

**Jill Avery**  
Harvard Business School  
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Boston, MA 02163  
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## EDUCATION

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<b>Harvard Business School, Harvard University</b> Doctor of Business Administration, Marketing	Boston, MA 2007
<b>The Wharton School, University of Pennsylvania</b> Master of Business Administration, Marketing and Finance	Philadelphia, PA 1993
<b>University of Pennsylvania</b> Bachelor of Arts, English and Art History	Philadelphia, PA 1988

## ACADEMIC APPOINTMENTS

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<b>Harvard University, Harvard Business School</b> Senior Lecturer, Marketing Unit	Boston, MA 2013-Present
<b>Simmons College, School of Management</b> Assistant Professor of Marketing Awarded Tenure and Promotion to Associate Professor	Boston, MA 2007-2013 Spring 2013
<b>Boston University, School of Management</b> Marketing Lecturer	Boston, MA 2000-2001
<b>Northeastern University, College of Business Administration</b> Adjunct Professor of Marketing	Boston, MA 2000-2001

## MANAGERIAL EXPERIENCE

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<b>The Gillette Company</b> Marketing Manager, Female Shaving New Products Product Manager, Male and Female Shaving Product Manager, Shaving Toiletries New Products Product Manager, Braun Personal Care Associate Product Manager, Braun Hair Care Assistant Product Manager, Braun Hair Care	1993-2000
<b>Boston Beer Company</b> Brand Development Manager, Samuel Adams	1995
<b>AT&amp;T</b> Marketing Intern, International Consumer Long Distance	1992-1993
<b>Campus Dimensions Inc.</b> Consumer Promotions Account Executive: Pepsi, General Foods, Bristol-Myers, Citibank accounts	1988-1992

## BOARD APPOINTMENTS

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<b>Amica Mutual Insurance Company</b> Corporate Director, member of Audit Committee and Investment Committee	Lincoln, RI 2015-Present
<b>Museum of Fine Arts, Boston</b> Chairman, Board of Overseers Elected Trustee, Board of Trustees, member of Budget and Finance, Nominating, Collections, Governance, and Executive Committees Chairman, Patron Program Vice Chairman, Board of Overseers Elected Overseer, Board of Overseers Chairman and Vice Chairman, Museum Council	Boston, MA 2014-Present 2013-Present 2012-2013 2010-2012 2004-2013 2000-2004
<b>St. Paul's School</b> Trustee	Concord, NH 2016-Present

## DISTINCTIONS AND AWARDS

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Private Company Board of the Year Award, *National Association of Corporate Directors, New England Chapter*, Director of the Year Awards, awarded to the independent directors of the Amica Mutual Insurance Company (2016)

Best Article Award (Honorable Mention), *Journal of Consumer Research*, for articles published in 2011 (awarded in 2014)

Marketing Award, The Case Centre Awards (2014)

Marketing Science Institute Best Paper Award, *International Journal of Research in Marketing*, Special Issue on Consumer Identities (2013)

School of Management MBA Award for Teaching Excellence, Simmons College (2011)

Best Paper Award, ACR Conference on Gender, Marketing, and Consumer Behavior (2008)

Swahnberg Novotny Research Grant, Simmons School of Management (2007, 2010, 2011)

Harvard Business School Wyss Award for Excellence in Doctoral Research (2006)

American Marketing Association Sheth Foundation Doctoral Consortium Fellow (2006)

Joseph R. Levenson Memorial Teaching Prize Nominee, Harvard University (2004)

Certificate of Distinction in Teaching, Harvard University (2003)

Bachelor of Arts *cum laude* honors, University of Pennsylvania (1988)

## RESEARCH

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### INTERESTS

Brand Management  
Brand Meaning and Consumer Identity Construction  
Consumer-Brand Relationships and CRM  
Digital Marketing and Branding in Social Media

## PUBLICATIONS

### Dissertation

Avery, Jill (2007) **"Saving Face by Making Meaning: The Negative Effects of Consumers' Self-Serving Response to Brand Extension,"** *Harvard Business School doctoral dissertation* completed under the supervision of John Deighton (chair), John Gourville, Susan Fournier, and Douglas Holt.

Dissertation awarded the Harvard Business School Wyss Award for excellence in doctoral research

### Books

Fournier, Susan, Michael Breazeale and Jill Avery (2015) ***Strong Brands, Strong Relationships***, London: Routledge.

### Academic Journal Articles

Paharia, Neeru, Jill Avery and Anat Keinan, (2014) **"Positioning Brands versus Large Competitors to Increase Sales,"** *Journal of Marketing Research*, 51(6), December 2014, pp. 647-656.

Avery, Jill (2014) **"Leveraging Crowdsourced Peer-To-Peer Assessment to Enhance the Case Method of Learning,"** *Journal for Advancement of Marketing Education*, 22(1), Spring 2014, pp. 1-15.

Avery, Jill (2012) **"Defending the Markers of Masculinity: Consumer Resistance to Brand Gender-Bending,"** *International Journal of Research in Marketing*, 29(4), December 2012, pp. 322-336.

Article awarded the Marketing Science Institute's Best Paper Award for the *International Journal of Research in Marketing*

Heckler, Susan E., Kevin Lane Keller, Michael J. Houston, and Jill Avery (2012) **"Building Brand Knowledge Structures: Elaboration and Interference Effects on the Processing of Sequentially Advertised Brand Benefit Claims,"** *Journal of Marketing Communications*, pp. 1-21.

Avery, Jill, Thomas J. Steenburgh, John Deighton, and Mary Caravella (2012) **"Adding Bricks to Clicks: Predicting the Patterns of Cross-Channel Elasticities Over Time,"** *Journal of Marketing*, 76 (3), May 2012, pp. 96-111.

Paharia, Neeru, Anat Keinan, Jill Avery, and Juliet B. Schor (2011) **"The Underdog Effect: The Marketing of Disadvantage and Determination through Brand Biography,"** *Journal of Consumer Research*, 37 (5), February 2011, pp. 775-790.

Article awarded the Best Article Award (Honorable Mention), *Journal of Consumer Research*, for articles published in 2011

Article reprinted and featured in *How to Publish High Impact Research*, edited by Paul Van Lange and Jeffrey Joireman, published by the American Psychological Association.

### Managerial Journal Articles

Ofek, Elie and Jill Avery (2014) **"Second Thoughts about a Strategy Shift,"** *Harvard Business Review*, 92 (12), December 2014, pp. 125-129.

Keinan, Anat, Neeru Paharia and Jill Avery (2014) **"The Upside to Large Competitors,"** *MIT Sloan Management Review*, 56 (1), Fall 2014, pp. 10-11.

Norton, Michael and Jill Avery (2014) **"Making Charity Pay,"** *Harvard Business Review*, 92 (10), October 2014, p. 26.

Avery, Jill, Susan Fournier, and John Wittenbraker (2014) **"Unlock the Mysteries of Your Customer Relationships,"** *Harvard Business Review*, 92 (7/8), July/August 2014, pp. 72-81.

Ofek, Elie and Jill Avery (2013) **"In Search of a Second Act: Riding the Popularity of a Great First Product is Easy; Finding the Next One is Hard,"** *Harvard Business Review*, 91(4), April 2013, pp. 133-137.

Avery, Jill and Thomas Steenburgh (2012) **"Target the Right Market,"** *Harvard Business Review*, 90(10), October 2012, pp. 119-123.

Fournier, Susan and Jill Avery (2011) **"Putting the 'Relationship' Back into CRM,"** *MIT Sloan Management Review*, 52 (3), Spring 2011, pp. 63-72.

Fournier, Susan and Jill Avery (2011) **"The Uninvited Brand,"** *Business Horizons*, 54 (3), May/June 2011, pp. 193-207.

Paharia, Neeru, Jill Avery, and Anat Keinan (2011) **"Underdog Branding: Why Underdogs Win In Recessions,"** *European Business Review*, 23 (4), May/June 2011, pp. 53-56.

Keinan, Anat, Jill Avery, and Neeru Paharia (2010) **"Capitalizing on the Underdog Effect,"** *Harvard Business Review*, 88 (11), November 2010, p. 32.

#### Under Journal Review

Avery, Jill, **"Saving Face by Making Meaning: The Negative Effects of Brand Communities' Self-serving Response to Brand Extensions,"** invited for resubmission at the *Journal of Consumer Research*.

#### Teaching Cases

**Global Brand Management at Lay's** (Forthcoming) Harvard Business School Case, with Kim Chen

**Longchamp** (2016) Harvard Business School Case No. 9-316-086, with Tonia Junker and Daniela Beyersdorfer.

**HourlyNerd** (2016) Harvard Business School Case No. 9-316-134, with Joseph Fuller and Anthony Mayo

**Paez** (2015) Harvard Business School Case No. 9-316-085, with Maria Fernanda Miguel and Laura Urdapilleta

**Accor: Strengthening the Brand with Digital Marketing** (2015) Harvard Business School Case No. 9-315-138 and Teaching Note No. 5-316-103, with Chekitan S. Dev and Peter O'Connor

**Denver Museum of Nature & Science** (2015) Harvard Business School Case No. 9-315-081, with Jim Rosenberg

**OneFineStay** (2015) Harvard Business School Case No. 9-515-072, with Anat Keinan and Liz Kind

**Doing Business in Morocco** (2014) Harvard Business School Case No. 9-315-007, with Tonia Junker and Daniela Beyersdorfer

**The Tate's Digital Transformation** (2014) Harvard Business School Case No. 9-314-122

**The Park Hotels: Revitalizing an Iconic Indian Brand** (2014) Harvard Business School Case No. 9-314-114, with Chekitan S. Dev

**Filene's Basement: Inside a Fired Customer's Relationship** (2014) Harvard Business School Case No. 9-314-076, with Susan Fournier

**Relating to Peapod** (2014) Harvard Business School Case No. 9-314-142 and Teaching Note No. 5-316-175, with Susan Fournier

**J.C. Penney's Fair and Square Strategy-Abridged (A)** (2013) Harvard Business School Case No. 9-514-063, with Elie Ofek

**J.C. Penney's Fair and Square Strategy (B): Out with the New, In with the Old** (2013) Harvard Business School Case No. 9-514-085, with Elie Ofek and Jose Alvarez

**J.C. Penney's Fair and Square Strategy (C): Back to the Future** (2013) Harvard Business School Case No. 9-514-073, with Elie Ofek and Jose Alvarez

**J.C. Penney's Fair and Square Pricing Strategy** (2012) Harvard Business School Case No. 9-513-036 and Teaching Note No. 5-513-099, with Elie Ofek

**EILEEN FISHER: Repositioning the Brand** (2012) Harvard Business School Case No. 9-512-085 and Teaching Note No. 5-513-095, with Anat Keinan, Fiona Wilson, and Michael Norton

**The Pepsi Refresh Project: A Thirst for Change** (2011) Harvard Business School Case No. 9-512-018 and Teaching Note No. 5-513-087, with Michael Norton

