

Jill Avery

EDUCATION

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

ACADEMIC APPOINTMENTS

Harvard University, Harvard Business School Senior Lecturer, Marketing Unit Chair for Convening and Special Events	Boston, MA 2013-Present
Simmons College, School of Management Assistant Professor of Marketing Awarded Tenure and Promotion to Associate Professor	Boston, MA 2007-2013 Spring 2013
Boston University, School of Management Marketing Lecturer	Boston, MA 2000-2001
Northeastern University, College of Business Administration Adjunct Professor of Marketing	Boston, MA 2000-2001

BOARD APPOINTMENTS

Amica Mutual Insurance Company Corporate Director, <i>Audit Committee</i> and <i>Investment Committee</i> Chair, <i>Audit Committee</i> Chair, <i>Audit, Pension Board</i>	Lincoln, RI 2015-Present 2019-2021 2019-2021
Museum of Fine Arts, Boston President, Board of Trustees President-Elect, Board of Trustees Co-Chairman, Strategic Planning Trustee Task Force Chairman, Board of Overseers Chair-Elect, Board of Overseers Trustee, Board of Trustees, <i>Executive, Governance, Budget & Finance, Audit, Development, Investment, Campus Planning and Building, Marketing and Communications, Nominating, Collections, Resource Management, and Learning and Community Engagement Committees</i> Chairman, Patron Program Vice Chairman, Board of Overseers Overseer, Board of Overseers, <i>Marketing and Nominating Committees</i> Chairman and Vice Chairman, Museum Council	Boston, MA 2018-2020 2017-2018 2016-2017 2014-2017 2013-2014 2013-Present 2012-2013 2010-2012 2004-2013 2000-2004
St. Paul's School Trustee, <i>Budget and Finance, Development, and Education and Student Life Committees</i>	Concord, NH 2016-2019

MANAGERIAL EXPERIENCE

The Gillette Company

1993-2000

Marketing Manager, Female Shaving New Products

- Directed NAM launch of breakthrough Venus razor, Gillette's most successful female shaving product ever, which reached \$500 million in global sales in less than 5 years.
- Assembled and led cross functional team of 25 to plan and execute go-to-market strategy.
- Planned and managed \$85 million in marketing expenditures. Conducted searches, evaluated competencies, hired, and managed seven advertising and marketing agencies.

Product Manager, Male and Female Shaving

- Managed \$300 million NAM business with 6 brands in 3 segments.
- Increased razor consumption by 10% via aggressive consumer acquisition. Increased share of disposable razors segment, despite intensive competitive attack.
- Trained, managed, developed, and evaluated brand team of four professionals.

Product Manager, Shaving Toiletries New Products

- Led cross functional new product development teams to launch 3 new products in 2 product categories into multiple global markets.
- Evaluated multinational market conditions and consumer needs and developed product concepts and value propositions. Worked with engineers and chemists to identify and refine new technologies. Managed manufacturing start up and ongoing supply chain process.
- Developed global vision for brands and coordinated launch deployment and marketing efforts of 13 countries.
- Directed internal and external creative resources to develop brand identities, logo treatments, packaging structural designs, and packaging graphics.
- Designed consumer communication plan, establishing creative and media strategies for global television and print advertising and guided advertising agency strategic development and creative execution.

Product Manager, Braun Personal Care

Associate Product Manager, Braun Hair Care

Assistant Product Manager, Braun Hair Care

- Built strategic launch plan to establish Braun in the hair care category in U.S. and Canada, solely directing launches of 3 new products. Achieved 20% leading dollar share position in first selling season, with premium pricing in commodity category. Increased sales from \$2 to \$50 million.

Boston Beer Company

1995

Brand Development Manager, Samuel Adams

- Established first on-line presence by designing *samadams.com*. Co-managed new product launches of 2 Samuel Adams beer styles.

AT&T

1992-1993

Marketing Intern, International Consumer Long Distance

- Produced ethnic marketing strategies and programs for consumer long distance calling.

Campus Dimensions Inc.

1988-1992

Consumer Promotions Account Executive: Pepsi, General Foods, Bristol-Myers, Citibank accounts

- Created and produced national consumer sales promotions and events targeting the youth market.

DISTINCTIONS AND AWARDS

2019 Most Influential Corporate Board Directors, WomenInc., for service as chair of the audit committee of the Amica Mutual Insurance Company (2019)

Overall Case Winner, The Case Centre Awards for HBS Case *Accor: Strengthening the Brand with Digital Marketing* (2019)

Robert F. Greenhill Award (2018) for outstanding service to the Harvard Business School community

The Case Centre Top 40 List of Bestselling Authors, *The Case Centre*, ranked #14 for 2018/2019, #16 for 2017/2018, #28 for 2016/2017, and #37 for 2015/2016 out of over 8,000 authors worldwide

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 for HBS Case *HubSpot: Inbound Marketing and Web 2.0* (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

INTERESTS

Branding and Brand Storytelling
Brand Meaning and Consumer Identity Construction
Consumer-Brand Relationships and CRM
Digital Marketing and Social Branding
Brand Valuation

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

Avery, Jill (2016) **“How Do You Compete with a Goliath?”** *Harvard Business Review*, 94 (10), October 2016, pp. 117-121.

