

Shopper Marketing and Social Networks: The Path to Integration

A Dissertation
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Degree

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DEDICATION

This dissertation is first dedicated to the enabler of all good works that we accomplish in this life long journey, my savior.

Secondly this dissertation is dedicated, to the other enablers and participators in all my crazy ideas, passions, and successes, my husband and amazing children. Each of you inspire me in your own way to work harder, achieve more, and make a more meaningful impact in this life.

I love you.

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ABSTRACT

The purpose of this dissertation is to examine the phenomenon of cross-functional integration of frontline employees supporting complex marketing initiatives. This dissertation contributes to research and managers through the exploration of how integration takes place, how knowledge is integrated across functions through social ties between people, and to begin to inspect its effects on the performance of marketing strategies. Integration captures the state of collaboration and coordination between individuals within and between a firm's functions. To date, cross-functional integration has been conceptually developed, but not empirically evaluated.

An extensive, multi-disciplinary literature review provides the foundation for understanding integration within the specific marketing context of shopper marketing. Shopper marketing is a marketing strategy that focuses on the consumer in shopping mode, requiring integral collaboration between functions (specifically marketing-logistics) and supply chain partners (manufacturer-retailer) in order to meet shopper needs. The flow of information and knowledge from consumer-retailer-manufacturer is dependent on an integrated network of social connections. Based on literature and theory, this research contends that the social network contributes to cross-functional integration, creating shopper marketing effectiveness through operations execution.

This dissertation examines the phenomenon of integration in two manners. First, an exploratory study seeks to map the supply chain social network of a firm implementing shopper marketing initiatives. Employing social network analysis, mapping the flow of ties between actors in the network, offers insight into the flow of knowledge and information that might bolster/impede shopper marketing implementation. Second, a theoretical survey design tests the

antecedents and consequences of cross-functional integration. The social network (connections between actors in the organization) concepts including relational embeddedness, socialization, and shared interpretation are explored as antecedents to cross-functional integration. The impact of cross-functional integration of individual performance is then tested as a measure of the service quality the frontline employee provides to retail customers. In short, these two studies will contribute to a holistic understanding of the supply chain management of shopper marketing through cross-functional integration and raise questions that should be addressed in future research.

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CHAPTER 1

INTRODUCTION

Shopper Marketing and Social Networks: The Path to Integration

The rising level of complexity in the contemporary marketplace requires firms to harness the flow of knowledge and information to stay competitive (Achrol and Kotler, 2006; Miles and Snow, 1986). Knowledge management entails intrafirm integration throughout the organizational network. Integration, which is the quality of the collaboration and coordination across and within functions, allows firms to manage the flow and interpretation of information for the creation of knowledge (Achrol and Kotler, 1999; Jones, et al., 1997; Kahn and Mentzer, 1996; Lawrence and Lorsch, 1967; Mentzer and Gundlach, 2010). In addition, integration across functions facilitates an understanding of what the customer wants as well as the capabilities of the organization in delivering upon those wants. Consequently, integration within the organization creates opportunities to increase firm performance (Esper, et al., 2010).

Firm performance depends in part on the actions of individuals within the firm to execute strategies such as marketing strategies (Pfeffer, 1994). The impact of individual performance on marketing strategy execution presents a challenge to companies that are not integrated. Consumer packaged goods (CPG) and retail firms are increasingly aware of the impact of poor cross-functional integration on marketing execution and effectiveness at the frontline (Deloitte Research and GMA, 2008). In the retail industry, CPG and retail firms partner to create a unique shopping experience in the retail store that markets directly to the needs of each retail channel's distinct shoppers, in a marketing strategy called shopper marketing (Flint, 2012). Despite the depth of understanding these firms have about how to reach the shopper, many organizations struggle to effectively execute in-store shopper marketing events (Deloitte Research and GMA,

2008). Therefore, execution of marketing strategies falls to frontline employees of either the CPG organization (or third party providers) who often lack the cross-functional integration necessary to make decisions in the store.

Marketing execution in the supply chain is often an afterthought in business theory and practice (Blanchard, 2011). Researchers have recognized that the great divide between functions in an organization impacts firm performance as well as marketing execution and individual performance. Integration research in supply chain and marketing lacks theoretical underpinnings that provide explanation of integration in multiple levels of the firm and contexts. In response to this gap in marketing and supply chain literature, a growing body of research focuses on the organizational social network and interactions between individuals that facilitate integration (Arndt, et al., 2011; Borgatti and Li, 2009; Mentzer and Gundlach, 2010). This research uniquely built on this growing area of research by exploring integration within the organizational network utilizing multiple methods to develop a paradigmatic theoretical framework from which integration can be explained.

Theoretical Approach

Multiple theories address the actions of individuals in an organizational network, but two network theories focus specifically on the impact of networks on organizational performance through examination of the antecedents and consequences of integration for the frontline individual. First, the network governance view (NGV) of social networks and organizations (Jones, et al., 1997) proposes that in a complex environment, social mechanisms such as coordination and collaborative behavior are driven by an individual's relational embeddedness in the organizational network. Relational embeddedness captures the individual's level of trust,

fine-grained information sharing, and joint problem-solving with others in the organizational network (Uzzi, 1999).

In the supply chain and marketing context, network governance can lend insight to inter- and intra-firm interactions. Network theory has been utilized in supply chain and marketing research to explain the interactions between organizations (Ketchen, 2007, Choi et al, 2001, Overby and Min, 2001), but has yet to be utilized to explore the individual interactions within the organization that facilitate knowledge management. In marketing research, individual and firm level interactions have been explored using the network based theory, social exchange theory (Hartline et al, 2000; Palmatier, 2008).

Second, social exchange theory (SET) captures the impact of the network on individual behavior (Emerson, 1976). SET formally recognizes the socialization and shared interpretation made possible by relationships within a network (Cook and Emerson, 1987; Hartline and Ferrell, 1996). Despite the paradigmatic foundations offered by network theories to predict the actions of individuals within an organizational network, networks and individual interactions have been relatively unexplored in marketing, retail channels, and supply chain research (Achrol and Kotler, 2011; Brown and Dant, 2008; Esper, et al., 2010).

Unfortunately, the lack of a unifying theory to explain and predict the impact of integration exposes several gaps in the streams of research that recognize the importance of integration. First, supply chain research indicates the importance of integration for firm-level performance (Ellinger, et al., 2006; Mollenkopf, et al., 2000), but has yet to develop a cohesive theoretical framework of antecedents and consequences (Esper, et al., 2010). Second, marketing research develops and explores the concepts of organizational knowledge management (Hult, et al., 2005) without exploring the individual interactions through which knowledge is created and

exchanged (Mentzer and Gundlach, 2010). Finally, strategy theories offer explanation of the impact of networks on firm-level performance (Jones, et al., 1997), but not the individual-level interactions and outcomes.

Research Approach

The purpose of this dissertation is to begin to explore and fill the gaps in the supply chain, marketing, and strategy literatures by investigating integration using multiple approaches. The first step in this research was to explore the managerial focus and behaviors necessary for managers and employees to integrate across functions. In business practice and research, evidence of the detrimental disconnect that still exists across functions in an organization can be found at both the frontline managerial and employee levels (Arndt, et al., 2011; Deloitte Consulting LLP, 2008; Ellinger, 2000; Ellinger, et al., 2006). The future of this stream of research will benefit from explanation found here of the nature of managerial interactions that may guide the theoretical understanding of integration within the organization. Integration takes place in symbolic social interactions through which individuals coordinate and collaborate knowledge and mutual goals (Esper, et al., 2010). Thus, this dissertation explored the following research question:

RQ1: How do managers and employees interact to facilitate integration?

The next step was an exploration of the nature of integration. Although network theories may provide fundamental assumptions regarding how individuals within an organization interact to foster a network environment (Cook and Emerson, 1987; Cross, et al., 2002), no integrated theory currently explains the antecedents and nature of integration. Supply chain research has primarily focused on the competitive advantage provided by cross-functional integration (Min, et

al., 2005; Mollenkopf, et al., 2000; Stank, et al., 1999), but does not address the social antecedents that facilitate the emergence of integration within an organization (Esper, et al., 2010). This dissertation begins to address this gap by exploration of the following research question:

RQ2: What is the nature of the individual network that facilitates integration?

Finally, this research explored the impact of integration on a traditional marketing process: marketing execution. Within the context of the retail channel, CPG and retail companies are struggling to convert complex shopper marketing strategies into frontline execution (Deloitte Research and GMA, 2008). Although past research does indicate that integration could provide managers within the organization and employees at the frontline with the knowledge necessary to make effective and efficient decisions in the retail store (Bowersox, et al., 1999), less research focuses on theoretically predicting and guiding the implementation of complex marketing strategies throughout the retail supply chain (Shankar, et al., 2011). The antagonistic nature of the relationships between manufacturers and retailers has left manufacturers dependent on providing quality products as well as quality service to their retail customers (Davis-Sramek, et al., 2008).

Shopper marketing provides CPG manufacturers with the dual benefits of marketing their products at an opportune time to the consumer in shopper mode (Stilley, et al., 2010) and deepening their relationships with retailers through the co-creation of a unique shopping experience (Flint, 2012). Firms that can deliver shopper marketing to their retail customers can also provide better service quality to their customers. Shopper marketing execution is dependent on integration across functions. The service quality provided through the execution of the

marketing strategy is also dependent on the level of cross-functional integration attained by frontline employees executing shopper marketing in the retail store. Service quality is dependent on both marketing effectiveness and logistics efficiency in delivery and management of the inventory (Mentzer, et al., 2001). Thus, the last research question explored is as follows:

RQ3: What is the impact of cross-functional integration on service quality?

This dissertation addressed these research question using three different approaches. The first research question was examined through ethnographic methods to capture how employees interact in their daily lived experiences. The investigation of the second research question employed social network methods to explore the nature of the network in which employees interact. Finally, the third research question was explored through a theoretical survey methodology to measure the impact of the individual's network on integration both within and across functions as well as the service quality provided to the retail store.

Contributions

This research contributes to multiple streams of research including marketing, supply chain, and strategy. First, throughout the qualitative analysis process, a new understanding of how cross-functional knowledge creation and exchange benefits marketing execution was developed. Then, by exploring the nature of networks impacting integration, the research presented here extended marketing concepts from the strategic to the individual level. Further, this research introduced network theory to supply chain research as an explanation of the impact of cross-functional integration. Finally, the findings of this research added individual performance implications to strategy research. The overall contributions of this research will be further discussed in the final summary chapter.

Organization of the Dissertation

This dissertation is organized into five chapters. Chapter One introduces the dissertation and explains the topic. The focus was to introduce the impetus for studying integration. Chapter Two is a comprehensive literature review, which provides the foundational information used to build the theoretical framework for this dissertation and to identify gaps in the extant literature. Chapter Three presents a qualitative and quantitative social network analysis of a shopper marketing based supply chain. Chapter Four reports the results of a survey that investigates the role of social capital in achieving shopper marketing objectives. Chapter Five concludes the dissertation by summarizing and integrating the findings from the two studies as well as offering suggestions for future research.

CHAPTER 2

LITERATURE REVIEW & CONCEPTUAL DEVELOPMENT

Shopper Marketing Knowledge Creation & the Emerging Shopper Orientation of the Firm

Introduction

Marketing execution presents a significant challenge to consumer packaged goods (CPG) companies that implement complex marketing strategies in the retail store (Deloitte Research, 2007). Retail and CPG manufacturing firms that are focused on in-store shopper marketing realize that over half of the shoppers in the store make purchase decisions as they shop (Inman, et al., 2009; Stilley, et al., 2010a; Stilley et al., 2010b; Underhill, 2000). Based on the importance of intersecting shoppers, CPG companies have developed shopper marketing strategies to gain insights into shoppers' behaviors and to market directly to those shoppers in the store. Shopper marketing is defined as the planning and execution of all marketing activities that influence the shopper during and after the path-to-purchase, which begins with the motivation to shop and continues through to the purchase, consumption, repurchase, and recommendation of products (Shankar, et al., 2011). Despite the importance of shopper marketing to capture shoppers' attention and to influence their purchase decisions, in-store marketing strategies are often not fully diffused (passed on) to frontline employees and, therefore, are not executed in the store (Deloitte Research, 2007; IBM Institute, 2002; Piercy, 1998).

In many companies, frontline employees do not have the knowledge necessary to juggle the cross-functional priorities of sales, merchandising, order placement, and display construction. Because key employees often do not understand either the importance of shopper marketing or how to prioritize their activities in the store, shopper marketing events are not well executed in

the retail store (Deloitte Research 2007). Lack of frontline employee ability to execute may be due to a lack of cross-functional integration. Cross-functional knowledge management is a priority for firms moving in the direction of strategic shopper marketing (Shankar, 2011).

A close examination of Shankar and colleagues' work in the areas of shopping behavior, retailing and shopper marketing (Inman et al., 2009; Shankar et al., 2011, 2010; Shankar and Bolton, 2004; Stilley et al., 2010a, 2010b; Inman et al., 2004) as well as industry press (Flint, 2012; Pincott, 2012) seems to imply that shopper marketing is far more than a new buzzword for merchandizing or a tactical approach by the marketing or sales arms of a brand manufacturing firm. Shopper marketing is largely driven by joint-organizationally developed shopper insights and involves cross-organizational and cross-functional efforts to plan and execute. In short, it involves a commitment across an entire organization and quite possibly multiple organizations to view much of their work through the lens of shoppers. Specifically, shopper marketing from one perspective could be envisioned as an orientation driving business solutions. A shopper orientation concept does not yet exist even though it seems apparent that this is exactly what firms and scholars are describing. In light of this gap, this chapter proposes a shopper marketing orientation concept.

Details on a shopper orientation are provided later in the chapter. For now, consider a shopper orientation as an extension of market orientation and as such, one that involves intelligence gathering and generation (i.e., shopper insights, retail demand chain partner information) and specific responses to that intelligence. It is also an extension of a customer orientation (Deshpande et al., 1983) or customer value orientation of the firm (Slater, 1997). At its core, a shopper orientated firm or collection of firms is driven by an understanding of and desire to connect with one's shoppers. Therefore, a shopper oriented firm creates knowledge,

products, and marketing strategies based on an interactive understanding of who the shopper is and what the shopper desires. Firms might contribute to the development of a shopper orientation by managing the flow of knowledge gained from shopper insights (research focused on understanding shopper behavior, wants, and needs). Shopper insights inform the company on how shoppers behave and are influenced along the path-to-purchase. A shopper-oriented firm would then integrate shopper insights through knowledge creation and management across supply and demand functions and throughout the corporate hierarchy, from the strategic corporate level to frontline employees executing shopper marketing events.

Knowledge management, defined as using market information to develop contextualized beliefs and subsequent strategic and structural commitments (Nonaka & Takeuchi, 1995), can only enable frontline employees to execute in the retail store if firms manage the creation and flow of knowledge throughout the organizational network. Knowledge is created through the interactions between people, which form the basis through which those people interpret and give meaning to complex information, such as shopper insights (Schuman, 1987; Nonaka, 2008). Shopper marketing teams at the corporate level within organizations create knowledge based on shopper insights, but often this knowledge is not diffused to the frontline employees who are expected to implement those strategies in the store (Shankar, 2011). In other words, knowledge creation takes place at the corporate level to develop shopper marketing strategies and events, but bottlenecks in the flow of knowledge hinder frontline execution.

Although knowledge is recognized as a key resource in many disciplines, marketing, supply chain, and management have not fully explored how the management of knowledge flows translates strategic marketing knowledge into tactical implementation. Further, this literature provides little empirical evidence of how marketing strategies are translated into execution

across functions (Wang, et al., 2009). Although marketing researchers recognize that knowledge is central to marketing strategy development (Jaworski and Kohli, 1993), marketing researchers pay little attention to how organizations can manage their members' interactions, during which knowledge is created, interpreted, and disseminated through the organization to the executors at the frontline (de Luca and Atuahene-Gima, 2007; Kirca, et al., 2005). On the other hand, supply chain researchers address the way that coordination and collaboration (cross-functional and inter-organizational integration) improve efficiency and effectiveness, but ignore the specific relationships that enable the effectiveness of marketing campaigns and events in the retail store (Esper, et al., 2010; Spralls III, et al., 2011). Finally, organizational behavior and management literatures contain theoretical foundations for understanding how knowledge is diffused throughout networks, but not how knowledge influences frontline decisions and impacts individual performance (Bolino, et al., 2002).

The purpose of this chapter is twofold. First, this chapter reviews the literature relevant to shopper marketing. This research contributes to the shopper marketing literature through a review of the shopper behavior, retail channel, and supply chain literatures, and unites what has been explored within the domain of shopper marketing across these streams of literature by paying more careful attention to the operational challenges inherent within shopper marketing. Second, this chapter suggests a shopper orientation concept and theoretical research agenda that guides future research addressing the gaps in the literature. The shopper orientation concept allows for a more holistic perspective of shopper marketing by moving beyond shopper insights and exploring how knowledge management impacts shopper orientations throughout the retail channel and enables marketing strategy execution. The shopper orientation concept further

develops the understanding of how knowledge is created through symbolic interactions and managed through its dissemination to the frontline.

This chapter is organized in three sections. The first section contains a review and synthesis of the research that inform shopper marketing literature. The second section builds on this literature review to develop a shopper orientation concept. Finally, the third section guides future research with an integrated research agenda.

Shopper Marketing

Although shopper marketing research is in its infancy (Shankar, et al., 2011), four specific streams of marketing and supply chain literature reflect facets of shopper marketing by addressing shopper behavior and the retail channel environment. Figure 2:1 shows these streams of research mapped onto the topic areas that fit the multiple definitions of shopper marketing, starting with the shopper journey and ending with the retail channel. First, the marketing literature focuses on at-home and in-store shopper behavior as well as retail channels and store environments. Next, the supply chain literature focuses more on inventory management, forecasting, and relationships between retailers and manufacturers.

Although different definitions of shopper marketing exist across academic research and business practice (Shankar et al, 2011), both the strategic and tactical perspectives inform the organization's shopper marketing strategy. From a strategic perspective, Shankar et al. (2011) broadly define shopper marketing with a focus on the planning and execution of marketing strategies based on shopper behavior, which benefit shoppers, retailers and brand manufacturers.

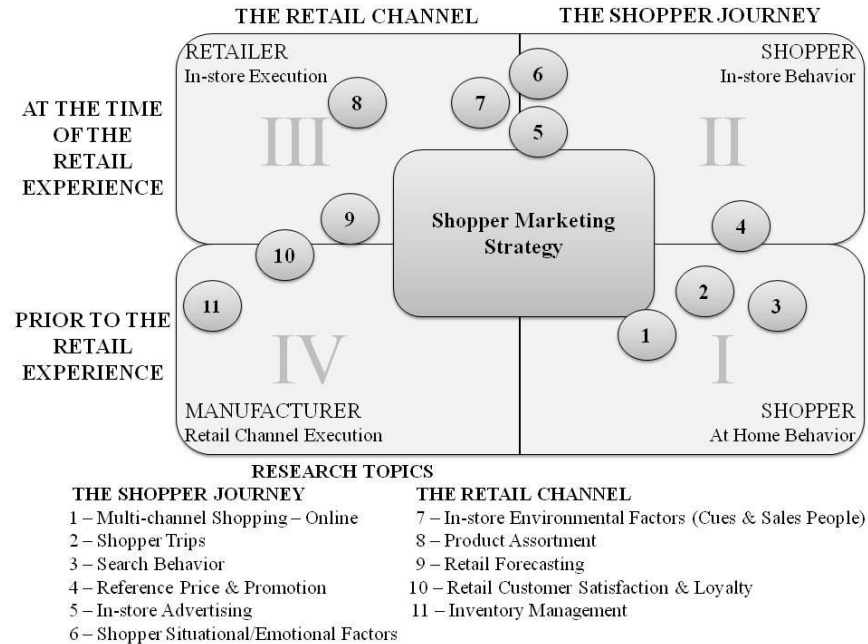


Figure 2:1 – Shopper Marketing Related Literature

A more tactical perspective from industry defines shopper marketing as including multiple retail channels as well as a stronger emphasis on the relationship between the manufacturer and retailer (Deloitte Research, 2007) (See Appendix A for a more comprehensive review of definitions). As companies increasingly invest marketing dollars in shopper marketing, the channel of distribution and retail relationship become even more important to companies attempting to execute the strategies in store (Deloitte Research and GMA, 2008; Neff, 2007). Figure 2:1 represents the literature that captures what is known about shopper behavior along the shopper journey as well as the activities in the retail channel, including the execution in the retail store and the execution at the manufacturing level.

The Shopper Journey

MARS Advertising developed the concept of the shopper journey to capture “true” insights into shopper behavior beyond the path-to-purchase, which was initially conceptualized only in the retail store (Scholler, 2009). Going beyond the path to purchase means that the

shopper journey starts at the awakening, which is the moment the shopper discovers a need, and continues to the homecoming, which is the post-purchase return home to use the product (Scholler, 2009). Market knowledge of this shopper journey as well as how shoppers behave both at home and in the store, forms the foundation of shopper marketing strategies. Shopper marketing goes beyond traditional marketing research that focuses on consumption behavior to explore the consumer as the shopper (Shankar, et al., 2011). Marketing strategy is then geared towards reaching the shopper in both the at-home and in-store environments.

Shopper: At-home Behavior

Knowledge about shopper behavior at home guides how the marketing mix can reach shoppers in this environment; however, the out-of-store drivers of shopper behavior are relatively unexplored (Bell, et al., 2011). When consumers shift into shopper mode, they begin the shopper journey or the path-to-purchase. The literature highlighted in Quadrant I of Figure 2:1 addresses the at-home shopper's journey, which includes the planning of the shopping trip, online shopping, and search behavior (Barlow, et al., 2004; Bell, et al., 2011; Larson, et al., 2005; Monga and Saini, 2009; Tauber, 1972).

The Shopping Trip Studies of shopper motivation show that people shop for many reasons other than a need for a product or service (Shopper Archetypes are displayed in more detail in Appendix B). By intersecting different types of shoppers with different marketing messages, shopper marketing can reach a broader audience (Tauber, 1972). Marketing research has long valued the shopper experience as more than just the acquisition of a product, focusing instead on why and how people shop as well as how they view the shopping trip from its initialization (Hirschman, 1984; Hirschman and Holbrook, 1982). Some people shop for purely

utilitarian purposes, while other shoppers derive more hedonic value from the shopping experience (Babin, et al., 1994; Chan and Tai, 2001). Shopper archetypes, motivations, and drivers of shopper trips identified in industry help guide companies' shopper marketing strategies so that retail channel members can meet multiple shoppers needs and create unique experiences (Mars Advertising, 2010; Sansolo, 2010). Research has investigated how various archetypes differently impact shoppers' retailing experiences (Massara and Pelloso, 2006). The experience of shopping has also been explored through rich ethnographic and phenomenological inquiry into how shoppers behave and derive value from their experiences while in shopping mode (Bloch and Richins, 1983; Markin, et al., 1976; O'Guinn and Faber, 1989; Thompson, et al., 1990). Understanding shoppers' motivations allow manufacturers and retailers to customize in-store experiences to capture the shopper's attention, thus resulting in more purchases.

