on customer insight captured from a variety of sources. Both firms integrate such information through mechanisms that recognize the

[29] Analyser firms' limited market scope contrasts with the domestic *and* international market strategies that prospector type of organizations pursue.

opportunities and threats in the firms' respective markets. Third, both firms have organizational structures and processes that boost the assimilation of customer insight acquired from different sources. Fourth, both firms studied emphasize continued improvement of efficiency. In SOFT, the study observed initiatives intent on shortening customer service cycles as well as on enhancing internal communication approaches. At EDU, the study witnessed initiatives intent on unifying the diverse customer approaches on which the different business units would embark separately and concurrently, targeting the same customers.

The question that emerges as a result of these observations is: how do managers use customer insight in organizations that pursue different types of strategies, like defender, prospector or reactor strategies (after Miles *et al.*,1978)? Defender strategies are characterized by a need to create stable markets and seek to realize cautious and incremental growth primarily through market penetration. Prospector strategies seek to locate and exploit new product and market opportunities through broad and continuous development of a domain. Defenders monitor a wide range of environmental conditions and events to realize growth when the opportunity unfolds, resulting in spurts of growth. In all three cases, the scope of use of customer insight differs, as does the occurrence of instrumental, conceptual (and potentially symbolic) use of customer insight (Citrin *et al.*, 2007).

9.6.2 Breadth of organizational cultures

Equally related to the sampling approach that this study adopted is the question of organizational culture. Evidence in the study suggests that SOFT (a UK subsidiary of a US multinational) reveals traits of an uncertainty avoidance, open-system, pragmatic culture, whereas EDU demonstrates a relatively closed system, more normative and possibly more uncertainty-oriented. Moorman (1995), although using different dimensions to define organizational cultures, finds that an organization's use of customer insight is influenced by the organization's culture, particularly with respect to insight dissemination, conceptual and instrumental use. This observation exposes another limitation in that this study's findings cannot be generalized across all organizational cultures, which, in turn, are influenced by the location of the

organization. The fact that this study captured data from two service and domestically-oriented organizations located in the UK reveals opportunities for further work in other countries and industries.

9.6.3 Level of analysis

Although the scope of this study is related specifically to the individual managers and their engagement with customer insight, there is a set of questions emerging from extant MBL literature that remain unanswered. For instance, this study offers some initial evidence about how managers form cliques where insight is shared more profusely than across such groups. There is a need for future work to determine how groups of users are formed as well as how different groups engaging with customer insight work with each other.

9.6.4 Participants' engagement with the study

Fourth, from a methodological perspective, there are two challenges that inhibit the effectiveness of RET approach in organizational research. The first is a degree of drop-out rate that this study experienced during the four-week RET field work, a characteristic common in continued, panel studies (McGivern, 2013). This occurrence is the result of study participants leaving the study before the end of the field work[30]. There is a possibility that individuals leaving the study may behave differently when engaging with customer insight. However, this study could not observe differences in behaviours between RET participants and non-participants. Second, RET participants were required to send text messages at every occasion they encountered a customer insight. It is possible that individuals opted not to report all encounters, especially with repeated encounters with one particular source, or when work demands overtake participants' control of effort and attention. This limitation reduces RET's ability to produce a more detailed picture about participants' behaviours.

[30] There may be different reasons that explain why participants leave before the end of the study, ranging from being extremely busy at work, to leaving work for a holiday or just because managers lose their enthusiasm and interest in the study.

However, like other ethnographic methods, the use of RET and depth interviews helped assemble a very detailed view of a process explaining how managers use customer insight. But, unlike participant observation approaches, the use of RET helped build a reliable picture about managers' encounters with customer insight as the method is independent of the researchers' presence in the field. Indeed, the use of RET in this study helped overcome various limitations of participant observation approaches like social desirablity bias and the inability for researchers to observe multiple participants engaging with a range of customer insight sources concurrently.

9.7 Opportunities for future research

From a methodological perspective, like other ethnographic studies, the success of RET and subsequent interviewing in organizational research relies on the participation of individuals within an organization. Whereas this study's method offers various advantages over traditional participant observation methods, attracting organizations to participate in such studies remains a key challenge, echoing the lament of various ethnographers like Brewer (2004); Charmaz and Mitchell (2001); Garfinkel (1984); Hammersley and Atkinson (2007); van Maanen (2011a; 2011b) and Schwartzman (1993). Nonetheless, the distinctively reduced observer presence in the field may help RET overcome traditional ethnography's lack of appeal, opening new opportunities for organizational multiple informant research in different industrial market settings and beyond.

From a theoretic perspective, this study helped identify functional clusters or teams within the organization, painting a landscape of cliques and communication channels through which insight flows. These networks of communication, however, rely on individuals' roles and behaviours. One emerging question is whether individuals adopt specific types of behaviours as a key characteristic of their roles in the organization. Are there individuals who would be simple acquirers of information? Would individuals prefer to focus on continued transformation of information into insight? What type of individuals would concentrate their energy on sharing and collecting feedback from peers? Further RET investigations in organizations are required to help answer these questions.

This study appraised customer insight processes as happening in two domestically oriented firms that target largely UK-based organizations. This was a logical choice, as the study intended to undertake an in-depth longitudinal case study investigation, with consequent limited generalizability (Yin, 2009). Despite the existing wealth of research on export-oriented firms, little can be drawn from this study and extended to reflect how export-oriented organizations use customer insight. Further work on the use of customer insight in such firms is thus needed to not only help us understand better the insight process in these sectors but also to elucidate differences in insight reliance across the two types of market orientations. On a similar note, this study examined the use of customer insight in a narrow selection from a wide range of organizational culture types. In MBL literature, Moorman (1995) offers limited evidence that the use of customer insight is likely to vary across different organizational cultures, whereas studies in organizational culture (Cook and Yanow, 1993; Hofstede, 1998; Schein, 1993) offer suggestions about managers' engagement in knowledge processes (Wang *et al.*, 2011) in a marketing context (such as Deshpandé and Farley, 2004). This observation suggests that there is further opportunity to extend current MBL views about the use of customer insight by investigating managers' use of customer insight in different organizational cultures.

The same notion holds with respect to how the use of customer insight may vary across organizations with different organizational structures. This study observes that organizational structure characteristics such as centralization, hierarchy, divisionalization and the formation of cross functional teams and cliques, influence users' engagement with customer insight at various stages of the insight use process. Earlier MBL studies focus on measuring the effect of characteristics of structure on the use of customer insight (such as Diamantopoulos and Horncastle, 1997; Korhonen-Sande, 2010; Zaltman and Deshpandé, 2001). Further studies employing a processual view about the use of customer insight in organizations with different structural characteristics can extend MBL's conceptualization of the effect of organizational structure on users' engagement with customer insight.

Observations in this study also hint at the value of insight, albeit in a way that is outside the scope of this paper. Earlier research on insight and associated phenomena, like

feedback, point at the importance of knowledge from an embedded perspective where value is seen as the net benefits less the perceived sacrifices involved in the acquiring of feedback (like Anderson and Narus, 1998; Lapierre, 1997; Zeithaml, 1988). Managers engage in different behaviours in their generation, sharing, interpreting and using of insight depending on a mix of benefits they perceive, whether for their organization, for their group or for themselves as individuals. These deductions suggest that the value of insight varies at each stage of the insight use process and emerges from managers *experiencing* customer insight, consistent with the value-in-use notion (as in Grönroos, 2011; Macdonald *et al.*, 2011; Normann and Ramírez, 1993; Ravald and Grönroos, 1996, among others). This study's RET methodology suits an investigation that explores the value of insight at each stage of the insight use process.

9.8 Concluding comments

This chapter concludes this study. It set out a summary of the research questions and the key observations emerging from this inquiry. The chapter moved on to review the key contributions of this study to the MBL literature as well as the implications it offers to practice and method. A set of limitations that impact the study's validity were also summarized and suggested directions for future research were offered.