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

Investindustrial's Aston Martin Investment: Revitalizing an Iconic Brand (2019) Harvard Business School Case No. and teaching note with Mette Fuglsang Hjortshøj and Emer Moloney.

Shiseido Acquires Drunk Elephant (2019) Harvard Business School Case No. 9-520-052 and teaching note

Away: Scaling a DTC Travel Brand (2019) Harvard Business School Case No. 9-520-051 and teaching note with Joseph Fuller

La Roche-Posay: Growing L'Oréal's Active Cosmetics Brand (2019) Harvard Business School Case No. 9-520-035 and teaching note with Vincent Dessain and Mette Fuglsang Hjortshøj

Kraft Heinz: The \$8 Billion Brand Write-Down (2019) Harvard Business School Case No. 9-519-076 and teaching note

Glossier: Co-Creating a Cult Brand with a Digital Community (2019) Harvard Business School Case No. 9-519-022 and teaching note

Understanding the Brand Equity of the Nestlé Crunch Bar: A Research Case (2019) Harvard Business School Case No. 9-519-061 and teaching note with Gerald Zaltman

Understanding the Brand Equity of the Nestlé Crunch Bar (B): Data Analysis (2019) Harvard Business School Case No. 9-519-062 and teaching note with Gerald Zaltman

Brand Activism: Nike and Colin Kaepernick (2018) Harvard Business School Case No. 9-519-046 and teaching note with Koen Pauwels

Super Bowl Storytelling (2018) Harvard Business School Case No. 9-519-041 and teaching note with Shelle Santana

Shiseido: Reinvesting in Brand (2018) Harvard Business School Case No. 9-519-026 and teaching note with Nobuo Sato

Tailor Brands: Artificial Intelligence-Driven Branding (2018) Harvard Business School Case No. 9-519-017 and teaching note

Hubble Contacts: Data Driven Direct-to-Consumer Marketing (2018) Harvard Business School Case No. 9-519-011 and Teaching Note No. 5-519-056 with Ayelet Israeli

Global Brand Management of Anheuser Busch InBev's Budweiser (2018) Harvard Business School Case No. 9-518-105 and teaching note

The Marriott-Starwood Merger: Navigating Brand Portfolio Strategy and Brand Architecture (2018) Harvard Business School Case No. 9-518-081 and teaching note with Chekitan S. Dev and Laure Mougeot Stroock

HubSpot and Motion AI: Chatbot-Enabled CRM (2018) Harvard Business School Case No. 9-518-067 and teaching note with Thomas Steenburgh

Adeo Health Science: Turning a Product into a Brand (2018) Harvard Business School Case No. 9-518-065 and teaching note with Elizabeth Keenan

Christie's and Leonardo da Vinci's *Salvator Mundi*: The Value of a Brand (2018) Harvard Business School Case No. 9-518-066 and teaching note

Armarium: Luxury Fashion for Rent (2017) Harvard Business School Case No. 9-518-047 and teaching note with David Fubini, Natasha Dossa, and Devon Stewart

LogMeIn: Brand Portfolio Strategy and Brand Architecture (Forthcoming) Harvard Business School Case No. 9-518-020

Brandless: Disrupting Consumer Packaged Goods (2017) Harvard Business School Case No. 9-518-044 and teaching note

Chase Sapphire: Creating a Millennial Cult Brand (2017) Harvard Business School Case No. 9-518-024 and Teaching Note No. 50518-068, with Shelle Santana and Christine Snively

Predicting Consumer Tastes with Big Data at Gap (2017) Harvard Business School Case No. 9-517-115 and Teaching Note No. 5-518-053, with Ayelet Israeli

Mavi: Fashioning a Path to Brand Growth (2017) Harvard Business School Case No. 9-517-075 and teaching note, with Gamze Yücaoğlu

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

Longchamp (2016) Harvard Business School Case No. 9-316-086 and Teaching Note No. 5-517-046, with Tonia Junker and Daniela Beyersdorfer

HourlyNerd (2016) Harvard Business School Case No. 9-316-134 and teaching note, with Joseph Fuller

Paéz (2015) Harvard Business School Case No. 9-316-085 and Teaching Note No. 5-517-092, 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, awarded *The Case Centre Overall Winner Award 2019*

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

OneFineStay: Building a Luxury Experience in the Sharing Economy (2015) Harvard Business School Case No. 9-515-072 and teaching note, with Anat Keenan 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 and Teaching Note No. 5-517-098

The Park Hotels: Revitalizing an Iconic Indian Brand (2014) Harvard Business School Case No. 9-314-114 and Teaching Note No. 5-517-076, with Chekitan S. Dev

Filene's Basement: Inside a Fired Customer's Relationship (2014) Harvard Business School Case No. 9-314-076 and Teaching Note No. 5-316-184, 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?: 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 Case Award 2014

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

Brand Storytelling (2019) Harvard Business School Technical Note, No. 9-519-049.