Online Shopping Online shopper research has also explored shopper behavior and the online experience from several differing perspectives of gender and race, quality, and browsing versus search. Retailers and manufacturers have much to gain from the ease of online customization to meet individual shopper's needs. Researchers have found major differences between how men and women, as well as people from different nations, search and purchase products online (Farag and Krizek, 2006; Seock and Bailey, 2008). Although different genders and races may approach online shopping with different motivations, the quality of the experience is crucial regardless (Barlow, et al., 2004; Burke, 2002; Enders and Jelassi, 2000; Kukar-Kinney, et al., 2009). Not only do at-home shoppers expect high quality experiences, but they tend to engage in more information search to find better deals and quality. Others use Internet browsing to reinforce retail loyalty and familiarity (Kaufman-Scarborough and Lindquist, 2002; Sundaram and Taylor, 1998). Knowledge of shoppers' online paths enables manufacturers and retailers to

market products more flexibly and to gain insights into how shoppers browse and concurrently shop and search online.

Search Behavior A wide body of literature investigates pre-purchase search behavior (see Bloch et al., 1986 for a thorough review). Search research focuses on how consumers gather information relevant to specific consumption questions. Today, shopper search begins at home, but continues in the store aided by handheld technology (Broeckelmann and Groeppel-Klein, 2008); however, spending time searching does not guarantee purchase. Monga and Saini (2009) found the cost of consumers' search activities impacts their likelihood of purchase intentions.

Shopper: In-store Behavior

Shopping behavior in the store has been investigated to provide retailers and manufacturers with information about the impact of reference price and promotion, in-store advertising, and shopper situation/emotional factors on shopper behavior. The literature that uses the shopper marketing terminology fits into this quadrant of the shopper marketing literature (Inman, et al., 2009; Shankar, et al., 2011; Stilley, et al., 2010a; Stilley et al, 2010b).

Reference Price and Promotion Reference price and promotion research focuses on the impact of mental budgets, price sensitivity, and promotions on in-store purchase decisions (Stilley, et al., 2010a; Stilley, et al., 2010b). Shoppers tend to have mental budgets with a lot of slack for additional purchases, and much of the shopper marketing literature addresses the in-store promotions that impact these mental budgets (Stilley, et al., 2010a; Stilley, et al., 2010b; Tang, et al., 2001). Consumers come to the store armed with reference prices from advertisements, mobile-devices, or Internet sites (Broeckelmann and Groeppel-Klein, 2008; Howard and Kerin, 2006). Research has found that price sensitivity is heightened in-store more

so than online (Chu et al, 2008). Although everyday low pricing (ELDP) increases sales (Hoch, et al., 1994), shopper characteristics drive price sensitivity (Hoch, et al., 1995). By knowing the shopper and understanding demand, large brands can gain more benefit from long-running price promotions guided by demand-based pricing (Pauwels, 2007; Srinivasan, et al., 2008).

In-store Advertising Research on in-store advertising focuses on how advertisement conveys brand meaning through multiple mediums. First, mobile marketing has historically focused on marketing through mobile devices such as the mobile phone (Broeckelmann and Groeppel-Klein, 2008). Hosbond and Skov (2007) found that a successful marketing campaign is more likely when relevant and interesting content is provided to shoppers at the right time. Second, product packaging and other media in the store communicate brand and product meaning by extending product characteristics and limited promotion information that might grab the shoppers' attention (Limon, et al., 2009; Sorensen, 2008). Additionally, the shelf position and aisle location of advertising in the store impacts purchase intentions (Chandon, et al., 2009). Finally, point of purchase promotions not only increase customer satisfaction with the shopping experience and help shoppers select appropriate products for their needs, but prior to that, they also positively impact purchase intent (Chandon, et al., 2009; Rajagopal, 2008).

In-store shopper situational/emotional factors Research indicates that a shopper's behavior in the store may be motivated by mood (Reynolds and Harris, 2009; Swinyard, 1993), the joy of a bargain (Arnold and Reynolds, 2009), the pleasure of the in-store experience (Cox, et al., 2005; Jin and Kim, 2003), or impulse (Beatty and Ferrell, 1998). When that initial purchase provides a psychological impulse, shopping momentum occurs to prompt further purchase of unrelated items (Miller, et al., 1999). Impulse shopping is defined as the sudden and powerful urge that arises within the shopper to buy immediately (Beatty and Ferrell, 1998; Jones, et al.,

2003). Promotions, momentum, presence of others, and power distance beliefs of the shopper have all been identified in the research as impulse purchase drivers (Luo, 2005; Miller, et al., 1999; Stilley, et al., 2010a; Stilley et al., 2010b; Zhang, et al., 2010).

Shopper marketing enables manufacturers and retailers to collaboratively draw on shopper insights (i.e., understanding of who the shoppers are and how they behave) throughout the shopper journey to create a retail experience that not only impacts shopper satisfaction but also results in a larger shopping basket. Shopper behavior, search behavior, online shopping, shopping trips, promotions and price, in-store advertising, and environmental and social cues all influence the marketing strategies devised by shopper marketing teams at consumer packaged goods companies. The literature is explicit in stating that much of shopper marketing is about creating customer (i.e., retailer) specific programs and initiatives (Coca-Cola Company et al 2010; Deloitte Research and GMA, 2008, Stahlburg and Maila 2012). In other words, when CPG firms, retailers, and shoppers interact, these insights can be utilized to create a knowledge resource unique to a specific retail channel or even a unique retailer-manufacturer relationship. The challenge then lies in the diffusion of the marketing strategy throughout the channel for marketing execution both in the retail store and throughout the CPG supply chain for a competitive advantage (Deloitte Research and GMA, 2008).

The Retail Channel

The retail channel literature that addresses shopper marketing strategies comes from two different bodies of research. The first is the research focused on in-store marketing and retail store design (See Figure 2:1 Quadrant III), which allows retailers to stay competitive by creating a strong brand through a unique shopper experience and a store differentiated from the

competition (Lucas, 2012). The second is supply chain management from the manufacturers' perspective. Due to the impact of customization of products by shopper and by retail channel, shopper marketing has the potential to completely disrupt a supply chain (Flint, 2012). Together, these streams of research paint a picture of the decisions and strategies that may enable in-store execution of shopper marketing strategies.

Retailer: In-Store Execution

The goal of the retail channel is to provide the optimal quantity and assortment of products and services to increase shoppers' satisfaction (Mathwick, et al., 2002; Tsay, 2001). Based on these overarching goals, the retail channel research that focuses on in-store execution comes from two different perspectives: first, the in-store environment and design perspective that engages shoppers and cues a satisfying experience, and second, the operations perspective that explores the optimal product assortments and forecasting of future inventory and product demand.

In-Store Environmental Factors and Cues The impact of store environment on shoppers' experiences, perceptions, and behaviors has been studied at the elementary level of store design and characteristics and the aggregate level of store ambiance and social cues (Lam, 2001). Further, retail store environmental research has consistently found that shoppers respond emotionally to the store environment, which has implications for increased purchase behavior (Yoo, et al., 1998). Because store design influences shopper inferences, retailers should have specific goals in mind when designing the store atmosphere (Baker, et al., 1994; Turley and Chebat, 2002). Music, lighting, and the overall excitement projected in a store will all impact the amount of time shoppers spend in the store as well as their emotional connection to the store

(Areni and Kim, 1994; Katheva and Weitz, 2006; Yalch and Spangenberg, 2000). Beyond environmental factors, shoppers take cues from the social environment and the overall ambiance of the store (Baker, et al., 1992; Baker, et al., 1994; Baker, et al., 2002; Grewal, et al., 2003) and from the moods and credibility of the salespeople (Swinyard, 1995; Swinyard, 2003). Positive social conditions and ambiances have a tendency to reduce price sensitivity and increase pleasure of the shopping experiences (Swinyard, 2003).

Product Assortment The design and ambience of the store provide the foundation on which the store showcases its products and services and influences the shopper experience. Retailers frequently attempt to attract shoppers by offering large product assortments (Boyd and Bahn, 2009); however, traditional category management (CM) research has found that CM does not provide an optimal solution for product mix. Instead, CM has the potential to drive up prices and provide less variety, suggesting that rather than focusing on each category individually, retailers should focus on basket assortment profits (Cachon and Kök, 2007). Basket growth is the traditional metric for shopper marketing performance, and in-store campaigns are geared towards increasing the mix in the basket for both the retailer and the manufacturer (Hoyt, 2011). Finally, experimental designs have modeled and tested the placement and assortment of products (whether infrequently purchased or staple item) to find different mixes effective in different retail environments (Drèze, et al., 1994; Miller, et al., 2010).

Retail Forecasting Leading retailers like Wal-Mart, Target, Best Buy, and The Limited have given their supply chain extra attention to reduce stockouts, find more efficient ways of moving goods from manufacturer to customer, and improve the shopping experience (Anon, 2005). Collaborative planning and forecasting between the retailer and manufacture is one of the key trends in retail forecasting research over the last ten years (Barratt, 2004; Ireland and Bruce,

2000; Ireland, et al., 2002; Moon, et al., 1998). Finally, while stochastic-demand methods enhance retailers' profit-maximization, in many cases collaborative judgmental forecasting on the part of the retailer and manufacturer leads to less error and more consistency over time (Arcelus, et al., 2005; Gauer, et al., 2007). Manufacturers in turn, have to collaborate with their retail customers in order to gain access to information and to meet their customers' needs efficiently and effectively (Kulp, et al., 2004).

Manufacturer: Retail Channel Execution

Supply chain management research has investigated retailer-supplier relationships and inventory management in the retail channel. Managing supply is critical to shopper marketing execution when specific stock keeping units (SKUs) are added for customization of products in each retail channel (Flint, 2012). Manufacturer-retailer collaboration is also crucial to shopper marketing execution success (Davis-Sramek, et al., 2008; Deloitte Research and GMA, 2008). Inventory management can then be coordinated between functions of the firm and across the supply chain to deliver the SKUs necessary. Inventory management directly impacts customer satisfaction through order fulfillment, as well as accurate and on-time delivery.

Retail Customer Satisfaction and Loyalty Retail customer satisfaction and loyalty is dependent on the effectiveness and efficiency of the manufacturer (Biong, 1993; Thirumalai and Sinha, 2005). Effectiveness is enhanced as loyalty builds over time through continued satisfaction with service quality (Davis-Sramek, et al., 2008; Davis-Sramek, et al., 2010). Service quality is increased through successful inventory management and order fulfillment (Eroglu, et al., 2011; Mejias-Sacaluga and Prado-Prado, 2002). Efficiency is then augmented when customer-oriented manufacturing companies proactively pursue collaborative relationships with

their retail customers to reduce costs (Bolumole, et al., 2003; Zokaei and Simons, 2006).

Collaboration and coordination in the supply chain also enables effectiveness through inventory management (Sahin and Robinson, 2002).

Inventory Management Effective inventory management is critical to retail channel success (Dubelaar, et al., 2001) and can be categorized from two different perspectives: the impact of signaling, collaboration, and coordination on performance and the impact of the product and service mix on the overall inventory management system of choice (Fisher, 1997; Sahin and Robinson, 2002). Information distortion in the supply chain creates a bullwhip effect in which the disproportionate responses of the manufacturer or suppliers to mixed signals sent from downstream in the supply chain result in stockouts and overstocks (Lee, et al., 1997). Stockouts, due to lack of coordinated inventory management, have a direct impact on store image and can influence product substitutions, store exits, or purchase delays (Zinn and Liu, 2001).

The other stream of inventory management focuses on the type of supply chain structure that supports the flow of inventory (Fisher, 1997). Inventory management has shifted from a manufacturer dominant “push” of inventory downstream to a much more responsive “pull” system, where manufacturers respond to the needs of the retailer (Fugate, et al., 2006). Pull supply chain strategies, birthed from the Toyota/Lean concepts of inventory reduction, focus on the design of the supply chain structure to support lean, postponement, and supply chain agility strategies that increase inventory performance (LeBlanc, et al., 2009; Rabinovich and Evers, 2003). Like retail forecasting, effective inventory management is dependent on information sharing between the manufacturer and the retailer. Shopper marketing requires a more responsive

and agile supply chain to adapt product packaging, inventory quantitative, and display packaging as events happen (Flint, 2011).

Shopper Marketing Research Potential

Despite having been discussed in practice since 2004, shopper marketing is a relatively new concept in marketing literature (Shankar, et al., 2011). However, the components that facilitate its success, namely understanding the shopper journey and the retail channel, are established streams within marketing and supply chain research. Although these literature streams are established, they are tangential and not yet integrated into a holistic perspective of the knowledge necessary for shopper marketing.

Research has established that shoppers' positive experiences in the retail store lead to larger shopping baskets (Stilley, 2010a). However, firms struggle with execution; research to-date has yet to explore the necessary integration within and across firms that enables better execution (Shankar et al, 2011). Shopper marketing is difficult to implement because inventory management and retail forecasting gets complicated by customization at the retail channel and even retailer level (Deloitte Research and GMA, 2008; IBM Institute, 2002). Retailers and manufacturers have a historically nefarious relationship that complicates coordination (Davis-Sramek, et al., 2007). Marketing and logistics functions within the firm still operate in silos, creating a great divide within organizations that hinders marketing execution (Drucker, 1973; Ellinger, et al., 2000).

The literatures streams relevant to shopper marketing strategies and future research on shopper marketing are piecemeal and disconnected, which offers an opportunity to pull much of it together. The challenge for shopper marketing research is to provide a holistic perspective of

shopper marketing that includes the upstream and downstream knowledge necessary for implementation. By taking a broader perspective of shopper marketing, research opportunities will become easier to identify. The next section is an attempt at achieving this integration objective by suggesting a shopper orientation concept.

The Shopper Orientation Concept

As shopper marketing takes center stage for many CPG firms, a new orientation towards the shopper captures the attention of marketing departments. Companies are beginning to utilize shopper marketing as a strategic marketing tool (Shankar, 2011). Shopper insights form the basis of shopper marketing, but companies also interact with retailers, shoppers and consumers to create experiences that meet shopper's individual needs. Building on the marketing concepts of Kotler (1998) and Houston (1986), it appears that a reorientation has emerged that includes the manufacturers, retailers, and the shoppers that "inhabit" the retail space (Coca-Cola Company et al 2010; Stahlburg and Maila 2012). Collectively, manufacturers, retailers, and shoppers interact to build a unique shopping experience that meets the needs of each party involved.

Historically, marketing research builds on the marketing concept resulting in perspectives of customer orientation and the market orientation of the firm (Brady and Cronin, 2001; Houston, 1986; Jaworski and Kohli, 1993; Kohli and Jaworski, 1990; Kohli, et al., 1993; Kotler, 1988; Narver and Slater, 1990). Customer orientation shifted the focus of the firm from the product to the customer, creating a slightly more service dominant marketing perspective (Brady and Cronin, 2001). Market orientation although broader, served to enhance the strategic importance of the marketing function as well as the importance of marketing within the activities focused on and driven by markets (Kohli and Jaworski, 1990; Narver and Slater, 1990). As market orientation becomes more widely adopted by organizations within an industry, the

competitive advantage diminishes, making market orientation necessary but not unique (Kumar, et al., 2011).

Multiple firm orientations have emerged such as supply chain and stakeholder orientations as firms strive for competitive advantages through difficult-to-copy cultural, attitudinal and behavioral guidelines for an entire organization. The supply chain orientation materialized as an extension of the marketing concept that provides a unique competitive advantage for organizations by capitalizing on both marketing and supply capabilities (Fugate, et al., 2006; Lambert, et al., 1998; Mentzer, et al., 2001; Min, et al., 2007). Stakeholder orientation extends market orientation beyond customers and competitors to include future customers and society (Ferrell, et al., 2010). The additional orientations that build on the marketing concept speak to a reorientation in both scholarship and business practice as traditional market orientation becomes standard practice. Firms may reorient themselves towards the unique market knowledge that will make them competitively inimitable.

Precise definition and measurement of market orientation emerged in 1990 as two schools of thoughts, one cultural (Narver and Slater 1990) and one behavioral (Kohli and Jaworski 1990), and has since grown into one of the more dominant areas of research in marketing. Relatively recently, scholars have concluded that both the behavioral and cultural aspects are critical to firm performance (Hult et al 2005). Over the last 10 years part of marketing's evolution has included the emergence of the concept of service-dominant logic (S-D Logic) (Lusch, et al., 2007), itself a "mindset for a unified understanding of the purpose and nature of organizations, markets and society (www.sdlogic.net, 2012). A S-D logic for marketing highlights shared value creation between companies and their customers, consumers, and suppliers (Vargo and Lusch, 2004). Further, the foundational premises of the S-D logic include:

knowledge as the fundamental source of competitive advantage, customers as co-producers, and the customer-oriented and relational nature of the service-centered view, where all products and services act to *serve* the needs of various actors in a social network, be they “customers” or “suppliers.” The proposed shopper orientation rests on the foundation set by both market orientation and S-D Logic. In the consumer packaged goods space, it seems that this has taken shape in the form of shopper marketing in the following ways:

- Shopper insights are the foundation of the shopper marketing competitive advantage; the capability to generate insights serves as an operant (intangible) resource and the knowledge that emerges serves as an quasi-operand (quasi-tangible) resource that can lead to products, services, marketing strategies that also serve as resources for competitive advantage for the manufacturer and retailer.
- Manufacturers collaborate with retailers to create a unique shopping experience in different retail outlets.
- The network of shopper marketing experience creation includes employees from across functions within the manufacturing company, employees from the corporate headquarters to the local store in the retail company, the shoppers, and the consumers who interact in the retail store and beyond.

For a shopper marketing strategy to be successfully initiated and executed, managers and frontline employees alike need specific behavioral guidelines. Any orientations of the firm, whether towards market, customer, supply chain, or the shopper, require senior level management support, interdepartmental integration, and an organizational network that supports that knowledge creation and diffusion throughout the organization (Deshpande and Webster Jr, 1989; Kohli and Jaworski, 1990; Min, et al., 2007).

As with any orientation, shopper-oriented knowledge and strategies are first the responsibility of top management (Kohli and Jaworski, 1990; Min, et al., 2007). Corporate-level teams gather shopper insights to create knowledge that can be utilized to generate shopper

marketing events. Without top management support of the strategies resulting from this knowledge generation, other members of the organization may not be willing to invest the extra time, effort, and resources necessary to pursue shopper marketing execution rather than a more traditional marketing form; therefore, top management's trust, support, and understanding of the shopper marketing strategies form the basis for informal diffusion throughout the organization (Hanson and Krackhardt, 1993).

In the marketing and business literature, knowledge has been treated as a static resource that has often been synonymous with information (Nonaka, et al., 2008); however, knowledge is created as individuals interpret and agree upon the meaning of information during their social interactions. Building on the symbolic interaction view, knowledge evolves through the use, interpretation, and changing meanings of information that take place during individual interaction and social exchanges (Flint, 2006). Thus, knowledge as a meaningful resource can only exist through a network of interactions between the individuals within an organization.

Within the organization, effective knowledge flows take place in the interactions across functions. Cross-functional integration (CFI) is a critical factor in the effective and efficient execution of any marketing strategy in the supply chain (Ellinger, 2000; Ellinger, et al., 2000; Ellinger, et al., 2006; Esper, et al., 2010). Through CFI, demand and supply information can be exchanged for the creation of knowledge through social interactions of employees. These interactions and exchanges signal supply chain capabilities and facilitate execution. Further, CFI enables frontline employees to gain shared interpretation with management, gain knowledge, and make timely decisions in the retail stores (Bowersox, et al., 1999; Narver and Slater, 1990). CFI is made possible when the organizational structure is no longer hierarchical but takes on a network form (Miles and Snow, 1986).

The adoption and execution of complex and knowledge intensive strategies require an organizational structure that facilitates the flow of knowledge across functions (Nonaka, et al., 2008). For instance, network structures evolve in organizations to become more cohesive and dense as strategies become more complex (Miles, et al., 1978). Densely connected network organizations facilitate knowledge flows and shared interpretation. The fundamental basis of management and marketing is captured in the knowledge flows through networks and network theories capture the whole systemic impact of human interaction (Achrol and Kotler, 2006; Lusch and Vargo, 2006). A shopper orientation would incorporate this thinking by addressing the complex nature of knowledge management within and across firms while remaining focused on shoppers. But to go much further, an understanding of several theoretical foundations may help, specifically those within network governance and social exchange. These theoretical frameworks help explain how people interact to generate and utilize knowledge. Within shopper orientation, this would be shopper specific knowledge (shopper insights) as well as about ways of connecting with those shoppers. The next few paragraphs offer insights to highlights of these frameworks.

The network paradigm provides the foundation for many theories including governance, social exchanges, social capital, and the diffusion of knowledge in organizations. Network governance and social exchange theories both reflect the assumption that individuals are influenced by social mechanisms that guide their behavior and choices (Cook and Emerson, 1987; Emerson, 1976; Jones, et al., 1997). Within the context of network governance and social exchange theories, socialization, which is the process through which an employee becomes an integrated and effective insider (Cooper-Thomas and Anderson, 2006), benefits organization because the managers and employees feel the social pressure of making choices that reflect the

goals of the network in which they function (i.e., the organization) (Jones, et al., 1997). Senior level management initiates socialization from the top down through training facilitated by human resources all the way to the frontline employees. Training and integration create social resources, such as social capital, that enable knowledge creation and diffusion throughout the organization (Jones, et al., 1997).

Although primarily studied through dyadic interaction, social interactions are the fundamental unit of analysis for understanding the social network and how social capital, defined as the “*resources embedded in a social structure which are accessed and/or mobilized in purposive actions*” (Lin, 1999 p.35), is developed and accessed. Additionally, social capital is augmented when individuals are given access to resources, such as information, that can then be utilized to create social capital at the group level (Oh, et al., 2004; Oh, et al., 2006). Social capital builds through social interactions, facilitating the exchange of information as well as the creation of knowledge (Nonaka, et al., 2008; Oh, et al., 2004). Employees within an organization then place more value on the relationships in which they create knowledge that enables effective and efficient decision-making. When managers value the knowledge of other functions and are committed to interact to create new knowledge and strategies, they participate in cross-functional integration.

Although organizations struggle to understand how to “manage” knowledge as a resource, knowledge has been positioned as the most important and sustainable resource, transcending more traditionally acknowledged resources such as land, capital, goods and labor (Drucker, 1993) and this is due in part because as a process that can be considered an operant resource it is more difficult to understand and emulate by competitors. Knowledge is subjective and dynamic and processes that generate it are sometimes opaque. The theory of knowledge-

based management captures the importance of symbolic interactions through which information is shared and knowledge is created (Nonaka, et al., 2008). By translating strategic knowledge into principles, the top levels of the firm can diffuse that knowledge throughout the organization to create an environment of shared interpretation and understanding. An outcome of a network organization in which individuals interact, share ideas and information, build strategies, and agree on execution is knowledge management that impacts individual and firm performance.