**Nanda Home: Preparing for Life After Clocky** (2011) Harvard Business School Case No. 9-511-134 and Teaching Note No. 5-512-098, with Elie Ofek

**EMC<sup>2</sup>: Delivering Customer Centricity** (2011) Harvard Business School Case No. 9-511-124 and Teaching Note No. 5-512-068, with Thomas Steenburgh

**Better World Books** (2010) Harvard Business School Case No. 9-511-057, Teaching Note No. 5-512-106, and Video No. 5-512-701, with Michael Norton, Fiona Wilson, and Thomas Steenburgh

**Porsche: The Cayenne Launch** (2010) Harvard Business School Case No. 9-511-068 and Teaching Note No. 5-511-069, with John Deighton and Jeffrey Fear

**HubSpot: Lower Churn through Greater CHI** (2010) Harvard Business School Case No. 9-110-052 and Teaching Note No. 5-116-051, with F. Asis Martinez-Jerez, Thomas Steenburgh, and Lisa Brem

**HubSpot: Inbound Marketing and Web 2.0** (2009) Harvard Business School Case No. 9-509-049 and Teaching Note No. 5-510-043, with Thomas Steenburgh and Naseem Dahod, awarded The Case Centre marketing award

**UnME Jeans: Branding in Web 2.0** (2008) Harvard Business School Case No. 9-509-035 and Teaching Note No. 5-509-043, with Thomas Steenburgh

**(PRODUCT) RED** (2008) Simmons School of Management Case

**Clocky: The Runaway Alarm Clock** (2007) Harvard Business School Teaching Note No. 5-508-022, with Elie Ofek

## Technical Notes

**Marketing Communications** (2016) in *Core Curriculum in Marketing*, Harvard Business School Publishing, No. 8186, with Thales Teixeira

**Teaching FIELD 3** (2016) Harvard Business School Teaching Note, with Anthony Mayo

**FIELD 3: Demonstrating Demand** (2016) Harvard Business School Note No. 9-316-147

**Competitive Strategies** (2015) in *Core Curriculum in Marketing*, Harvard Business School Publishing, No. 8158, with Sunil Gupta

**Brand Positioning** (2015) in *Core Curriculum in Marketing*, Harvard Business School Publishing, No. 8197, with Sunil Gupta

**FIELD 2: Developing Customer Empathy** (2015) Harvard Business School Note, No. 9-316-082

**FIELD 2: Situation Analysis** (2015) Harvard Business School Note No. 9-316-081

**FIELD 2: Global Immersion** (2014) Harvard Business School Teaching Note

**FIELD 2: Project Planning Exercise** (2014) Harvard Business School Note No. 9-615-029, with Willy Shih and Pian Shu

**Learning from Extreme Consumers** (2014) Harvard Business School Note No. 9-314-086, with Michael Norton

**FIELD 2: Orchestrating a Compelling Presentation** (2013) Harvard Business School Note No. 9-315-085

**FIELD 2: Brainstorming Techniques** (2013) Harvard Business School Note, with Michael Norton

**Harvard Business Review's Go to Market Tools: Customer Lifetime Value** (2013) online interactive tool, *Harvard Business Review*, available through hbr.org, October 2013, with Thomas Steenburgh

**Harvard Business Review's Go to Market Tools: Pricing for Profit** (2013) online interactive tool, *Harvard Business Review*, available through hbr.org, July 2013, with Thomas Steenburgh

**Harvard Business Review's Go to Market Tools: Market Sizing** (2013) online interactive tool, *Harvard Business Review*, available through hbr.org, May 2013, with Thomas Steenburgh

**Understanding Brands** (2008) Harvard Business School Note No. 9-509-041, with Anat Keinan

**Marketing Analysis Toolkit: Situation Analysis** (2010) Harvard Business School Note No. 9-510-079, with Thomas Steenburgh

**Marketing Analysis Toolkit: Customer Lifetime Value Analysis** (2010) Harvard Business School Note No. 9-511-029 and Quantitative Analysis Toolkit No. 9-511-702, with Thomas Steenburgh

**Marketing Analysis Toolkit: Pricing and Profitability Analysis** (2010) Harvard Business School Note No. 9-511-028 and Quantitative Analysis Toolkit No. 9-511-701, with Thomas Steenburgh

**Marketing Analysis Toolkit: Market Size and Market Share Analysis** (2010) Harvard Business School Note No. 9-510-081 and Quantitative Analysis Toolkit No. 9-510-714, with Thomas Steenburgh

**Marketing Analysis Toolkit: Breakeven Analysis** (2010) Harvard Business School Note No. 9-510-080 and Quantitative Analysis Toolkit No. 9-510-713, with Thomas Steenburgh

**Marketing Analysis Toolkit: Calculating Growth Rates** (2009) Simmons School of Management Note and Quantitative Analysis Toolkit

#### Book Chapters/Other

Avery, Jill and Anat Keinan, "**Consuming Brands**," (2015) *Cambridge Handbook of Consumer Psychology*, eds. Michael I. Norton, Derek D. Rucker, and Cait Lambertson, Cambridge University Press, pp. 209-232.

Paharia, Neeru, Jill Avery and Anat Keinan, "**Framing the Game: How Brands' Relationships with their Competitors Affect Consumer Preference**," (2015) *Strong Brands, Strong Relationships*, eds. Susan Fournier, Michael Breazeale, and Jill Avery, Routledge, pp. 28-47.

Avery, Jill, Thomas Steenburgh, John Deighton and Mary Caravella (2013) "**Adding Bricks to Clicks: On the Role of Physical Stores in a World of Online Shopping**," *GfK Marketing Intelligence Review*, Vol. 5, No. 2, November 2013, pp. 29-33.

Avery, Jill, Neeru Paharia and Anat Keinan (2013) "**They Try Harder: Why Underdog Brands Win in Recessions**," *Management Magazine*, Simmons School of Management, 2 (1), Spring 2013, pp. 10-13.

Avery, Jill and Susan Fournier (2013) "**It's Not You, It's Me: Are CRM Programs Transforming Best Customers into Customers You Want to Fire?**" *Management Magazine*, Simmons School of Management, 1 (2), Winter 2013, pp. 23-25.

Avery, Jill and Susan Fournier (2012) "**Firing Your Best Customers: How Smart Firms Destroy Relationships Using CRM**," *Consumer-Brand Relationships: Theory and Practice*, eds. Susan Fournier, Michael Breazeale and Marc Fetscherin, Routledge, pp. 301-316.

Avery, Jill (2012) "**The Relational Roles of Brands**," *Marketing Management: A Cultural Perspective*, eds. Lisa Penaloza, Nil Toulouse, and Luca M. Visconti, Routledge, pp.147-163.

Malone, Chris, Jill Avery and Susan Fiske (2011) "**Brands Are People Too! Harnessing the Power of Brand Warmth and Competence**," *white paper* published by The Relational Capital Group, Newtowne Square, Pennsylvania.

Fournier, Susan and Jill Avery (2011) "**Consumers' Relationships with Brands**," *Perspectives on Brand Management*, ed. Mark D. Uncles, Tilde University Press, pp. 225-248.

Avery, Jill, Neeru Paharia, Anat Keinan, and Juliet B. Schor (2010) "**The Strategic Use of Brand Biographies**," *Research in Consumer Behavior*, Volume 10, ed. Russell W. Belk, Emerald Group Publishing Limited, pp. 213-229.

Avery, Jill (2010) "**Gender Bender Brand Hijacks and Consumer Revolt: The Porsche Cayenne Story**," *Consumer Behavior: Human Pursuit of Happiness in the World of Goods*, ed. Banwari Mittal, Open Mentis, pp. 645-649.

Avery, Jill (2008) "**Marketing in the Age of Web 2.0**," (2008) *Simmons Magazine*, 90 (3), Fall 2008, p. 21.

Avery, Jill (2006) "**Business Insights from Consumer Culture**," Marketing Science Institute, Working Paper Series, No. 06-303.

Avery, Jill and Mark DeFanti (2004) "**Brand Orchestration**," Marketing Science Institute, Working Paper Series, Issue One, No. 04-001.

## Research in Progress

Fournier, Susan, Jill Avery, and Claudio Alvarez Martinez, "**Toward a Dynamic Theory of Consumer-Brand Relationships: Content and Process from a Relationship Contracting Perspective**"

Avery, Jill, "**Kempner: Turning a Cultural Icon into a Luxury Brand**," Harvard Business School case and teaching note.

Avery, Jill "**Art Lifting**," Harvard Business School case and teaching note.

Avery, Jill and Gamze Yücaoglu "**Mavi Jeans**," Harvard Business School case and teaching note.

## TEACHING

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### UNDERGRADUATE

**Creating Brand Value**, Simmons School of Management (2011-2013)

**Consumer Behavior**, Simmons School of Management (2008-2012)

**Integrated Marketing Communications and Brand Strategy**, Simmons School of Management (2008, 2010)

**Integrated Marketing Communications**, Boston University School of Management (2001)

**Marketing Research**, Boston University School of Management (2002)

**Managing a Global Business** (honors seminar), Northeastern University College of Business Administration (2000)

**Introduction to Marketing** (undergraduate core), Northeastern University College of Business Administration (2000-2001)

**Social Psychology of Organizations**, Harvard University Psychology Department, Teaching Fellow for J. Richard Hackman (2003), awarded Harvard University Certificate of Distinction in Teaching



## **MBA**

**Marketing** (MBA core), Harvard Business School (2014, 2015, 2016)

**Branding + Different**, Harvard Business School (2014)

**Field Immersion Experiences for Leadership Development (FIELD)**,  
Harvard Business School

FIELD 1: FIELD Foundations (2013)

FIELD 2: Global Intelligence (2013-2017), Module Head (2014-2015)  
2014: Malaysia, 2015: Morocco, 2016: Turkey

FIELD 3: Integrative Intelligence (2014-2016), Module Head (2016)

**MBA START Program**, Harvard Business School (2013)

**Marketing Management** (MBA core), Simmons School of Management  
(2007-2013)

**Marketing Management** (MBA core), Northeastern University College of  
Business Administration (2001)

**Brand Management and Integrated Marketing Communications**, Simmons  
School of Management (2008)

**Brand Management**, Northeastern University College of Business  
Administration (2001)

**Consumer Behavior**, Simmons School of Management (2009), online course

**Strategic Thinking and Analytical Decision Making**, Simmons School of  
Management (2012)

## **EXECUTIVE EDUCATION**

**Strategic Marketing Management**, Harvard Business School (2014-2016)

**Entrepreneurs-in-Training**, Defy Ventures (2014)

**Digital Strategies**, National Arts Strategies, faculty lead and course  
developer, two day program for arts and cultural organizations (2013, 2014)

**Strategic Marketing**, National Arts Strategies, two day program for arts and  
cultural organizations (2012)

**Taking Marketing Digital**, Harvard Business School (Spring 2011, Fall  
2011)

**Swarovski Guest Professor, Brand Research Laboratory**, University of  
Innsbruck, one week in residence sessions (Summer 2011)