9.9 A personal afterthought

My PhD journey was nothing short of a life-changing experience in many ways, and were it not for the support of many, in short or long ways, I doubt if this learning would ever have borne any fruit. Here I stand after four years of exploration, discovery and understanding, not to mention the excitement, anxiety and despair that often coloured the PhD journey. This voyage is far from over, and I consider the "completion" of this study to be the beginning of a braver but equally exciting phase of life as I start my academic career.

This PhD has changed my life in three ways. The first is a change on an intellectual dimension. My PhD meant that I traversed a career path from a small yet established practitioner to an academic in a field that attracted scant interest in recent years. My journey meant that I moved from an interest in market research and supplier-customer

relationships to a more appealing theme about managers' behaviours when engaging with customer insight. In this journey, I stumbled on theoretical domains that influenced my thoughts in more than one way. Literature domains like KP, organizational learning and organizational memory early in my expedition meant no more than a library shelf code. How wrong I was. Although I acknowledge that MBL contributions from Deshpandé, Diamantopoulos, Moorman, Souchon, Toften and Zaltman (and many others) were of seminal importance to this work, I felt that organizational learning and KP theory scholars like Argote, Argyris, Boisot, Nonaka and Polanyi had nothing less than profound influences on my evolving thinking.

The same learning process also meant that I experienced an ontological shift. I came to this study from a positivist proclivity and expected that the entire PhD process would fit that archetype. However, my engagement with the study meant that the research questions I was asking needed a completely different view on the phenomenon of interest, implying a steeper learning curve for me. My interest in the works of Guba, Glaser and Hammersley (among others) soon steered me into appreciating the constructionist view about reality. In my attempts to reconcile the diametrically opposite views I identified critical realism as a way of seeing reality, compatible with the writings of Bhaskar and Sayer (among others), recognizing an inner self that had been waiting to emerge in my work.

The second way I feel I am a changed man is in how I look at research. Before embarking on my project, I had very prejudiced views about anything that did not fit the quantitative approach because I was fascinated by a world of numbers, constructs, coefficients and models. Through my mental iterations across diametrically opposite ontologies, I learned to appreciate the challenges to validity that any single epistemology suffers. It is no secret among my peers at Cranfield that I embraced methodological triangulation with reprieve, despite its demand of a steeper learning curve and decisively more difficult work from me.

The third way in which my PhD made me a different being is in how I see managers use customer insight. Managers are people, driven by people for people. To make informed decisions, managers need customer insight in order to reach various

organizational (and some personal) goals. Managers are imperfect and not consistently rational. Through small ways, managers impact the entire organization in big ways. Thus, my study helped to explain the significance of customer insight and the associated usage process that can only be as objective, robust and effective as the weakest link in a network of interacting managers.

PART V

ADDENDA

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APPENDICES

Appendix A Sample Size Considerations

A.1 Study participation: Qualitative interviews

To develop a well-saturated, grounded theory, scholars suggest a number of participants ranging from 20 to 30 individuals (Creswell, 2012) to more than 40 individuals (Charmaz, 2006). These suggestions are echoed in the recommendations carried in a report that aggregates various "expert voices" like Patricia and Peter Adler, Alan Bryman, Kathy Charmaz, Norman Denzin, Uwe Flick and Charles C. Ragin (Baker and Edwards, 2012).

Because this study examined how individuals and groups engage in using customer insight, well-defined groups of "culture-sharing" individuals could only be identified after studying significant numbers of users who could, in turn, be categorized in groups. Such identification of groups was one objective that real-time experience tracking addressed, bearing direct implications on the numbers of participants recruited for subsequent qualitative interviews.

As the study targeted research participants who were part of

- a limited pool of subjects,
- "difficult to discern" groups that vary only in their way of using customer insights rather than some other explicit property relating to type of job or demographic characteristics.

Then, a requirement for accessing and using large samples (Adler and Adler, 2012 in Baker and Edwards, 2012) became unjustifiable. Approaches with limited numbers of participants, ranging between 12 and 20 persons per case study, thus remained a justified option (Adler and Adler, 2012 in Baker and Edwards, 2012).

A.2 Real-time Experience Tracking

Identifying groups of customer insight users through an appraisal of reported behaviours would require data analysis approaches involving clustering techniques, such as latent-class analysis (after Hagenaars and McCutcheon, 2002; Magidson and Vermunt,

2004; Vermunt and Magidson, 2002) or quick *k-Means* clustering approaches. From a processual perspective, identifying the sequence of steps involved in the use of customer insight as well as the level of association of different variables is likely to involve structural equation modelling techniques.

A review of statistical literature about ideal sample sizes in latent class analysis and structural equation modelling (using Monte Carlo simulations; see Table A-1) suggests that an ideal sample size is linked to the number of parameters estimated in the model (Tanaka, 1987).

As a rule of thumb, scholars point at sample sizes computed on the basis of ten observations for each variable measured (Tanaka, 1987), moving away from Formann's (1984) recommendation for use of samples equating to at least 2^m, where *m* is the number of clustering variables (as cited in Mooi and Sarstedt, 2011).

This review (summarized in Table A-1) also points to the absence of a general rule of thumb that can guide the size of a sample that is adequate for any investigation (Hair *et al.*, 2010; Muthén and Muthén, 2002). Various authors point at the stabilization of performance in cluster models' predictability when analysts employ larger data sets, meaning that the use of data sets beyond a specific number of observations presents no additional benefits. Indeed, while a minimum of 100 responses is considered adequate (for datasets featuring two factors/dimensions composed of 3 to 5 variables each), datasets with n = 200 observations may yield acceptable latent class models (Magidson and Vermunt, 2002; Nylund *et al.*, 2007; Vermunt and Magidson, 2002) without any improvement or deterioration in acceptance tests' performance (like Lo-Mendel-Rubin or bootstrap likelihood ratio test) in larger datasets (such as n = 500 or n = 1000 responses) (Nylund *et al.*, 2007).

Table A-1 Reported tested/ideal sample sizes (Source: Author)

Source	Ideal Sample Size	Comments
Anderson and Gerbing (1984; 1988); Gerbing and Anderson (1985)	100 to 200	Compare various sample sizes (from N = 50 to N = 300) and resulting ML estimator. A sample of N = 150 is sufficient for a converged solution.
Bearden *et al.*, (1982)	50 to 500	Compare various sample sizes (from N = 10 to N = 10,000) and resulting ML estimators. Propose minimum sample sizes of N = 50 (for simple models) but not exceeding N = 500 for more complex models
Browne (1968)	100 to 1,500	Compares various types of factor analyses. ML estimator dependent on the number of variables tested
Browne (1984)	500	Compares two models estimating ADF chi-square test (performs well across all 20 iterations – with intra-class bias) and high ML values (without bias)
Boomsma (1985)	100 to 200	ML estimator in latent variable structural equation modelling (LISREL) breaks down in samples N<100 subjects.
Crano and Mendoza (1987)	53	Obtained high goodness-of-fit for a model with eight factors using exploratory structural analysis and "less than optimal data quality" (ibid:47)
Geweke and Singleton (1980)	>10	ML estimator suggests model fit for N=10 and one factor solution, N = 30 for two factor solution (five variable models)
Hertzog and Nesselroade (1987)	42	Fit a model with structural regression parameters and significant regression coefficients for a longitudinal data set.
Hu and Bentler (1998)	<250	Propose use of ML based fit indices like TLI, BL89, RNI, CFI and SRMR for measuring model fit as these indices are less sensitive to sample size
Huba and Harlow (1987)	257	Demonstrate model fitting using asymptotically distribution-free estimators and Muthen's dichotomous variable technique (after Muthen 1978, 1981, 1982, 1983)
(MacKenzie *et al.*, 2005)	>125	Demonstrate model fitting for samples N = 125 to N = 875 with decreasing Goodness of Fit Index of models in smaller samples
Muthen (1984)	231	Demonstrates model fitting using ordered and dichotomous categorical variables to develop a longitudinal model with a structural model for multivariate probit regressions
Muthén and Muthén (2002)	150 to 315	Demonstrates confirmatory factor analysis model fitting in four different data conditions – from continuous factors and no missing data to non-normal factors and missing data.
Nylund *et al.*, (2007)	200 to 1,000	Bootstrap likelihood ratio test is a very consistent indicator of classes across all models considered. Model fit deteriorates for small classes in smaller sample sizes (e.g. class covers 5% of N=200 sample)
Tanaka (1984); Muthen and Kaplan (1985)	<100	Model fit statistic degraded in samples N = 100 in a confirmatory two-factor, six-variable model. Points that results observed by Anderson and Gerbing (1984) become more acute in non-normal estimation.
Tanaka (1987)	>100	ML fit index suggest a lower bound sample size of N = 100 albeit ML fit index is related to sample size.
Vermunt and Magidson (2002)	~145	Fit a cluster solution based on a sample of 145 patient data involving three continuous variables.