Pulling it all together, this chapter proposes that a *shopper orientation* is the cultural and behavioral aspects of a single firm at a minimum and ideally of multiple firms working together driven by and aimed at understanding and serving shoppers (consumers when they are in shopping modes). These understandings are typically referred to as insights, the generation of which requires multiple organizations to collect, share and interpret shopper-specific data. Shopper marketing programs, which sometimes include customized products and solutions, involve complex collaborative supply chain relationships to develop and execute both out of stores and within stores. The distinction for shopper marketing is not in-store versus out-of store but rather the shopping mode versus consumption mode of the consumer. Complex social interaction within and across firms with an assumed goal of better serving shoppers lies at the heart of a shopper orientation. All of this, constitutes a shopper orientation concept.

This shopper orientation concept however raises numerous questions, some of which are the motivation for this dissertation research. The next section presents some of the research questions that emerge from a shopper orientation concept.

Agenda for Future Research

By utilizing the paradigmatic foundations of network theory as a lens, many opportunities are revealed for future investigation that rest on a foundation of shopper orientation and specifically support shopper marketing strategies. The original premise of network theory was that the networked organization, with its decentralized flow of information and knowledge, better supported complex strategies than the traditional siloed and hierarchical business model (Miles, et al., 1978). The management literature offers many examples of the creation and diffusion of knowledge and innovation (Rogers, 1995), but little is known within marketing in a retail channel context about the processes through which knowledge is created and diffused within and across organizations. When this knowledge is driven by and focused on the shopper experience, this can be viewed as an aspect of a shopper orientation. But beyond one firm, the level at which most “orientations” operate, there is still much to learn about knowledge management within a shopper oriented network of firms. Interesting opportunities emerge when thinking about knowledge management from symbolic interactionist (Blumer 1960), organizational network (Coleman 1994) and supply chain knowledge sharing (Myers and Cheung 2008) perspectives,

Symbolic Interactions and Knowledge Creation Little research investigates the symbolic interactions between individuals that result in knowledge creation. Building on Blumer’s (1960) foundation of symbolic interactionism and Nonaka’s (2008) conceptualization of Ba (the knowledge creation process) it is possible that because knowledge is based on the shared meaning of information, knowledge is richer than information when it is created through experiential interactions between people, (Flint, 2006; Nonaka, et al., 2008). Orientation research has highlighted the importance of shared interpretation as well as knowledge management on firm performance (Slater and Narver, 1995; 2000); however, the phenomenological process of

creating knowledge through the interactions and experiences of employees and arriving at a shared meaning is underexplored. Future research could investigate this phenomenon through qualitative studies that utilize ethnography to understand the culture, phenomenology to understand the interaction experience, and grounded theory to build future theoretical implications. Specifically, what are people up to as they interact in meaning-making exchanges trying to make sense of shoppers, business partners, shopping-related demand opportunities and shopper-focused supply constraints?

Organizational Networks and Diffusion of Knowledge Research has indicated that cohesive networks enable diffusion of information (Coleman, 1994), but little research investigates this within the marketing context and even less research investigates that impact on individual-level performance. Retail channel research, which investigates the importance of exchange and relationships, has brought marketing research to the “threshold of a network paradigm” (Achrol and Kotler, 2011). Network organizations have evolved within the paradigm of co-creation of value to bring production and consumption closer together, creating a need for deeper understanding of the impact of organizational networks on knowledge diffusion throughout the organization. Marketing networks are superior to hierarchies in the creation and diffusion of knowledge (Achrol and Kotler, 2011). To function, networks rely on relational governance processes rather than hierarchical authority or power (Achrol, 1997). Organizations have less time to respond to consumer demand, yet they embrace mass-customization of products and marketing techniques in different retail channels. Shopper marketing studies note the disconnect between the sophistication of shopper marketing insights and the resultant strategies and the lack of execution by frontline employees in the retail channel (Deloitte Consulting LLP, 2008). Future research should investigate the networks in organizations that successfully implement

shopper marketing strategies in order to understand the knowledge flows that enable frontline knowledge and execution in the retail store. What do social networks look like for frontline employees trying to execute on a shopper orientation driven initiative?

Supply Chains as Network Organizations Finally, future research should extend beyond the interactions within an organization to investigate the entire system of interactions between the manufacturer, retailer, shopper, and consumer. As is depicted in Figure 2:1, the shopper marketing concept envelopes multiple streams of marketing and supply chain research. These streams of research inform business and research about the micro-interactions between shoppers and the retail environment as well as retailers and manufacturers. Future research should holistically investigate shopper marketing throughout the entire retail channel network. This research area would investigate questions such as: What does a successful shopper oriented network of firms look like? What are the barriers to developing and operating a system comprised of numerous shopper-oriented firms? Do all firms need to have an organization-level shopper orientation for a network of firms to be considered shopper oriented?

Conclusion

Shopper marketing is rich with future research potential (Shankar, et al., 2011). As the shopper orientation becomes prevalent in business practice, more attention is being paid to the negative impact of functional silos and the lack of execution in the retail store by frontline employees (Deloitte Research and GMA, 2008). Shopper marketing is dependent on collaboration across functions and between organizations, which is a shift in the culture of the organization to embrace the shopper as a key factor in decisions making. The interactions between people that help generate and diffuse knowledge about shopper behavior and needs determines the success of the execution of any shopper marketing strategy. Knowledge is the

fundamental resource of shopper marketing. Network integration allows for the exchange of shopper insights, through which knowledge is created and diffused across functions and from the top echelons to the frontline employees for effective and timely implementation. Organizations with a shopper orientation and the capability to manage knowledge to the front line have the opportunity to take the lead in shaping the future of responsive and unique shopper marketing.

CHAPTER 3

ETHNOGRAPHIC SOCIAL NETWORK MANUSCRIPT

Tension at the Frontline: A Study of Networks and Behavior in the Retail Channel

Introduction

Business scholarship and practice have recently witnessed the emergence of a new knowledge-based economy in which knowledge is a firm's most important resource, superseding land, capital, and labor (Drucker, 1994). People, then, are an equally important resource of the organization, because executives, managers, and employees house an organization's knowledge (Pfeffer, 1994; Pfeffer, et al., 1995) and the interactions between executives, managers, and employees create and diffuse knowledge (Nonaka and Takeuchi, 1995; Nonaka, et al., 2008). Unfortunately, many firms failure to foster these interactions inhibits the diffusion of knowledge from top executives who formulate strategies to the frontline employees who execute those strategies (Gadiesh and Gilbert, 2001). For consumer packaged goods (CPG) companies in the retail channel, this results in a lack of strategic marketing execution at the frontline (Deloitte Research and GMA, 2008). Two critical issues drive this disconnect between the marketing strategy formulation and frontline strategy execution: lack of cross-functional integration and lack of knowledge flow management in the organization (Esper, et al., 2010; Gadiesh and Gilbert, 2001; Nonaka, et al., 2008).

Network theory suggests that strong ties or connections between people facilitate the diffusion of knowledge in an organization and that this diffusion can only be achieved by increasing individual social capital (Coleman, 1988; Rogers, 1995). Social capital is defined as the resources embedded in a social structure that are accessed and/or mobilized by individuals in

purposive actions (Lin, et al., 2001). Individuals' structural embeddedness, which is the number of ties they have out of the possible ties in their network, as well as their relational embeddedness, which is the level of relationship strength, trust, and quality that enables them to gain access to resources, are both central to the development of social capital (Granovetter, 1973). As employees become more embedded in their organization, they are more likely to adhere to the organization's norms through socialization, and more likely to interact with multiple functions and levels within the organization to create and diffuse knowledge (Autry and Griffis, 2008; Jones, et al., 1997). Frontline employees may then be further empowered to make decisions that are aligned with organizational goals as well as designed to increase efficiency and effectiveness in the retail store (Bowersox, et al., 1999).

Despite the importance of the management of knowledge flows, many gaps exist in the research regarding knowledge management and cross-functional integration. First, research has not yet investigated how managers and employees interact to create and diffuse knowledge (Nonaka, et al., 2008). Second, the social capital literature calls for more research that adapts and develops theory in the context of supply chain and channel management (Borgatti and Li, 2009). Third, little research has addressed managers' interactions within the organizational network to integrate knowledge across functions and arrive at a shared interpretation (Esper, et al., 2010). Finally, retail channel research lacks thick description of the mindsets, behaviors, and attitudes through the emic and etic interpretation of retail channel interactions (Brown and Dant, 2008; 2008). The purpose of this research is to fill these gaps by exploring the nature of knowledge flows and social interactions at the retail channel frontline from the perspective of the manufacturer's frontline employee. The frontline employee's lived daily experiences and

interactions are explored by the researcher, who joined the workforce for a period of two months in an ethnographic immersion.

Ethnographic inquiry helps to interpret the symbolic interactions through which CPG firms create and diffuse marketing knowledge for retail channel execution. In this research, both the emic perceptions of managers and employees and the etic observations and interpretations of the researchers generate insights about the frontline behaviors. Data regarding how employees and managers interact were gathered through several sources, including interviews, ride-alongs, and network surveys. Data was then analyzed through triangulated qualitative and social network analysis methods. The emic perceptions of employees and managers that emerged from the interview transcript data are coded and categorized into themes to provide a reflection of employee mindsets. The etic observations of the researcher are then applied in two ways. First, the etic observations are applied to interpret the flows of information in the network maps, depicting connections between individuals in the retail channel, through the analysis of the network data. Second, etic observations are utilized to further analyze the theoretical relationships between the themes in the qualitative data.

Through rigorous triangulation of data collection and analysis, the emic and etic thick description of frontline interactions lays the foundation for theoretical exploration of knowledge flows across functions through a network perspective. By doing so, this research contributes to several literatures. First, this research contributes to the social capital literature by exploring frontline employees' and managers' embeddedness, through which they create market knowledge that they use to make decisions downstream in the retail store. Second, building on the retail channel literature, the impact of empowerment through cross-functional integration is explored to understand how cross-functional integration facilitates empowerment and enables

frontline employees to execute marketing strategies. The attitudes that frontline employees emote are explored as a direct result of the empowerment or control that they feel at the frontline. Finally, this research introduces a network theory lens to uncover the underlying relationships between established concepts that emerged in new ways to build mid-level theory that depicts relationships between previously unexplored concepts.

This research studies interactions between frontline employees and their networks in the retail channel. After a review of the relevant literature, this chapter presents emic perceptions of frontline employees' lived experiences of trying to integrate knowledge through their social interactions within the organizational network. Next, this chapter explicates the etic observations of the researcher immersed in the organizational network. Subsequently, an integration of the emic and etic perceptions provides a full framework of frontline interactions. Finally, implications of this research for future theoretical and managerial application are discussed.

Literature Review

The following bodies of knowledge form a theoretical framework for the themes that emerged through the iterative process of trekking back and forth between the data and the literature (Glaser, 1978; 1998). The themes were reviewed with theoretical sensitivity and were defined based on the literature; inclusion in this research was supported with quotes from participants in the findings (as is depicted in Table 3:3). The literature that informed the results included the broad themes social capital, power, and employee attitudes as well as subcategories that emerged in each of the thematic areas. Within the context of social capital, these subcategories include embeddedness, socialization, and knowledge creation and exchange. The power theme includes a literature review of the subcategories of control and empowerment.

Finally, the employee attitude literature reviewed includes subcategories of perspectives of self-efficacy and perceived supervisor support.

Social Mechanisms. Social capital and network perspectives have gained more relevance in business research as researchers shift away from an economic view of the firm to one that is more behavioral and humanistic (Achrol, 1997; Achrol and Kotler, 1999; Borgatti and Foster, 2003; Lin, et al., 2001). One of the main outcomes of organizations with dense, tightly-knit networks is the likelihood that employees will mobilize and share resources. This exchange of resources creates the basis of an employee's social capital. In this way, when the connections between employees facilitate the sharing of resources, such as knowledge, employees continuously build individual social capital (Coleman, 1988; Cross, et al., 2001; Cross and Parker, 2004). Individual employees' social capital is further impacted by their embeddedness in the network, organizational socialization, and the knowledge they exchange within the network.

A core premise of social capital is the notion of embeddedness (Autry and Griffis, 2008; Granovetter, 1983), which captures both the relational and structural ways in which people are connected. Relational embeddedness has been explored in depth in both management and organizational behavior research (Dacin, et al., 1999; Echols and Tsai, 2005; Grewal, et al., 2006; Moran, 2005; Rowley, et al., 2000; Uzzi, 1997). Ethnographic research (Uzzi, 1997) captured components of embedded relationships including trust, joint problem-solving, and fine-grained information transfers. These three components of embeddedness are constructed through a history of social interactions (Nahapiet and Ghoshal, 1998). In contrast, structural embeddedness captures the configuration of linkages between people (Moran, 2005; Nahapiet and Ghoshal, 1998) and enhances a person's access to knowledge through the centrality of his or her position in the network (Cross, et al., 2001). Together, relational embeddedness enhances an

individual's likelihood of gaining access to knowledge while structural embeddedness enhances an individual's opportunity to interact with others who have knowledge. In these ways, embeddedness creates a convergence of expectations through socialization that in turn further enhances an individual's level of embeddedness (Cousins, et al., 2006; Jones, et al., 1997).

Socialization, a concept that has garnered increased attention in marketing research, has a rich history in the human resources and organizational behavior literature (Bell and Menguc, 2002; Cooper-Thomas and Anderson, 2006; Fisher, 1986; Hartline and Ferrell, 1996) because of its investigation of both organizational and individual efforts to integrate newcomers (Cooper-Thomas and Anderson, 2006). Socialization has been viewed as both a firm-level effort to integrate employees as well as an individual-level effort to be an insider. Organizational socialization tactics by the firm, such as training, decrease role ambiguity and enhance self-efficacy, individual learning, organizational commitment, and job satisfaction (Bauer, et al., 2006; Jones, 1986; Van Maanen and Schein, 1979). From the perspective of the individual, socialization efforts are typically attributed to employees with proactive personalities and result in social integration, job clarity, and motivation (Chan and Schmitt, 2000; Crant, 2000; Fisher, 1986; Jones, 1986; Kammeyer-Mueller and Wanberg, 2003). Through organizational and individual socialization processes, individuals build cohesion that brings individuals across organizational levels and functions together (Louis, 1980; Morrison, 2002; Saks and Ashforth, 1997). Social cohesion and integration are key elements that enable individuals to interact with other employees and managers to create and exchange knowledge (Cross, et al., 2001; Morrison, et al., 2002).

Finally, knowledge has been uniquely conceptualized in different literatures. In supply chain and operations research, knowledge is frequently viewed as a static resource and is thus

conceptualized and measured as information or information sharing (Esper, et al., 2010; Fugate, et al., 2009). Information is frequently synonymous with knowledge in the supply chain literature, although information has been defined as a facet of knowledge (Nonaka, et al., 2008). Other literatures view knowledge as the result of social exchanges through which individuals exchange information, experiences, and data to generate purposive action (Nonaka, et al., 2008; Sharma, et al., 2007). Regardless of conceptualization and operationalization, knowledge is recognized in all literatures as one of the key resources mobilized through social capital between individuals (Gupta and Govindarajan, 2000). Individuals with high social capital who are deeply embedded and socialized in an organization have access to and can leverage their knowledge to improve their job performance (Huang and Newell, 2003). Employees who are able to co-create and exchange knowledge with their managers and coworkers can also shift the balance of power, which is often based on control of specific knowledge, to become empowered in their jobs.

Power. The notion of empowerment is derived from root concepts of power and control (Anderson and Huang, 2006). Power and control are functions of an individual's dependence on another with formal authority or control over resources (Emerson, 1976; Pfeffer, 1981). One of the principle sources of power is the opportunity for an individual to access specialized knowledge (Conger and Kanungo, 1988). In fact, social exchange theories imply that empowered employees will be more likely to achieve their desired outcomes than those without power (Pfeffer, 1981; Pfeffer and Salancik, 2003). Employees gain power when a leader or manager shares power with subordinates to increase their level of self-efficacy and to enable and motivate them to perform their jobs (Conger and Kanungo, 1988). This process of empowerment also increases task autonomy (Brown and Peterson, 1993), decision-making (Neihoff, et al., 1990; Scott and Bruce, 1994), self-efficacy (Hartline and Ferrell, 1996), and boundary-spanning

capabilities (Singh, 1993). Additionally, frontline employees can be empowered to do their jobs and contribute to organizational performance when given access to knowledge and some level of control (Bowen, 1990; Ford, et al., 1995) and empowered frontline employees tend to have more satisfied customers because they can respond to special needs and desires (Bitner, et al., 1990). Further, empowerment enhances customer satisfaction as well as the frontline employee's job satisfaction and attitude at work (Bowen, et al., 1995; Bowen and Lawler, 1992).

Attitudes. Attitudes are broadly researched in marketing; this research focuses more specifically on two attitudes: self-efficacy and perceived supervisory support. Both self-efficacy and employees' perceptions of supervisory support have been found to enhance employee behavior across a number of different performance domains such as completing assigned duties, fulfilling responsibilities, and overall citizenship behavior (Becker and Kernan, 2003; Wambura, et al., 2010). Self-efficacy refers to how capable frontline employees perceive themselves to be. This positive perception of self helps frontline employees to increase their sales and service performance (Hartline and Ferrell, 1996; Spiro and Weitz, 1990; Wang and Netemeyer, 2002). Supervisors play a role in enabling employees and fostering self-efficacy as well; the level of perceived supervisory support impacts employee self-efficacy and the employee's commitment to the supervisor (Tierney and Farmer, 2002). Further, when paired with supervisor support, self-efficacy enables frontline employees to be more creative in the application and creation of knowledge in the workplace (Tierney and Farmer, 2002).

Employee attitudes and behaviors also factor into social exchanges in an organization (Konovsky and Pugh, 1994). Employees' perceptions of their supervisors are formed on trust (Mulki, et al., 2008) as well as the feeling that the supervisors value their contributions and care about their well-being (Eisenberger, et al., 2002). Frontline employees often perceive that their

supervisors are representatives of the organization itself (Eisenberger, et al., 2010); thus, perceptions of higher levels of supervisory support increase an employee's perceived support and commitment back to the supervisor as well as the employee's level of organizational support, organizational commitment, and job performance (Babin and Boles, 1996; Pazy and Ganzach, 2009).

Each of these streams of research has been investigated with a network perspective, but no research yet ties social capital and social exchange theories together within the realm of supply chain and marketing execution. The literature on social capital, including embeddedness, socialization, and knowledge, is heavily influenced by social network theories (Granovetter, 1973; Inkpen and Tsang, 2005; Jones, et al., 1997; Lin, 1999; Westlund and Corporation, 2006), whereas the literatures on power, empowerment, and employees' attitudes are heavily influenced by social exchange theories (Cook and Emerson, 1987; Emerson, 1976; Hartline and Ferrell, 1996; Mulki, et al., 2008). Upon exploration of the broad axiomatic principles of network theory, the concepts dependent on these two theories can be found to have overlapping explanations for the impact of human interaction on behavior and knowledge creation (Eccles and Nohria, 1992). This chapter builds on these streams of research through an in-depth qualitative investigation of the individual interactions at the frontline of the supply chain.

Methodology

Due to the lack of knowledge about behaviors in the retail channel that lead to in-store execution of marketing strategies, three complimentary approaches were used for data collection and analysis. First, data collection was accomplished through an ethnographic approach, utilizing interviews, ride-alongs, and network survey data collection. Then the network data collected in

the field were analyzed through social network analysis to generate maps of the network of connections between frontline employees and corporate managers reflected in the three core components of embeddedness: fine-grained information transfer, problem-solving, and trust. Finally, the qualitative data transcripts were analyzed following the precepts of grounded theory to generate depth of understanding (Flint, et al., 2002).

Data Collection and Analysis

Frontline employee interactions were studied in the context of a CPG retail channel. CPG companies account for a large percentage of the companies shifting marketing budgets to shopper marketing in the retail store (Deloitte Research and GMA, 2008). Deep insights into the needs and behaviors of the shopper in different retail environments define and create shopper marketing events at the corporate level. Shopper marketing events include specialized product packaging, displays, and retail sets that are built around specific sporting events, holidays, or causes such as breast cancer awareness. The sale and execution of shopper marketing displays throughout the CPG industry falls to a frontline employee who is either employed directly by the CPG firm or indirectly by a third party sales and marketing provider. Whether the frontline employees are direct or indirect employees hired for in-store solutions, they likely interact with the same people daily and manage similar knowledge to make in-store decisions regarding sales, merchandising, or ordering.

Ethnographic triangulation was employed for three different types of data collection. First, the researcher spent approximately 86 hours with 19 frontline employees in two different geographic locations. The researcher rode and worked alongside each frontline employee on their local daily routes from distribution centers to retail stores. During the nearly three weeks spent in the field with frontline employees, the researcher participated in all frontline employee

activities, including one-on-one meetings with the frontline employee and his direct manager as well as group meetings held at the distribution center with the entire team of frontline employees.

Second, in-depth interviews were conducted with all 19 frontline employees immediately after the researcher worked alongside them. The time spent together in the store enabled the researcher to gain insights into the frontline employee's daily life and interactions both at the CPG firm and in the retail store, and to build camaraderie through hard work, conversation, and assistance throughout the shifts, which lasted anywhere from 3-12 hours. The researcher then conducted another round of interviews with other frontline employees and management at the distribution center, including operations, marketing, and sales personnel. All interviews utilized the well-established grand tour ethnographic inquiry technique (McCracken, 1988; Spradley, 2003). The interviews were open-ended and discovery-oriented, and lasted between forty-five and ninety minutes. They were audio-recorded and transcribed verbatim.

Finally, to understand the nature of the participants' relational embeddedness, the researcher spent time in the field observing and listening to the frontline employees and managers discuss the nature of their interactions in the retail channel. The specific relational embeddedness components of problem solving, promotional information sharing, and trust were utilized to build a network survey for each of the two geographic locations. The CPG firm provided a roster of every employee's name at each location. All of the frontline employees and managers in the two locations, including the ride-along and interview participants, were surveyed about their relationships with all of the other employees in the distribution center in which they are based. Each respondent answered the three different network questions related to problem solving, promotional information gathering, and trust about each of their coworkers and each of the sales, operations, and account managers by name.