The Art and Science of Brand Valuation (2018) Harvard Business School Technical Note, No. 9-518-086

Brand Portfolio Strategy and Brand Architecture (2016) Harvard Business School Technical Note, No. 9-517-021

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 Lamberton, 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 Penalzoza, 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.

Digital Content

Avery, Jill and Amy Gallo (2018) **“Inside the Case at the Tate Museum: How Does a Legacy Organization Become Digital-First?”** *Harvard Business Review Webinar*.

Avery, Jill (2017) **“Competing Against a Goliath,”** *Harvard Business Review Facebook Live Session* (142,000+ views).

Avery, Jill and Brian Kenny (2017) **“Does Le Pliage Help or Hurt the Longchamp Luxury Brand?”** *Cold Call by Harvard Business School Podcast*.

Avery, Jill (2016) **“Humanizing Customer Relationship Management,”** *Harvard Business Review Facebook Live Session* (46,000+ views).

Avery, Jill and Andrew O’Connell (2015) **“Case Study: Reinvent This Retailer,”** *HBR IdeaCast*

Research in Progress

Avery, Jill and Ayelet Israeli **“Thing Testing,”** Harvard Business School case and teaching note.

TEACHING

MBA

Marketing (MBA core), Harvard Business School (2014-2019)

Creating Brand Value, Harvard Business School (2018, 2019)

Branding + Different, Harvard Business School (2014)

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

- FIELD 1: FIELD Foundations (2013)
- FIELD Global Immersion (2013-2017), Course Head (2014-2015)
2014: Malaysia, 2015: Morocco, 2016: Turkey, 2017: Finland
- FIELD 3: Integrative Intelligence (2014-2016), Course Head (2015-2016)

MBA START Program, Harvard Business School (2013)

MBA Bridges Program, Harvard Business School (2017)

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)

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

EXECUTIVE EDUCATION

Open Enrollment

Driving Digital Strategies, Harvard Business School, instructor (2019)

Transforming Customer Experiences, Harvard Business School, instructor (2019)

Global Strategic Management, Harvard Business School, instructor (2018)

Strategic Marketing Management, Harvard Business School, instructor (2014-2018)

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

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

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

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

Custom Programs

Young Presidents' Organization (YPO) Gold, Harvard Business School, instructor (2020)

Endeavor, Harvard Business School, instructor (2019)

The Coca-Cola Company, Harvard Business School, instructor (Spring/Fall 2018)

Bacardi Leadership Workshop, Harvard Business School, instructor (2018)

Midea Group Top Leaders Program, Harvard Business School, instructor (2018)

ANTA Sports Products Limited, Harvard Business School, faculty co-chair (2018)

IBM Global Business Services Digital Strategy Master Class, Harvard Business School, instructor (2018)

American Express Leadership Direct Program, Harvard Business School, instructor (2017-2018)

Kellogg's Executive Development Program, Harvard Business School, instructor (2017)

Constellation Brands Executive Development Program, Harvard Business School, instructor (2017)

Anheuser-Busch InBev Brand-Led Innovation, Harvard Business School, faculty chair (2016)

HubSpot Leadership Fellows Program, instructor (2016-2019)

Defy Ventures Entrepreneurs-in-Training, Harvard Business School, instructor (2014)

Digital Strategies, National Arts Strategies, faculty chair and instructor, custom program for arts and cultural organizations (2013, 2014)

Strategic Marketing, National Arts Strategies, instructor, custom program for arts and cultural organizations (2012)

VISITING POSITIONS

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

ACADEMIC COMMUNITY CONTRIBUTIONS

Research Center Director	Institute for Brands and Brand Relationships , Director and Treasurer, 2013-Present
Ad Hoc Journal Reviewer	Journal of Consumer Research , 2006-2015 Journal of Marketing , 2008-2017 Marketing Science , 2008-2009 Journal of the Academy of Marketing Science , 2008-2013 International Journal of Research in Marketing , 2011-2016 Journal of Retailing , 2014 MIT Sloan Management Review , 2012-2013 Consumption, Markets, and Culture , 2009-2016 European Journal of Marketing , 2013-2017 Journal of Brand Management , 2012 Journal of Marketing Management , 2011-2012 Marketing Theory , 2009 Marketing Education Review , 2014 Journal of the Association for Consumer Research , 2015 Journal of Business Research , 2012-2015 Family Business Review , 2010 Routledge Publishing , 2010
Conference Leadership	Brands and Brand Relationships Conference (2012-2016), Conference Co-Chair American Marketing Association Summer Educators Conference (2010), Branding Track Chair Consumer Culture Theory Conference (2008), Session Chair, "Consumer Identity Projects"