Notes:
ML Maximum Likelihood fit index
TLI Tucker Lewis (1973) fit Index
BL89 Bollen (1989) fit index
RNI McDonald and Marsh's (1990) relative noncentrality index
CFI Bentler's comparative fit index
SRMR Root-mean-square residual after Bentler 1995

Appendix B Preparatory Qualitative Interview Guides

Preparatory research rendered the remaining parts of the inquiry (RET and participant observation) feasible and relevant. The following tables set out the interview guide followed in these preparatory qualitative interviews with (a) the key informant (project champion) within the case study organization, and (b) the organization's key customer insight users.

Table B-1 Orienting interview with organization's key informant

Research Area	**Key Questions**
Introductory	(University, researcher's identity, scope of project)
	<Orientation of project>
Personal context	Job title, role and department
Insights users	Which are the key departments and individuals in this organization that use customer insight?
	How are these people organized? [Ask participant to write/draw]
Sources	What are some key sources of insight for this organization?
	We are trying to identify a core of about five sources.
Common use of insight	Which of these sources of insight are *in common* between these people and their departments?
Terms	How does each department refer to the key sources of insight?
	We need the "names" of insights as commonly referred to by people accessing and using them.
Way forward	Considering the nature of this project, whom can you suggest to champion the research within your organization? [Role? Contact details? When can an introduction happen?]
Access: Heads of department and other key users	How can we get in touch with the heads of the departments you mentioned earlier?
	How can we liaise interviews with these people?
Access to insights	Is it possible for us to access the insights you mentioned earlier?
	How can we access these insights?
Finishing off	Do you feel that this discussion has provided you with a clear picture of the project at hand? Respondent email address and phone number

Table B-2 Initial interview (Departmental informants)

Research Area	**Key Questions**
Introductory	(University, researcher's identity, scope of project)
	<Orientation of project>
Personal context	Job title and role
Insights & Providers	We have been told of these insight providers serving your firm.
	Can you please indicate which of these your function deals with?
Supplier inclusion	Do you think this list is complete?
	[Do you think there are any missing external firms?]
	[Are there any missing internal sources?]
Supplier interaction	Does your function interact with thee providers directly? [How?]
Insights	Can you mention some "insights" these suppliers provide to you / your function?
	What do these insights relate to?
	[How often? In what form are these insights provided?]
Individual involvement	Who within your function is involved in the use of insights? [Teams? Individuals?]
	What are their roles in the firm?
	What use do they make of insights? How?
User inclusion	Who else might be involved in the use of customer insights?
	[Departments? Individuals?]
	How do they "interact" with insights?
Closure	Any further comments?
Way forward	How can we get in touch with the people in your department you mentioned earlier?
	How can we access the insights you mentioned earlier?

Appendix C Post-RET Interview Questions Appraisal

Table C-1 Post-case qualitative interview guide and associated research questions: A comparison (Source: Author)

		How do individual managers use customer insight?			
	Interview Question	What are the behaviours that individual managers manifest in their processing of customer insight?	What are the mechanisms that help managers engage with customer insight as groups?	How do managers, individually or as groups, engage with organizational memory during the use of customer insight?	**What are the key influences that impact on managers using customer insight?**
A	This map (A) shows how you interact with several insight packets.				
	What are your initial comments / reactions? (Can you elaborate further on what goes on?)	✓	✓	(✓)	(✓)
	Do you think this is an accurate reflection of your experience?	✓	(✓)	(✓)	(✓)
	Do you think anything is missing?				
	Any insights you were provided and not shown here?	✓	(✓)	(✓)	(?)
	Any insights you requested and not shown here?	✓	✓	(✓)	(?)
	Any insights you shared with other people and not shown here?	✓	✓	✓	(?)
	Any insights you used and not shown here?	✓	(✓)	(✓)	(?)
	Any insights you applied in your work and not shown here?	✓	(✓)	(✓)	(?)
	Any insights you put away or stored and not shown here?	✓	(✓)	(✓)	(?)
	Why have you scored a "1"? Why have you scored a "5"?	✓	✓	(✓)	(✓)
	Was any of these encounters particularly important to you? Why?	✓	(✓)	(✓)	✓
	And/or to your department?	✓	✓	✓	✓
	WHY?	(✓)	✓	✓	✓
	Do you note anything missing in this map?	✓	(✓)	(✓)	✓
	Could you describe the outcomes of <this> encounter?	✓	(✓)	(?)	✓
	What were your intentions with <this insight packet>?	✓	(✓)	(✓)	(✓)
	Did the insight help you achieve your goals?	✓	(✓)	(?)	✓
	Was it useful to you?	✓	(✓)	(?)	✓
	Considering the use of customer insights… Is this a true reflection of how you make use of insights?	✓	(✓)	(?)	(✓)
	Would your colleagues agree with you on this?	(✓)	(✓)	(✓)	(✓)
	Let's look at <one insight> reported during the study. Is there anything that you observe?	✓	(✓)	(?)	(✓)
	Is there anything that surprises you?	✓	(✓)	(?)	(?)

Table C-1 Post-case qualitative interview guide and associated research questions: A comparison (Source: Author) (continued)

	Interview Question	How do individual managers, departments and organizations make use of customer insights?			What are the key influences that impact on managers using customer insight?
		What are the behaviours that individual managers manifest in their processing of customer insight?	What are the mechanisms that help managers engage with customer insight as groups?	How do managers, individually or as groups, engage with organizational memory during the use of customer insight?	
B	This map (B) shows which insights moved across your function and who was involved in these processes. The second map (C) shows how your function interacts with the other functions in <your organization> in the use of customer insights				
	What are your initial reactions or comment to this?	(✓)	(✓)	(✓)	(✓)
	What do you think is going on?	(✓)	(✓)	(✓)	✓
	Is this a true reflection of your organization's use of insights?	(✓)	(✓)	(✓)	(✓)
	Do you think we have missed anything in these maps?	(✓)	(✓)	(✓)	(✓)
	What is the use of the insights you see here?	(✓)	✓	(✓)	(✓)
	What are the outcomes of the insights you see here?	(✓)	✓	✓	✓
	Would your colleagues agree with you on this?	(✓)	✓	✓	✓

Key:

(A) Individual Map
(B) Departmental Map
(C) Insight Source Map

✓ Direct relevance to research question
(✓) Indirect relevance to research question
(?) Might help answer research question

Note

Insight quality/characteristics aspects (like ambiguity, complexity, tacitness, newness credibility and relevance) are to be detected in the data rather than probed directly

Individual and organizational absorptive capacity characteristics (like sourcing, dissemination, transformation and exploitation) are to be detected in the data rather than probed directly

Appendix D RET Instruments

Five quantitative instruments are customized, piloted and administered for each case study organization. The following tables set out a summary of these instruments. Each instrument is features the least number of items, intent on optimising respondent participation.