Throughout the research, theoretical sampling was used to expand and link theoretical concepts and gain multiple individuals' perspectives on the emergent theory (Glaser, 1998). Participants were frontline employees responsible for in-store marketing sales and execution. The participant base was then expanded to include other functions and levels of management including local-level sales, operations, and marketing managers, as well as regional-level sales, operations, and business managers. The final sample included 83 employees in 2 different geographic locations of the CPG firm. Participants represented a diverse population along several dimensions, including gender, job tenure and position, and retail channel type, which incorporated both small and large format retail stores. The number of participants at each level of employment reflects the company's managerial hierarchy. Table 3:1 depicts the participants involved in this research.

Table 3:1 - Sample

Participant's Role in the Organization	Total # of Participants (Network Survey & Interview)	% of Participants	Total # of Interviews	Interview & Ride Along (4+ hours)	Tenure / Years
Frontline Employee	67	81%			
Small Format Retail Stores	39		15	14	2-28
Large Format Retail Stores	28		7	5	2-30
Sales Manager	7	8%	7		1-25
Operations Manager	4	5%	1		10-26
Account Manager	2	2%	2		5-9
Zone-Regional Manager	3	4%	2		24-27
Total	83	100%	34	19	

Analysis

Analysis was conducted using two different methods of qualitative and network data analysis. Analysis of the verbatim interview transcripts followed traditional Glaserian grounded theory guidelines (Glaser, 1998) and began after the first day of interviews, which allowed for interpretations to inform and direct subsequent interviews and network questions. As is standard for grounded theory analysis (Charmaz, 2006), in-vivo, axial, and theoretical coding were utilized. In-vivo coding was first conducted with the exact words of managers in gerund phrases that depict actions and feelings described by the participants. The in-vivo codes were then re-coded as subcategories through axial/categorical methods as themes emerged. Finally, as the researcher continuously trekked back and forth between the literature and the emergent themes, theoretical coding was conducted to draw out the causal or correlated relationships between the themes. QDA Miner, a commercial qualitative coding software, was used throughout the coding process.

The subsequent network data were analyzed through social network analysis methods including matrix algebra and combinatorics (graphing). First, three separate valued matrices (ties between actors were valued on a scale of 0-4) were built from the roster survey data for each district involved. Three matrices were built for each geographic location because the two networks were not connected. The matrices were two-way, 1-mode, meaning that the matrices captured the flow of information (1-mode) reciprocally (both a participant's value of others as well as the others' value of the participant (two-way)). Two-way matrices include both the responses of the participant A about the other participants in the network as well as the responses of the other participants regarding participant A, resulting in an asymmetric matrix that reflects outgoing and incoming ties between all participants. Results are asymmetric because participant

A may value others at a higher/lower level than they value participant A. Values were gathered on a scale of 0-4 for each network. For the Problem Solving Network and Promotional Information Gathering Network, 0 was equal to never and 4 was equal to frequently. Similarly, the Trust Network was on a scale of 0 to 4: Not at all–Completely. The valued matrices were then converted to diagraphs (Wasserman and Faust, 1994). These diagraphs (Figure 3:1) represent the connections between every actor in the network.¹

Attribute data were also collected for each participant, which created a visual depiction or diagraph that delineates the cross-functional and integrated nature of the social networks of trust, promotional information sharing, and problem solving. UCINET social network analysis software was used to analyze the matrices and build the sociograms (Borgatti, et al., 2002).

Trustworthiness of the qualitative research was established by applying interpretive research criteria of credibility, transferability, dependability, confirmability, and integrity (Lincoln and Guba, 1985; Wallendorf and Belk, 1989). Although trustworthiness of network research is more difficult to assess (Wasserman and Faust, 1994) the data and analysis were rigorously reviewed by co-authors and participants to establish trustworthiness as demonstrated in Table 3:2 and several participants in each survey were interviewed subsequent to the data analysis to test the reliability and realistic depiction of the network structure. In all cases, participants were surprised by how closely the network represented each dimension of trust, problem solving, and promotion information sharing with the CPG firm.

¹ Standard to many network and graph theory approaches (Hanneman and Riddle, 2011), each graph represents the sets of nodes (v) and directed arcs (E) that connect pairs of nodes utilizing graph theory notation: $(u,v) \in E$ (u sends arc to v but not the transverse).

Table 3:2 - Trustworthiness

<i>Trustworthiness Criteria</i>	<i>Implementation</i>	<i>Cite</i>
Credibility – <i>adequate and believable representations of the data in the results</i>	• Participants reviewed a final report of data findings • Prolonged pursuit of data collection and interpretation	(Flint, et al., 2002; Lincoln and Guba, 1985; Miles and Huberman, 1984)
Transferability – <i>extent to which the theory developed can be employed in other contexts</i>	• Committee members have access to the data and agree with interpretation	(Flint, et al., 2002; Lincoln and Guba, 1985)
Dependability – <i>Interpretation was constructed in a manner which avoids instability</i>	• Data was analyzed through a rigorous iterative process of open coding, and categorical coding to build patterns and explanations	(Glaser, 1998; Lincoln and Guba, 1985)
Confirmability – <i>the avoidance of bias from the research in the interpretation of the data</i>	• Participants provided feedback on analysis • Concepts are represented by data from all participants	(Miles and Huberman, 1984)
Integrity – <i>the assertion that the participants were telling the truth</i>	• Interviews were conducted in a non-threatening and confidential manner	(Wallendorf and Belk, 1989)

Findings

The findings are summarized in three ways for full exploration of the knowledge flows and social interactions of the frontline employees in the retail channel. First, Table 3:3 provides an overview of the social themes that emerged from the in-vivo and categorical analysis and addresses the emic perceptions of frontline employees regarding their social environment. Second, Figure 3:1 represents an etic interpretation of the structure of the networks in which frontline employees are embedded through fine-grained promotional information sharing, joint problem solving, and information trust. Finally, Figure 3:2 depicts the relationships between the social themes to develop theoretical foundations to explain the impact of frontline employees' social interactions and knowledge flows on individual performance in the retail store.

Emic Social Themes

Throughout the iterative coding process, four broad themes and ten subthemes emerged (see Table 3:3 for a summary of these themes). At the broadest level, participants discussed their social capital in the retail channel, their struggle for power, their attitudes towards the corporation, and the retail outcomes in the store. Social capital themes included interactions through which employees are embedded in the retail network, their level of organizational socialization, and the knowledge they create when they interact with the market environment and people within the channel. Power themes illustrated the frontline employees' desire to have control over which products and promotions appear in their market and their desire to be empowered to make decisions that fit their customers' needs. Employee attitude themes reflected the tensions felt by frontline employees about their own self-efficacy and the perceived support from their supervisors, attitudes which are then projected onto the organization. Finally, retail customer outcome themes involved perceived impacts of the frontline employees' actions in the retail store. Each of these themes is discussed further below with illustrative quotes.

Social Mechanism Themes

The subcategories within the social capital theme are all components of how individuals interact within an organization to gain access to knowledge. Social capital themes reflected the embeddedness, socialization, and knowledge creation and exchange that enable frontline employees to gain access to the resources they need to do their job in the retail store.

Table 3:3
Definitions, illustrative quotes, and frequency of occurrence for themes

Theme		Definition	Example	# of cases in which the theme emerged
SOCIAL MECHANISMS	Embeddedness	Relational embeddedness - the personal relationships people develop with each other through a history of social interactions (Nahapiet and Ghoshal, 1998: 244). Structural embeddedness - the impersonal configuration of linkages between people (Moran, 2005; Nahapiet and Ghoshal, 1998).	<i>Frontline people come out here, building relationship with the managers. That's the key goal that I have and that I think Company A should set out for a sales person. And you build that relationship, and that's where you get your extra displays, your promotional displays. (Rusty)</i>	24
	Socialization	A process in which an individual not only learns how to work in a particular organization, but also comes to accept and behave in ways that are appropriate to that organization (Taormina, 2004: p. 77. see, for example, Fisher, 1986; Van Maanen and Schein, 1979).	<i>It's just... I know it's part of the job, but I think we have to come up with a solution to... how do we designate our time? How do we plan our time? How do we plan our day a little better? Let's do more product, I know it's productive, but let's do other things. It doesn't allow me to do other things.... It just takes away, I'm cutting corners. (Troy)</i>	11
	Knowledge Exchange	Knowledge is a resource born of human interaction and is subjective, process-relational, aesthetic, and created in practice. Knowledge is created by people in their interactions with each other and with the environment. (Nonaka et al, 2008, p.7 & 14)	<i>You have to know, you have to know the account's history and, you know, what they've done previously on certain items and... Of course, when you get new items, it's hit or miss, you know. So you have to kind of experiment. (Walter)</i>	20
POWER	Control	A function of the dependence and/or interdependence of actors based on the possession of formal authority or control over resources (Blau, 1979; Emersen, 1962; Homans, 1974; Conger & Kanungo, 1988).	<i>But I mean, there's not that many decisions, just whatever the planogram for that store is, that's pretty much... We have no control over that, you know, so. (Jack)</i>	11
	Empowerment	The sharing of authority or delegation and decentralization of decision-making power. (Burke, 1986; Kanter, 1983; Conger & Kanungo, 1988).	<i>I mean, I'll do it myself and then my boss will say, you know, you know that end cap? And he'll pretty much ask me, won't tell me, or he'll give me suggestions, you know. (Terrence)</i>	21

Table 3:3 (Continued)
Definitions, illustrative quotes, and frequency of occurrence for themes

Theme		Definition	Example	# of cases in which the theme emerged
EMPLOYEE ATTITUDES	Self Efficacy	Self-efficacy is defined as the “belief in one’s capabilities to organize and execute the courses of action required to produce given attainments” (Bandura, 1997, p. 3).	<i>I know the planogram, so I know what to order. I know my best sellers. I know what dip I should put on there. I know how much I should order because it's a one week promotion. I know if I'm going to order more if it's a big holiday, Fourth of July, Super Bowl. (Troy)</i>	19
	(Perceived) Supervisor commitment and support	Represents how an employee feels about his or her supervisor (Walumbwa et al, 2010, p. 519)	<i>Drew gives us the basics. He is one of the better [sales managers]. He always has the basis, he has the knowledge. Any question that you can ask him, he is always up to date on it. And he just, basically just kind of gives us what the stores have lined out for us to do.(Georgia)</i>	19
RETAIL CUSTOMER OUTCOMES	Customer Value	Customer value can be conceptualized as the perceived worth in satisfaction and in monetary terms—that is, as the customer’s willingness to buy or comply (e.g., Flint, Woodruff, and Gardial 1997; Ravald and Grönroos 1996).	<i>I take care of the store, that's one reason why I have it (large display sold to the store on action alley) is, the store manager likes me and he says, 'You know, you're one of my best vendors and you take care of my store'. (Candy)</i>	27
	Customer Satisfaction	“Satisfaction is an outcome of purchase and use resulting from the buyer’s comparison of the rewards and costs of the purchase in relation to the anticipated consequences.” (Churchill, 1982; p. 493)	<i>My main agenda is making sure of what the customer (the retail store) wants; it's getting them what they need. And then trying, at the same time trying to please my company, to do what they want. (Micky)</i>	25
	Customer Compliance	“The retailer’s participation in the supplier’s programs and it’s compliance with the supplier’s policies.” (Kumar, Stern, Achrol, 1993, p. 1650)	<i>I had an end cap for 18 years. We just changed it out and freshened it up. And then last year we lost it because of the clean store concept. It's really hard to get these displays on the floor, every so often I do get a display but you have to be kind of creative like it's low profile where you can.(Ronald)</i>	19

Embeddedness

Participants discussed interacting with multiple people throughout the retail channel on a daily basis in the process of gathering information and executing their job in the retail store.

Frontline employees are boundary spanners both within the CPG firm and between the CPG firm and the retail organization (Arndt, et al., 2011). These employees interact with sales and operations managers and employees within the CPG firm as well as retail store managers, receiving room clerks, and department managers. The following quotes illustrate the boundary spanning nature of the frontline employee's embeddedness in the retail channel network:

"I'm communicating with [sales manager] a lot. Not that I'm calling him every minute, but I talk to him every day, let him know if I have any issues with a product or if I have any... issues getting a display or if I maybe need help putting out a big display... I communicate with him. Then he has to communicate with me, he gives me my sales plan, he gives me my promotion calendar... he gives me... basically what [the company] wants on there. Then I go, then I just take it and run really. You know, you're your own boss out here but you have to follow the guidelines." (Troy²)

"I talk to them [operations managers] every day about my orders for tomorrow, just making sure. We're supposed to check with them before we leave to make sure that uh that they've got our orders for tomorrow." (Trent)

"I'll talk to the [retail store] manager. They'll come by and say hi... or I'll talk to the manager at [Store X]. I talk to him all the time about gambling, you know. I'm from Las Vegas, so he's a gambler, so we always talk about how he did. That's about it, unless something's going on. Shoot the breeze, try to be their friend... I get along good with everybody, this guy here for awhile was kind of an ass. Now there's a different manager, he's a cool manager... He's really taking care of us." (Donald)

The way in which frontline employees interact across their different connections is unique to each type of connection (reflected in more detail in Figure 2:1); additionally, how they relate is dependent on whether the connection occurs between frontline employee and sales manager, frontline employee and operations, or frontline employee and store manager. Frontline employees' relational and structural connections drive their ability to adapt to the organization and create the knowledge necessary to execute marketing strategies in the retail store. Without

² All names are pseudonyms to protect the confidentiality of the participants.

connections, the frontline employee must rely on conjecture, which proliferates the problem of lack of execution in the retail store.

Socialization

Socialization involves interacting with sales managers and co-workers to understand the processes through which organizations accomplish goals. Socialization is a process; within the socialization process in the retail channel, employees are first trained, then they rely on their relationships to solve problems. Next, they arrive at an agreed meaning of goals with managers, and finally exchange with co-workers as illustrated in the quotes below.

“Put them with the right person. Yeah, that's key. Yeah, that really is. Getting them with somebody that they can trust and you know rely on long after the training is over. They need that point person that they feel like they can go to complain or with a question that they feel is stupid. They need that trust network, I guess.” (Catherine - Manager)

“Ardis [sales manager] was real open to what we suggested, you know, he may say well you need to do it this way and we'd say, well you know, if we do it this way, this won't work or this won't work. And we, you'd always be able to come to a mutual agreement. I mean, it's going to work some way, whether he can sit behind the desk, you know, or *higher-up-archy* in my Company, they sit behind a desk and they send all the stuff down line. You know, a lot of times I don't know if they get out into the real world to see if what they say is going to work. So you gotta take what they give you and make it work because every store's different.” (Derek – frontline employee)

“If he [sales manager] doesn't have a planogram show up right away, and like I can get one from my store, I get a copy of it. I'll give it to him... and he'll pass it on to the other guy. Or I'll see him and I'll say, 'Hey, I got this planogram. Do you have it?' And there's other people in the other districts too that I'll say, 'Hey, you know, do you have a planogram yet?' or 'Hey, I've got one.' And we just kind of trade off copies to help each other out.” (Candy – frontline employee)

In the quotes above, the managers and frontline employees all reflect on the importance of being connected and plugged into the organization in order to build a trust network and gain access to exchange information, forming an environment in which knowledge can be created. These quotes capture only a piece of the data within the subtheme of socialization; frontline employees referred to the distribution center as a big happy family, talked about their close-knit core group of coworkers on whom they call for help and to exchange ideas, and shared more

general details about their friendships and relationships within the company and with the retail store managers. During a ridealong with the lead researcher, one frontline employee described how he jumps on a route with a coworker that he calls a friend every once in awhile to generate new ideas and create new knowledge about sales, display creation, and route inventory management. The close-knit environment creates trust and support with management as well as a cohesive network in which knowledge is created and exchanged.

Knowledge Exchange

Frontline employees' discussion of the knowledge they gain comes from two separate environments: their interactions in the retail market environment with store managers and shoppers and their interactions with coworkers and sales, operations, and marketing managers. The knowledge gained in the retail store environment appears to be based on interactions with the market environment through observing shoppers, watching product sell or go obsolete, and discussing trends with store managers. In contrast, the knowledge that frontline employees gain within the organization comes from social interactions with their peers and management.

Participants' reflections on creating knowledge with store managers and through their experiences in the market are displayed in the quotes below:

"A lot of my traffic is walking. Walking traffic. So if it's raining, I know that I'm not going to get very much business. So they're not going to make it to the farther stores, like the grocery stores. The grocery stores may be really slow but then my convenience stores are going to be really, really busy.... And I think that's where a lot of people don't pay attention to, like the things that go on other than just delivering to the stores. They don't pay attention to what's around them, the weather, and events. Things like that that we can take care of ourselves just being in the market." (Micky)

"Everyone knows I'm a good one to change planograms... I will try to make more, a lot more money for the store and for the [company]. [To make decisions] I use my job knowledge. My experience that I've had and... in the grocery stores and to what I do now. And just knowing...what other people... basically what people are going to buy." (Georgia)

“Well, you know, some, it's um... uh well, you know, you swap ideas and you get ideas out on a store that you try. Maybe you put certain kind of display in a store and you did pretty good with it, so you uh pass it on to another guy. Maybe he can do it.” (Walter)

In the first two quotes, knowledge is created through frontline employees' observations in the retail market environment. They observe occasions that impact shopper behavior, such as weather, and they see patterns in shoppers' purchases in unique retail stores. The frontline employees then take their ideas and observations, the knowledge created in the marketplace, and swap ideas with their coworkers. Based on the perceptions described in their comments, participants clearly see a free exchange of ideas with each other, but do not as obviously perceive as much information exchange flowing upstream in the organization; in other words, they do not feel that if they pass information on to their managers it will ever reach the corporate headquarters or make an impact. In these moments in the interviews, the disconnect felt between the frontline employee and corporate ideas was tangible. The integrity of the marketing idea formed at the corporate headquarters was lost in the translation to the frontline and the frontline employee held a wealth of market knowledge that was never integrated into the corporate marketing strategy. In effect, a tension is created at the frontline as employees feel disconnected even while yearning for more knowledge and understanding through which they can gain the power to execute their job and perform more effectively in the retail stores.

Power Themes

Power themes represent a category of themes through which frontline employees expressed desires for more freedom and less corporate control. The participants felt tension between corporate-mandated initiatives and the needs of the retail store customers. In many cases, the frontline employees felt that they needed to be more empowered to make decisions regarding what appears in their market and less constricted by corporate controls. Two

subcategories that portray the balance of power, control and empowerment, further illustrate these points.

Control

Corporate control impacts frontline employees who want to be out in the market making timely decisions to meet their customer's needs. Frontline employees are in retail stores every day. They see things going on in the retail store that they would like to change, but sometimes feel restricted by corporate mandates with which they may disagree:

"There's the Company A world and then there's the real world. You know? And you gotta be able to combine both and when... are my stores 700% the planogram? No. But are they close to planogram? Yeah. You know, I may have, if I have a store that sells more of one thing, less of another thing, I'm going to, and the picture says you're supposed to have this, this and that. Well if the picture says you're supposed to have this, this and that, I can't keep running out of that, I'm going to take that and expand on that and cut back on this."(Derek)

"I guess you have a lot of leeway, as far as what you do out in your market. It's kind of, it's kind of... you do and then you don't. There's a lot of things you can't do that they don't want you to do. And it's probably getting more strict on what we can and can't do. Within your, within your little, your little area, you can, you can do a lot to grow your own business and to take control of that. But there are still a lot of things that you're told to do, and so, you know, it's becoming less and less of your own ability to do what, you're pretty much following orders most of the time." (Trent)

The tension between frontline employee action and what they perceive to be the demands of the organization are predicated on the information they receive and their interpretation of that information. As knowledge gets diluted in the organizational network, they are sometimes left with a fragment of information and a command: do this in the retail store, deliver this in the retail store. This results in misunderstood events and marketing displays that sometimes go unexecuted. Sales managers interviewed all discussed frontline employees' distrust of corporate mandates and their own inability to sometimes effectively filter the right information to create the knowledge necessary for sales and execution into the retail store.

Empowerment

Frontline employees discussed gaining control in two ways: first, by starting with the required baseline (the planogram) and second, through convincing their direct sales managers that their way of doing things in the field works. Even though the following participants respect the company's guidelines, each feels that meeting retail customers' needs is their responsibility and their ability to respond to market demand helps them meet that responsibility:

"You're working for yourself. I mean, this is my route. I manage my own route. I'm the manager of this. So I get support from above but I'm the manager of this route. When it comes right down to it, someone comes in my store and looks at it and says, this store looks good or looks like crap, it's going to fall back on me because I'm the manager of the route." (Rusty)

"They had an actual inner-city planogram for stuff like that, which expanded on the hot stuff and stuff like that. And that worked pretty good but you still gotta be able to... to have the freedom to cater to each individual store's needs. And you know, if you can do that then your store's happy and you're happy because you're selling more product." (Derek)

"I think a planogram is for something to start with. And then store by store is when you do case by case, you know, if you're a doctor, you can't go in there and say just because you have a broken leg it's just broken. There might be something else wrong with it. You know, same with a store. Just because you know your planogram but you might need to adjust it a little bit." (Micky)

Gaining the sales manager's support also makes a huge difference. When the sales manager trusts the frontline employee to mostly stick to plan while still increasing sales, many times the frontline employee can take advantage of that to reap the benefits. One frontline employee, Micky, talked about a manager who insisted that all stores follow the planogram exactly, regardless of customer requests. She followed his request, but saw a dramatic decrease in sales. When confronted about her decrease in sales, she showed him the impact of the strict planogram guidelines and eventually was allowed to customize her stores and increase sales and promotions once again.

Employee Attitude Themes

Employee attitude themes represent the participants' beliefs that they are capable of doing their job and are supported in their efforts by their direct manager. Self-efficacy was reflected in how frontline employees felt about their ability to sell, execute, and manage inventory as well as relationships with store managers in order to achieve their goals. Supervisor support, on the other hand, was expressed both through positive examples of supervisors who are hands-off but provide ideas, help, and knowledge and negative examples of inflexible supervisors who are ultimately thought of as negatively impacting sales.

Self-Efficacy

Frontline employees within the retail channel of this CPG firm took a lot of pride in executing their jobs well. Overall, participants believe that the frontline employees who are confident in their abilities and take pride in their job execution will have better sales. Over time, frontline employees learn to trust their instincts and respond to initiatives that roll out of the corporate headquarters to customize marketing events for their individual retail stores.

“Then you’ll find the ones [frontline employee’s] who are talking about the displays they built or the things that they did or you know take pride in doing it and those are the ones that are usually sales-wise; they’re higher.” (Micky)

“I’ll come in [to the store] and say this is where we are, if I have the figures I’ll show him [the store manager] where we stand and a lot of times we have great support, our people come in and show him some more detailed information and talk to him about, ok, we’re coming into a holiday. Those wire TV’s you saw, one time there were six of them up front of the U-scan, very low profile, very simple but they’re very neat. We’ve had them up probably since April [4 months].” (Ronald)

“Then you sort of get a feel, you get a gut feeling this is going to be good. And so you kind of go with those. And after awhile you begin to go with those kind of feelings that you have about how business is going to be.” (Trent)

However, not all employees are so confident. Some find the juggling of relationships and information to be challenging in the field:

“Here it is even harder. You have to deal with the customers, which is the store manager and all that. And someone calling you up between dealing with his boss and his associate and it’s kind of mentally hard.” (Adam)

Participants who are confident in their ability to do their job had better results in sales in the retail store, took pride in their work, and shared with others. Above, Ronald’s high self-efficacy allows him to feel confident in sharing his past experiences with store managers in order to negotiate more floor space for displays as opposed to Adam, who finds the job mentally difficult. Much of their self-efficacy came from working alongside a supervisor who supports them and trusts them to do the job well.