UNIVERSITY SERVICE CONTRIBUTIONS

Chair of Convening and Special Events , HBS DIALOGUE, (2019-2021)	
Faculty Advisor	HBS Women's Student Association (WSA) 2018-2020
Faculty Chair	HBS Admissions Peek Weekend (2018-2020)
External Speaking Engagements	Immersion 2016 Conference , Marketing Science Institute, Fall 2016 Golden Seeds Forum , Spring 2016
Internal Speaking Engagements	Ivy+ Annual Fund Conference @ Harvard University , Spring 2019 HBS Rock 100 Summit , Fall 2018 Harvard Undergraduate Marketing Club , Fall 2018 Harvard Undergraduate Women in Business Intercollegiate Business Convention , Fall 2018

HBS Sales and Business Development Club, Panel with Samuel Adams CEO Martin Roper, Spring 2018

HBS Dynamic Women in Business Conference, Big Data in Retailing Panel, Harvard Business School, 2018

HBS IAE Visiting Scholars Case Session, Fall 2017

HBS Career Panel on CPG 101, Fall 2017

HBS Admissions Peek Weekend, Spring 2017

HBS Art Society, “How to Get on a Non-Profit Board,” 2017, 2018, 2019

HBS Admitted Students Revisit Day, Spring 2017, 2018

HBS Admissions Lunch with Prospective Students, Fall 2016, Spring 2017

HBS LGBT Student Open House, Faculty Panel, Fall 2016, 2017, 2018

HBS Rock 100 Entrepreneurs’ Summit, Group Discussion Moderator, 2016

HBS Dynamic Women in Business Conference, Women on Boards Panel, Harvard Business School, 2016

HBS Women’s Student Association Speaker Series, Recruited and moderated discussions with:

- Abigail Johnson (CEO, Fidelity Investments)
- Sandra Moose (Senior Advisor, Boston Consulting Group)
- Jill Medvedow (Director, Institute of Contemporary Art)
- Diane Paulus (Director, American Repertory Theater)
- Linda Wells (Founder, *Allure Magazine*)
- Lisa Hughes (Chief Revenue Officer, *The New Yorker*)
- Jill Shah (serial founder)
- Eileen Serra and Pam Codispoti (JPMorgan Chase)
- Christiana Smith Shi (President/DTC, Nike)
- Alexandra Weiss (SVP Marketing, Glossier)
- Tina Sharkey (Founder and CEO, Brandless)
- Pam Hamlin (CEO, Arnold Worldwide)

HBS Executive Education and Harvard Business Review Case Study Session, Istanbul, Harvard Business School, 2016

HBS General Management via Marketing/CPG Panel, Harvard Business School 2015

Harvard Undergraduate Women in Business Career Panel, Harvard College, 2015, 2018

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, Fall 2015

HBS Marketing Innovation Conference, Fall 2014, 2017

HBS Club of Connecticut, Harvard Business School, 2014

Harvard Arab Weekend, Harvard University, 2013

Women’s Student Association Faculty Brown Bag Lunch Series, Harvard Business School, 2013

Harvard University Women in Business Speaker Series, Harvard College, 2013

MEDIA PRESENCE

Magazines

Advertising Age, The Economist, Bloomberg/Businessweek, The Atlantic, Entrepreneur, Forbes, Inc., Slate, Business at Oxford, Simple Living

Newspapers

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

Trade Journals

Strategy and Business, Drug Store News, Direct Marketing News

Digital Media

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.
How Do You Compete with a Goliath?	2016, <i>Harvard Business Review</i>	Tela is a second mover and a small brand competing against a savvy global brand that has preempted its attempts to position itself as a social mission driven, authentic Peruvian brand. How should Tela position its brand to best compete against Saira? Several positioning narratives are presented for debate, including authenticity, low price, social mission, and underdog branding.
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.

PEDAGOGICAL MATERIALS		
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.
Armarium: Luxury Branding in the Sharing Economy	2017, HBS Case	Armarium, a two-sided online platform that offered consumers the opportunity to rent the most coveted, current season high fashion clothing and accessories from the top global luxury brands, had emerged from its first sales season with two distinct customer segments: the High Net Worth (HNW) woman and the High Earner, Not Rich Yet (HENRY) woman. As it began to scale its operations, it had to decide which segment was the more desirable target market and how to refine the company's value proposition to maximize value creation for both consumers and the luxury brands that supported the business model. The jury was still out on whether a rental model could attract higher income women who could afford to buy luxury brands and whether it could support the \$400 rental price points Armarium would need to charge for its one-of-a-kind pieces with retail values that could reach as high as \$15,000. The two founders faced significant scaling challenges, from how to establish guardrails around curation of the collection to go-to-market distribution channel strategy and customer acquisition strategy.
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.
BOOK CHAPTERS AND OTHER		
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	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

	Mittal, Open Mentis.	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 Brands

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		
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?
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?
PEDAGOGICAL MATERIALS		
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.