**Strategic Leadership Institute for Experienced Women Educators**,  
Simmons School of Management (2008)

**Senior Executive Seminar for Retailers and Suppliers**, Harvard Business  
School (2007)

**The Women's Leadership Forum**, Harvard Business School, "Personal  
Action Plan" facilitator (2007)

## ACADEMIC COMMUNITY CONTRIBUTIONS

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<b>Research Center Director</b>	<b>Institute for Brands and Brand Relationships</b> , Director and Treasurer, 2013-Present
<b>Ad Hoc Journal Reviewer</b>	<b>Journal of Consumer Research</b> , 2006-2015 <b>Journal of Marketing</b> , 2008-2015 <b>Marketing Science</b> , 2008-2009 <b>Journal of the Academy of Marketing Science</b> , 2008-2013 <b>International Journal of Research in Marketing</b> , 2011-2016 <b>Journal of Retailing</b> , 2014 <b>MIT Sloan Management Review</b> , 2012-2013 <b>Consumption, Markets, and Culture</b> , 2009-2016 <b>European Journal of Marketing</b> , 2013 <b>Journal of Brand Management</b> , 2012 <b>Journal of Marketing Management</b> , 2011-2012 <b>Marketing Theory</b> , 2009 <b>Marketing Education Review</b> , 2014 <b>Journal of the Association for Consumer Research</b> , 2015 <b>Journal of Business Research</b> , 2012-2015 <b>Family Business Review</b> , 2010 <b>Routledge Publishing</b> , 2010
<b>Conference Leadership</b>	<b>Brands and Brand Relationships Conference</b> (2012-2016), Conference Co-Chair <b>American Marketing Association Summer Educators Conference</b> (2010), Branding Track Chair <b>Consumer Culture Theory Conference</b> (2008), Session Chair, "Consumer Identity Projects"
<b>Conference Reviewer</b>	<b>Association for Consumer Research Annual Conference</b> (2009) <b>Consumer Culture Theory Conference</b> (2008, 2009) <b>International Colloquium on Consumer-Brand Relationships</b> (2011) <b>ACR Conference on Gender, Marketing, and Consumer Behavior</b> (2008, 2010) <b>Marketing Science Institute Doctoral Dissertation Competition</b> (2007)

## UNIVERSITY SERVICE CONTRIBUTIONS

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<b>Faculty Advisor</b>	<b>Fulbright Student Advisor</b> , Harvard Business School, 2013-2014
<b>Speaking Engagements</b>	<b>HBS Rock 100 Entrepreneurs' Summit</b> , Small Group Discussion Moderator, 2016 <b>HBS Dynamic Women in Business Conference</b> , Women on Boards Panel, Harvard Business School, 2016 <b>HBS Women's Student Association Speaker Series</b> , Moderated discussions with Abigail Johnson, President and CEO of Fidelity Investments, and Sandra Moose, Senior Advisor at Boston Consulting Group, 2015-2016 <b>HBS Executive Education and Harvard Business Review Case Study Session</b> , Istanbul, Harvard Business School, 2016

**HBS General Management via Marketing/CPG Panel**, Harvard Business School 2015  
**Harvard University Women in Business Career Panel**, Harvard College, 2015  
**HBS Alumni Reunion**, Harvard Business School, Fall 2015, Spring 2016, Fall 2016  
**HBS Manbassador Program Living + Working Event**, Harvard Business School, 2015  
**HBS Hospitality & Travel Conference**, Harvard Business School, 2015  
**HBS Marketing Innovation Conference**, Harvard Business School, 2014  
**HBS Club of Connecticut**, Harvard Business School, 2014  
**Harvard Arab Weekend**, Harvard University, 2013  
**Women's Student Association Brown Bag Lunch Series**, Harvard Business School, 2013  
**Harvard University Women in Business Speaker Series**, Harvard College, 2013

## **MEDIA PRESENCE**

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<b>Magazines</b>	Advertising Age, The Economist, Bloomberg/Businessweek, The Atlantic, Entrepreneur, Forbes, Inc., Slate, Business at Oxford, Simple Living
<b>Newspapers</b>	The Financial Times, The New York Times, The Boston Globe, The San Francisco Chronicle, The Globe and Mail, The Washington Post, The Washington Examiner, The San Diego Union-Tribune, The Pittsburgh Post-Gazette, The Kansas City Star, The Vancouver Sun, The Montreal Gazette, The Edmonton Journal, The Times of India
<b>Trade Journals</b>	Strategy and Business, Drug Store News, Direct Marketing News
<b>Digital Media</b>	BBC, CNBC, CBS News, Huffington Post, Business News Daily, Science Blog, eScience News, MoneyWeb.com, National Affairs, Financial Express, Demo Dirt, Entertainment Daily, Indian Express, Miller-McCune, Small Biz Daily

# RESEARCH SUMMARY

## 1: Brand Meaning and Consumer Identity Construction

Summary: This vibrant stream explores how managers build meaning into their brands through narrative stories, and nurture, leverage, and maintain meaning over time. It also explores how consumers use this meaning embedded in brands to construct their identities and live their social lives. In several papers, I explore how consumers collectively make meaning for brands in online brand communities. In others, I explore how men construct their masculinity through the use of brands and show how gender-bending brands, taking a brand that has historically been targeted to one gender and targeting it to the other, harms men's identity work, prompting a defensive response. In other work, I explore how consumers use underdog brands to help them negotiate their own lives.

JOURNAL ARTICLES		
The Underdog Effect: The Marketing of Disadvantage and Determination through Brand Biography	2011, <i>Journal of Consumer Research</i>	We introduce the concept of an underdog brand biography to describe an emerging trend in branding in which firms author a historical account of their humble origins, lack of resources, and immense struggle against the odds. We identify two essential components of an underdog biography: external disadvantage, and passion and determination. We demonstrate that an underdog brand biography can increase purchase intentions, real choice, and brand loyalty. Five studies show that the underdog effect is mediated by identification with the brand, and is stronger for consumers who self-identify as underdogs. We demonstrate that the underdog effect is heightened when consumers are purchasing for the self (rather than others) and are primed with underdog movie plots. We further show that cultural context can reverse the underdog effect; while American consumers prefer underdog brands, Asian consumers prefer top dog brands.
Capitalizing on the Underdog Effect	2010, <i>Harvard Business Review</i>	Underdogs have been winning at the polls, at the Oscars, and on grocery shelves across America. Firms can capitalize on this through the use of underdog brand biographies. Today's store shelves are filled with stories of humble beginnings and noble struggles against overpowering adversaries, seeding underdog stories for consumers to use. In this article, we identify a significant "underdog effect" which can drive incremental sales for branded products. Our research shows that building an underdog brand biography for a brand increases purchase interest and actual choice. We advise managers how to build a compelling underdog story for their brands, outlining the two underlying dimensions that drive consumer identification: external disadvantage and passion and determination.
Underdog Branding: Why Underdogs Win In Recessions	2011, <i>European Business Review</i>	Underdog stories about overcoming great odds through passion and determination are particularly resonant during difficult times as they inspire us and give us hope when the outlook we face is bleak. They promise that success is still possible, a much needed message in challenging social, political, and economic times. In the midst of the worst recession since the Great Depression, the economic challenges facing people have intensified due to the financial

		crisis of 2008, the collapse of the housing market, widespread job losses, rising health care costs, and crushing amounts of consumer debt. During recessionary time periods such as this, people feel increasingly disadvantaged, making them even more likely to identify with the struggles of underdogs. Firms can capitalize on this through the use of underdog brand biographies. Through the stories of brands ranging from Virgin, Lindt, and Adidas, we illustrate how effective underdog stories can catapult brands into the spotlight and sustain them as they grow.
Defending the Markers of Masculinity: Consumer Resistance to Gender-Bending Brand Extensions	2012, <i>International Journal of Research in Marketing</i>	I study the Porsche Cayenne SUV launch to ethnographically analyze how men consuming a gendered brand respond to perceived brand gender contamination. Consumers' communal gender work in a Porsche brand community is analyzed to uncover brand gender contamination's effects on the identity projects of consumers, the brand as an identity marker, and the prevailing gender order in the group. Through the promulgation of gender stereotypes, Porsche owners stratify themselves along gender lines and create an ingroup sharply defined by masculinity and an outgroup defined by femininity. The construction of social barriers limits access to Porsche's meanings to those who achieve masculine ideals and causes SUV owners to resort to hyper-masculine behaviors to combat exclusion. Consumers' gender work reverses the firm's efforts to gender-bend the brand, reinstates Porsche as a masculine marker, and reifies particular definitions of masculinity in the community.
Saving Face by Making Meaning: The Negative Effects of Brand Communities' Self-serving Response to Brand Extensions	invited resubmission, <i>Journal of Consumer Research</i>	An ethnographic study of a brand community following the launch of the Porsche Cayenne SUV finds that brand extensions can negatively affect the value of their parent brands. By studying the collective response to brand extensions of existing consumers and by substituting a culturally situated and socialized view of consumers, I expose negative feedback effects which have been previously undervalued in existing branding theories. By tracing the processes by which brand extensions are dialectically negotiated in a brand community, I show that negative brand effects stem from consumers' self-serving meaning-making activities. The research highlights three discourses in which consumers debate the legitimacy of users of the brand extension, the brand extension itself, and the post-extension parent brand. These discourses shift the locus of the brand's identity meanings within the brand hierarchy rendering the brand extension and the parent brand less attractive as identity markers and reducing brand equity.
<b>PEDAGOGICAL MATERIALS</b>		
Porsche: The Cayenne Launch	2010, HBS case	Can an online discussion forum supply insight into the evolution of brand meaning? In 2003 Porsche launched a sport utility vehicle, dividing Porsche purists from newcomers to the brand. Vocal members of online and offline Porsche communities ridiculed the Cayenne SUV and disapproved of the new breed of driver. Some opposed offering Porsche club membership to them, and some even refused to extend the fraternal Porsche 'wave' or headlight flicking to them on the road. Porsche's values of speed, luxury, and a certain masculine zeal resonated strongly with its devotees, while drivers of the Cayenne (which came to be known as 'the SUV for soccer moms') tended to be safety-conscious, family-oriented, and conservative. Evolving debates on the forum allow a class to debate whether the brand had strayed too far from its core