Perceived Supervisor Commitment

All of the participants discussed interacting with their direct supervisors on a daily basis. Easy relationships enable information flows, which in turn enable marketing plan execution in the retail stores; conversely, difficult relationships create a bottleneck through which information does not pass and agreement is rarely achieved. Frontline employees with supervisor commitment and support are able to execute more events in the stores. Sales managers who support their employees discussed spending time in the stores with the frontline employees and even setting up displays and working on merchandising plans.

“I’m communicating with Greg a lot. Not that I’m calling him every minute, but I talk to him every day, let him know if I have any issues with product or if I have any issues getting a display maybe need help putting out a display. I communicate with him. Then he communicates with me, gives me my sales plan, he gives me my promotion calendar, basically what [the company] wants on there. Then I just take it and run.” (Troy)

“My boss is always asking me what he can do for me. How he can help me... He gives me a lot of tools, a lot of information. He keeps me up to date constantly and there’s changes you know that happen.... I’ll get a text; I’ll get 3 or 4 texts every day from my boss. He’s telling me this and that as he gets information, he relays it to me.” (Trent)

“[Sales managers] give us promotional information for the period and for the next week, and we talk about what we’re going to do, what I’m going to do, how much I’m going to put out, what’s my plan for that promotion. He gives me ideas and I give him ideas and we kind of come together and work together.” (Rusty)

These participants have strong ties to their boss as reflected in the level of communication, assistance, and knowledge created through their interactions. Rusty talked at length about working with his sales manager to come up with ideas and plans for selling marketing promotions into the retail store.

Retail Outcome Themes

Retail outcome themes reflected the impact of frontline employee social capital, empowerment, and attitudes on their ability to execute in the store through customer value, customer satisfaction, and compliance. Frontline employees with dense network connections were able to gain the knowledge necessary to make effective decisions in the store that made the retail manager happy as well as creating longer-term satisfaction and compliance. Value and satisfaction are reflected in the two quotes from Walter and Micky below, while Donald's comment exhibits the frustrations that arise when the retailer does not comply.

"No, if you can, if you work with your [retail store] managers, you get in with them pretty good and treat 'em good and stuff then... some of 'em will let you do things." (Walter)

"I will actually make other trips just to make my customers happy so down the road, if I do need to take a display in there, they'll be like, oh yeah, no problem. So I'm more building rapport with my customers. So that way I can get the things that I want put in there that I need to put in there in order to build sales." (Micky)

"[Retail store A] right down there, they won't let you put anything out on the floor. [Displays are delivered to Retail Store A from Retail Store A's DCs] ... and they just don't want [the display] on the floor. So what they tell me to do is... break the display down and put them on an end cap, which I think is kind of stupid. (Donald)

Each of the individual's comments reflect an element of customer value, willingness of the customer to let the frontline employee "do things," satisfaction because "customers are happy down the road," and compliance, or non-compliance in Donald's case. Frontline employees well connected within the organization have access to customize service, delivery, and displays that

end up on the retail store. Cross-functional integration enables the frontline employees to respond in a timely manner to the individual needs of the retail store. In order for participants to achieve the desired results in the retail store, they needed a cross-functionally integrated network to gain information and solve problems. Although participants mentioned people in the organization with whom they interacted, the researcher noted that each participant commented on similar ties to individuals within the organization who helped them do their job day-in and day-out in different ways.

Interpretation of the Social Network Structure

During interviews, frontline employees often referenced the importance of their relationships with key people in the organizational network, but they were less perceptive about the power and centrality of certain groups of actors for specific situations. Power and centrality reflect the position of managers and frontline employees' co-workers across functions in the information network of an organization. Managers with high levels of power and centrality tend to have more information and knowledge that enables other employees to do their jobs; consequently, people seek out these managers for information and they become central in the network. To gain a more descriptive picture of how frontline employees interact across and within functions, methods were triangulated to capture the overall culture and position of individuals at the frontline.

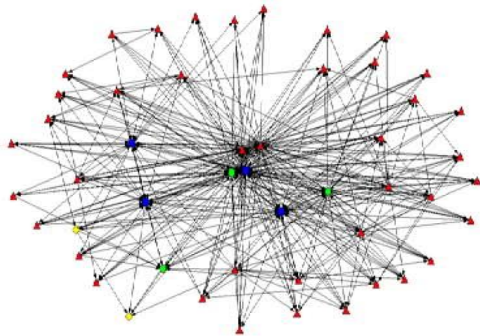
The analysis process of the emic data showed clear impacts of frontline employees' everyday interactions; however, the lead researcher's etic observations provided the additional insight that participants used different relationships in different situations. Based on Uzzi's (1997) conceptualization of embeddedness as fine-grained information sharing, joint problem-solving, and trust, network questions were designed to tap into how the frontline employees

interact to fulfill different requirements of their jobs. The network analysis produced by the data from these questions supported the lead researcher's etic observations by showing that frontline employees create unique knowledge through different network structures. Specifically, frontline employees rely on their relationships with sales managers for formulating sales plans, operations managers for problem-solving in the retail store, and other frontline employees for interpretation.

Figure 3:1 reflects the structure of the networks of promotional information sharing, problem solving, and trust (larger versions of the networks are included in Appendices B-F). Frontline employees are represented by red triangles; frontline managers are represented by blue squares. Additionally, regional managers are represented by green circles and operations managers and employees are represented as yellow diamonds.

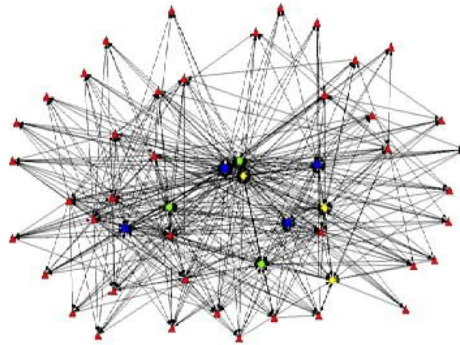
Because frontline employees are embedded differently in different networks, social capital, empowerment, and employee attitudes are reflected in these networks in different ways. Social capital is built through frontline employees' access to cross-functional resources that add to their functional knowledge. In terms of promotional information-sharing, the important links are to the direct sales managers (blue squares) who hold all of the information and knowledge necessary for frontline employees to perform their jobs. However, in the promotional information sharing network, operations managers (yellow diamonds) are on the periphery of both networks, indicating that operations managers do not hold the important knowledge necessary for frontline employee implementation. The operations managers become much more central to the frontline employee network when it comes to solving problems that arise in the retail store. Thus, operations managers are much more central to the problem-solving network, almost to the same degree as the frontline employees' direct managers. Both the direct sales manager and operations managers play a role in the empowerment of frontline employees.

Location X –Promotional Info Sharing Network



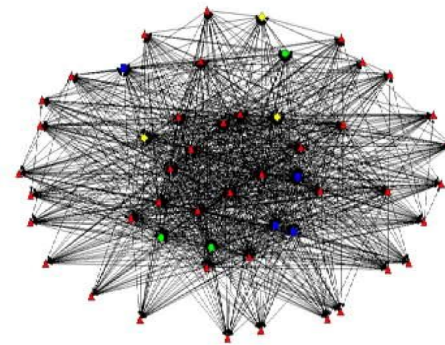
Network Centralization (Outdegree) = 62.551%
Network Centralization (Indegree) = 47.980%
Density = 0.436

Location X –Problem Solving Network



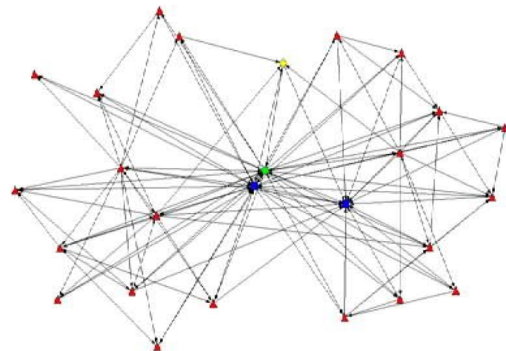
Network Centralization (Outdegree) = 46.459%
Network Centralization (Indegree) = 54.265%
Density = .575

Location X – Info Trust Network



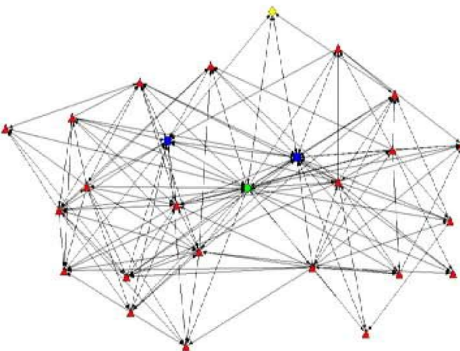
Network Centralization (Outdegree) = 64.551%
Network Centralization (Indegree) = 38.010%
Density = 1.519

Location Y –Promotional Info Sharing Network



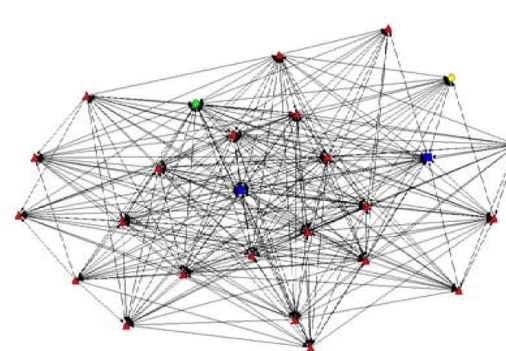
Network Centralization (Outdegree) = 52.625%
Network Centralization (Indegree) = 51.542%
Density = 0.537

Location Y – Problem Solving Network



Network Centralization (Outdegree) = 50.875%
Network Centralization (Indegree) = 50.875%
Density = 0.602

Location Y – Info Trust Network



Network Centralization (Outdegree) = 59.750%
Network Centralization (Indegree) = 40.250%
Density = 1.794

Figure 3:1 Network Embeddedness: Promotional Information Sharing, Problem Solving and Information Trust Networks

Frontline employees are empowered to do their jobs through access to sales information (reflected by the centrality of frontline managers in both Location X & Y). Frontline employees are then further empowered when they have direct links to operations managers that can give them access to help and information regarding inventory issues or delivery problems. This is reflected in the centrality (centrally-located position) of operations managers in Location X's problem-solving network and, although operations managers are not central at Location Y, frontline employees described the lack of access to operations managers in Location Y as a problem.

Finally, trust is fundamental to the commitment frontline employees feel towards their supervisors and the perceived support that they attribute to supervisors. This does not necessarily mean that frontline employees rely solely on supervisors for support and information. Trust is fundamental to measures of commitment and perceptions of supervisors (Mulki, et al., 2008); however, the network connections that frontline employees have with each other seem to engender as much trust as supervisors. In both Location X and Y, frontline employees become more central in the trust network. This reflects that frontline employees trust knowledge and information more when they perceive that the person is out in the field, or the real world, as opposed to the managers they perceive to be sitting behind a desk.

Structural and relational embeddedness enable frontline employees to gain access to information that empowers them to make more effective and efficient decisions in the retail store. Where a frontline employee is positioned in the network can impact the amount of information that have available to them. A network of promotional information sharing or problem solving does not provide the full picture of how frontline employees are truly embedded in the organizational network, but examining all three networks simultaneously shows the

importance of embeddedness in multiple types of networks—sharing information, solve problems, and trust—in order to have the right mix of ties to truly empower a frontline employee to execute marketing promotions and displays in the store.

Theoretical Interpretation

Marketing execution is an obstacle for CPG firms across the retail industry; often marketing knowledge that enables execution is not being diffused throughout the organization to the frontline (Deloitte Research and GM A, 2008). Both the categorical codes (Table 3.3) and the network structures (Figure 3.1) informed the theoretical coding that guided the understanding of the relationships between the concepts (displayed in Figure 3.2 below).

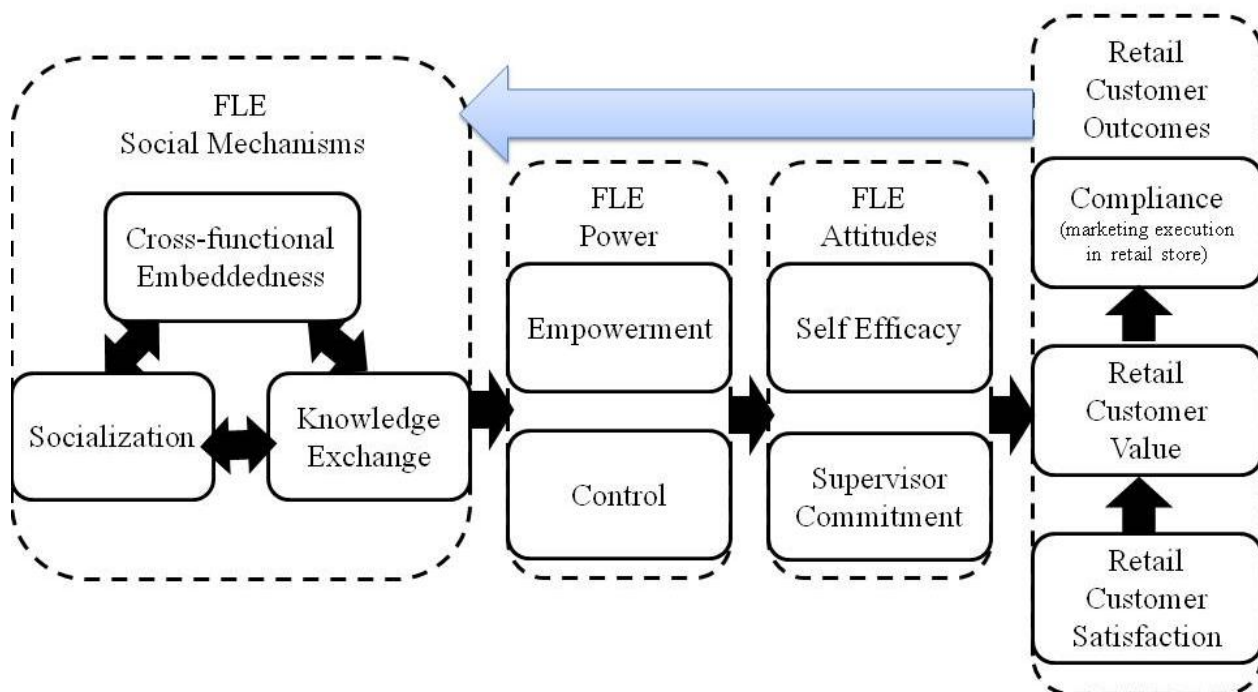


FIGURE 3:2 – Impact of Frontline Employee (FLE) Empowerment on Retail Outcomes

The frontline employee's social capital impacts the level of power they have to make decisions and react in the retail store. Frontline employees discussed the ways in which they interact with sales and operations management and other frontline employees in order to gain access to information and knowledge they need to do their jobs. The frequency and relational elements of these interactions are reflected by the frontline employee's level of embeddedness across functions. As was reflected in the trust network in Figure 3.1, frontline employees share dense networks of trust with each other and supervisors. The more embedded they are in the network, the more socialized they are. Micky and Derek both discussed direct managers who had taught them the ropes of the job as well as managers with whom they discussed both promotional marketing goals and the retail store obstacles. Derek explicitly stated that he and his manager discussed different initiatives and came to a mutual agreement. This agreement and supervisory support empowered Derek to make decisions in the market that were customized to each retail manager's wants and needs. As this example shows, embeddedness is the foundation of social capital and socialization and increases the likelihood of joint creation of knowledge, while knowledge creation and exchange is the actualization of social capital in the network. The frontline employee gains access to the information through connections to managers. The unique knowledge that they create through information exchange during interactions empowers the frontline employee to act.

Once empowered with unique knowledge, the frontline employee is able to act in line with the goals of the corporation. Regardless of the market or the unique desires of the store manager, Micky's manager refused to allow the frontline employees to customize or change anything on the planogram or promotional pictures to meet the needs of a retail store or shopper

community. As a result, Micky saw her sales plummet. After several quarters of decreasing sales, her manager was asked why Micky's sales were so low, to which her manager responded:

"Well, I don't know. I'm doing the planogram in all my stores. I'm helping my [frontline employee's] in all my stores, with all the planograms, but I don't know." So then they said, hmm. Something's not working. And I think that's when we changed our planogram a lot around."
(Micky)

Her attitude towards her supervisor and the company was diminished when he did not seem to understand the market she was serving. She did not want to fully change the planogram that was set in place by the company, only tweak the inventory depth and assortment to match the flow of sales in the store she serviced. Her self-efficacy was stifled; she knew that she could serve her market better, but her boss, who was new to the company, was not open to her ideas. She did not have enough social capital with him, either in embeddedness or socialization, to exchange knowledge and be empowered to make in-store decisions. Additionally, the flow of information was one-way, decreasing the frontline employee's power to meet the needs of the customer and creating a lack of perceived supervisor support and self-efficacy that generated tension between the frontline employee's desire for empowerment and managerial control.

On the other hand, Derek worked for a supervisor with whom he could interact to create knowledge. Derek was confident in his knowledge of the marketplace and his supervisor supported his decisions in the store. His good relationships with the store managers enabled him to keep sales up and to sell in shopper marketing displays in unlikely places:

"You can get with them, even if stuff comes down the line, and you can make it yours, you can cater [promotions] to work with your stores. I mean, you do have the freedom and the flex, as long as it's not outrageously out of the box, I mean, you know as long as it's within reason... It works....And that worked pretty good but you still gotta be able to... to have the freedom to cater to each individual store's needs. And you know, if you can do that then your store is happy and you're happy because you're selling more product. (Derek)

Derek reflects knowledge of the market that helps him to make decisions to meet store managers' needs. Derek's self-efficacy and feeling of empowerment is reflected in his freedom to cater to the store, the happiness he feels in selling more products, and the retail outcome of store manager satisfaction. Because Derek has a dense network through which he gains knowledge, he is empowered to make choices. In response, he perceives more supervisor support and self-efficacy, which makes the retail store compliant and satisfied in the end. The feedback loop in Figure 3:2 captures the impact of a satisfied retail customer on a frontline employee's ability to become even more embedded with managers across functions, to offer more support to co-workers and create better future prospects within the firm, and to create even more knowledge. Central to frontline employees' performance in the retail store is the empowerment they attain from their network in the organization. The challenge for companies is to manage the knowledge creation in the organization so that the networks of knowledge around this empowered employee are aligned with strategic marketing goals.

Discussion

This paper answers several calls for more research. First, by exploring social networks within the retail channel, this paper answers a call from the social network literature to adapt and adjust social capital to the supply chain context. Borgatti and Li (2009) ask for more exploration and adoption of social capital and social network analysis in the supply chain context to better understand implications of the network. The social network analysis conducted in this study begins to reveal the networks through which frontline employees and managers interact in the retail channel to exchange information and solve problems.

Second, by exploring frontline employees' daily interactions with both sales and operations managers, this research begins to address Esper et al.'s (2010) call for further

exploration of how cross-functional information is exchanged by managers to create effective and efficient demand and supply integration. Through observation and interviews about the interactions throughout the network, a new perspective on individual-level knowledge creation and management is introduced.

Third, retail channel researchers have called for more investigation of how people behave in the retail channel (Brown, 2009). This call for exploration of behavior in the channel is addressed through an in-depth ethnographic exploration of the daily lived experiences of frontline employees, sales, and operations managers in the retail channel. The qualitative research uncovered the importance of embeddedness in connecting people to the retail network. The network analysis further highlighted the importance of cross-functional integration of the frontline employee for sales and promotional information as well as problem-solving. Interestingly, behavior is driven by trust, as shown in the density of the trust network as compared to the other networks, as well as by the frontline employee's need for information or a solution.

Finally, this research provides a theoretical basis for cross-functional integration research grounded in the phenomenon of marketing execution in the retail channel. In the introduction of the concept of demand and supply integration, cross-functional integration for more efficient and effective firm performance, Esper et al. (2010) call for theoretical development of our understanding of knowledge management across function of the firm. By utilizing a rigorous process of grounded theory analysis, this study offers several theoretical implications.

Implications

This research combines the premises of several network-based theories to provide a holistic view of how social capital impacts frontline employee effectiveness. Social capital

theory guided the interpretation of how frontline employees interact to gain access to knowledge as well as create new knowledge (Lin, et al., 2001). Social exchange theory guided the interpretation of empowerment and employees' attitudes (Cook and Emerson, 1987; Emerson, 1976). Throughout the analysis process, a new understanding of how embeddedness impacts knowledge creation and exchange, empowerment, employee attitudes, and in-store execution of marketing strategies emerged. Understanding the relationships between these concepts illuminates several important implications of this research.

First, not all social capital is created equally. Frontline employees were differently embedded in each of the three networks. In the promotional information network, the sales manager was central. In the problem-solving network, both sales and operations managers were central. In the trust network, frontline employees became more central. In each of these networks, high-performing frontline employees were connected to the central figures in the network. Studies in the supply chain and marketing literatures have indicated that cross-functional integration is important for execution (Esper et al, 2010), but not the specific contexts and relationships that truly enable execution. Empowerment comes from having the right ties to the right people; in this case, ties with sales managers enabled frontline employees to be empowered in the retail environment.

At the frontline, management's perceptions of a frontline employee's social capital, including the embeddedness, organizational socialization, and knowledge created, lead to more decision power for the frontline employee. This supports previous research that views empowerment as the delegation or sharing of power by managers (Conger and Kanungo, 1988). This research expands the empowerment process to include the co-creation of knowledge between managers and employees. The creation of knowledge was about sharing information, as

well as interpreting and transforming information into executable knowledge for frontline employees.

The co-creation of knowledge arose when managers and supervisors valued employees' knowledge from the marketplace. Rather than being viewed as an out-of-touch boss behind a desk, managers who enabled top performance salespeople were those who exchanged information and knowledge with the frontline employee to help align them with corporate marketing goals.

The ideas that emerged related to social capital, empowerment, and attitudes are viewed individually through network governance and social exchange theories, which come together under the umbrella of network theory. Network governance theory provides axiomatic insights about social mechanisms at the firm level; this research offers them at the individual level (Jones, et al., 1997). Social exchange theory postulates that the social environment governs behavior. Konovsky and Pugh (1994) found that frontline employees who are more embedded in the network have higher levels of socialization and more opportunities to exchange knowledge with coworkers and managers. Because they are governed by their position in the network and their co-creation of knowledge, frontline employees act in ways that become more predictably in-line with corporate marketing strategies. Frontline employees feel empowered by managers to make decisions and therefore act increasingly in the interest of their managers and the organization (Bandura, 1986). Top managers can learn from this research to position their frontline managers to better enable knowledge exchanges with frontline employees.