Understanding the Brand Equity of Nestlé Crunch Bar: A Market Research Case	2019, HBS Case	<p>In early 2018, Nestlé announced the sale of its U.S. candy-making division and a select collection of twenty of its confectionery brands, including the Nestlé Crunch Bar, to Ferrero SpA for \$2.8 billion. As the Nestlé Crunch Bar brand transitioned to its new owners, it was time for some serious brand analysis to assess the brand equity of Nestlé Crunch Bar and plot a course for its future growth. How strong/weak was the brand? What were its sources of brand equity that could be leveraged in brand storytelling? Which types of messages might attract new consumers to the brand and what might work to cause infrequent users to purchase more often? Did the product itself need to be changed? Were there brand extension possibilities? Luckily, an old consumer research study on the Nestlé Crunch Bar conducted by Professor Gerald Zaltman was found on the shelves at Harvard Business School. The study used an innovative market research methodology developed by Professor Zaltman, the Zaltman Metaphor Elicitation Technique (ZMET), which had proven to be useful to brand managers hoping to better assess and understand their brands. The research methodology and raw data from Professor Zaltman’s ZMET study on the Nestlé Crunch Bar are presented in the case as tools to help students assess and understand the brand equity of the Nestlé Crunch Bar and map its future strategic course.</p>
Away: Scaling a DTC Travel Brand	2019, HBS Case	<p>Away, a direct-to-consumer, digital native e-commerce seller of travel luggage, is debating how to invest its latest round of venture funding. How quickly could and should Away scale and what were the most promising growth trajectories to maximize its potential? Three decisions face the founders. Should Away continue to invest in driving growth in suitcases and other travel bags or was it time to begin to expand into other adjacent travel categories? How should they use the results of the company’s first customer segmentation study to select target segments and quantify their growth aspirations? What were the right distribution strategies moving forward following a series of pilots that included company-owned stores, temporary airport kiosks, and pop-up experiences with retailer partners?</p>
Brandless: Disrupting Consumer Packaged Goods	2018, HBS Case	<p>With \$52.5 million of venture funding in its coffers, could Brandless, an online direct-to-consumer seller of upscale private-label consumer packaged goods, take on both the world’s greatest brands and the world’s most dominant retailers to change the way consumers bought the essential items that filled their pantries? Industry pundits had long been predicting both the death of brands and the death of brick and mortar retailing in the contemporary marketplace. Would Brandless be the last nail in the coffin?</p>
Global Brand Management of Anheuser Busch InBev’s Budweiser	2018, HBS Case	<p>Brian Perkins, chief architect of the \$6 billion Budweiser brand was excited about 2018, in which the company would launch Budweiser into several new markets in Africa and Latin America. He was also feeling the pressure to finalize a global brand strategy that would define Budweiser’s value proposition and guide its development and execution around the world. The problem was that Budweiser actually had two distinct brand realities that differed across geographies and that often interfered with each other.</p>
The Marriott-	2018, HBS Case	<p>In September 2015, hotel operator Marriott International Inc. completed its \$13.3 billion</p>

Starwood Merger: Navigating Brand Portfolio Strategy and Brand Architecture		acquisition of Starwood Hotels & Resorts, which added 11 brands to its already robust 19 brand portfolio. Marriott's CEO acknowledged that the company probably didn't need 30 different hotel brands, but claimed to have no plans to shed any of them. Marriott's global brand officer was charged with making sense of the brand portfolio and designing a strategy that would clearly differentiate each brand from the others and a brand architecture system to communicate to consumers how to navigate among them. She would need to decide whether and how to prune brands from the portfolio, whether and how to combine brands through dual-branding and/or sub-branding strategies, and whether, where, and how to use the Marriott parent brand to endorse the remaining brands.
Adeo Health Science: Turning a Product into a Brand	2018, HBS Case	For decades, American parents were warned to avoid introducing potential allergens to their babies prior to their first birthday. However, in 2017, the medical establishment radically reversed their position and now warned parents that delaying the introduction of allergens had the potential to increase their baby's risk of developing allergies. Adeo Health Science was ready to act on this reversal, having recently developed a feeding solution that made it simple for parents to introduce allergens to infants. The company was planning its launch strategy and deciding how to turn their product into a brand. A major decision involved their path to market: B2B through pediatricians, direct-to-consumers, or via traditional grocery retailers. Each path required a different type of brand and different types and levels of marketing support. As a new startup, Adeo Health needed to make the right decisions or it risked running out of funding before getting its product to market.
LogMeIn: Brand Portfolio Strategy and Brand Architecture	Forthcoming, HBS Case	Following a merger that brought together two companies to create a billion dollar software-as-a-service (SaaS) company with a large and diverse brand and product portfolio, CMO Sean Ford must ascertain how to design, deploy, and manage the combined company's multiple brands as a diversified, yet cohesive portfolio that addressed the needs of diverse customers and maximized return while minimizing risk. He would need to specify the optimal portfolio of brands for comprehensive market coverage with minimal overlap, determine the role and scope of each brand, and design a strategic, logical, and efficient brand architecture that knitted the brands together into an interdependent system that promoted synergy, diminished friction, and sketched a clear and compelling roadmap for customers' purchase journeys.
Longchamp	2016, 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?
Global Brand Management at Lay's	Forthcoming, 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