		values and was at risk.
EILEEN FISHER: Repositioning the Brand	2012, HBS Case	Well-established fashion brand Eileen Fisher has traditionally appealed to older women. However, to drive growth, Eileen Fisher's management team wants to target a younger demographic and has revamped its Fall product line to offer more fashionable styles to appeal to younger women. But, repositioning the brand has proven to be harder than expected. This case explores the challenges of appealing to new target markets, without alienating existing consumers. The case follows Eileen Fisher's initial forays into social media as they chase a younger demographic and demonstrates the opportunities and pitfalls that await big brands when they enter the world of Web 2.0.
Paez	(2015), HBS Case	Paez, an Argentine start-up fashion brand, sold traditional alpargatas, a sleepy category that suddenly woke up when U.S. company TOMS borrowed the traditional alpargata design, covered it with fashionable colors and prints, and tied it to a social cause. Paez's founders were keenly aware of the present and future challenges they faced due to the resources and capabilities of their well-capitalized and marketing-savvy competitor. How could a small brand compete against a company that had captured the hearts and minds of consumers? Which brand positioning concept should Paez choose to best to capture consumers' attention and interest and compete against TOMS? How would the choice of positioning affect the rollout of Paez' distribution strategy and its product line strategy?
<b>BOOK CHAPTERS AND OTHER</b>		
Gender Bender Brand Hijacks and Consumer Revolt: The Porsche Cayenne Story	2010, book chapter in <i>Consumer Behavior: Human Pursuit of Happiness in a World of Goods</i> , Ed. Banwari Mittal, Open Mentis.	Throughout history, marketers have created gendered brands, creating their brands and the stories they crafted about them in their advertising to appeal either to men or to women. Gendered brands deliver value to consumers, and therefore, deliver value to marketers. "Gender-bending," taking a brand that has historically been targeted to one gender and targeting it to the other gender, is becoming a more common occurrence. This can be a risky strategy. Consumers who rely on the brand's gender meanings feel threatened when the brand becomes associated with the opposite gender. This chapter traces what happens when brands traditionally used by one gender are targeted toward the other and shows the detrimental long term branding effects of gender-bending.
The Strategic Use of Brand Biographies	2010, book chapter in <i>Research in Consumer Behavior</i> , Volume 12, Ed. Russell Belk, Emerald.	We introduce the concept of a brand biography to describe an emerging trend in branding in which firms author a dynamic, historical account of the events that have shaped the brand over time. Using a particular type of brand biography, "the underdog", we empirically show how managers can strategically use brand biographies in brand positioning, in this case to mitigate the curse of success. As brands grow and become successful, they are often marked by the negative stigma associated with size and power, which elicits anti-corporate sentiment from consumers. An underdog brand biography can be strategically wielded to prevent or offset anti-corporate backlash stemming from consumers' negative perceptions of firms' size and/or market power.

## 2: Building and Managing Brand Meaning

Summary: I love brands and have been managing them and studying them for 25 years, as a brand manager and as an academic researcher and teacher. This stream of research captures my thoughts about brand management and provides guidance to students and managers about how best to manage brands over time.

JOURNAL ARTICLES		
Positioning Brands versus Large Competitors to Increase Sales	2014, <i>Journal of Marketing Research</i>	We explore the effects of having a large dominant competitor and show conditions under which focusing on a competitive threat, rather than hiding it, can actually help a brand. We demonstrate through lab and field studies that highlighting a large competitor's size and close proximity can help smaller brands instead of harming them. We find that support for small brands goes up when faced with a competitive threat from large brands, versus when they are in competition with brands that are similar to them, or when consumers view them outside of a competitive context. This support translates into purchase intention, real purchase, and more favorable online reviews in a study of over 10,000 Yelp posts. We argue that this "framing the game effect" is mediated by consumers' motivation to express their views and have an impact in the marketplace through their purchasing.
Building Brand Knowledge Structures: Elaboration and Interference Effects on the Processing of Sequentially Advertised Brand Benefit Claims	2012, <i>Journal of Marketing Communications</i>	Two experiments are reported that examine the effects of an ad campaign designed to link two different benefit claims to a brand. The findings indicated that recall for a subsequently advertised claim depended on the strength of existing brand-benefit links in memory. If prior advertising strongly established a benefit claim in memory, then proactive interference effects inhibited recall of subsequently advertised benefit claims unrelated in meaning. Additional analyses suggested that these interference effects appeared to be a result of difficulties with encoding the newly advertised claims. If the original benefit claim was <i>not</i> as strongly established in memory, however, unaided recall of the subsequently advertised benefit claims was actually <i>higher</i> than if there had been no prior advertising at all. In fact, less accessible and memorable claims, whether they preceded or followed more accessible and memorable claims, enhanced recall of the stronger claims. Additional analyses suggest that these elaboration effects occurred because prior or subsequent advertising improved brand awareness and thus later brand claim recall as a result.
Second Thoughts about a Strategy Shift	2014, <i>Harvard Business Review</i>	A new retail strategy that moves from high/low pricing to everyday low pricing is dragging down sales of a century-old Spanish retailer. Can management wait long enough for existing consumers to learn how to shop in this new environment? Is new fashion-forward merchandise attracting new customers fast enough to compensate for older customers who are leaving?
The Upside to Large Competitors	2014, <i>MIT Sloan Management Review</i>	Large competitors are often viewed as a major threat for start-ups and small companies; big companies have more financial resources, greater scale, market power, and brand awareness than smaller ones. However, our research finds that a smaller brand can actually benefit if consumers can see the competitive threat it faces from a larger organization.

In Search of a Second Act: Riding the Popularity of a Great First Product is Easy; Finding the Next One is Hard	2013, <i>Harvard Business Review</i>	Capitalizing on the wild popularity of a great first product is easy; finding the next one is hard. A young entrepreneur struggles with how to expand the product portfolio of her fledgling company. Her initial smash hit product brought fun to a boring task – learning a foreign language – with the creative use of artificial intelligence. Should she continue to plumb the depths of her existing product category or should she innovate into new categories? Did her brand capital derive from “fun” or from language expertise? Would relying on “fun” as a brand positioning relegate her products to fad status rather than allowing them to develop into mature product lines? Would pursuing more serious innovations in the language learning space relegate her to a less fulfilling new product development career?
<b>PEDAGOGICAL MATERIALS</b>		
Understanding Brands	2008, HBS Module Note	For many firms, the brands associated with their products and/or services are their most valuable assets, and, hence, much management attention is given to designing, communicating, nurturing, and protecting them. This note is designed to provide an understanding of brand management strategies firms use to build, sustain, and leverage their brands.
Longchamp	2015, HBS case	Longchamp’s Le Pliage is one of the fashion world’s most successful products, a cultural icon across the globe. But managing the low priced, nylon handbag is challenging as Longchamp tries to move its brand upmarket into higher priced, luxury leather goods. How much should Longchamp focus on Le Pliage versus its leather handbags? How should the subbrand be distributed, merchandised, priced, and promoted? How does Le Pliage both contribute to and detract from Longchamp’s brand equity?
Kempner: Turning a Cultural Icon into a Luxury Brand	In Progress, HBS case	
Global Brand Management at Lay’s	2016, HBS case	In late 2012, the Global Snacks Group was feeling the pressure. They had just spent the last few weeks speaking with regional and local brand managers for Lay’s from across the globe. As each brand manager relayed their unique business challenges, they also expressed their desire for customized branding strategies specific to their market. As the global guardian of the Lay’s brand, it was clear that the Global Snacks Group had their work cut out for them. As the “keeper” of PepsiCo’s largest global snacks brands, they had to define and enforce the guardrails for the Lay’s brand, the centralized rules governing its visual identity, brand positioning, product forms, and brand personality. With over sixty countries carrying the Lay’s brand, this was no easy feat as each market often had its own brand team, business considerations, and local consumer preferences. Two challenges exemplified the complexity of defining guardrails for a brand that spanned such different markets. Could the Lay’s product guardrails extend beyond the signature potato chip? Could the Lay’s brand stretch to play effectively in the premium snack space? What type of guardrails would best enable Lay’s to build strong global brand equity while providing enough wiggle room for markets to stay locally relevant and competitive? Setting too narrow of product and brand guardrails would



		limit growth potential, but going too broad would dilute the brand messaging and confuse consumers in an increasingly global economy.
Mavi Jeans	In Progress, HBS case	Mavi, a Turkish apparel retailer which began as a family business, was the market leader in denim with an 18% market share, and the strongest top-of-mind retail brand among Turkish consumers. The company had sold more than seven million pairs of jeans in 2015, achieving sales of \$440 million with a growth rate of 30%. Mavi had been a high growth company since its inception in 1991, but 2008 marked a turning point for the company as Turkven, one of the largest private equity companies in Turkey, became an investor, transforming Mavi from a family-owned business to one in which Turkven and family members shared ownership and responsibility. Senior managers were contemplating how they could continue to build Mavi's business upon this successful foundation. Kartus, Mavi's loyalty card program, provided the management team with valuable customer behavior information that could inform their formulation of a growth plan. As they perused the data, the managers recognized that there were several avenues to growth that they could pursue, but recognized that choosing the right one was becoming increasingly difficult in the rapidly changing Turkish fashion market. Fast-fashion brands, such as Zara and H&M, were pressuring Mavi's market share, and a number of local brands were introducing inexpensive denim lines. Turkven, after seven years with Mavi, was ready to make some significant bets as it planned its exit options. As they debated their options, they realized that the choices in front of them would determine the company's growth trajectory in the short term, but more importantly, shape the value of the Mavi brand asset for the longer term.
The Park Hotels: Revitalizing an Iconic Indian Brand	2014, HBS case	Priya Paul, chairwoman of The Park Hotels, an award-winning portfolio of thirteen boutique hotels scattered across India, was in the midst of a brand revitalization program. Landor Associates, a leading brand consultancy had identified three areas of concern: the shrinking differentiation opportunity provided by the boutique hotel positioning, consumers' negative perceptions of The Park's properties, and a lack of consistency across the hotel properties in the brand portfolio. Competition was heating up and Paul had a goal to expand her hotel portfolio to twenty properties in the next ten years. Paul knew that she had to make some major changes to her brand, including changing her positioning, choosing a new logo, and selecting the right products and services that enhanced her revitalized brand. And, she had to decide where to site the new hotel properties to best compete against global behemoths, Starwood, Marriott, Hyatt and Intercontinental. How could she best revitalize her brand to stand out in a crowded marketplace, while preserving its rich heritage? Which changes would best propel The Park Hotels into the future?
Nanda Home: Preparing for Life After Clocky	2011, HBS case	Entrepreneur Gauri Nanda is looking to capitalize on the success of her quirky alarm clock, Clocky, to build a diversified product line and a brand devoted to adding humor and fun to everyday objects for the home. Hoping to avoid becoming a "one-hit-wonder," Nanda has developed several new product concepts and is analyzing consumer research to assess which