Firms ready to compete in the knowledge-based economy can take away several insights from this research. First, knowledge is created and exchanged during interactions, not just through the distribution of information. Often, firms measure knowledge through information

flows in the organization rather than taking into account the specific interactions during which knowledge is created. Shared interpretation of the information between the frontline employee and the frontline manager is crucial for marketing execution to take place in the retail store. Second, if frontline managers want the information that they pass on to frontline employees to be trusted, they need to demonstrate that they know what is happening in the marketplace. Frontline employees trusted the information they gained from each other more than the information they received from managers; therefore, managers who engage in the marketplace will more effectively interact with frontline employees to create knowledge that will enable in-store execution. Finally, knowledge flows across functions that have a feedback loop within the organization will be more successful than a one way flow of information. Knowledge about sales and promotions may come from sales managers, but if a problem with execution arises, the operations manager's knowledge must be passed on to the frontline employee for execution to take place.

Conclusion

This chapter identified several themes that represent the driving forces behind marketing execution in the retail channel. Although further research is needed, this research offers some insights to business regarding the nature of frontline interactions and perceptions of frontline employees.

The limitations to this research provide opportunities for future research. First, a limited sampling approach was used. This offers promising avenues for expanding the themes and theoretical implications identified in this research to different contexts and settings to explore the impact of social capital and the organizational network on frontline marketing execution. Second, the current study focused primarily on the interactions of frontline employees with sales

and operations managers within the firm. Future research should extend this to the relationships with the retail store managers downstream in the retail channel. Finally, this research represents the perceptions of 83 individuals, which provides a foundation for future research to further test generalizability of the relationships between the concepts in different contexts.

The melding of several network perspectives through a triangulated ethnographic exploration of marketing execution in the retail channel was grounded in daily experiences of the frontline employees responsible for execution. By exploring the nature of knowledge flows and social interactions at the retail channel frontline from the perspective of the manufacturer's frontline employee, this research introduces a theoretical framework through which frontline employees are embedded in the organization, socialize, interact to exchange and create knowledge, become empowered to make decisions, and develop supervisor support and self-efficacy to reach the ultimate goal of marketing execution through customer value, satisfaction, and compliance in the retail store. Even the most knowledgeable market-oriented firm stands impotent if their knowledge is not translated to the frontline employees executing marketing strategies on the floor of the retail store every day.

CHAPTER 4

QUANTITATIVE MANUSCRIPT

Frontline Networks and Marketing Execution

Introduction

Supply chain execution is frequently an afterthought for marketing strategies in theory and in practice (Blanchard, 2011). Theoretically, more effective and efficient marketing execution is enabled when marketing and supply chain functions integrate to collaborate and coordinate information throughout the organizational network (Esper et al, 2010, Achrol and Kotler, 2011). However, most research and theoretical development focuses on either marketing or supply chain strategies without considering simultaneous implementation (Mentzer & Gundlach, 2010). Further, in a recent theoretical development, integration has gained increasing importance as marketing research has expanded to include a service-dominant logic that requires more cross-functional integration for execution and increased service quality (Achrol and Kotler, 2006; Vargo and Lusch, 2008). In marketing practice, consumer packaged goods (CPG) companies and retailers are implementing shopper marketing strategies by working together to provide a unique experience for the shopper in the retail environment (Flint, 2012; Shankar, et al., 2011). Despite the potential benefits of shopper marketing, many firms fail to execute the marketing experience in the retail environment, often due to disconnects between functions and levels within the corporate hierarchy (Deloitte Research and GMA, 2008).

Shopper marketing strategies are more complex than many traditional marketing approaches. Shopper marketing events in the retail store often center on sports, holidays, and special themes that require local retail store manager buy-in as well as the construction of elaborate displays, unique product packaging, secondary placement of products and a specific

inventory mix. Execution of a shopper marketing event falls to a frontline employee who is employed by either the CPG company or a third party provider. Either way, the frontline employee manages the relationship with the retail store, gathers information from within the CPG company, and executes the shopper marketing event in the retail environment. The complexity of shopper marketing creates challenges for the frontline employee, who must have access to both marketing and supply chain knowledge to execute the marketing event in store (Deloitte Research and GMA, 2008).

Frontline employees are more likely to achieve higher levels of service quality and effective supply chain execution when they have cross-functional knowledge (Bowersox et al, 1999). Piecemeal or incomplete information can make it more difficult for the frontline employee to execute shopper marketing initiatives. Frontline employees gain access to information and knowledge through their relational networks (Arndt et al, 2011), which enhance the quality of service they can offer to their retail customers as well as the shopper's experience (Ashforth, et al., 2007; Cross, et al., 2001). Frontline employees, with access to knowledge and information through their integration within and across functions, may be able to provide high quality service to retail store customers. The purpose of this research is to explore the impacts of the frontline employee's organizational network on integration and the resulting service quality to the retail store.

Despite the importance of cross-functional integration, marketing, supply chain, and strategy researchers have taken three unique approaches to the discussion of integration. In marketing research, emergent and established concepts such as service-dominant logic and market orientation are both predicated on the firm's ability to manage knowledge and create a corporate culture inclined towards shared interpretation of that knowledge (Lusch, et al., 2007;

Slater and Narver, 2000). However, marketing research views knowledge management from a strategic level, leaving a gap in the understanding of how knowledge is collaboratively integrated at the individual level to enhance service quality. Supply chain research provides a long history of exploration of marketing and logistics integration (Bowersox, et al., 1999; Ellinger, et al., 2000; Esper, et al., 2010), but lacks a unifying theoretical framework to amalgamate the antecedents and consequences of integration within the supply chain context. Finally, strategy research provides the network paradigm through which integration and knowledge diffusion can be explained (Coleman, 1988; Cook and Emerson, 1987; Jones, et al., 1997), but lacks exploration of the individual-level actions and outcomes within the network. Across these literature streams, gaps in the research include an understanding of individual-level integration, antecedents and consequences of individual-level integration, and the impact of individual actions on performance.

The research presented here begins to fill these gaps by testing the impact of network relationships on cross-functional integration and service quality utilizing structural equation modeling and network methods. First, qualitative interviews were utilized to observe and explore the network interactions at the frontline of a CPG retail channel. Second, survey research was conducted at the frontline to examine the impact of networks on cross-functional integration in multiple retail contexts. Finally, direct measures of individual performance were used to assess the impact of each participant's unique relational network and level of integration on the service quality provided to the retail store.

This research offers contributions to the marketing, supply chain, and strategy literatures. By exploring the impact of the organizational network on shared interpretation of knowledge, the research presented here extends marketing concepts from the strategic to the individual level.

Further, this research introduces network theory to supply chain research as an explanation of the impact of cross-functional integration. Finally, by exploring multiple channel contexts in which network theories can be applied to understand interactions between individuals, the findings of this research add individual performance implications to strategy research.

This chapter is organized in the following sections. First, the relevant literature is explored to build the theoretical foundation for the research. Second, the social network and structural equation methodology utilized to test the theory is explained. Third,, the results of the network analysis and structural equation modeling methods are explored. Fourth, , discussion of the findings and implications for theory and practice are described. Finally, future research and conclusions are revealed.

Literature Review

The study of networks is multidisciplinary, necessitating a review of several streams of literature to understand the impact of the network on the frontline employee and the potential impact of the frontline employee's network on integration and service quality. The literature reviewed here focuses on network concepts that impact or are impacted by frontline employee integration. Specifically, the next sections review concepts inherent within service quality, relational embeddedness, organizational socialization, shared interpretations and integration.

Service Quality

Consumer packaged goods companies implementing shopper marketing have the potential to increase the quality of service they provide to their retail customers through managing product categories as well as by creating unique shopping experiences. The success of shopper marketing strategies is dependent upon a logistics capability to effectively and efficiently deliver and distribute displays, events, and products to precise retailers and retailer

locations within precisely timed event windows which ensures that CPG companies provide high quality service to their retail customers and that those retailers provide high quality service to their shoppers. The concept of logistics service quality (LSQ) extends the marketing concept of service quality to include logistics efficiency and effectiveness in providing service to customers. High levels of LSQ can increase customer satisfaction, potentially leading to improved future sales performance (Mentzer et al, 2001). The frontline employee in a CPG company has the opportunity to enhance service quality through both the logistics of delivery and inventory management and the shopper marketing event they bring into the retail store.

Service quality is an important facet of frontline employee and firm performance. In services marketing research, frontline employees can provide a source of differentiation and competitive advantage to firms through customers' perceptions of the service quality they provide (Bitner, et al., 1990; Sabiote and Román, 2009). Supply chain research conducted in distribution centers found that frontline employee performance and interdepartmental customer orientation had a positive effect on distribution center service quality and performance (Voss, et al., 2005). Therefore, in addition to performing better individually, frontline employees providing quality service also increase firm performance. The notion of interdepartmental customer orientation indicates that service quality relies on an integrated organization.

In both of these marketing and supply chain literatures, service quality is based on the social abilities and networks of the frontline employee (Bitner, et al., 1990; Mentzer, et al., 2001). Managers and other employees in the frontline employee's network impact his/her ability to deliver both efficiently and effectively in the retail store. A cross-functional network of relationships may enable frontline employees to gain access to information, better understand their jobs and roles in the company, and arrive at a shared meaning of information for the task at

hand. The knowledge gain through the frontline employee's network can increase service quality through the effectiveness of the shopper marketing event in the retail store and the efficiency of timely delivery and inventory mix to make the event a success (Mentzer et al., 2001). Thus, the network within the organization can provide the frontline employee with all the resources and knowledge necessary to provide high quality service to retail customers (Cross et al, 2001).

Embeddedness

Embeddedness, a central concept to network theory, has been defined simultaneously and distinctively as either the relational *or* the structural, or the relational *and* the structural nature of an actor's network of relationships (Moran, 2005; Uzzi, 1997; Jones et al., 1997). Building on political economy and economic theories, the concept of embeddedness was adopted into sociological theory to capture how actors' dyadic relations and the structure of those relations impact economic actions and outcomes (Granovetter, 1973; Uzzi, 1997). Although much research on structural and relational embeddedness focuses on the firm level (Dacin, et al., 1999; Echols and Tsai, 2005), attention in this research is drawn to the embeddedness of a single focal actor, referred to as the ego (Borgatti, 2010).

Both relational and structural embeddedness build on the importance of an individual's connections that impact access to resources (Lin, et al., 2001), power (Brass, 1984), leadership (Brass and Krackhardt, 1999), employment (Fernandez, et al., 2000; Krackhardt and Porter, 1985), and individual performance (Baldwin, et al, 1997; Mehra, et al., 2001; Sparrowe, et al, 2001). Structural embeddedness research builds on the views of Coleman (1994) and Putnam (2001) who call for a dense ego-network in which an ego's alters, who are others in the ego's network, can coordinate with each other to help the ego (Borgatti and Foster, 2003). Relational embeddedness research, on the other hand, contrasts the traditional arms-length, transaction cost

view of market relations to explore the benefits of the relationships between individuals characterized by trust, fine-grained information sharing, and joint problem-solving (Uzzi, 1997; 1999; Uzzi and Lancaster, 2003). Moran (2005) explored the relationship between structural and relational embeddedness on execution-oriented and innovation-oriented tasks in a pharmaceutical company, finding that structural embeddedness had a stronger impact on execution while relational embeddedness had a stronger impact on innovation.

The innovation-oriented task environment may be more akin to the complex shopper marketing retail environment facing the frontline employee. A high level of relational embeddedness impacts the frontline employee's ability to gain access to knowledge and increase complex task performance (Moran, 2005). This is important for frontline employees implementing shopper marketing events as they manage their relationships within their own company and with the retail store manager to share information and correct problems that may arise. Also at the individual level, research indicates that relational embeddedness speeds the exchange of knowledge and assists in socialization (Dhanaraj et al, 2004).

Organizational Socialization

Socialization is defined broadly as the convergence of expectations and goals of an individual in an organization through four dimensions: (1) training, which refers to how well the company has prepared the employee to do a job; (2) job understanding, which refers to how well the employee comprehends how the organization functions and how to operate in it; (3) co-worker support, which refers to how well the employee relates to other members in the organization; and (4) future prospects, which refers to the employee's long-term view of the organization, such as anticipation of future employment or rewards (Jones, et al., 1997; Taormina, 1994; 2004). Socialization matters to the organization and individual because

individuals socially construct meaning throughout their interactions (Blumer, 1969; Pfeffer and Salancik, 1978). Although most socialization research focuses on the newcomer, socialization is a continuous process important to complex organizations in which employees need to change and adopt new innovative strategies, such as shopper marketing, quickly (Ashforth, et al., 2007).

Socialization is an intra- and inter-organizational process (Chou, 2005) that allows for collaboration and integration through the conversion of new knowledge into tacit knowledge. Shared experiences, interpretation, and interactions with other people within or beyond organizational boundaries all facilitate socialization. Additionally, the shared knowledge created through social interactions among individuals and organizations is dynamic, meaning that the socialization process has neither an end nor a beginning, but shifts continuously as new information and situations are introduced (Chou, 2005). Shopper marketing strategies require continuous socialization of frontline employees within their own organization to manage and interpret information to meet organizational goals. Also, shopper marketing strategies require frontline employees to be socialized across organizations so that they can adapt to and understand the needs of the retail store manager. Overall, the socialization of a frontline employee increases the individual level of performance that is then projected to the organization (Ashforth et al., 2007).

Socialization of employees has many positive effects on the firm, including increased trust (Griffith et al., 2006; Hameren, 2010; Ireland et al., 2002; Oh et al., 2004; Kingshott, 2006; Lippert and Davis, 2006; Chou, 2005; Geiger and Turley, 2005; Cousins and Menguc, 2006), commitment (Kingshott, 2006; Geiger and Turley, 2005), willingness to share resources such as knowledge (Ireland et al., 2002; Oh et al., 2004), improved group effectiveness (Oh et al., 2004), and enhanced equity, communication, friendliness, and intimacy (Geiger and Turley, 2005).

Further, socialization facilitates the shared interpretation of information (Ford and Baucus, 1987).

Shared Interpretation

Shared interpretation has been defined as the perceived presence of consensus between an individual and organizational members with regard to the meaning of information (Slater & Narver, 2005). Shared interpretation has been further defined as both a component of organizational learning as well as knowledge management (Esper, et al., 2010; Tippins and Sohi, 2003). Shared interpretation influences the collaborative flow of information and knowledge within and across functions. The ability to arrive at a shared interpretation of information is essential for successful integration within and across functions. Functions that inherently disagree about the meaning of information will be less likely to collaborate and coordinate the information that they attain.

When shared interpretation leads to agreement across functions, the individual's ability to coordinate and collaborate on information they receive and co-create knowledge is increased. Research has investigated the outcomes and nature of shared interpretation and found that socialization led to higher levels of knowledge inflows (Gupta and Govindarajan, 2000). Individual performance in knowledge-intensive work is, to some degree, a product of obtaining and interpreting the right information to solve novel, challenging problems. In information search and interpretation, cohesive or closed networks might promote consistent norms, trust, and cooperation that motivate contacts to share knowledge (Coleman, 1988; Granovetter, 1985; Reagans & McEvily, 2003). Interactive information networks that span social divides improve performance in knowledge-intensive work because they provide access to more relevant

expertise for framing problems as well as acquiring and interpreting information for solutions (Burt, 1992; Cross & Cummings, 2004).

Integration

Integration is defined as the quality of an individual's collaboration and coordination across and within departments that is required to achieve unity of effort (Esper, et al., 2010; Kahn, 1996; Lawrence and Lorsch, 1967). Integration has been found to be a significant differentiator of overall firm performance, logistics performance, and inventory management effectiveness (Stank et al., 1999). Further, logistics competencies that enhance firm performance all require some level of collaboration and coordination (Stank, et al., 2001). Collaboration is reflected in the utilization of relationships that link functions to support customer requirements and maintain shared vision and goals intra-and inter-organizationally through the communication of information (Min et al, 2005). Coordination is reflected in the seamless congruency of external and internal information-sharing, technological and planning integration, and measurement integration (Stank et al, 2001).

Integration is important within and across functions for frontline employees with an understanding of the goals of the organization and occurs in several forms. First, sales integration captures the coordination and collaboration within the sales function. Second, operations integration captures the coordination and collaboration within the operations function. Third, cross-functional integration at the individual level captures the level of coordination and collaboration an individual has across functions, namely sales and operations.

Cross-functional integration research has focused on elements of organizational culture such as structure, relationships and networks, and learning. Between the mid-1960's and the mid-1980's, research on firm structure shifted away from the mechanistic and traditional view of

functions operating in solitude. Concepts such as organic firm structures, network organizations, and social action systems emerged within theories of the firm to explain competitive advantage and firm performance (Anderson, 1982; Lawrence and Lorsch, 1967; Lawrence and Lorsh, 1967; Van de Ven, 1976). Fueled by emergent theoretical concepts, relationships and networks have become the focus of governance and effectiveness for firm performance (Charan, 1991; Hanson and Krackhardt, 1993; Miles and Snow, 1992). Traditional economic rationing theories did not explain the advantages gained when members of the organization and supply chain integrate goals and information across functions, rather than acting solely in self-interest (Jones, et al., 1997). Cross-functional integration, through both collaboration and coordination, provides an environment wherein members of the firm and supply chain can share knowledge and information and achieve mutual goals (Feldman and March, 1981).

Antecedents to integration have been relatively unexplored in supply chain research (Esper et al, 2010). Social exchange and network theories provide an axiomatic foundation through which relational embeddedness, socialization, and shared interpretation can be captured as the social mechanisms that lead to integration (Emerson, 1976; Jones et al, 1997; Nonaka et al, 2008). The following section utilizes network theories of social network and social exchange theory to explore the relationships between each of these concepts.

Research Hypotheses

Network theories have three fundamental axioms (Eccles & Nohria, 1992). First, all individuals are actors within a network of alters (Borgatti, 2003). Second, the alters in the network influence the individual actor's behavior (Emerson, 1976; Granovetter, 1983). Third, the actors with strong ties, or relationships, in the network will be better positioned to gain access to information and to create knowledge necessary to perform their jobs (Coleman, 1994).

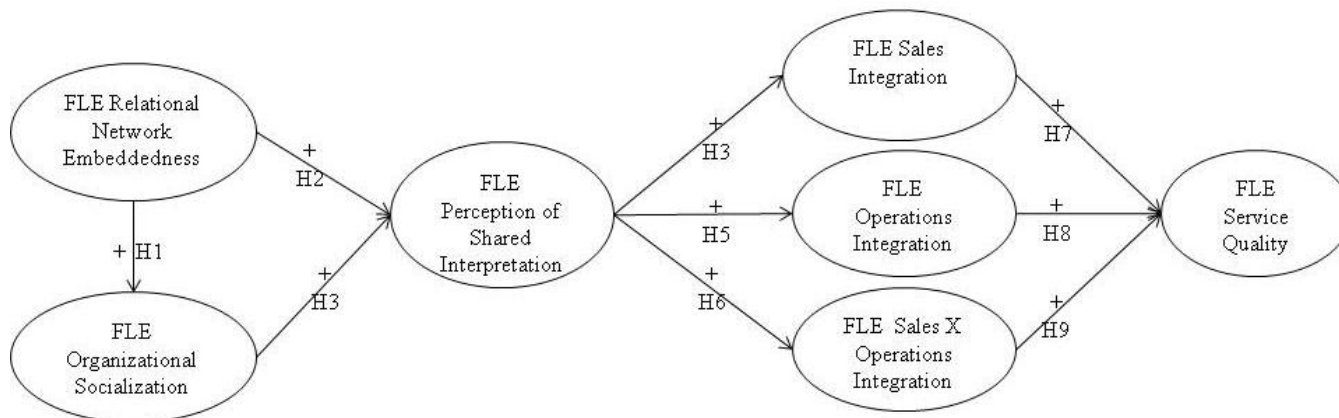


FIGURE 4:1
Factors Effecting Integration and Service Quality for Frontline Employees

Building on the network paradigm, the frontline employee who has strong ties within the organization will be better positioned to access information and create knowledge from multiple sources and across functions. The basic assumption of this research is that the impact of cross-functional integration on individual performance is dependent on the actor's network embeddedness, socialization, and shared interpretation of the meaning of information. Figure 4:1 provides a conceptual model that summarizes the research and subsequent hypotheses.

Relational embeddedness is a foundational concept in network theories (Lin, 2001) and thus, network outcomes such as socialization and shared interpretation depend on an individual's relational embeddedness (Jones et al, 1997). This research investigates the extent to which individual relational embeddedness impacts an individual's ability to socialize and arrive at a shared interpretation with management in an organization. Network governance theory proposes that embeddedness precedes social mechanisms such as socialization and shared interpretation (Jones, 1997). Building on network governance theory, relationships underlie knowledge-sharing, shared interpretation, and the development of future activities in an organization

(Kohtamäki, 2010). Social capital theory also builds on the importance of embeddedness for establishing an individual's ability to access resources such as knowledge (Lin, et al., 2001). Fundamentally, the strength of frontline employees' relationships across an organization will enable them to become more effectively socialized along the four dimensions of training, understanding, co-worker support, and future prospects (Morrison, 2002; Taormina, 2004). Drawing on these views, embeddedness is the foundation of meaningful social interactions, and leads to the following hypotheses:

Hypothesis 1: Relational network embeddedness will positively associate with organizational socialization.

Hypothesis 2: Relational network embeddedness will positively associate with shared interpretation.

In addition to the impact of relational embeddedness on shared interpretation, organizational socialization also plays a mediating role. Various perspectives exist regarding the nature of socialization that indicate it influences shared interpretation of information (Cooper-Thomas and Anderson, 2006; Nonaka, et al., 2008; Taormina, 1994; 2004). Based on social exchange theory, the more socialized frontline employees are, the more likely they are to be prepared for and understand their jobs. Socialization influences the frontline employee's ability to agree on the meaning of new information received from management (Saks and Ashforth, 1997), indicating a positive relationship between socialization and shared interpretation. From a knowledge theory perspective, socialization impacts the interpretation of information and creation of knowledge between individuals (Nonaka & Takeuchi, 2008). Knowledge converges in a process through which individuals interact to create and ultimately agree upon the meaning of information (Choo, 1996). Thus, the following is predicted:

Hypothesis 3: Organizational socialization will positively associate with shared interpretation.