		<p>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.</p>
Mavi: Fashioning a Path to Brand Growth	2017, HBS Case	<p>Mavi, a leading Turkish apparel retailer, had sales of \$419 million in 2015, up 20%. Growth rates like these were becoming routine at Mavi. But, the path to growth was getting more challenging, and Turkven, Mavi's private equity partner, was planning its options after seven years of investment. There were four growth levers Mavi could pull, but each involved selecting one growth path while neglecting another. Should the company invest in growth domestically or internationally? Should they change the price positioning of the brand to move up-market or down-market? Which value proposition offered the most future promise: functional differentiation, lifestyle differentiation, or celebrity endorsement? Should the company continue to serve both men and women of all ages or were there specific consumer targets that offered the most promise? Managers realized that these choices would not only determine the company's short term growth trajectory but also shape the longer term value of the Mavi brand.</p>
Nanda Home: Preparing for Life After Clocky	2011, HBS case	<p>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.</p>
J.C. Penney's Fair and Square Pricing Strategy	2012, HBS Case	<p>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</p>

		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?
Brand Portfolio Strategy and Brand Architecture	2016, HBS Technical Note	While companies choose to brand their products and services in many different ways, there are some central tenets that help define an optimal brand portfolio and associated brand architecture. Brand portfolio strategy involves the design, deployment, and management of multiple brands as a coordinated portfolio of meaning-based assets that address the needs of diverse customers in a marketplace and maximize return while minimizing risk. It specifies the optimal portfolio of brands a company should maintain for comprehensive market coverage with minimal overlap, determines the role and scope of each brand in the portfolio, and designs a strategic, logical, and efficient brand architecture that knits the brands together into an interdependent system. Done well, it informs the allocation of investment across brands, identifies underperforming brands as candidates for pruning or revitalization, and pinpoints gaps in the portfolio that indicate growth opportunities for new brands.

BOOK CHAPTERS AND OTHER

Consuming Brands	2015, book chapter, <i>Cambridge Handbook of Consumer Psychology</i> , Eds. Michael Norton, Derek Rucker and Cait Lambertson	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.
------------------	---	--

3: Brand Storytelling, Meaning Management, and Brand Positioning

Summary: This research explores how brand managers can tell compelling stories that resonate with consumers.

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.
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.
PEDAGOGICAL MATERIALS		
La Roche-Posay: Growing L'Oréal's Active Cosmetics Brand	2019, HBS Case	As 2018 neared its end, Laetitia Toupet, international general manager of L'Oréal's La Roche-Posay brand reflected on the brand's achievements over the past year. At €1 billion in revenue, La Roche-Posay had recently become the number one dermocosmetics brand in the world. While Toupet was pleased with this feat, she believed that the brand was at a critical juncture. It was time to make some significant marketing decisions related to brand positioning to try to accelerate La Roche-Posay's future growth trajectory.
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?
Brand Storytelling	2019, HBS Technical Note	This technical note is designed to help students and managers understand the fundamentals of brand storytelling. It includes information on how and why consumers respond more favorably to brand information presented in story form. It deconstructs brand stories into four key

		elements: Message or moral, conflict, characters, and plot. It illuminates the practice of archetypal branding, using archetypal plots and characters to compose a brand story. It highlights the opportunities and challenges of different types of creative appeals and storytelling devices, including humor, fear, romance/sex, irony, and authenticity/transparency. Finally, it provides a roadmap and template for composing and telling resonant, relevant, authentic, defensible, and differentiated brand stories.
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?
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 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.
Super Bowl Storytelling	2018, HBS Case	Given the large and mostly captive audience that the Super Bowl delivers, advertisers are willing to pay a substantial premium – more than \$5 million in 2018--for a 30-second spot. Firms vie to win <i>USAToday's Ad Meter</i> , published the morning after the game, which reveals which commercials consumers liked the best (and the least). One key question is whether advertising

		<p>on the Super Bowl is worth the expense (especially when you consider that the \$5 million for a 30-second ad doesn't cover the cost of actually creating the ad and generating awareness for it, which can easily add at least another \$1 - \$2 million). The answer to the question of whether advertising on the Super Bowl is worth it depends heavily on the advertiser's goals and the extent to which they're able to leverage social media before, during, and after the broadcast to extend the reach and impact of their Super Bowl ad buy. Brand awareness, social media buzz, and unit sales are very different desired outcomes, and Super Bowl ads can be more or less effective in delivering against each of these objectives.</p>
<p>Kempner: Turning a Cultural Icon into an Iconic Brand</p>	<p>In Process, HBS Case</p>	<p>Chris and Meggie Kemper, grandchildren of the legendary clotheshorse and Manhattan socialite Nan Kempner, were in the midst of launching a new American sportswear fashion collection for women under the newly created Kempner brand. The case follows the two founders as they struggle with limited resources to design and build a product line, establish a distribution strategy, and generate initial consumer awareness for their venture. The siblings quickly realize that a strong brand will be essential to their success in attracting retail partners and generating press coverage of their company that will help attract and spur consumers to purchase. How should two siblings leverage their iconic grandmother's legacy to create a fashion brand? How could a cultural icon of the 1960's and 1970's be refashioned to resonate with today's Millennials?</p>

4: Brand Valuation and Investing in Brands

Summary: Brands are often the most valuable asset a firm possesses but due to challenges associated with valuing these intangible assets, brands are often mismanaged. From an accounting standpoint, investments in brands flow through the income statement as expenses and brand asset value only appears on the balance sheet at book value when a brand is acquired through a merger or an acquisition. This accounting treatment often drives firms toward short-term returns rather than to building long-lived assets. In this research stream, I explore the opportunities and challenges associated with brand valuation and provide insight into how managers could better manage brands as assets.