		ones have the most potential for the marketplace. Along the way, she is trying to decipher Clocky's formula for success so that she can try to replicate its meteoric rise to fame as she builds her company's brand. At the same time, she is trying to extend Clocky's life cycle, combating flattening sales, retail distribution losses, and counterfeit knock-offs, to avoid having the product become just a fad.
J.C. Penney's Fair and Square Pricing Strategy	2012, HBS case	It was August 2012 and the release of second quarter earnings was looming for CEO Ron Johnson. Johnson had intimated to Wall Street that the retailer's second quarter results were likely to miss expectations again, following dismal first quarter results. These results were particularly disheartening given the company's radical repositioning of its business model and its brand in February 2012. The heart of the repositioning strategy was a switch from J.C. Penney's traditional high-low pricing strategy, in which the retailer ran frequent sales to offer customers discounted pricing off of its higher day-to-day list prices, to a new pricing strategy the company dubbed "Fair and Square" pricing. "Fair and Square" pricing attempted to simplify J.C. Penney's pricing structure and make it more straightforward for customers, offering them great prices every day, with less frequent price promotions. But by mid-summer 2012, customers and shareholders appeared to be voting with their feet, leaving the retailer in droves as it struggled to implement its innovative redesign. Was his new pricing strategy misguided or was it just a matter of time before customers fully embraced it? Johnson was under enormous pressure to turn things around quickly as the all-important back-to-school and holiday shopping seasons were imminent.
J.C. Penney's Fair and Square Strategy (B): Out with the New, In with the Old	2014, HBS case	Ron Johnson swiftly felt the blowback from his Q2 2012 earnings release, as J.C. Penney's stock price dropped an additional 8%, compounding its freefall that had started six months earlier. This (B) case follows Johnson through the critically important back-to-school and holiday selling seasons as he struggles to implement his "Fair and Square" strategy, with little success. When the board's patience runs out, Johnson is fired and replaced by his predecessor, Mike Ullman, who returns to J.C. Penney to right the sinking ship. But, what should Ullman do? Push forward with the "Fair and Square" plan? Return J.C. Penney to its former strategy? Or would he define a new path for the retailer to follow?
J.C. Penney's Fair and Square Strategy (C): Back to the Future	2014, HBS case	As he looked forward to the challenges he faced in bringing J.C. Penney back from the brink of bankruptcy, Mike Ullman knew that he would have to look forward, not back, to heal the J.C. Penney brand. Reversing the damage that Ron Johnson had inflicted on the venerable retailer would involve refinancing the ailing company, offering customers a mea culpa, abandoning the "Fair and Square" pricing strategy, remerchandising stores, and surviving a proposed coup by rogue board member, William Ackman. But, would his actions be enough to resuscitate the ailing retailer? Or was the end of J.C. Penney near?
Core Curriculum in Marketing: Brand Positioning	2014, HBS Marketing Core Curriculum Book Chapter	Consumers in most product categories today are bombarded with too many choices. Even worse, the multitude of products that face them on the shelf often seem undifferentiated from one another, making choice even more difficult. This Reading addresses the principles of brand

		<p>positioning and demonstrates how companies can strategically craft powerful, resonant, and unique brand positions to help their products stand out amidst the cacophony of the marketplace. Strategic brand positioning provides consumers with the answer to the all-important question, “Why should I buy?” The Reading discusses how to craft a brand’s value proposition for competitive advantage, through analysis and synthesis of consumer, company, and competitive factors. It highlights the types of brand positions companies can stake out in the minds of consumers, providing insight into the many creative ways brands can be differentiated from one another. It provides guidance for defending a market position through the illumination of the competitive dynamics of brand positioning. Special attention is given to disruptive positioning strategies that have the potential to reshape product categories. Finally, it presents the challenges associated with repositioning brands and the tension that exists between maintaining brand meaning consistency versus changing with the times.</p>
<b>BOOK CHAPTERS AND OTHER</b>		
<p>Consuming Brands</p>	<p>2015, book chapter, <i>Cambridge Handbook of Consumer Psychology</i>, Eds. Michael Norton, Derek Rucker and Cait Lambertson</p>	<p>Traditional definitions of branding often underestimate the value a brand has for infusing a choice situation with meaning. This chapter explores how people consume brands and presents three perspectives on the meaning of brands that have diverse theoretical roots in cognitive psychology, social psychology, and cultural sociology. Brands are important building blocks of the self and serve as relational partners, enabling people to build and enact meaningful lives. People consume brands to access the meaning contained within them and co-create that meaning through their consumption of and relationships with brands. Brands, thus, are meaning-based assets, so brand management, at its core, is a process of meaning management. Managerial questions related to how to build and extend brand meaning and how to change an existing brand’s meaning over time are informed by the illumination of individual consumer and collective community meaning-making processes. The chapter concludes with thoughts about the challenges of studying brands and the importance of interdisciplinary multi-method branding research that aims to understand brands in social, cultural, and competitive context.</p>

### 3: Consumer-Brand Relationships and CRM

Summary: This highly pragmatic stream investigates the contemporary practice of customer relationship management (CRM) by exploring the phenomenological, lived experience of consumers' relationships with brands. Using a contracting theory lens supplemented with knowledge of sociological practices, this work explores the consumer-brand relationship contract, outlines the contents of various relationship contracts found in consumption, and traces the process by which consumers and brands form, negotiate, and renegotiate relationships over time. Select publications develop a critical perspective on customer relationship practices that leave the people out of the equation and create contracts that are opportunistic and misaligned. This research stream is one of the first to inquire into the dynamics of consumer-brand relationships – enlivening an important construct in marketing that had previously been theorized only as a static variable.

<b>BOOKS</b>		
Strong Brands, Strong Relationships	2015, Eds. Susan Fournier, Michael Breazeale and Jill Avery, Routledge	Even though the study of consumer-brand relationships is still relatively new when compared to other marketing topics, the practical necessity of understanding these relationships has driven a great deal of important work in a short period of time. This book compiles and presents innovative research that is directed at a better theoretical understanding of the phenomenon that is consumer-brand relationships and the processes that drive them as well as practical application of the findings in commercial, social, and psychological arenas. By extending and applying brand relationship theory to such a diverse array of topics, the authors demonstrate the important and timely implications of this sub-discipline. This book extends the groundbreaking work presented in our first volume, <i>Consumer-Brand Relationships: Theory and Practice</i> by building on and extending conceptual and empirical foundations to further develop the disciplinary base of knowledge concerning consumers and their brands.
<b>JOURNAL ARTICLES</b>		
Unlock the Mysteries of Your Customer Relationships	2014, <i>Harvard Business Review</i>	Consumers have always had relationships with brands, but sophisticated tools for analyzing customer data are finally allowing marketing organizations to personalize and manage those relationships. With this new power comes a new challenge: People now expect companies to understand what type of relationship they want and to respond appropriately – they want firms to hold up their end of the bargain. Unfortunately, many brands don't meet those expectations.
Putting the 'Relationship' Back into CRM	2011, <i>MIT Sloan Management Review</i>	Many managers think that the way to capture value through relationship marketing is to focus on the 'good' customers and get rid of the 'bad' ones. But there is a lot more to best practice relationship management than maximizing revenues on individual customers and minimizing costs to serve. How can companies build better relationships with their customers? Findings include: 1.) Get to know who your customers really are and what they need and value. 2.) Be open to the different types of relationships that people form with your company and your brand. 3.) Recognize that relationships can't be one-sided; accept responsibility for difficulties.
Target the Right Market	2012, <i>Harvard Business Review</i>	Should SparkPlace target small business owners or marketing managers at mid-size companies? The B2B marketing software company is debating which target market to pursue and has to consider market size, customer lifetime value, marketing return on investment, and other

		metrics to help it make its decision.
<b>PEDAGOGICAL MATERIALS</b>		
HubSpot: Lower Churn through Greater CHI	2010, HBS Case	In this case, students wrestle with the trade-offs inherent in rapidly growing a customer base and retaining customers over time. HubSpot, an entrepreneurial start-up selling Web 2.0 software-as-a-service to B2B and B2C customers, is under pressure from its venture capital backers to acquire new customers at a rapid rate and to maintain a low level of customer churn. In the case, students explore the drivers of customer churn and uncover opportunities to increase customer retention across the customer selection, selling, and training processes. Students assess a company model used to predict which customers will churn and suggest alternatives to improve the model's prediction. Students develop programs to reduce churn post-hoc and then reengineer the company's marketing and customer relationship management processes to manage churn proactively through market segmentation and targeting, product design, and customer interactions.
Filene's Basement: Inside a Fired Customer's Relationship	2014, HBS Case	How, in a business climate in which building relationships with customers has dominated both managerial thought and marketing budgets, could Filene's Basement have fired a loyal customer, one who was formally and informally recognized as a best customer? This case allows students to reverse-engineer a fired customer's relationship with discount retailer Filene's Basement, from her perspective, to uncover the critical incidents and behaviors of each party that shaped their relationship trajectory. The company's customer relationship management (CRM) programs are analyzed to show how they influenced and encouraged unprofitable customer behavior.
Relating to Peapod	2014, HBS Case	Explores the relationships formed between consumers and the Peapod consumer-direct grocery delivery service, as revealed through an ethnographic study of Boston-area Peapod shoppers. Three representative case histories are brought to life using extensive quotes from these selected longitudinal interviews. Closes with short vignettes describing the experiences of additional service users so that students can offer relationship predictions using process insights derived from the detailed case studies. Together, the data-driven exercises are designed to deepen students' understanding of the development processes characterizing consumer-firm/brand interactions over time, toward the goal of more informed relationship marketing strategies and sharper brand relationship executions.
<b>BOOK CHAPTERS AND OTHER</b>		
Framing the Game: How Brands' Relationships with their Competitors Affect Consumer Preference	2015, book chapter in <i>Strong Brands, Strong Relationships</i> , Eds. Susan Fournier, Michael Breazeale and Jill Avery, Routledge	In this chapter, we explore how brands' relationships with their competitors affect consumers' preferences. Through a series of experiments, we show that the competitive context in which a brand operates can affect consumers' purchase interest and purchase frequency. We show that brand positioning statements that communicate that brands are in direct competition with each other elicit size effects: consumers like small brands more when they compete with big brands and like big brands less when they compete with small brands. We further explore the relationships between brand size and competition and show that while large brands are

		punished for being a competitive aggressor, small brands are rewarded when they compete aggressively. Our findings illuminate how small brands can benefit from the presence of a large competitor and provide a process understanding of how consumers assess and relate to brands not in isolation, but as part of a competitive system.
The Relational Roles of Brands	2012, book chapter in <i>Marketing Management: A Cultural Perspective</i> , Eds. Lisa Penaloza, Nil Toulouse, and Luca M. Visconti, Routledge	In contemporary culture, brands play important relational roles, linking consumers to others and serving as relational partners. This chapter provides an understanding of the relational roles of brands to illuminate why and how consumers connect with brands and how those connections enable consumers to relate to each other. Moving away from an economic definition of marketing relationships as exchange-based, the chapter provides a more nuanced understanding of consumer-brand bonds and highlights the core processes that drive customer relationship development. It cautions managers not to try to “manage” their customer relationships, but rather, to negotiate them with consumers, providing a fresh approach to CRM.
Firing Your Best Customers: How Smart Firms Destroy Relationships Using CRM	2012, book chapter in <i>Consumer-Brand Relationships</i> , Eds. Susan Fournier, Michael Breazeale, and Marc Fetscherin, Routledge	With incidences in the 20-25% range, the practice of firing customers has become increasingly attractive as firms try to maximize the lifetime value of their customer portfolios. This chapter traces the relationship trajectory of a 30-year customer of Filene's Basement, a retailer offering fashion goods at discounted prices, who was eventually fired by the firm. The case traces how company actions taken in the name of customer relationship management (CRM) contributed to the creation and demise of a particular type of commercial relationship: the best customer. Ironically, we find that firing the customer is often a case of blaming the victim: managers remain largely unaware of their own roles in creating the unprofitable customers they seek to shed. We reveal how CRM programs can transform best customers from highly profitable, loyal customers into high maintenance customers whose value stemming from their frequent purchasing is eroded by their increasing cost-to-serve. The case advocates a deeper appreciation of the two-way, reciprocating nature of customer relations, and the dynamic processes whereby they should be nurtured and maintained.
Consumers' Relationships with Brands	2011, book chapter in <i>Perspectives on Brand Management</i> , Ed. Mark D. Uncles, Tilde University Press	This chapter presents a brand management paradigm based on the foundational principles of relationships. (1) Brand relationships are a means to an end: brand relationship managers must consider the whole person and understand how the brand adds meaning into people's lives. (2) Brand relationships are diverse and multi-faceted: relationship management requires sensitivity to the operative contract and relationship form. (3) Brand relationships are process phenomena: savvy relationship strategies consider the dimensions on which relationship develop and address the causes that drive evolution and change over time. Our perspective enlightens current customer relationship management (CRM) practice by providing a deeper appreciation of the 'R' in CRM.