Learning and knowledge theories of the firm capture the concept of shared interpretation (Hult, 2003; Nonaka et al, 2008; Slater and Narver, 1990). Shared interpretation occurs within the social network of the organization, reflecting the consensus among organizational members with regard to information shared (Slater and Narver, 1990; Tippins and Sohi, 2003). The premises of knowledge and learning theories indicate that when members of the firm agree about the meaning of information, they are capable of coordinating and collaborating to execute and implement strategies at the frontline (Nonaka et al, 2008; Tippins and Sohi, 2003). Learning theories further demonstrate that the collective network nature of information interpretation for organizational knowledge creation enables individuals to interact purposefully (Dixon, 1992; Slater and Narver, 1995). Individuals who do not agree on the meaning of information will be less likely to work together towards the end goal; in contrast, when individuals within the organization do agree on the meaning of information, they will be more likely to coordinate and collaborate towards an end goal:

Hypothesis 4: Shared interpretation will positively associate with sales integration.

Hypothesis 5: Shared interpretation will positively associate with operations integration.

Hypothesis 6: Shared interpretation will positively associate with cross-functional integration.

Network theorists have discussed the importance of integration to performance outcomes (Achrol and Kotler, 1999; Cross, et al., 2002). Conceptualizations of integration include collaboration and coordination across functions (Ellinger, et al., 2000; Esper, et al., 2010; Kahn, 1996; Mollenkopf, et al., 2000). Collaboration includes the communication of information towards common goals (Mentzer, et al., 2000; Min, et al., 2005). Coordination of activities then captures the signaling between functions of future promotions, product changes, and customer needs (Mollenkopf, et al., 2000). Collaboration and coordination within a function enable

frontline employees to gain access to information and create knowledge that will help them make better decisions in the store through their interactions (Cross & Parker, 2004). When frontline employees are better able to make decisions in the store, they provide higher levels of service quality to the retail customer (Arndt et al, 2011; Bowersox et al, 1999; Mentzer et al, 2001). The collaboration and coordination of information and activities, integration, within and across functions will enhance the common goal of service quality to the retail store. When frontline employees are able to coordinate and collaborate with sales and operations managers, they will have the joint benefits of cross-functional integration, knowledge about both marketing and supply chain capabilities. Thus, the joint form of both sales and operations integration is also hypothesized to have a positive impact on service quality:

Hypothesis 7: Sales Integration will positively associate with service quality.

Hypothesis 8: Operations integration will positively associate with service quality.

Hypothesis 9: Cross-functional integration will positively associate with service quality.

Method

In order to test the proposed hypotheses concerning the nature of the relationship between relational embeddedness, socialization, shared interpretation, cross-functional integration, and service quality, quantitative methods were utilized. To gather the necessary data to test the proposed conceptual model and this dissertation's hypotheses, nonexperimental survey methodology (Kerlinger and Lee, 2000) was employed. Survey methodology was deemed appropriate because surveys result in data that are easily quantifiable and suitable for statistical testing for significance of results. The following section describes the sampling plan and methods used to test the theory.

Sample and Data Collection

Data were collected from frontline employees in a sponsoring CPG company. This company is actively involved in shopper marketing events and shopper behavior research and has multiple retail channels including large and small format retail stores. The sample of participants was drawn from across both large- and small-format retail channels and from all geographic regions of the United States to minimize channel-specific practices and to enhance the generalizability of the results.

Participants and Procedure

The sampling frame consisted of 900 employees of the CPG firm. Two months of preliminary interviews ascertained that each frontline employee had the opportunity to develop relationships, integrate across functions, and impact the service offered to the retail stores, and therefore met the criteria necessary to be included in the research. A first round of surveys was deployed to 150 frontline employees for preliminary testing and potential scale refinement. A second wave of surveys was then sent to another 750 frontline employees in regions across the nation.

Frontline employees in the organization are responsible for the selling, merchandising, building of displays, and ordering of all products for the retail customers. The questionnaire directed to the participants gave them the option to identify their route; this procedure avoided potential selection bias, by allowing them the option to refrain from identifying themselves on the survey. Surveys with route numbers were matched to performance data provided by the organization. In all, 613 completed questionnaires were received for a response rate of 68%. Of those, 190 were eliminated due to lack of route identification for performance matching or more

than 10% missing data. The 423 remaining surveys were then divided into two samples. Sample 1 consists of 253 small format retail channel frontline employees that service stores including gas stations, convenience and grocery stores. Sample 2 consists of 170 large format retail channel frontline employees that service stores including Wal-Mart, Target, and Sam's Club.

Out of the regions participating, all frontline employees in the districts were administered the survey during group meetings. The districts that were not able to respond were not able to do so because of timing of meetings. Therefore, all participants given the survey responded. They were then given the option whether or not they would identify themselves on the survey (by listing their individual route numbers). Participants that did not identify themselves on the survey were considered partial respondents.

Three forms of potential response bias were evaluated. In the measure development pretest, the volume of partial and incomplete responses was compared between two different methods of questionnaire distribution. Non-identifying respondents were evenly distributed across the two types of questionnaires. Then, an early-to-late respondent comparison of the pretest group to the final sample indicated no significant differences ($p < .05$) for all of the constructs using model comparisons (Fugate et al, 2009). Finally, participants who did not complete the identifying portion of the survey were considered non-respondents. These non-identifying respondents who did not fully complete survey or did not complete the route identification of the survey were compared to those who fully completed the survey in a model comparison and there was no significant difference ($p < .05$) between the measurement models including non-identifying non-respondents (Mentzer and Flint, 1997).

Measures

Measures were developed based on standard psychometric scale development procedures (Churchill, 1979; Hinkin, 1995; 1998). Multi-item scales were adopted and adapted based on the conceptual definitions, reviews of the literature, and interviews with frontline personnel, sales, and operations managers (Hinkin, 1995). The scales were refined through the pretest phase. Tests were conducted to assess item and scale reliability, unidimensionality, and convergent and discriminant validity. After the exploratory factor analysis, confirmatory measurement models for both samples had a Comparative Fit Index (CFI) of $\approx .9$ and all Cronbach's alphas were over .7, so no items were reduced. In the main survey phase, psychometric properties of the final measures were assessed through confirmatory factor analysis using AMOS as well as traditional methods including coefficient alphas and average variance extracted. Tables 4:1 & 4:2 reflect the measures used in the study (Appendix I & J includes all of the scale items and the full survey). The following paragraphs describe the measurement assessment and the measures that were utilized to test the model.

Measure development. Two pretests were used to develop and refine the wording of scale items. Initially in stage 1, qualitative interviews were conducted with 32 frontline employees, 19 of whom also participated in extended interviews (4-12 hours). Next in stage two, a larger pretest employed the responses of 150 frontline employees for standard psychometric evaluation and refinement of scale items. At each stage, the instructions for the survey and the wording of individual items were modified and refined. Tables 4:1 and 4:2 report summary statistics for the retained items, including model fit and Cronbach Alpha. The CFI should be at or above .90 to indicate goodness of fit (Bentler and Bonett, 1980) and the root mean square error of approximation (RMSEA) should be less than or equal to .08 (Hair, et al., 1998). Further, based

on standard rules of thumb, X^2/df should be less than 4 to be acceptable and less than 2 to indicate goodness of fit (Hair et al, 1998). Based on these standard rules, the models both indicate overall acceptable goodness of fit. Further, the measurement models of the two samples were not significantly different ($p > .05$), although there was slight variance in factor loadings, indicating that the measurement covariance matrix is consistently capturing the loadings of the constructs measured across samples.

The dependent outcome variable, service quality, was measured as a direct measure of each participant's service quality over the course of a year within his organization. As defined in the literature, service quality measured by the CPG firm captures components of on-time delivery and frequency of service. The sponsor company provided a service quality aggregate number for each respondent. Service quality is measured as the average index of perfect and standard service quality provided to the retail stores on each respondent's route including the amount of times the frontline employee should service the retail stores and the frequency or scheduled days of service.

Relational embeddedness was measured utilizing the social network measure of the relational value of the participant's ego network. A name generator instrument was used to construct indices measuring the egocentric relational embeddedness properties on three dimensions previously defined in the literature review: trust, fine-grained information transfer, and joint problem-solving (Uzzi, 1997). In past social network research, egos have been found to have at most 12 key alters (Moran, 2005), so participants were asked to list up to 12 of the key people who contribute to their ability to do their job, help them formalize sales plans, and are their friends at Company X. For each person listed, they were asked to value their relationship with that person along all three dimensions, including 3 items measuring trust, 2 items measuring

fine-grained information sharing, and 3 items measuring joint problem solving. These items were all captured on 5 point Likert-type scales in which 1 indicated strongly disagree and 5 indicated strongly agree. Measures of relational network composition were based on name generator data about alters.

For example, the first measure of relational embeddedness captures relational trust: I trust this person's decisions. Consider this Relational Embeddedness₁. This statement was answered on a scale of strongly disagree to strongly agree (1-5) for each person (alter) the participants listed in their immediate network (an ego network). The level of relational embeddedness for the ego network was then calculated using the following network measures developed by Marsden (2012):

$$\text{Relational Embeddedness}_i = \frac{\sum_{j=1}^{n_i} X_{(i)j}}{n_i}$$

$X_{(i)j}$ attribute value for alter j in i's network
 i respondent i, ego
 n_i ego network size (number of alters in ego's network)
 j alter in i's network

The mean level of Relational Embeddedness₁ captures the strength of the relationship between the ego and the alters in the network (Marsden, 2012). This analysis was done for all facets of relational embeddedness. Trust was measured with three scales, fine-grained information transfer with two scales, and problem solving with three scales (all on a scale of strongly disagree – strongly agree). Measures were adapted from Moran (2005) and constructed from the Uzzi (1997) qualitative study of relational embeddedness. Together these 8 network measures form the construct of relational embeddedness with correlation estimates >.8 and Cronbach's alpha = .971.

Organizational socialization was measured as a second-order factor with four first-order dimensions of training, co-worker support, role understanding, and future prospects. Scales for

organizational socialization were adopted from Taormina's (1994, 2004) organizational socialization inventory because it provides the most consistent accurate configuration for socialization in the literature (Taormina, 2004). Correlation estimates of items to the first order and second order factors were all $>.6$ with a Cronbach's Alpha of .939.

Measures of shared interpretation were adopted from Tippins and Sohi (2003) to capture the level of agreement and shared understanding. All of the items were on a scale of 1-5, strongly disagree to strongly agree. The correlation estimates of items were all $>.5$ with Cronbach's alphas of greater than .85/.86.

Integration was conceptualized across the two dimensions of coordination and collaboration, through information sharing (Esper, et al., 2010; Mollenkopf, et al., 2000). Scales for integration were adapted from Mollenkopf et al.'s (2000) study of marketing and logistics integration. Sales and operations integration were measured individually on scales of 1-5, strongly disagree to strongly agree. The scales for sales and operations integration were identical (aside from changing the name from sales manager to operations managers) and both captured the collaboration and coordination of information within the functions utilizing the same questions. The correlation estimates of sales integration items are $>.6$ with a Cronbach's alpha of .83 for both samples. All of the correlation estimates of items for operations integration are $>.79$ with a Cronbach's alpha $>.8$ for both samples. Multiplicative scales were formed to measure cross-functional integration: Sales Integration X Operations Integration to capture the interaction of sales and operations integration. Multiplicative scales have been used previously in marketing research to capture plural norms of governance (Cannon, et al., 2000) and are common practice in sociology and psychology research (Busemeyer and Jones, 1983).

Table 4:1 Confirmatory Factor Loadings & Reliability Estimates

SAMPLE 1 Small Format

CFI .911; χ^2/DF 2.106; RMSEA .051											
	RE		OS		SI		SaI		OI		CFI
Cronbach's Alpha	0.97		0.93		0.85		0.83		0.91		0.91
RE1	0.91	TR	0.94	SI1	0.58	SAI1	0.69	OI1	0.73	CFI1	0.77
RE2	0.68	OS1TR	0.78	SI2	0.68	SAI2	0.77	OI2	0.86	CFI2	0.89
RE3	0.90	OS5TR	0.75	SI3	0.76	SAI3	0.78	OI3	0.87	CFI3	0.89
RE4	0.90	OS9TR	0.85	SI4	0.81	SAI4	0.56	OI4	0.74	CFI4	0.76
RE5	0.91	OS13TR	0.70	SI5	0.84	SAI5	0.77	OI5	0.83	CFI5	0.87
RE6	0.96	OS17TR	0.86								
RE7	0.96	UN	0.91								
RE8	0.94	OS2UN	0.61								
		OS6UN	0.69								
		OS10UN	0.80								
		OS14UN	0.69								
		CS	0.76								
		OS3CS	0.65								
		OS7CS	0.76								
		OS11CS	0.69								
		OS15CS	0.76								
		FP	0.87								
		OS4FP	0.82								
		OS8FP	0.78								
		OS12FP	0.81								
		OS16FP	0.76								

RE: Relational embeddedness; OS: Organizational Socialization; TR: Training; UN: Understanding; CS: Co-worker Support; FP: Future Prospects SaI: Sales Integration; OI: Operations Integration; SI: Shared Interpretation

Table 4:2 Confirmatory Factor Loadings & Reliability Estimates

SAMPLE 2 Large Format

	RE		OS		SI		SaI		OI		CFI
Cronbach's Alpha	0.97		0.93		0.86		0.83		0.91		0.93
RE1	0.93	TR	0.96	SI1	0.79	SAI1	0.72	OI1	0.79	CFI1	0.83
RE2	0.65	OS1TR	0.72	SI2	0.77	SAI2	0.73	OI2	0.83	CFI2	0.86
RE3	0.93	OS5TR	0.86	SI3	0.78	SAI3	0.68	OI3	0.83	CFI3	0.86
RE4	0.91	OS9TR	0.78	SI4	0.79	SAI4	0.70	OI4	0.85	CFI4	0.87
RE5	0.94	OS13TR	0.71	SI5	0.84	SAI5	0.78	OI5	0.86	CFI5	0.89
RE6	0.95	OS17TR	0.82								
RE7	0.96	UN	0.92								
RE8	0.96	OS2UN	0.60								
		OS6UN	0.78								
		OS10UN	0.77								
		OS14UN	0.73								
		CS	0.81								
		OS3CS	0.67								
		OS7CS	0.71								
		OS11CS	0.68								
		OS15CS	0.76								
		FP	0.82								
		OS4FP	0.84								
		OS8FP	0.75								
		OS12FP	0.81								
		OS16FP	0.77								

RE: Relational embeddedness; OS: Organizational Socialization; TR: Training; UN: Understanding; CS: Co-worker Support; FP: Future Prospects SaI: Sales Integration; OI: Operations Integration; SI: Shared Interpretation

**Table 4:3 SAMPLE 1 Small Format
Discriminant Validity Assessment**

	RE	OS	OI	SaI	SI
RE	0.83				
OS	0.15	0.90			
SAI	0.47	0.76	0.62		
OI	0.11	0.34	0.24	0.57	
SI	0.14	0.73	0.62	0.37	0.55

Diagonal (Bold): Average Variance Extracted
Lower Matrix: Squared Correlations

Model Comparisons shows that all questionable variables (in red) are statistically different at $p < .001$

**Table 4:4 SAMPLE 2 Large Format
Discriminant Validity Assessment**

	RE	OS	OI	SaI	SI
RE	0.82				
OS	0.11	0.88			
SAI	0.13	0.88	0.63		
OI	0.004	0.39	0.36	0.62	
SI	0.10	0.80	0.72	0.37	0.68

Diagonal (Bold): Average Variance Extracted
Lower Matrix: Squared Correlations

Model Comparisons shows that all questionable variables (in red) are statistically different at $p < .001$

Convergent and discriminant validity are reported in tables 4:1-4:4. Fit statistics from the confirmatory factor analysis are reported at the tops of Tables 4:1 and 4:2. Evidence of discriminant validity was assessed through two methods and results of the discriminant validity assessment are displayed in Tables 4:3 and 4:4. The average variance extracted (AVE) and squared correlations were calculated and compared to ascertain that the AVE for each latent variable was higher than the squared correlations between variables. In addition, questionable variables (highlighted in red) were tested using model comparisons in which the questionable relationships were set equal to 1. In all cases the fit was significantly decreased and the variables were deemed discriminant.

Control Variables

In order to control for other factors impacting frontline employee service quality performance, additional items were included to ascertain that other factors were not impacting service quality. These control variables included the level of retail manager accommodation and ease of relationship with the retail manager and the level of frontline employee effort, care, job commitment, and willingness to work more hours. All of these factors were tested in the final

model and all decreased the model fit significantly. The employee care measure that was significant did not increase the model fit nor did it have a higher weight or capture more variance than the integration measures on service quality. Thus, while employee care was significant, it had a lesser correlation with service quality. Finally, willingness to work more hours had a negative significant impact on service quality in the large format sample, possibly this could indicate that employees that are willing to work overtime and not efficiently executing their job, creating a lower level of service quality to the retail stores.

Results

The results of the analysis are reported in Table 4:5 and Figure 4:2. Fit indices for both the large- and small-format models were acceptable with a goodness of fit $CFI > .9$ and $X^2/df < 4$, and badness of fit $RMSEA < .051$. These results are acceptable within the rules of thumb outlined by Hair et al., (1998) referring to a $CFI \geq .9$, $X^2/df < 4$, and $RMSEA < .08$. The structural and measurement models of the two samples were not significantly different ($p > .05$) except for slight variance in relationships between integration and service quality. Results for the tested hypotheses are discussed in this section in relation to the analytical models of large and small format retail channels described earlier.

Hypothesis 1 predicted that a frontline employee relationally embedded in the organization will be more likely to agree with managers on the meaning of information. Thus, Hypothesis 1 predicted a positive correlation between relational embeddedness and shared interpretation. The results in Table 4:5 support Hypothesis 1 in the context of the small-format, but not in the context of the large-format retail channel.

Table 4:5
Results of Structural Equation Models and Hypothesis Tests

	Small Format Retail Channel			Large Format Retail Channel		
	CFI .906; X ² /DF 2.11; RMSEA .051					
		Hypothesis Supported	Hypothesis Rejected		Hypotheses Supported	Hypothesis Rejected
<i>Actor Relational Network Embeddedness</i>						
ARNE → Shared Interpretation	0.055		H ¹	0.056		H ¹
ARNE → Organizational Socialization	0.369**	H ²		0.359*	H ²	
<i>Organizational Socialization</i>						
Organizational Socialization → Shared Interpretation	0.893*	H ³		0.922*	H ³	
<i>Shared Interpretation</i>						
Shared Interpretation → Sales Integration	0.871*	H ⁴		0.912*	H ⁴	
Shared Interpretation → Operations Integration	0.616*	H ⁵		0.647*	H ⁵	
Shared Interpretation → Sales x Operations Integration	0.744*	H ⁶		0.774*	H ⁶	
<i>Integration</i>						
Sales Integration → Service Quality ^a	-0.090**		H ⁷	-0.127**		H ⁷
Operations Integration → Service Quality	-0.375		H ⁸	-0.528**		H ⁸
Sales x Operations Integration → Service Quality	0.433**	H ⁹		0.616**	H ⁹	
<i>Control Variables</i>						
Effort → Service Quality	0.02			-0.118		
Retail Manager Accomodation → Service Quality	0.021			-0.100		
Frontline employee care? → Service Quality	0.128**			-0.061		
Job Commitment → Service Quality	0.088			-0.011		
Willingness to work more hours→ Service Quality	-0.045			-0.220**		
Ease of Retail Manager Relationship → Service Quality	0.063			-0.128		
<i>Marker Variable</i>						
Need for cognition → Service Quatlity ^b	0.011			0.019		

*p < .01

**p < .05

a. Data for these variables were log-transformed to attenuate skewness

b. Need for cognition, Cronback Alpha .762; Factor weights > .8; Decreases Model Fit

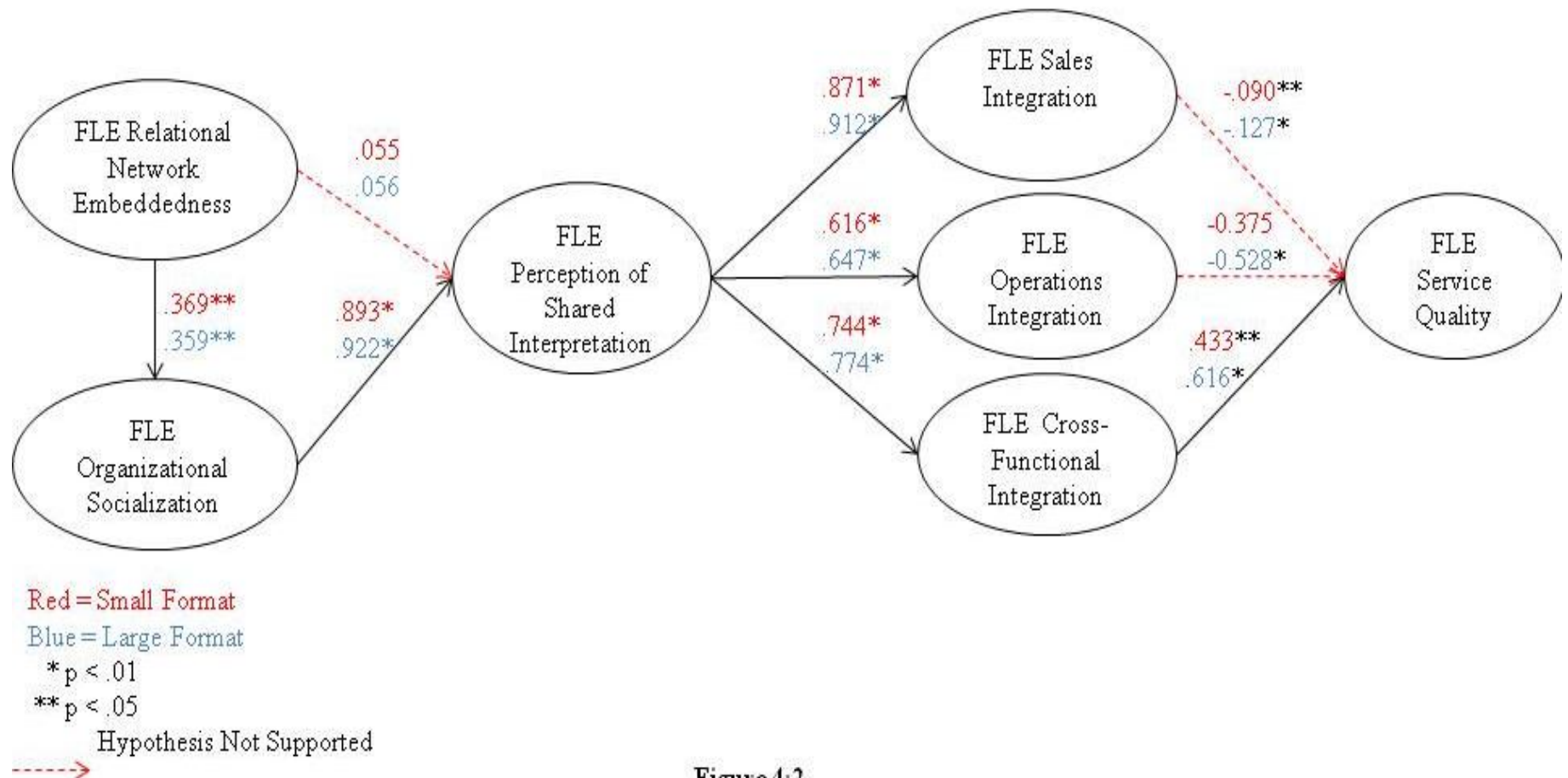


Figure 4:2
Structural Model Results
 CFI .906; χ^2/DF 2.11; RMSEA .051

In addition to Hypothesis 1, Hypothesis 2 predicted that relationally-embedded frontline employees will also be highly socialized in the organization. Thus, Hypothesis 2 predicted the positive association between relational embeddedness as socialization. The results in Table 4:5 provide support for the predicted relationship in both the large and small retail channel formats.