PEDAGOGICAL MATERIALS		
The Art and Science of Brand Valuation	2018, HBS Note	Brand valuation, the art and science of calculating the economic value accruing to a firm from its use on an intangible brand asset, yields frustratingly inconsistent, discrepant, and therefore, controversial results. While it is widely accepted that brands are long-lived assets that can contribute significant value to firms over time, there is no consensus on how to value them. This note outlines several different methods for valuing brands and exposes readers to the commercial methods most used by firms. It discusses the opportunities associated with valuing brands as well as the challenges.
Kraft Heinz: The \$8 Billion Brand Write-Down	2019, HBS Case	On Friday, February 22, 2019, following an unexpected and disappointing earnings report, The Kraft Heinz Company's stock price fell 27%, wiping out \$16 billion in market value. CEO Bernardo Hees had announced that the company had taken a \$15.4 billion asset write-down, that the company would be cutting its annual dividend from \$2.50 to \$1.60 and that it was under SEC investigation for accounting irregularities related to its procurement process. \$8.3 billion of the asset write-down was related to a loss in value of the firm's intangible assets, specifically its Kraft and Oscar Mayer brands. As Kraft Heinz looked ahead to the future, it was time to recalibrate its brand management strategies. With nearly \$100 billion in brand assets remaining on its balance sheet, effectively managing its brands going forward was critical to avoiding another brand asset write-down and to regaining the \$15 billion brand value the company had just lost.
Shiseido: Reinvesting in Brand	2018, HBS Case	Shiseido was in the midst of a six year corporate turnaround, trying to reverse the effects of decades of under-investment in R&D and marketing which had led to a vicious cycle of declining customer support and brand value. Would the CEO's VISION 2020 plan, centered on four strategies: 1.) increasing R&D spending from 1.8% to 3% of sales, 2.) investing an incremental ¥120 billion in brand-building marketing, 3.) moving to a "think global-act local" matrixed brand management structure, and 4.) rethinking brand portfolio strategy, be enough to achieve aggressive 8% per year sales goals while simultaneously increasing the company's operating margin from 8% to 10% in the highly competitive and slow growing beauty industry?
Christie's and Leonardo da Vinci's <i>Salvator Mundi</i> : The	2018, HBS Case	On November 15, 2017, the gavel fell after nineteen minutes of fevered bidding for Lot 9 in Christie's Post-War and Contemporary Evening Sale. Leonardo da Vinci's 500 year old painting, the <i>Salvator Mundi</i> , was sold for \$400 million, three times its estimate. Miraculously, the

Value of a Brand		<p>painting had been sold at auction by Sotheby's for £45 a mere 59 years earlier and then later sold at a regional art auction in Louisiana in 2004 for \$10,000. Its long and twisting journey from there to Christie's selling floor had all the markings of a bestseller, filled with intrigue, art world celebrities, and conspiracy theories. A sixteenth century Renaissance masterpiece, missing for 137 years, believed by many to have been destroyed, and then rediscovered, becomes the most expensive painting ever sold, all the while surrounded by controversy. Did the buyer pay too much? Was it real? Did it matter?</p>
Investindustrial and Aston Martin Lagonda: Revitalizing a Brand	In Process, HBS Case	

5: 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.