Brands Are People Too! Harnessing the Power of Brand Warmth and Competence	2011, white paper published by The Relational Capital Group	Research in customer behavior has revealed that the way humans respond to brands is simply an extension of the way they instinctively perceive, judge, and behave towards one another. Understanding how consumers judge brands using social processes akin to those used in human interaction allows us to unlock the social psychological power of our brands, making them more compelling and attractive as relationship partners for consumers.
<b>WORK IN PROGRESS</b>		
Toward a Dynamic Theory of Consumer-Brand Relationships: Content and Process from a Relationship Contracting Perspective		Leveraging data from a longitudinal ethnography of consumers' experiences with an Internet grocery shopping service, a case study of a long-standing loyal service customer, and critical incident interviews concerning severed brand-loyal relations, this paper informs content, structure, and process issues surrounding consumers' relationships with brands. Building from our data and the literature on relationship contracting theory implicated through its analysis, we provide a framework synthesizing concepts of relationship rules and norms, relationship templates, and relationship signaling behaviors to help codify the structure of the consumer-brand relationship space and the mechanisms governing relationship evolution and endurance. Nine relational forms are identified and illuminated, each with its own unique set of rules and norms, guiding principles, motivations and provisions, and self/other relationship roles. Feedback seeking mechanisms within the general behavioral signaling and response system shown to govern relationship dynamics are also inducted and include contract illumination tests, supra-contracting, and contract breach behaviors. By enlivening consumers' interpretations of the customer relationship management (CRM) activities engaged in by firms, this research offers insight into the efficacy and implication of such marketing practices, and the ways in which the implementation of CRM programs and principles is often misaligned with consumers' lived relationship experiences at their core.

## 4: Social Mission Branding

Summary: In this stream of research, I explore how brands can be agents of political, social, and/or cultural change by weaving brand narratives with social missions. The work spans the spectrum of social mission branding, from brands that bake social mission into the core of their business models to brands that tack on social missions as part of cause-related marketing programs.

<b>JOURNAL ARTICLES</b>		
Making Charity Pay	2014, <i>Harvard Business Review</i>	Companies are increasingly experimenting with how charity might be used to increase consumer loyalty, brand awareness, and sales. But even highly creative approaches that garner a lot of buzz often fall short of sales goals, leading many companies to conclude, prematurely, that consumer philanthropy doesn't work. Our research, in contrast, suggests that charity can drive engagement - when done right.
<b>PEDAGOGICAL MATERIALS</b>		
Art Lifting	In Process, HBS Case	
Better World Books	2010, HBS Case	A socially-conscious start-up struggles to compete against behemoth Amazon in the online bookselling industry. As the company grows, the business model is changing and founder Xavier Helgesen must decide whether to expand into selling new books, how to adjust their pricing and donation models, and how to reposition their donation communications. As the industry shifts, the founders find themselves working harder to build brand awareness for their fledgling brand and to manage and incentivize their non-profit partners. A for-profit company with a social mission, Better World Books comes under public scrutiny as they begin to turn a profit.
The Pepsi Refresh Project: A Thirst for Change	2011, HBS Case	For the first time in 23 years, PepsiCo did not invest in Super Bowl advertising for its iconic brand in 2010. Instead, the company diverted the \$20 million it would have spent on the game to the social media fueled "Pepsi Refresh Project," where it invited consumers to generate ideas to "refresh everything" in their worlds. Ideas were vetted and posted on the web where consumers voted for their favorites which Pepsi then funded with grants ranging from \$5,000 to \$250,000 for health, environmental, social, educational, and cultural causes. The case analyzes how Web 2.0 is changing cause-related-marketing and compares the benefits and risks of traditional branding and social media branding. Pepsi's return on investment is analyzed in the context of emerging brand health and social media metrics.
(PRODUCT) RED	2008, Simmons Case	This case discusses the opportunities, challenges, and risks of incorporating a social mission into an established brand. The case introduces students to sociocultural trends driving socially conscious consumerism and asks them to confront and evaluate rising consumer skepticism about greenwashing behaviors of firms. The case allows students to grapple with the strategic and tactical decisions that accompany brand positioning and to combine information on consumer behavior with an understanding of brand objectives, in order to assess and evaluate marketing sponsorship programs. Brand manager Tess Sullivan is evaluating a sponsorship



		<p>proposal from (PRODUCT) RED, an innovative social mission branding experiment well positioned for the growing trend of socially-conscious consumerism. Her analysis revolves around understanding why some of RED's sponsors have successfully leveraged their association with the brand, while others have been unable to cash in on their sponsorship. Sullivan analyzes if and how (PRODUCT) RED fits with her cosmetics brand and assesses what her brand gains from a partnership and how the sponsorship puts her brand at risk.</p>
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## 5: Digital Marketing and Social Media Branding

Summary: This very contemporary line of research explores the rapidly changing digital world, and investigates how emerging technologies are creating a new consumer culture in which consumers expect to be partners in the co-creation of brands. The work explores the branding effects of e-commerce, social media, virtual worlds, online brand communities, and peer-to-peer sharing and provides managerial insights into the challenges of managing big brands in the age of social media.

<b>JOURNAL ARTICLES</b>		
Adding Bricks to Clicks: Predicting the Patterns of Cross-Channel Elasticities Over Time	2012, <i>Journal of Marketing</i>	The authors propose a conceptual framework to explain whether and when the introduction of a new retail store channel helps or hurts sales in existing direct channels. A conceptual framework separates short- and long-term effects by analyzing the capabilities of a channel that help consumers accomplish their shopping goals. To test the theory, the authors analyze a unique data set from a high-end retailer using matching methods. The authors study the introduction of a retail store and find evidence of cross-channel cannibalization and synergy. The presence of a retail store decreases sales in the catalog but not the Internet channel in the short run but increases sales in both direct channels over time. Following the opening of the store, more first-time customers begin purchasing in the direct channels. These results suggest that adding a retail store to direct channels yields different results from adding an Internet channel to a retail store channel, as previous research has indicated.
The Uninvited Brand	2011, <i>Business Horizons</i>	Brands rushed into social media, viewing social networks, video sharing, online communities, and microblogging sites as the panacea to diminishing returns for traditional brand building routes. But, as more branding activity moves to the web, marketers are confronted with the stark realization that social media was made for people, not for brands. In this paper, we explore the emergent cultural landscape of open source branding, and identify marketing strategies directed at the hunt for consumer engagement on the people's web. These strategies present a paradox, for to gain coveted resonance, the brand must relinquish control. We discuss how web-based power struggles between marketer and consumer brand authors challenge accepted branding truths and paradigms: where short-term brands can trump long-term icons, where marketing looks more like public relations, where brand building gives way to brand protection, and brand value is driven by risk, not returns.
<b>PEDAGOGICAL MATERIALS</b>		
UnME Jeans: Branding in Web 2.0	2008, HBS Case	This case introduces emerging Web 2.0 social media in virtual worlds, social networking sites, and video sharing sites, and encourages students to explore the opportunities and risks they present for brands. The case allows students to grapple with the strategic and tactical decisions that accompany marketing communications strategy and to combine information on consumer behavior with an understanding of brand objectives, in order to assess and evaluate new social media options. Brand manager Margaret Foley is facing an increasingly complex media environment in which her traditional media plan, focused on television, print, and radio advertising, has become less effective due to declining audiences, increased advertising clutter,

		and consumers tuning out. She is exploring emerging Web 2.0 social media options to determine if they can better achieve her branding and advertising objectives. Her challenge is to cut through all of the hype surrounding Web 2.0 and to analyze the social media's potential for her brand by delving into the consumer needs and behaviors underpinning Web 2.0 technologies.
HubSpot: Inbound Marketing and Web 2.0	2009, HBS Case	This case introduces the concept of inbound marketing, pulling customer prospects toward a business through the use of Web 2.0 tools and applications like blogging, search engine optimization, and social media. Students follow the growth of HubSpot, an entrepreneurial venture which sells inbound marketing software as a service to business-to-business customers. HubSpot has built its own fledgling business entirely through inbound marketing strategies and tactics. However, the business is currently at a crossroads with management looking for rapid acceleration of sales and profits. HubSpot, in its quest for growth, faces significant challenges which are associated with the inbound marketing model. These include: 1.) developing market segmentation and targeting strategies after customers have initiated contact with the company to decide which customers to serve and which to turn away, 2.) configuring pricing strategies to align with the value delivery stream customers experience, and determining the scope and role of freeware in the product strategy, and 3.) determining whether inbound marketing communications programs can generate enough scale or whether traditional outbound marketing methods need to be employed to rapidly accelerate growth. The case introduces inbound marketing and juxtaposes it against traditional outbound models of marketing, encouraging students to explore the opportunities and challenges this new model presents for firms. The case allows students to grapple with the strategic and tactical decisions that accompany marketing strategy and to understand how marketing decisions pertaining to product, price, and promotion are interrelated and affect higher level strategic decisions on market segmentation, targeting, and positioning.
EMC: Delivering Customer Centricity	2011, HBS Case	This case discusses the concept of customer centricity, aligning the resources of your organization to effectively respond to the ever-changing needs of the customer, while building mutually profitable relationships, in the context of EMC, the world's leading information infrastructure company. EMC has built a corporate culture which puts customers squarely in the center of their business mission and has created structures and processes to enable customer centricity to infuse the organization. However, the firm has grown organically and through acquisitions and is now managing a diverse product line and a diverse customer base which includes large firms and small firms, as well as individual consumers. Moving to a VAR sales model has also distanced EMC from its customers. Customer centricity, as historically practiced by EMC, is becoming more difficult to execute and may not be feasible or cost effective, given the large variance in customer lifetime value across the customer portfolio. The case introduces students to fundamental Web 2.0 concepts and allows them to grapple with whether EMC can use "high-tech" customer service to replace or supplement "high-touch" customer service.