Table D-1 RET texting instrument

Construct	Definition	Items	Source/s
Insight provider	Source of insight encountered by respondent	1	Authors
Action	Actions undertaken by respondents during their encounter	1	Authors (developed from literature review on use of market research information)
Satisfaction	Respondents' satisfaction with their encounter	1	Authors

Table D-2 RET diary instrument

Construct	Definition	Items	Source/s
Date/time of encounter	Time stamp from SMS response	1	RET Administration
Insight provider	Source of insight encountered by respondent	1	Authors
Insight packet	Identity of insight encountered (linked with supplier above)	1	Authors
Interaction partner	Other people involved in the interaction with the insight	1	Authors
Format	Format of encounter	1	Authors
Additional information	Open ended item – respondent describes the encounter in as much detail as possible	1	Authors

Table D-3 Pre-survey screener instrument

Construct	Definition	Items	Source/s
Screener			
Screener	Respondent has mobile phone, able to send messages and willing to give mobile phone number for further research	1	Authors
	Part of case organization	1	Authors
Respondent characteristics			
Demographics	Gender	1	Authors
	Age	1	Authors
	Role in organization (function)	1	Authors
	Highest level of education attained	1	Authors
Insight provider – respondent relationship dimensions			
Insight source	Insight providers (internal and external)	1	Authors
Overall satisfaction*†	Overall satisfaction with insight provider	1	Authors

* Items repeated for each insight provider mentioned

† Random prompting sequence

Table D-4 Post survey quantitative instrument characteristics (administered at the end of week 4)

Construct	Definition	Items	Source/s
Insight provider – respondent relationship dimensions			
Insight source	Insight providers (internal and external)	1	Authors
Overall satisfaction*†	Overall satisfaction with insight provider	1	Authors
Further comments	Open ended - comments	1	Authors

* Items repeated for each insight provider mentioned

† Random prompting sequence

Appendix E Sample of RET Screenshots

The administration of RET meant that all instruments had to feature on users' mobile phone and computer screens in particular ways. The following is a sample of images of screenshots that research participants encountered in their involvement with this study.

E.1 Pre-case instrument screenshots

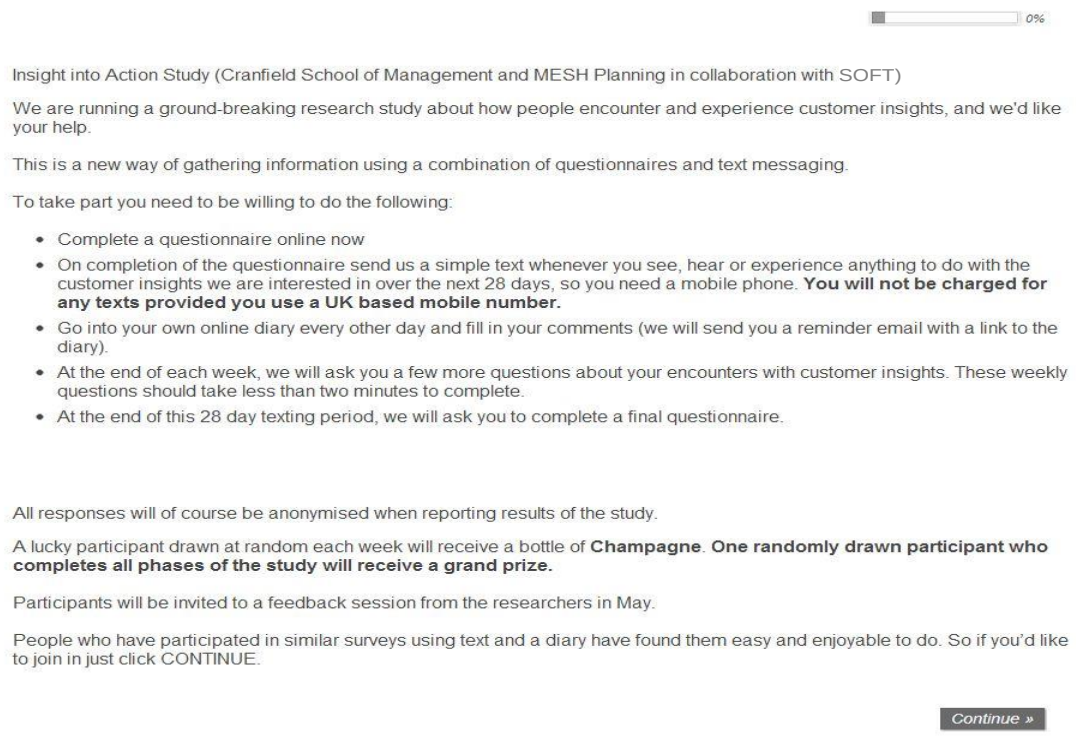


Figure E-1 Opening screen: Pre-case screening instrument

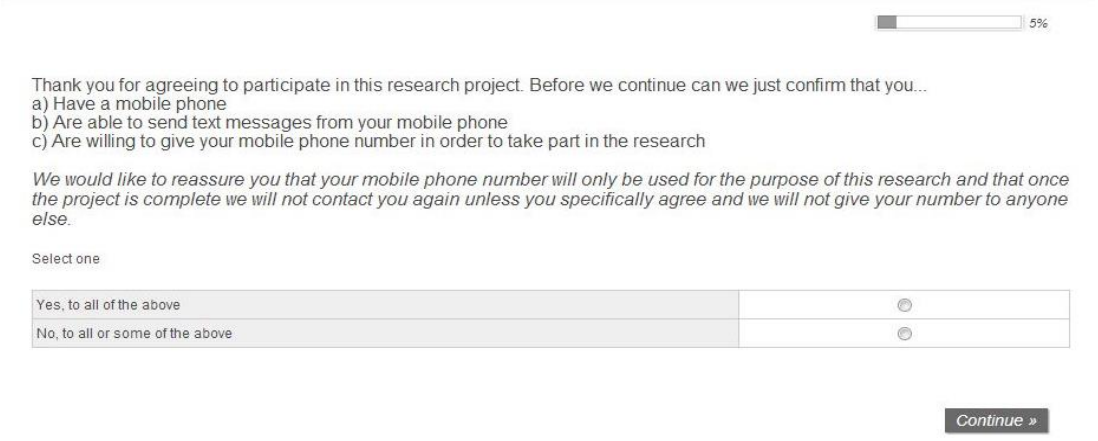


Figure E-2 Second screen: Pre-case screening instrument questions

Figure E-3 Third screen: Pre-case screening instrument participant demographic questions