BOOKS		
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.
JOURNAL ARTICLES		
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.
PEDAGOGICAL MATERIALS		
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.
Glossier: Co-Creating a Cult Brand with a Digital Community	2018, HBS Case	Glossier's proclaimed strategy was "born from content, fueled by community". The digital-first, direct-to-consumer beauty brand had experienced rapid growth, with sales up 600% in 2017 and a customer portfolio that grew by threefold. But, its founder, Emily Weiss, was not complacent. Instead, she dreamed of creating the world's first socially-driven brand that inserted its community into the buying experience so that the company was merchandising people, their opinions, and their content, just as much as they were merchandising products. As her team debates marketing strategies for 2018, they recognize the opportunities and challenges associated with managing Glossier's rapidly scaling brand community. While the community's support had emerged organically in the past, the team was now debating whether the company's next phase of growth would need to be fueled by a greater emphasis on paid peer-to-peer sales representatives, professional influencer marketing, paid media, and a physical market presence.
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.
HubSpot and Motion AI: Chatbot-Enabled CRM	2018, HBS Case	HubSpot, an inbound marketing, sales, and customer relationship management (CRM) software provider had recently closed on its acquisition of Motion AI, a software platform that enabled companies to easily build and deploy artificial intelligence-fueled chatbots to interact with their customers. Should HubSpot replace its live chat representatives with chatbots? Was the company ready for bots to become the face of its brand to its prospective customers? What were best practices for chatbot-driven CRM that HubSpot could teach its B2B customers as they moved to incorporate chatbots into their own CRM strategies?
Chase Sapphire: Creating a Millennial Cult Brand	2017, HBS Case	JPMorgan Chase has just launched the most successful consumer credit card in its history. The Chase Sapphire Reserve has exceeded everyone at the company's expectations, signing up over 1 million cardholders in its first seven months. Consumer acquisition was fast and furious following the announcement that the card would carry an unprecedented 100,000 point bonus, which could be worth over \$1,500. With a launch plan heavily reliant on public relations, social media, and word-of-mouth, the product became a cult-brand among the previously resistant to credit cards Millennial target market. But now, management has to develop plans to retain these new customers long enough so that they become profitable to the firm. They are focused on making the Reserve card top-of-wallet and retaining customers through their one year anniversary, when they decide whether or not to renew the card and pay its \$450 annual fee without the inducement of a sign-on bonus. A recent move to reduce the sign-on bonus to 50,000 points risks new customer acquisition growth. Assimilating the successful new product into an existing brand and product line was challenging. How should managers dynamically manage all three Chase Sapphire products to best meet the needs of diverse consumers in the credit card market? Which features and benefits should each card carry to best differentiate itself from Chase's other products and from increasingly competitive products from American Express and Citi? And, how should all three be managed to continue to enhance the brand equity of the Chase Sapphire sub-brand?
BOOK CHAPTERS AND OTHER		
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	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

Competence		them more compelling and attractive as relationship partners for consumers.
WORK IN PROGRESS		
Toward a Dynamic Theory of Consumer-Brand Relationships: Content and Process from a Relationship Contracting Perspective		<p>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.</p>

6: 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.

JOURNAL ARTICLES		
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.
PEDAGOGICAL MATERIALS		
Brand Activism: Nike and Colin Kaepernick	2018, HBS Case	Nike's selection of politically polarizing Colin Kaepernick as the spokesperson for the thirtieth anniversary of its iconic "Just Do It" campaign catapulted the brand into the media spotlight and made it a political flashpoint for consumers across America. Would the choice of Kaepernick positively or negatively affect Nike's business results or just generate a lot of social media chatter? As Nike's management team watched some people burn their sneakers in protest on YouTube and others applaud the company's behavior on Facebook, they wondered whether inserting Nike into the middle of a heated political debate was the right thing to do or the most reckless action Nike's brand stewards had ever taken, putting Nike's \$30 billion brand asset at risk? After all, on social media, it was easy to say that one would boycott or buycott a brand due to one's political beliefs, but in the marketplace, other purchase criteria often reigned supreme.
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 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.

7: 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.

JOURNAL ARTICLES		
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.
PEDAGOGICAL MATERIALS		
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 Marketing	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 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.
Predicting Consumer Tastes with Big Data at Gap	2017, HBS Case	CEO Art Peck was eliminating his creative directors for The Gap, Old Navy, and Banana Republic brands and promoting a collective creative ecosystem fueled by the input of big data. Rather than relying on artistic vision, Peck wanted the company to use the mining of big data obtained from Google Analytics and the company’s own sales and customer databases to select the next season’s assortment. Peck was betting that intelligence fueled by big data could outperform a fashion industry creative director at predicting the future fashion trends and tastes of consumers.
Tailor Brands: Artificial Intelligence-Driven Branding	2018, HBS Case	Using proprietary artificial intelligence technology, startup Tailor Brands set out to democratize branding by allowing small businesses to create their brand identities by automatically generating logos in just minutes at minimal cost with no branding or design skills required. As it sets out to raise its Series B, the founders make some critical changes to their business model, moving to a subscription model and adding additional products and services to automate other parts of the branding and marketing process. Can algorithms, machine learning, and artificial intelligence help Tailor Brands outperform graphic designers and branding agencies in developing brand identities? And, can Tailor Brands differentiate itself from the many other logo generators popping up in the market?
Hubble Contacts: Data Driven Direct-to-Consumer Marketing	2018, HBS Case	As its Series A extension round approaches, the founders of Hubble, a subscription-based, social media fueled, direct-to-consumer (DTC) brand of contact lenses, are reflecting on the marketing strategies that have taken them to a valuation of \$200 million and debating changes to them that will allow them to grow their business. Ensuring that their marketing dollars were being spent efficiently was critical to the data-driven management team and proving to be complicated as the company moved spending from digital marketing to offline media, which made attribution modeling more difficult. Decisions pertaining to product extensions, channel expansion beyond DTC e-commerce, and geographic expansion were also on the table to prove that Hubble's customer value proposition and operations could profitably scale.
BOOK CHAPTERS AND OTHER		
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.
--	--	--

8: 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.

JOURNAL ARTICLES		
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.
PEDAGOGICAL MATERIALS		
<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.

9: 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 Global Immersion), 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.

PEDAGOGICAL MATERIALS		
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 Global Immersion: 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 Global Immersion: 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.