The Tate's Digital Transformation	2014, HBS Case	John Stack was the visionary Head of Digital Transformation at the Tate, a collection of four major art galleries in the UK, including Tate Modern, the most visited gallery devoted to modern and contemporary art in the world. Stack was the architect of the Tate's "fifth gallery," its online presence. Stack had guided the Tate through two digital strategy planning processes and his team had experienced much success in developing the Tate's fifth gallery into a virtual place filled with immersive and engaging content, activities, experiences, and communities. Looking to the future, Stack was working to execute a new digital strategy, one that included digital as a dimension of everything the Tate did, both physically and virtually. This effort was raising important questions about organizational structure, marketing strategy, product and service design, and return on investment. What would it take to be a truly digital organization where digital was the norm?
Denver Museum of Nature and Science	2015, HBS Case	Digital was on Vice President of Strategic Partnerships and Programs Bridget Coughlin's mind these days. DMNS had been dabbling in digital for the past few years, but had never fully committed to it. The time had come to establish a strategic vision, and to decide whether to designate serious human and financial resources. It was time to make some decisions about the DMNS' digital future. The digital discussion was taking place within a larger strategic conversation about the primacy of the onsite experience of the Museum and the need to get outside of its walls to reach new constituents. How should she balance onsite programming, offsite programming, and online programming to maximize attendance and deliver against the Museum's mission? Was digital the magic pill that would allow the Museum to reach new audiences or was DMNS better off delivering a face-to-face museum experience within its own four walls or out on the streets of the Denver community?
OneFineStay	2015, HBS Case	onefinestay offered high-end home rentals to travelers who sought a more authentic and local experience than a typical upscale hotel might provide. onefinestay's brand had been "hacked" together quickly during the company's early years. After five years of rapid growth, it was time to do a comprehensive analysis of the company's brand and its positioning in the marketplace. Marketing Director, Miranda Cresswell had spent several months gathering data and insights, and was starting to experiment with use case scenarios that took a crack at segmenting the company's customers. While segmenting in this way was intriguing, it led to a branding challenge - as a start-up, it was difficult for onefinestay to have the resources to support multiple brand messages in the marketplace and different segments wanted different things from their travel experience. She pondered whether there were other ways to group customers that would allow for a more universal positioning for the brand or whether the company needed to focus on one or two segments to serve. Who was the company competing against and how could it carve out a unique value proposition that would appeal to travelers and be differentiated from what was offered by other hospitality options?
Accor: Strengthening the Brand with Digital	2015, HBS Case	Accor, the world's leading hotel operator with a portfolio of fourteen hospitality brands (including Sofitel and Novotel) in 92 countries, prided itself on living up to its motto, "To open

Marketing		new frontiers in hospitality". Accor was indeed contemplating how to do just that – but not by tackling a new frontier of the geographic variety. Rather, the firm was further exploring the digital frontier via a new distribution channel that would allow it to better compete in the online marketing space for travel reservations.
<b>BOOK CHAPTERS AND OTHER</b>		
Adding Bricks to Clicks: On the Role of Physical Stores in a World of Online Shopping	2013, <i>GfK Marketing Intelligence Review</i>	Buying a product has never been easier. Consumers can shop online, over the phone or via mail order, from home or on the go, and if they want to experience touch and feel, they can also visit a “real” store. Often, one and the same retailer offers several of these options, and multichannel retailing has become common in most product categories. By offering several channels, retailers are trying to reach more consumer segments and create synergies, with stores acting as billboards for the brand, catalogs providing enticing reminders to buy and the Internet providing an ever-present storefront. But synergies do not arise automatically. Different channels can also cannibalize one another, and it is not always easy to predict which effects will prevail. A recent study took a closer look at the interplay among different retail channels and showed that the short-term effects of store openings can be very different from the long-term sales impact.

## 6: Marketing Management Theory and Toolkits

Summary: I have been teaching marketing for almost a decade and my time in the classroom has illuminated many areas in which MBA students and the executives they will eventually become could benefit from theory, tools, and exercises designed to enhance their understanding of the theory and practice of marketing. This research stream provides marketing educators with materials they can use in the classroom and provides marketing practitioners with tools they can use every day. Textbook chapters are combined with interactive quantitative toolkits.

<b>JOURNAL ARTICLES</b>		
Leveraging Crowdsourced Peer-to-Peer Assessments to Enhance the Case Method of Learning	2014, <i>Journal for the Advancement of Marketing Education</i>	Many marketing educators use the case method to help their students strengthen their decision making skills. Rigorous class participation is essential to achieving the learning objectives in case method learning. One challenge for case method instructors is the assessment of students' class participation, particularly in large classes. This article offers a solution that mines the practices of peer-to-peer feedback and crowdsourcing to enhance the assessment of learning in face-to-face class sessions. Based on five years of data (N=7,025) across ten sections, the article demonstrates that crowdsourced peer-to-peer assessment (unlike self-assessment) offers ratings that are highly correlated with instructor assessment and demonstrate strong inter-rater reliability. Results show that crowdsourced peer-to-peer assessments are perceived by students as fair and accurate.
<b>PEDAGOGICAL MATERIALS</b>		
<i>Harvard Business Review's</i> Go to Market Tools: Customer Lifetime Value	2013, <i>Harvard Business Review</i> Toolkit	How much are your customers worth? Has your marketing budget been slashed? Need to figure out the best place to invest your time and effort to reach your growth target? HBR's Go to Market Tool helps calculate your customer's lifetime value, allowing you to prioritize your marketing and product development resources on the customers that will provide the biggest returns. This tool allows you to play around with the levers that determine a customer's lifetime value - providing insight into how to maximize the value each type of customer delivers to your company. The relationships a company has with its customers are one of its most valuable assets, and understanding the value of those customer relationships is key to managing them well over time. But not all customers are created equally, and figuring out how much value each customer adds to your bottom line allows you to be most efficient with your marketing and product development investment. Enter your own data into HBR's Customer Lifetime Value tool to figure out: (1) How much to spend to acquire a new customer, or retain an existing one, (2) What levers you could pull to increase a customer's lifetime value, and by how much, (3) Which customer segments you should target to maximize profits, (4) Which customer segments are dragging down your profitability, and (5) How to increase the value of the customers you already have. HBR's Customer Lifetime Value tool includes: a brief tutorial that walks you through the concepts and calculations; guidance for gathering your own data to plug into the tool; and a pre-designed, yet fully customizable PowerPoint presentation to share your results with your colleagues.

<p><i>Harvard Business Review's Go to Market Tools: Pricing for Profit</i></p>	<p>2013, <i>Harvard Business Review Toolkit</i></p>	<p>What price is right? Figuring out the best price for your product or service can be nerve-wracking. Your new product launch or marketing campaign's success--perhaps even your career advancement--may hinge on the price you choose. So how do you select a price that's attractive to customers and profitable for your company? This tool will help you confidently arrive at the most profitable price--by guiding you through a series of questions: How much does it cost to produce each product you sell? How are your competitors' products priced, and how valuable is your product or service relative to those competitors? How many customers will buy your product at various price points? What price maximizes your profitability? HBR's Pricing for Profit will help you turn your raw data into a clear analysis that will inform your pricing decisions. HBR's Pricing for Profit tool includes: a brief tutorial that walks you through the process and calculations; instructions for gathering your own pricing data to plug into the tool; and the results of your data analysis in a PowerPoint to share with your colleagues. The tool provides a systematic approach to determining the most profitable price for your product or service.</p>
<p><i>Harvard Business Review's Go to Market Tools: Market Sizing</i></p>	<p>2013, <i>Harvard Business Review Toolkit</i></p>	<p>Market size matters. On the hook to launch your division's next great product or service? Need to convince higher ups that your product will fill that gaping revenue hole--and is worth the team's scarce marketing and product development resources? You need hard data to make your case: How many customers will buy it? How much will they pay? What are your competitors' strategies? We can help. Use HBR's Market Sizing tool again and again, to turn your raw market data into a clear analysis that will inform your product development and marketing plans. It will help you (1) gather the data you need to size your own market, (2) use your data to make confident projections, (3) turn your results into a game plan. HBR's Market Sizing tool includes: a brief tutorial that walks you through the process and calculations; instructions for gathering your own market data to plug into the tool; and the results of your data analysis in a PowerPoint to share with your colleagues. The tool will help you turn your own market data into a compelling business case for your great idea.</p>
<p>Marketing Analysis Toolkit: Situation Analysis</p>	<p>2010, HBS Technical Note</p>	<p>Before managers can begin to formulate marketing strategies for their businesses, they must have a strong understanding of the internal and external marketing environments in which they are operating. In this note, we present three methods for collecting and analyzing information about the internal and external marketing environments firms face: 5 C's Analysis, Porter's Five Forces Industry Analysis, and SWOT Analysis. These analyses help students understand the analytical processes by which managers understand themselves, their consumers, and the marketplaces in which they compete. The note gives students a foundation for analyzing marketing cases, as well as providing an analytical structure and process for completing the situation analysis section of a marketing plan.</p>