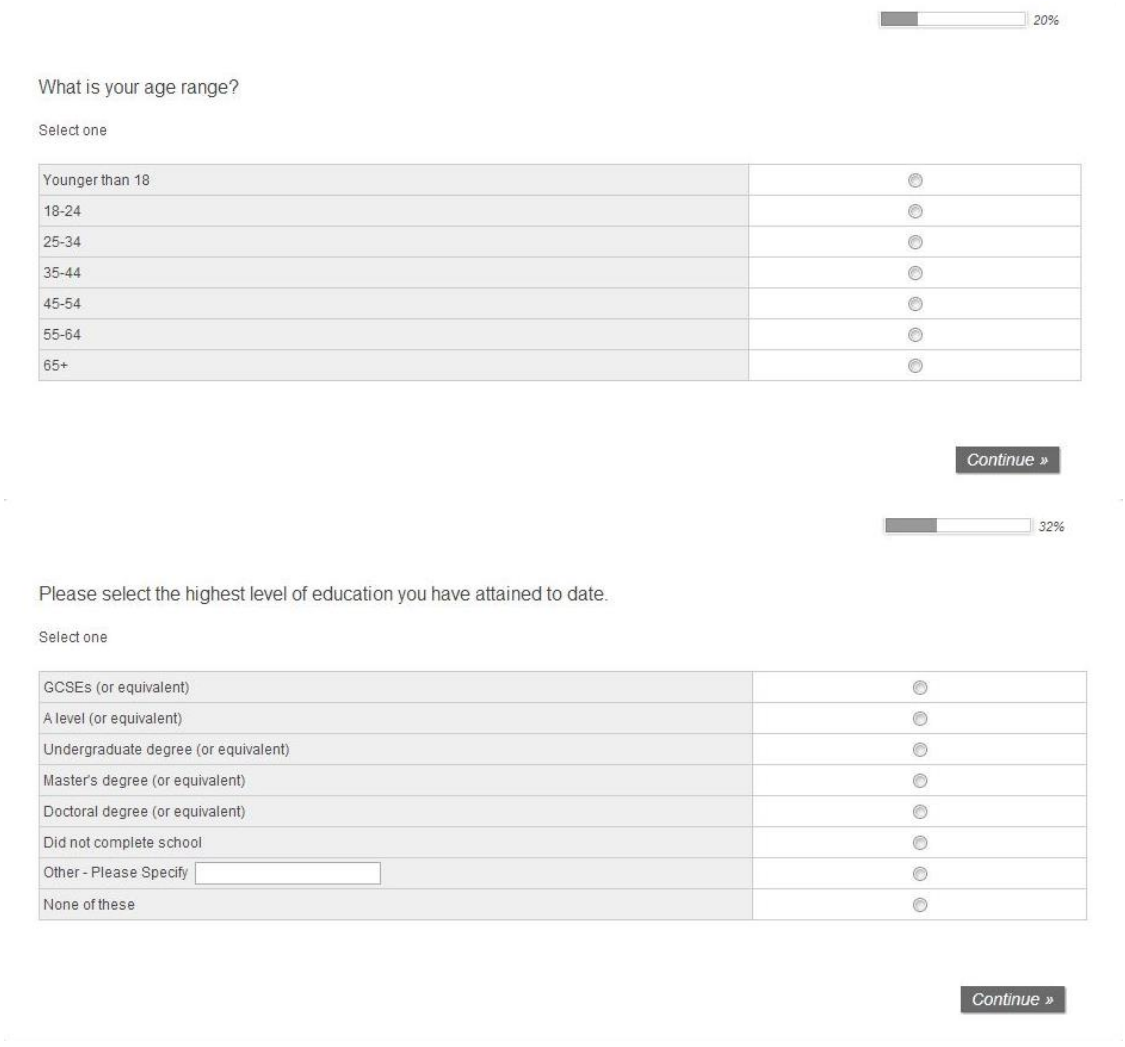


Figure E-4 Fourth screen: Pre-case participant screening items

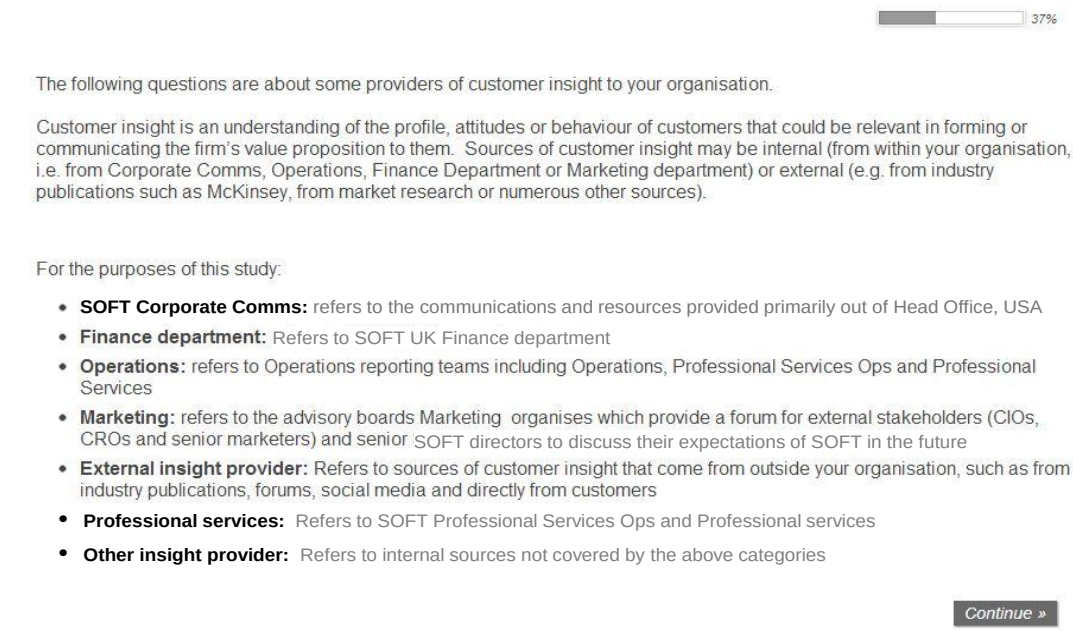


Figure E-5 Fifth screen: Pre-case participant instructions

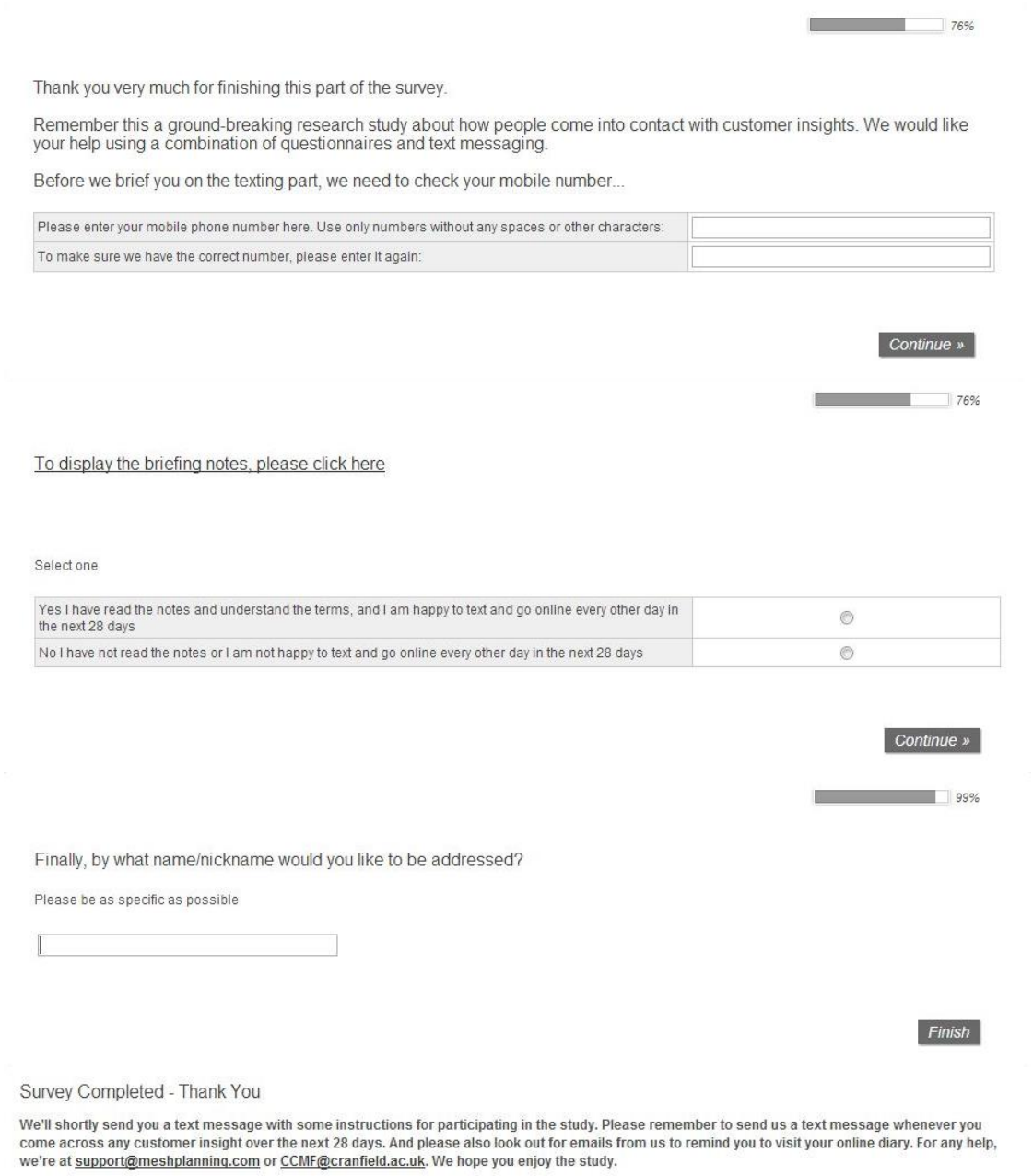


Figure E-6 Sixth screen: Pre-case instrument closing items

E.2 Participant online briefing

Your task

For the next 28 days we would like you to become a researcher, reporting on the following insight providers:

SOFT corporate communications, Operations, Finance department, Marketing, Professional Services, External insight provider, Other insight provider

Every time you see, hear or experience anything to do with any of these Insight providers we would like you to text us to **60095**, answering 3 simple questions:

1. Which Insight Provider was it?

A. SOFT CORPORATE COMMUNICATIONS

B. OPERATIONS

C. FINANCE DEPARTMENT

D. MARKETING

E. PROFESSIONAL SERVICES

F. EXTERNAL INSIGHT PROVIDER

G. OTHER INSIGHT PROVIDER

2. What did you do in this encounter?

A. REQUESTED
B. RECEIVED
C. REVIEWED
D. TRANSFORMED/CHANGED
E. SHARED
F. STORED
G. APPLIED
H. OTHER

(See below for a detailed description of these actions)

3. To what extent are you satisfied with your encounter on a scale from 1 to 7 (1 is very dissatisfied and 7 is very satisfied)?

[1 to 7 where 1 is very dissatisfied and 7 is very satisfied]

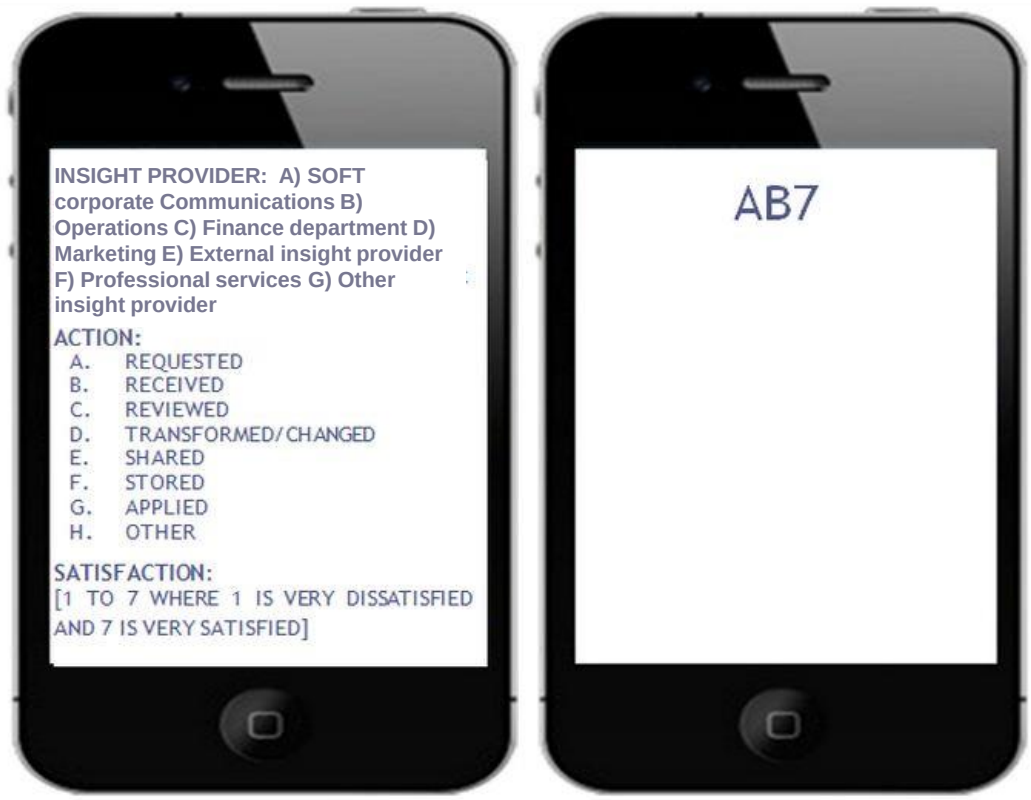
There are no charges for texts sent to the number from a UK mobile phone

Each week you will also receive reminder texts about the survey and to remind you to go online to your diary (www.mysmsdiary.com). Here you can tell us more information about your experiences.

Example 1

If you **received** a piece of insight from **SOFT Corporate Communications** and you were very satisfied with it you might text **AB7**

Figure E-7 Participant online briefing (one screen)



Example 2

You shared a piece of insight from the **Finance Department** with a colleague but were quite dissatisfied with the encounter

CE2

(C for **Finance Department**, E for shared, 2 for quite dissatisfied)

Insight provider	**Defined**
A) SOFT Corporate Comms	refers to the communication and resources provided primarily out of Head Office
B) Finance department	refers to SOFT UK Finance department
C) Operations	refers to Operations reporting teams including Sales Ops
D) Marketing	refers to the advisory boards Marketing organizes which provide a forum for external stakeholders (CIOs, CROs and senior marketers) and senior SOFT directors to discuss their expectations of SOFT in the future
E) External insight provider	refers to sources of customer insight that come from outside your organization, such as from industry publications, forums, social media and directly from customers
F) Professional Services	refers to Professional service reporting teams like Professional Services Ops and Professional Services
G) Other insight provider	refers to internal sources not covered by the above codes

Figure E-7 Participant online briefing (one screen) (continued)

Action	What it means
A) REQUESTED	Requested or specified the insight needed
B) RECEIVED	Received insight
C) REVIEWED	Analyzed or interpreted the insight
D) TRANSFORMED/CHANGED	Used insight to produce a message/data/report
E) SHARED	Shared insight with someone else
F) STORED	Put it away/stored it
G) APPLIED	Applied insight to a recommendation/decision
H) OTHER	

Every couple of days

Every couple of days while the study is on-going we would like you to go online to www.mysmsdiary.com. We will send you a reminder text and email with a link to it.

Here you will see all the texts you have sent to us. We would like you to provide a few more details, by using the drop down menus, and telling us about your experiences while they are still fresh in your mind.

Frequently Asked Questions

What happens if I don't have a mobile signal when I see, hear or experience something?

Just send us a text as soon as you are able to.

How many times can I reply to the first text message you've sent me?

Just keep the text saved and reply to it as many times as you need to.

What if I delete the text to reply to by mistake?

Just send an email with your mobile number to support@meshplanning.com asking to be resent the text

What if I want to stop doing the survey?

We hope that you will enjoy doing it but if you want to stop you can do so at any time. Just send an email with your mobile number to support@meshplanning.com asking to be removed from the study.

What happens if I need some help?

Just email support@meshplanning.com or CCMF@cranfield.ac.uk with any question you may have.

Briefing Notes

Figure E-7 Participant online briefing (one screen) (continued)

E.3 Online-diary screenshots

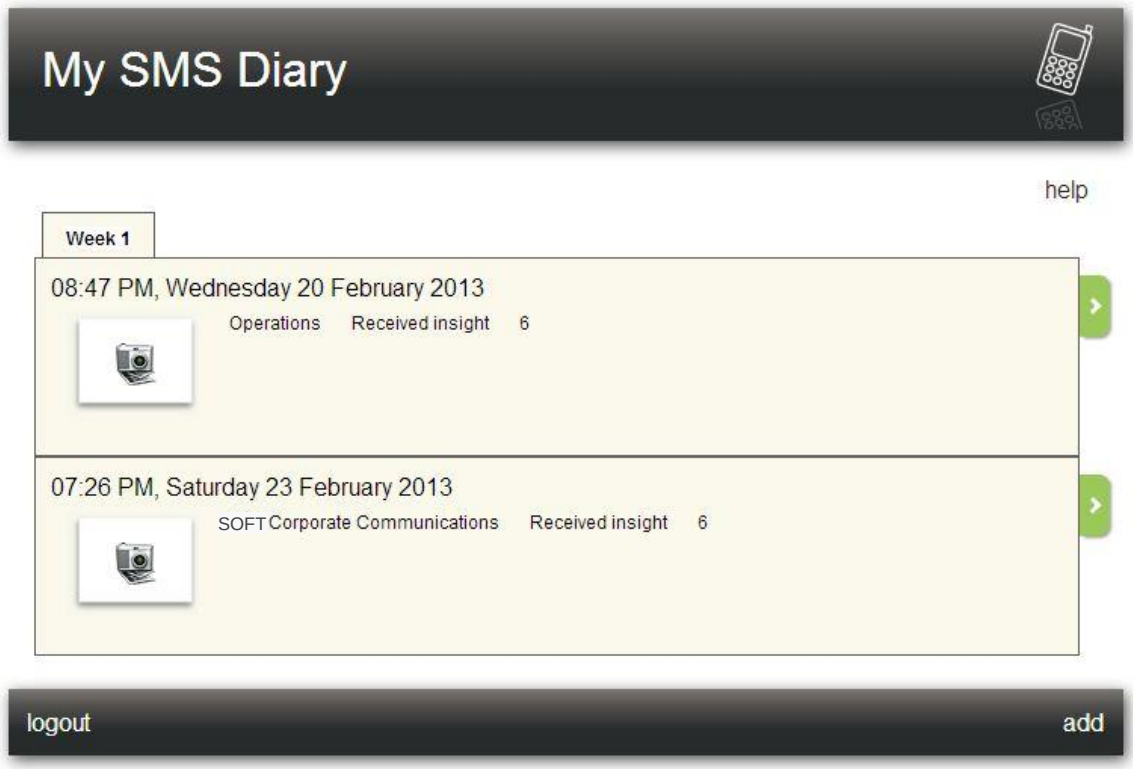


Figure E-8 Opening screen: Online diary

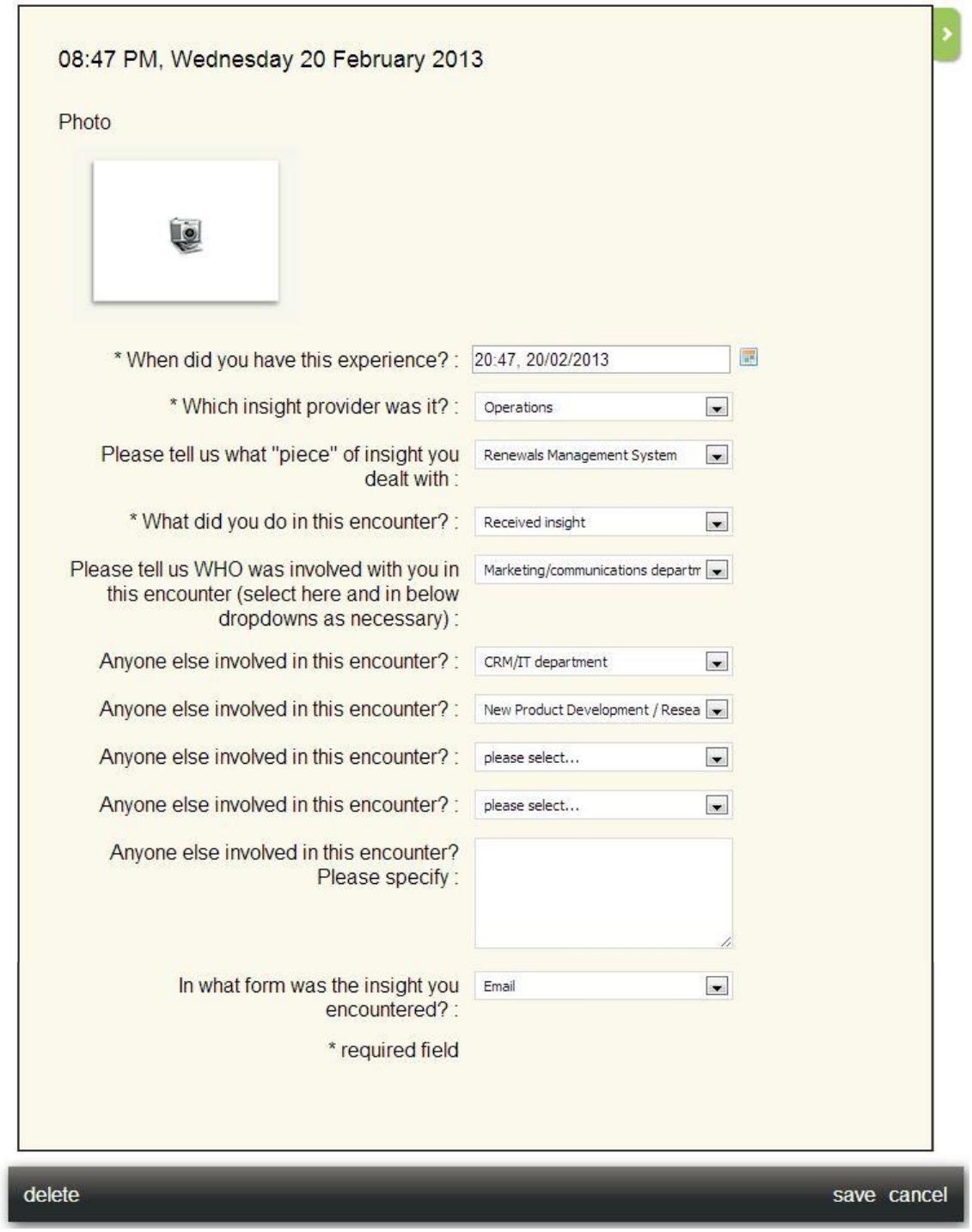


Figure E-9 Second screen: Online diary

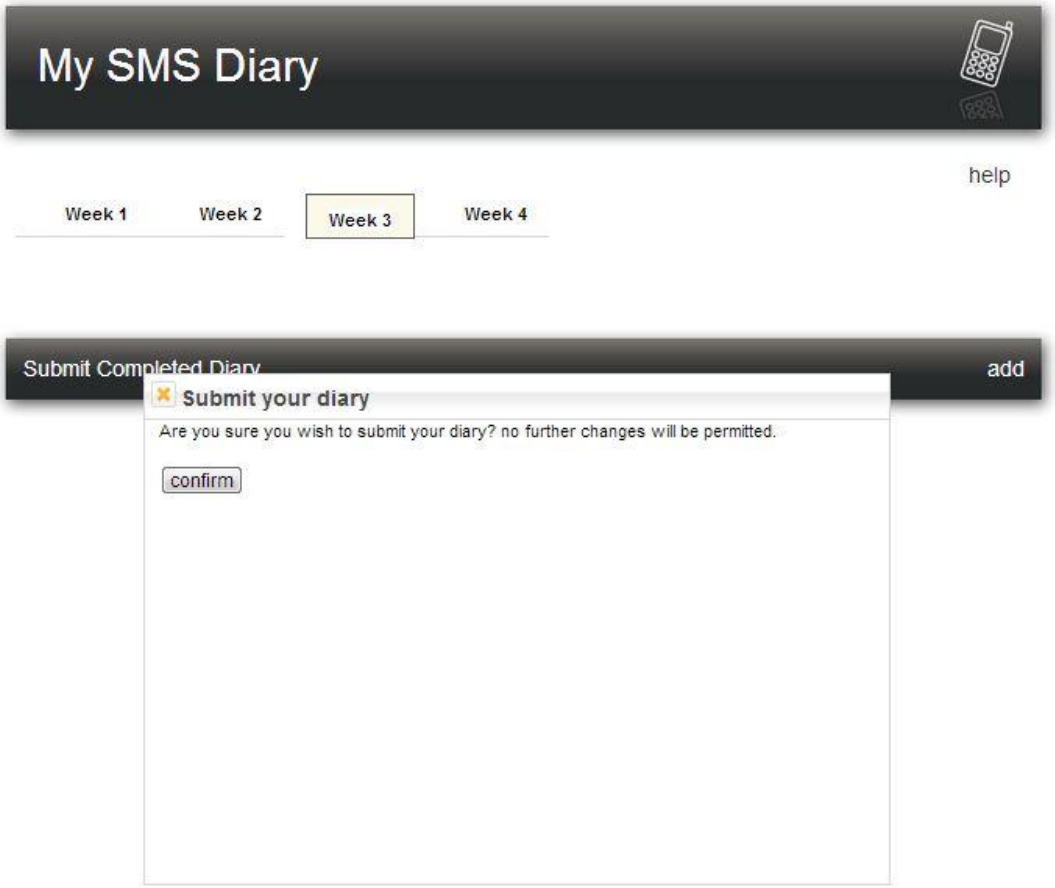


Figure E-10 Third screen: Online diary