Marketing Analysis Toolkit: Customer Lifetime Value Analysis	2010, HBS Technical Note	Customers are increasingly being viewed as assets that bring value to the firm. Customer lifetime value is a metric which allows managers to understand the overall value of their customer base and relate it to three customer strategies firms employ: asset acquisition - attracting new customers to the firm, asset maximization - maximizing the value the firm extracts from each customer, and asset retention - retaining existing customers for the long term. The note gives students a foundation for analyzing marketing cases, as well as providing an analytical structure and process for completing a marketing plan. The note is accompanied by a free Excel worksheet which contains sample problems, prebuilt Excel models to calculate customer lifetime value, and charts and graphs which help visualize the results.
Marketing Analysis Toolkit: Pricing and Profitability Analysis	2010, HBS Technical Note	Pricing is one of the most difficult decisions marketers make and the one with the most direct and immediate impact on the firm's financial position. This toolkit will introduce the fundamental terminology and calculations associated with pricing and profitability analysis. Users will learn how to produce and interpret demand curves and calculate the price elasticity of demand. The concepts of revenue, costs, and contribution margin, gross margin, and net income will be introduced to inform profitability analyses. Finally, retailer profitability metrics including retailer margin and penny profit are discussed. The note gives students a foundation for analyzing marketing cases, as well as providing an analytical structure and process for completing a marketing plan. The note is accompanied by a free Excel worksheet which contains sample problems, prebuilt Excel models to calculate demand curves, price elasticity, and profitability metrics for firms and their channel partners, and charts and graphs which help visualize the results.
Marketing Analysis Toolkit: Market Size and Market Share Analysis	2010, HBS Technical Note	Marketers frequently need to estimate the size of their markets -- both for existing products so that sales forecasts can be developed, and for new products so that market opportunities can be assessed. This toolkit enables students to size a market and generate a sales forecast using a market build-up methodology. Students learn to measure market demand and company demand and calculate market and product penetration rates and market share. The note gives students a foundation for analyzing marketing cases, as well as providing an analytical structure and process for completing a marketing plan. The note is accompanied by a free Excel worksheet (available only to authorized faculty) which contains sample problems, pre-built Excel models to calculate market size, market penetration, and market share, and charts and graphs which help visualize the results.
Marketing Analysis Toolkit: Breakeven Analysis	2010, HBS Technical Note	Marketing managers are often called upon to make recommendations for or against programs that cost money to implement. Before expenditures are made, managers want to be sure that they will be getting a return on their investment. One way of assessing this is by calculating the breakeven point. In this note, we introduce the concept of breakeven analysis and show how it is used to guide marketing decision making. This analysis helps students assess the feasibility of proposed fixed and variable marketing expenditures, the feasibility of permanent pricing



		changes, and the feasibility of a new product introduction. The note gives students a foundation for analyzing marketing cases, as well as providing an analytical structure and process for completing a marketing plan. The note is accompanied by a free Excel worksheet which contains sample problems, pre-built Excel models to calculate breakeven, and charts and graphs which help visualize the results.
Core Curriculum in Marketing: Competitive Strategies	2015, HBS Marketing Core Curriculum Book Chapter	This reading illuminates the dynamics of companies in competition and offers a process for planning and executing marketing strategies to effectively compete in a rapidly changing marketplace. Its goal is to arm managers with the information they need to make marketing decisions that take into account their competitors' likely responses. It delineates processes for understanding the opportunities and challenges of the games firms play with their competitors, providing guidance for choosing competitive contexts that enable success, while avoiding contexts in which profitability will be elusive. It discusses how managers can change the games offered to them, by alleviating or assuaging the competitive forces that constrain them, and by opening up new ways and places to compete that are more conducive to growth. The chapter concludes with insights into how consumers respond to marketplace competition, and provides guidance for how companies can frame the competitive games they play to their advantage in brand positioning and marketing communications.
Core Curriculum in Marketing: Marketing Communications	2015, HBS Marketing Core Curriculum Book Chapter	This reading explores the landscape of marketing communications and promotion strategy. Promotion strategy involves crafting and communicating the voice and the story of the brand to consumers in an effort to achieve marketing objectives. Marketing communications translate the company's value proposition into compelling narratives that can establish, maintain, or modify a brand image in the minds of consumers. Marketing communications can entertain and/or educate consumers and persuade and/or remind them to purchase. Various types of creative appeals (e.g., humorous, fear-inducing, seductive, informative) engage audiences, prompting them to think or feel something about the brand that works to induce them to action. Managers choose to tell their stories through various channels, delivering the brands' narrative through advertising, sales promotions, public relations, digital marketing, personal selling, and other promotional vehicles that reach out to the company's target markets. Current and potential customers consume these messages as part of their daily lives, absorbing them, interacting with them, and, if the messaging is effective, responding to them.

## 7: FIELD Method Theory and Pedagogy

Summary: At Harvard Business School, I have been blessed to be part of a grand experiment in launching the FIELD (Field Immersion Experiences in Leadership Development) course, a new addition to the curriculum introduced to complement HBS's case study method. FIELD gives students meaningful opportunities to act like leaders, translating their ideas into practice. FIELD is a required first-year course that spans a full academic year, divided into three parts: leadership intelligence (FIELD 1), global intelligence (FIELD 2), and integrative intelligence (FIELD 3). This research stream provides educators with the theory of the FIELD method and materials they can use in the classroom to deliver FIELD courses.

<b>PEDAGOGICAL MATERIALS</b>		
FIELD 2: Global Immersion Teaching Note	2014, HBS Teaching Note	This note prepares faculty to teach the FIELD 2 Global Immersion, as part of the Field Immersion Experiences for Leadership Development (FIELD) course. The Global Immersion is part of the second module of the course, FIELD 2, and is designed to raise students' "global intelligence" – their ability to operate in an unfamiliar, global context. During the FIELD 2 module, students work in small teams of six to develop a concept for a new product or service for a Global Partner company located in an emerging market. Students apply the tools of design thinking to develop a novel and promising product or service that meets consumers' needs. Along the way, they experience the challenges and opportunities of launching and managing a team, planning and executing a project plan, and communicating their ideas in an effective and persuasive manner. For eight days, students work directly with their Global Partner company in their emerging market to test their ideas, complete their projects, and present their conclusions and recommendations to senior executives.
FIELD 2: Learning from Extreme Consumers	2014, HBS Technical Note	Traditional market research methods focus on understanding the average experiences of average consumers. This focus leads to gaps in our knowledge of consumer behavior and often fails to uncover insights that can drive revolutionary, rather than evolutionary innovation. This note outlines a process for studying extreme consumers – consumers who fall in both tails of a normal distribution of customers – with needs, behaviors, attitudes, and emotions atypical of the average customer. Different tactics for leveraging the power of the fringe, product category virgins, customers with constraints, and lovers, haters, and opt-outers are presented.
FIELD 2: Project Planning Exercise	2014, HBS Technical Note	Project management encompasses the planning, the allocation of resources (human, material, and financial), the organizing of processes, and the ongoing management to achieve the successful completion of a project. Project management requires balancing (and often trading off) the scope, cost, and time constraints of the project to achieve the highest quality outcome. Strong project management provides the benefits of clarity, consensus, coordination, and control. Through project management activities, team members collectively achieve clarity and consensus on the scope of the project, the tasks involved, the resources required, and the timetable to achieve it. In this exercise, students participate in a series of project management activities, including Project Timelines, Task Lists, Gantt Charts, and Risk Assessments, to prepare them for their FIELD 2 projects.

FIELD 2: Brainstorming Techniques	2013, HBS Technical Note	Brainstorming is an essential part of the Design Thinking process. Establishing norms that promote the open exchange of ideas is critical to successful group brainstorming. This note discusses the rules that IDEO, a leading design firm, follows to establish the right conditions for innovative thinking. Then, seven proven brainstorming techniques are presented to spur creativity during brainstorming sessions and to insert much needed energy when creativity begins to flag.
FIELD 2: Orchestrating a Compelling Presentation	2013, HBS Technical Note	Orchestrating a compelling presentation involves a three stage process of conceiving, visualizing, and presenting that begins with understanding and empathizing with your audience, leveraging your emotional intelligence to craft a persuasive message that addresses their needs. Developing an engaging story, using storytelling techniques, can help you design a presentation that will resonate with your audience. Translating your story into visuals with impact and delivering it with presence is critical to connecting with your audience in an authentic and powerful way. This note helps you organize and orchestrate a persuasive, inspiring, and powerful presentation – a presentation with presence.
Doing Business in Morocco	2014, HBS Case	This case examines the challenges and opportunities of doing business in Morocco. It highlights Morocco's ongoing economic transformation in the decades leading up to 2014 in the context of its historical, political, and cultural background. The case summarizes some of the main obstacles faced by businesses operating in the country – changing regulations and insufficient access to credit, infrastructure and talent constraints, and a large informal sector – contrasting these with the benefits of operating in a market that provides access to the African continent and proximity to Europe, has relatively low labor costs, and created a series of investment incentives. Some of these challenges are illustrated through the discussion of an investment decision by French car maker Renault, which opened a new manufacturing facility in Morocco's free trade zone near Tangier. Now a few years into operating the facility, the case zooms in on some of the obstacles that Renault encountered, such as scarcity of trained staff and of local suppliers, and on the progress that was made, in order to evaluate the potential of the investment going forward.
FIELD 3: Demonstrating Demand	2016, HBS Note	Demonstrating demand forces entrepreneurs to prove that their product or service idea has traction in the marketplace by providing evidence that a.) customers value it enough to purchase and/or use it, and b.) that the company can extract some of the value that it creates for its customers to power a profitable business model. Demonstrating demand goes beyond having a product or service that meets specific consumer needs. It also goes beyond preparing market size projections based on existing products in existing markets. Demonstrating demand requires showing that one's offering is compelling and competitive enough to gain traction in the marketplace via an in-market test. Only in interacting with customers in the marketplace can entrepreneurs truly provide proof of concept. Entrepreneurs must provide persuasive traction evidence that illustrates the magnitude of the market response, the momentum of the business along a growth trajectory, and the robustness and scalability of the demand.

FIELD 2: Developing Customer Empathy	2015, HBS Note	The Design Thinking process begins with empathizing with potential customers. Empathizing, being aware of, interpreting, and understanding the thoughts, feelings, and experiences of others, as well as being able to vicariously experience them oneself, requires the careful and deliberate study of consumers. Extensive use of qualitative methods, such as observation, interviews, and focus groups, provide rich, thick descriptions of consumer behavior and can be essential for building this understanding. Once product or service prototypes are developed, quantitative methods, such as surveys, experiments, and in-market tests, can help managers assess their viability in the market.
FIELD 2: Situation Analysis	2015, HBS Note	In this note, we present a method, the 5 C's Analysis, for collecting and analyzing information about the internal and external environments that firms face. This analysis will enable you to develop design ideas for a new product or service for your Global Partner that meet the needs of local customers, take into account the local context, leverage the capabilities of the company and its collaborators, and provide a sustainable advantage versus competitors.
HourlyNerd	2016, HBS Case	HourlyNerd, a two-sided marketplace platform for matching freelance consultants with small companies looking for help, struggles to define a growth plan for the future. The company, started as a class project in HBS' FIELD 3 course, is assessing three growth paths: shifting their target from small and medium sized businesses to enterprise customers, expanding into new verticals to become the Amazon of freelance labor, and transforming its business model from a marketplace to a software-as-a-service (SaaS). Each of the three paths was risky and required financial and human resource investment. Could and should the fledgling startup change its business model? Could it fundamentally change the way companies purchased consulting services? Or, should the founders play it safe by remaining focused on executing their original business model – a proven winner?
Teaching FIELD 3	2016, HBS Teaching Note	The FIELD Immersion Experiences for Leadership Development (FIELD) course, a year-long, three-part RC course, is designed to provide students with the opportunity to put theory into practice, working in small teams on intensive projects to solve real world problems and create new business opportunities. The third module of the course, FIELD 3, is designed to raise students' "integrative intelligence" – their ability to operate as a general manager and integrate the cross-functional knowledge, skills, and tools that they are acquiring in the first-year curriculum to strategize, execute, and manage effectively. During the FIELD 3 module, students work in small teams to develop and launch a viable micro-business in a demanding environment where resources are constrained, uncertainty is high, and there is a short window of opportunity. This teaching note prepares instructors for teaching the FIELD 3 module.