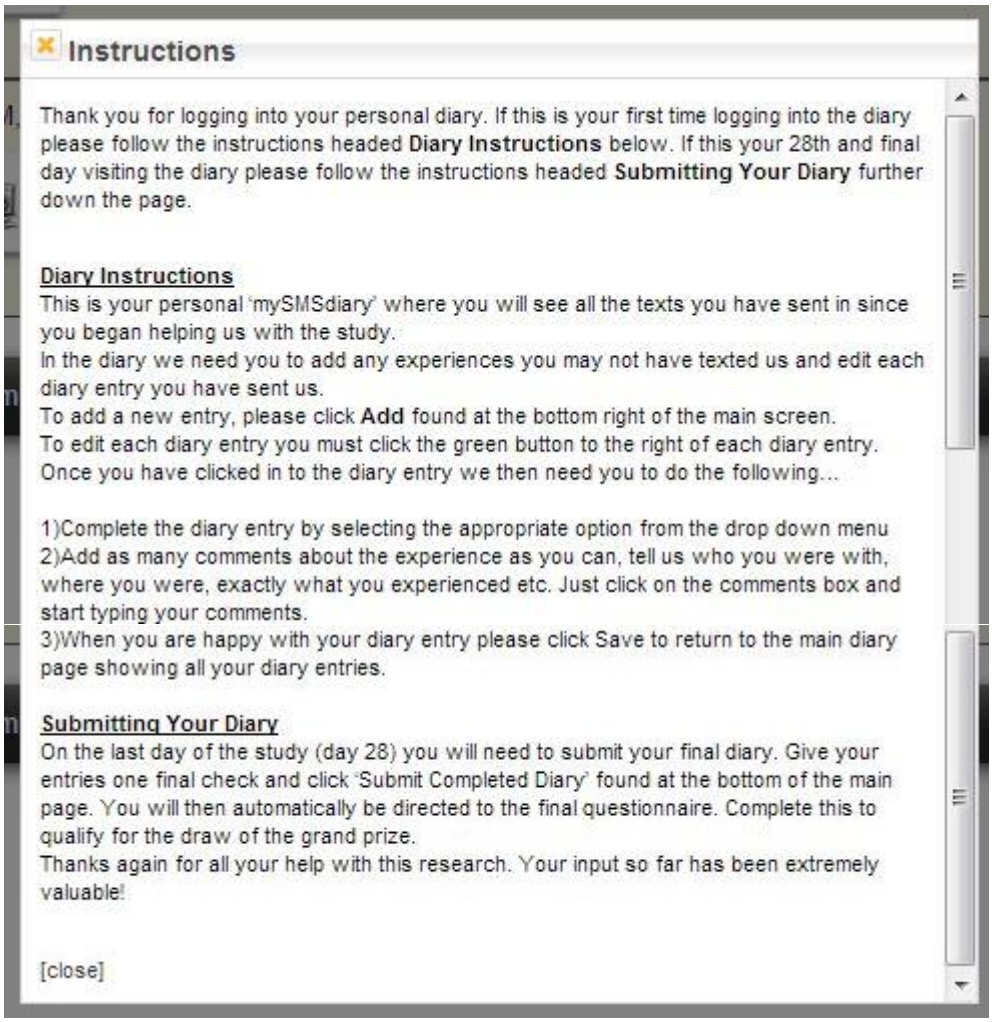


Figure E-11 Fourth screen: Online diary user instructions

Appendix F Validating Workshop Feedback Poster

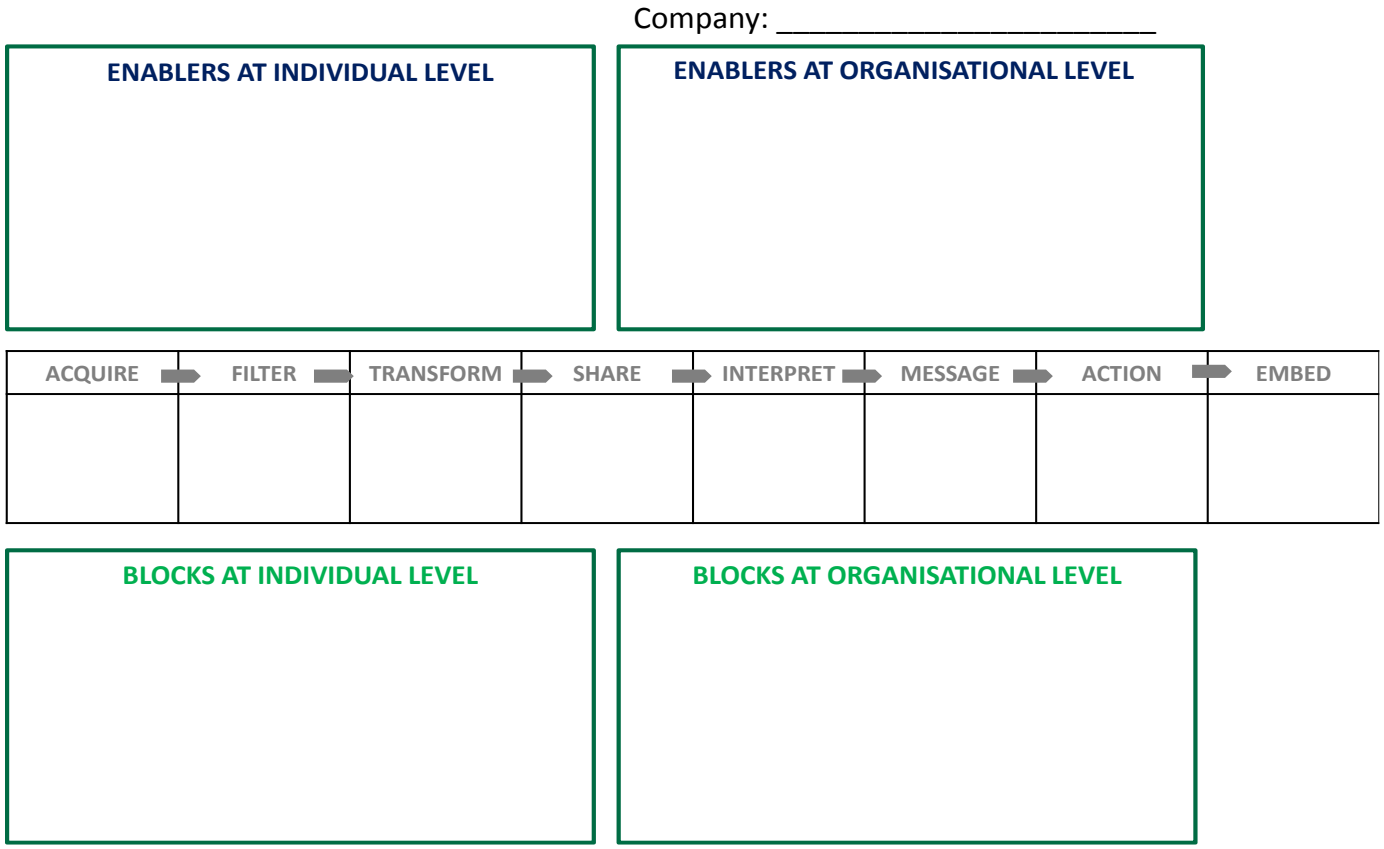


Figure F-1 Feedback poster provided to workshop participants (Source: Author)