Hypothesis 3 predicted that the socialized frontline employee will also be more likely to agree with management on the meaning of information. Hypothesis 3 captures the positive correlation between socialization and shared interpretation. The results in Table 4:5 provide support for the predicted relationship in both the large- and small-retail channel formats.

Hypotheses 4, 5, and 6 all predict that shared interpretation of information positively associates with the integration of frontline employees with sales managers, operations managers, and across functions. As Table 4:5 demonstrates, all of these hypotheses support the predicted relationships between shared interpretation and frontline employee integration within and across functions.

When frontline employees are integrated with sales and operations managers, they may have a higher level of coordination and communication with management that provides them access to information they may need to execute marketing strategies in the retail store to increase service quality. Thus, Hypotheses 7, 8, and 9 all predict the positive impact of integration on the service quality a frontline employee will provide to the retail customer. Hypothesis 7, predicting that sales integration will positively impact service quality, seems to impact frontline employees to different degrees in different contexts. Hypothesis 7 is not confirmed in the small retail or the large retail format. Likewise, Hypothesis 8, which predicts the impact of operations integration on service quality, has differing outcomes on service quality performance, a significant negative

impact in the small and large retail formats. Finally, cross-functional integration is assumed to provide the employee with the information necessary to make both efficient and effective decisions in the store. Hypothesis 9, predicting the positive impact of cross-functional integration on service quality, had consistent results. The impact of cross-functional integration on service quality was significant in both the small and large retail channel.

Discussion and Implications

The results demonstrate that frontline employees behave similarly across retail channels but may utilize managerial communication and coordination in unique ways depending on their needs in the retail store. Although most of the findings were consistent across the samples, utilizing two samples of frontline employees in different channel contexts shows that integration impacts performance slightly differently in unique retail channels. While the outcomes of integration differed, the antecedents to integration were consistent across the two samples.

The presence of consistent findings of the antecedents to integration was confirmed by utilizing multiple samples. Relational embeddedness leads to socialization, which in turn increases shared interpretation. Shared interpretation then has a positive relationship with cross-functional, sales, and operations integration. This is consistent with network theory and confirms theoretical implications of relational embeddedness on social interactions (Jones, et al., 1997). It also implies the importance of the network in an individual's ability to integrate across functions as antecedents to cross-functional integration that have not been explored in the literature.

Cross-functional integration at the frontline enables frontline employees to make timely and informed decisions (Bowersox et al., 1999). In order for firms to be successful at both effective and efficient execution at the frontline, this research indicates that frontline employees

first need a relationally strong ego network, a high level of organizational socialization, and a shared interpretation of the information they are given. Once relationally embedded, socialized, and at a shared interpretation, the frontline employee is more likely to coordinate and collaborate within their own function and potentially across functions.

Consequences of cross-functional integration tended to differ slightly across samples. Although it was hypothesized that all forms of integration would have a positive impact on service quality, this was not the case. Operations integration had the reverse or little impact on performance. This may be due to communication within the company that reaches operations managers at the frontline. A divide between functions within the firm may cause frontline employees who are more integrated with the operations function to be less receptive towards sales managers, decreasing their performance in the retail store. On the other hand, frontline employees who are integrated singularly with sales managers do not seem to have a better likelihood of performing well in the retail store. Sales integration by itself does not provide as much explanation for service quality as cross-functional integration. Finally, cross-functional integration has slightly more impact in the large than the small-format setting. Thus, in the large and small format retail channels, where frontline employees have to handle large volumes of product and a wide variety of products, they need to understand the inventory and marketing implications of their decisions in the store.

The results of this research afford implications for theory and practice of marketing execution at the frontline. Increased attention has been given to cross-functional integration in marketing, supply chain, and strategy research in recent years (Mentzer and Gundlach, 2010), and this research begins to address the lack of theoretical development in this area. Further, this research has multiple implications for companies seeking to empower frontline employees to

make decisions in the retail store that will enhance the service quality they can offer to their customers downstream.

This research answers a call for research investigating the impact of cross-functional integration on performance at the individual level (Esper, et al., 2010). At the strategic level, marketing research highlights the importance of knowledge management and shared interpretation of knowledge for increased service quality, but lacks explanation of how this happens at the individual level (Lusch, et al., 2007). Marketing research further highlights the importance of service quality provided by frontline employees (Hartline and Ferrell, 1996). This research utilizes network theory to provide an explanation for how frontline employees utilize their network relationships to become socialized and to arrive at a shared interpretation of the information they receive within an organization at the individual level.

Supply chain research provides a long history of investigating the effectiveness and efficiency provided by employees who understand both the marketing and supply chain implication of frontline decisions (Bowersox, et al., 1999; Ellinger, et al., 2006), but lacks theoretical development about how this happens. This research provides an explanation for the contexts in which cross-functional integration enhances performance and the potential contexts in which functional integration may be equally important. Further, this research shows that cross-functional integration does not provide the same results in different contexts, indicating that it may be more useful under some circumstances than others.

Finally, this research demonstrates how the individual network can enhance the individual's socialization, shared interpretation, and integration in an organization. Unlike other studies conducted in management research (Moran, 2005), structural embeddedness was not

found to have any impact on the individual's level of socialization or shared interpretation. This research builds on strategy research to extend the understanding of the importance of relational embeddedness in enhancing the individual's ability to provide increased service quality within the retail channel. Network theory provides a lens through which integration at the individual level can be explored.

Firms wanting to manage the flow of knowledge to the frontline must understand that the frontline employee's interpretation of information is dependent on their relationships with managers further up in the organization. The information that frontline managers receive may impact the ability of the frontline employee to co-create useful knowledge that will increase performance in the retail store. Frontline managers need to be armed with the right information to enable increased frontline employee performance.

Further, cross-functional integration is often viewed as the answer to information gaps created when functional silos impede the breadth of knowledge available. This research shows that cross-functional information is valuable for increased frontline performance. Cross-functional integration is then more important for the frontline employee in predicting performance than solely sales or operations integration.

Conclusion

In summary, this research highlights the importance of individuals' networks on their ability to integrate both within and across functions to increase performance. Although these findings have many interesting implications for theory and practice, several limitations may restrict the overarching impact of this research. First, cross-functional integration by the frontline

employee is dependent on the assumption that managers further up in the organization also communicate and coordinate information. A lack of cross-functional integration at higher levels of the organization may impact the effectiveness of cross-functional integration at the frontline employee level. Future research should explore cross-functional integration at multiple levels of the organization to attenuate the importance of integration at the management level before it can be fully effective at the frontline. Second, cross-functional integration results in different outcomes in the two samples collected here indicating that the channel in which a frontline employee works may impact either the importance or effectiveness of cross-functional integration, leaving the importance of cross-functional integration still somewhat cloudy. Future research can further test the proliferation of the impact of cross-functional integration at the individual level in different industries and channel structures. Finally, the samples in the study are all representative of one organization. Arguably, cross-functional integration is an outcome of a certain culture within an organization. It is possible that the culture of this organization does not provide an environment where cross-functional integration present throughout the organization. Future research could explore the impact of an organizations culture on the effectiveness of cross-functional integration.

This research provides evidence that an individual's network relationships impact the cross-functional integration he or she can attain, although the impact of the cross-functional integration on individual performance may shift in different contexts. Firms pursuing individuals who can make both effective and efficient decisions in the retail store can best manage the knowledge flows to the frontline of the organization by training sales and operations managers to work together and communicate a united message to the frontline employee.

CHAPTER 5

CONCLUSION

Shopper Marketing & Networks: The Path to Integration

Integration within and across functions has been a longstanding challenge for organizations (Drucker, 1994; Ellinger, 2006). The challenge for integration is further emphasized in recent calls for research in both marketing and supply chain literatures for investigation of integration at the individual level (Esper et al., 2010; Arndt, 2011). Further, strategy literature indicates the need to extend network theories into the supply chain and marketing context to lend explanation to social interactions inherent in integration, but lacks development at the individual level (Borgatti, 2009). The purpose of this dissertation was to begin to explore and fill the gaps in the supply chain, marketing, and strategy literatures by investigating integration based on the following research questions exploring the integration phenomenon. First, how do managers and employees interact to facilitate integration? Second, what is the nature of the individual network that facilitates integration? Third, what is the impact of cross-functional integration on individual performance?

The exploration of integration within the context of shopper marketing and retail channels provides a foundational understanding of integration for both research and practitioners. Shopper marketing provides a pertinent environment in which to explore and test the potential impact of cross-functional integration as industry wide research has uncovered the pressing need for collaboration and coordination both within and across firms for shopper marketing to be successful (Deloitte, 2008). By working closely with a consumer packaged goods company

(CPG) currently pursuing shopper marketing strategies, the phenomenon of integration within an organization could be programmatically explored utilizing multiple methods to address the research questions.

Each chapter in this dissertation investigates integration using multiple methods to understand how integration takes place between individuals, the nature of the integrated network, and the antecedents and consequences of integration. Yet, like all research, it has boundary conditions and limitations. These boundary conditions, however, provide the fodder for future research to expand on the findings and discussions presented within the three articles of this dissertation. The next section explores the three predominant findings, limitations, and potential needs for future research that emerged in this dissertation.

Findings, Limitations, and Future Research Agenda

Need for Future Application of Network Theory. This research explored, developed, and confirmed network theory concepts within the context of the CPG retail channel. The qualitative research explored the daily lived integration of frontline employees and developed an emergent theory of retail frontline employee interactions. The findings in this research provide a new way of viewing network ideas through blending concepts and constructs across multiple network theories into one cohesive framework. The quantitative study confirms the relationship between network variables by exploring the association of relational embeddedness, socialization, and shared interpretation with integration.

While this research lends insight to research and theory, it was constrained to the scope of one organization. The sponsoring company is a large CPG firm serving multiple retail customers in multiple channel types. However, there were similarities across the two samples drawn from within the organization in the large and small retail formats because the participants were all employees within the same organization. The concepts studied here can be generalized to other companies that provide direct to

store service as well as any organization in the CPG context utilizing a third party provider to serve retail customers, as they function as a direct extension of the firm they represent. However, this contextual constraint lends itself to future research in other environments. Although the context of frontline employees in the CPG retail channel may not be generalizable to every existing organization, the underlying concepts of network theory can be tested in multiple contexts.

Based on this, future research should explore the proposed network theory concepts in multiple contexts to test the proliferation of these findings across industries and cultures. Integration research ought to be explored in multiple types of organizations and industries to test the pervasiveness of network theory in explaining and predicting the outcomes of integration. This research provides a theoretical foundation for future research measuring integration at the individual level. While exploring integration qualitatively at the individual level, a set of network concepts emerged that have yet to be explored cohesively under the umbrella of network theory. For instance, the concept of empowerment emerged as a central outcome of integration and potential driver of individual performance.

Need for Future Exploration of Empowerment. Throughout the qualitative interviews and data analysis, it was clear that frontline employees struggle to gain control and empowerment from their managers for timely decision making in retail stores. While empowerment has been explored in marketing literature within the theoretical lens of social exchange theory (Hartline, 1996), it has not been explored to date in concert with network constructs such as embeddedness, knowledge exchange, and integration that emerged in the grounded theory analysis. A unique contribution of this research is to integrate multiple theories that build on network axioms in order to explore the antecedents and outcomes of integration. However, the theoretical test conducted within this research focused on network governance constructs singularly, leaving a gap in the understanding of how empowerment is associated with integration and other network concepts.

Thus it is important for future research to explore the concepts that emerged and were identified in both studies in unison to gain more holistic perspective of the relationship between each emergent concept. Empowerment theoretically fits within the social context, as it is derived from social exchange theory, but has yet to be explored with the constructs of embeddedness and integration. By establishing a comprehensive understanding of network concepts, a more complete picture of integration has been presented in this research. Future research should then explore empowerment within the network paradigm to establish its relationship to integration both within and across functions. Beyond embeddedness, integration takes place in the interactions of employees *and* managers at multiple levels of the firm.

Need for Future Exploration at the Strategic Managerial Level. Within the context of this research, integration was explored within the interactions of the frontline employee. Exploration of frontline interaction and integration is unique in supply chain research as much of the integration literature has focused on team and firm level conceptualizations (Esper et al, 2010). Frontline employees, however, daily make choices that draw on both supply and demand knowledge creating a need for integrated information. This research contributes to the frontline employee research by exploring frontline employees' lived experiences, networks, and the impact of the network on integration. Managers throughout the organizational hierarchy also interact within the social network of the organization daily to make decisions.

This research qualitatively included managers' perceptions of integration, but focused on the frontline employees as the unit of analysis. The CPG industry challenge of marketing execution at the retail frontline drove the research problem for this program of research. While limited in scope to the frontline employee in the quantitative measurement, findings in the qualitative study offer opportunities for future research to explore the impact of the network concepts and integration at the managerial level of the organization. Feasibly, the managerial level may drive the culture of integration throughout the

organization and the social interactions between managers that facilitate integration have yet to be explored.

Future research should extend the findings of this dissertation to the managerial and strategic corporate level of the firm. This dissertation begins to uncover the tactical frontline benefits of integration; however, future research should further investigate the firm and strategic antecedents and outcomes of integration. Integrated ego-networks of individual frontline employees seem to enable empowerment and a positive attitude that impacts individual performance. Future research at the firm level ought to investigate the impact of a networked organizational structure (an organization where employees are tightly connected across functions and levels) on firm strategies and performance.

Conclusion

This research contributes to theory and practice through exploring integration at the frontline of the retail channel. The theoretical framework that emerged in the qualitative research unites multiple network theories for a more cohesive understanding of integration and knowledge exchange in the organizational network contributing an individualistic perspective to marketing research. The quantitative findings further test the relationship between potential antecedents and consequences of integration within a network answering a call for exploration in supply chain research. Finally, this research approaches the singular phenomenon of integration utilizing multiple methods and tools to test what is known theoretically and build emergent theory where there are gaps in marketing, supply chain, and strategy literatures.

In the age of the network, it is important for organizations and researchers to not forsake the social interactions between individuals that make intra- and inter-firm networks possible (Snow et al, 1992; Achrol, 1997). The successful intra-firm network is one based on cross-functional and vertical integration that defies the contradictory impact of decision making in functional silos and encourages the sharing of knowledge and information throughout the

organization. Individuals armed with the knowledge of how supply facing functions operate efficiently and the objectives of demand facing functions to market effectively will be best prepared to make decisions that further the goals of the firm. While integration may start at the corporate suite, its impact is felt all the way at the frontline as individuals seek information from sources within their own ego-networks that include warehousing, sales, and marketing managers for the creation of superior cross-functional knowledge. Empowered by their network relationships and the knowledge gained through social interactions with others in multiple functions of the firm, integrated individuals are prepared to understand how to most efficiently meet the needs of the marketplace effectively.

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APPENDICES

Appendix A

Definitions and Views of Shopper Marketing

View	Cite	Description of View
“the planning and execution of all marketing activities that influence a shopper along, and beyond, the entire path-to-purchase, from the point at which the motivation to shop first emerges through to purchase, consumption, repurchase, and recommendation,”	Shankar et al, 2011	Broad view of marketing planning and shopper behavior
Shopper marketing is the employment of any marketing stimuli, developed based on a deep understanding of shopper behavior, designed to build brand equity, engage the shopper (i.e., an individual in “shopping mode”), and lead him/her to make a purchase.	GMA/Deloitt Research, 2008	Collaborative Grocery Industry and Industry Research Consultants
Shopper Marketing is understanding how our target consumers behave as shoppers in different channels and formats and leveraging this intelligence via strategies and initiatives that result in balanced benefits to all stakeholders – our brands, our key retailers and the mutual shopper.	Nestle, 2008	Consumer Packaged Goods Corporation
Shopper marketing refers to the employment of marketing and sales efforts based on a deep understanding of and insight to shoppers (consumers while they are in shopper mode) in different channels and formats that are designed to ethically and sustainably build brand equity, engage the shopper, enhance the shopper experience, and facilitate the shopper’s purchasing decisions. Much of this effort is within stores, but it should not be limited to this context.	UT Shopper Marketing Forum, 2010	University Research center on Shopper Marketing
Many people have tried to define Shopper Marketing . Our view is that it's an <i>approach</i> , not a <i>discipline</i> , and we will draw on any tool or media to help us achieve our goal. In today's world, shopping doesn't start and finish in retail, so our ideas travel beyond the store and we employ a wide range of media tools and tactics throughout the entire shopping cycle.	Saatchi X, 2011	Shopper Marketing Advertising Agency

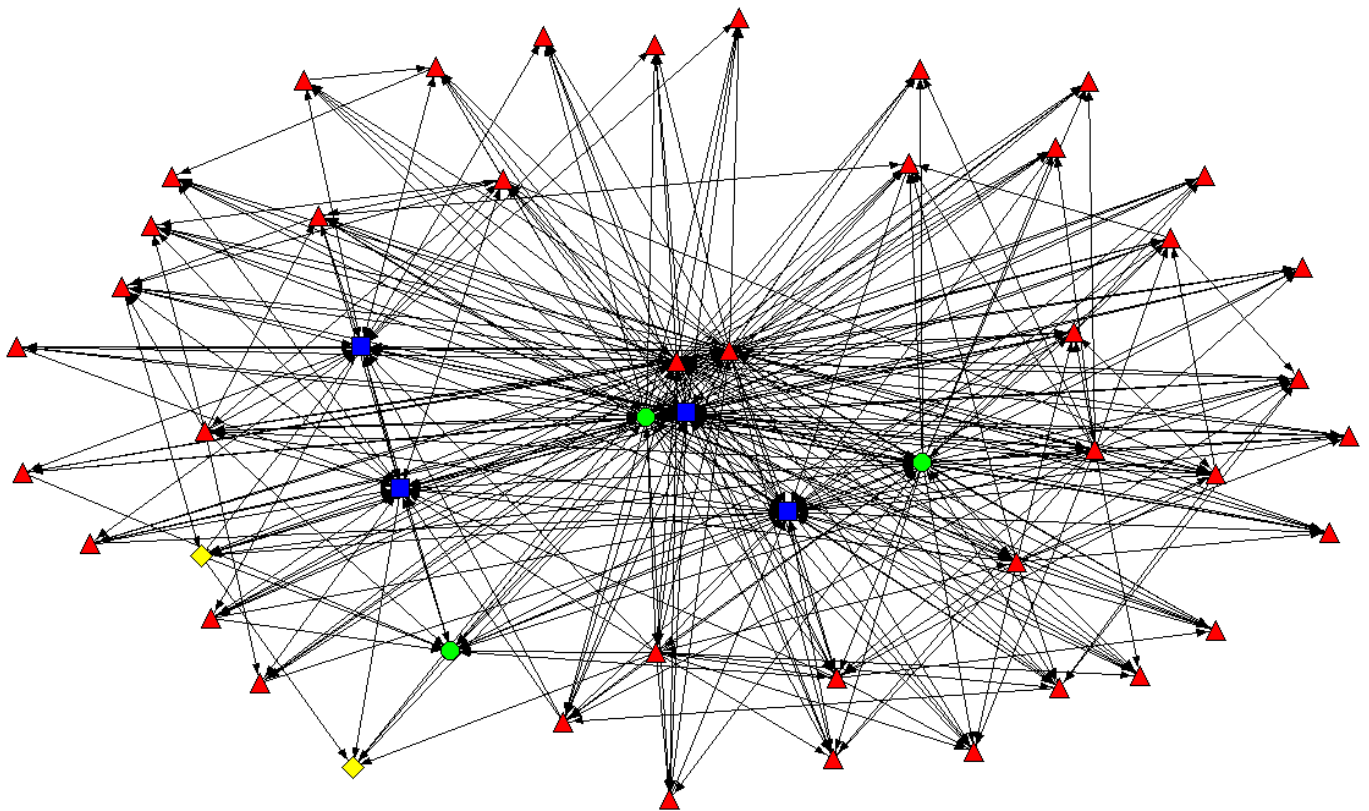
Appendix B

Shopper Archetypes of Shopper Marketing

Shopper	Motivation and Behavior	Supply Chain Implications for Frontline	Cite
Task Shoppers (Quartermaster)	don't necessarily enjoy the shopping trip and view it mostly as a means to procure the items on their list	Minimization of stock-outs	(Mars Advertising, 2010); Sansolo, 2010)
Bargain Shoppers (Banker)	approach shopping as a strategic game to be mastered and attempt to maximize the return on a personal "value equation"	Maximization of inventory on promotion	(Mars, 2010; Sansolo, 2010)
Price Shoppers (Bargain hunter)	view shopping as a zero-sum endeavor that's focused narrowly on cash outlays and choosing brands and retailers that meet the need-of-the-moment	Maximization of inventory on promotion	(Mars, 2010; Sansolo, 2010)
Discovery Shoppers (Seeker)	may know their needs, but rely on the store environment as a catalyst for purchases and are open to new products	Maximization of variety	(Mars, 2010)
Comfort Shoppers	are focused on mitigating any frustration associated with shopping and have a stronger aesthetic orientation	Consistency in the aisle; ease of product location	(Mars, 2010)
Experiential Shoppers	much more engaged while shopping and seek to become immersed in the culture of the category while shopping	Maximize displays and experiential in-store marketing	(Mars, 2010)
The Keeper Shoppers	the person who takes the responsibility of providing for the household through food shopping, these people enjoy shopping and enjoy their responsibility	Maximize displays and experiential in-store marketing	(Sansolo, 2010)
Desperate Shopper	this shopper is desperate, needing a specific item immediately.	Focus on consistency in the aisle	
Reluctant Shoppers	he or she does the shopping but wishes for a new way. If reluctant shoppers could hire someone to do the task they would.	Focus on consistency in the aisle	(Sansolo, 2010)
Courier Shoppers	this shopper is doing small grab-and-go trips, has a limited shopping list and is looking for a combination of speed and price to help.	Minimization of stock-outs and maximization of price promotional items	(Sansolo, 2010)
Hungry Shoppers	this shopper's goal is a specific item for a specific need	Focus on consistency in the aisle	(Sansolo, 2010)

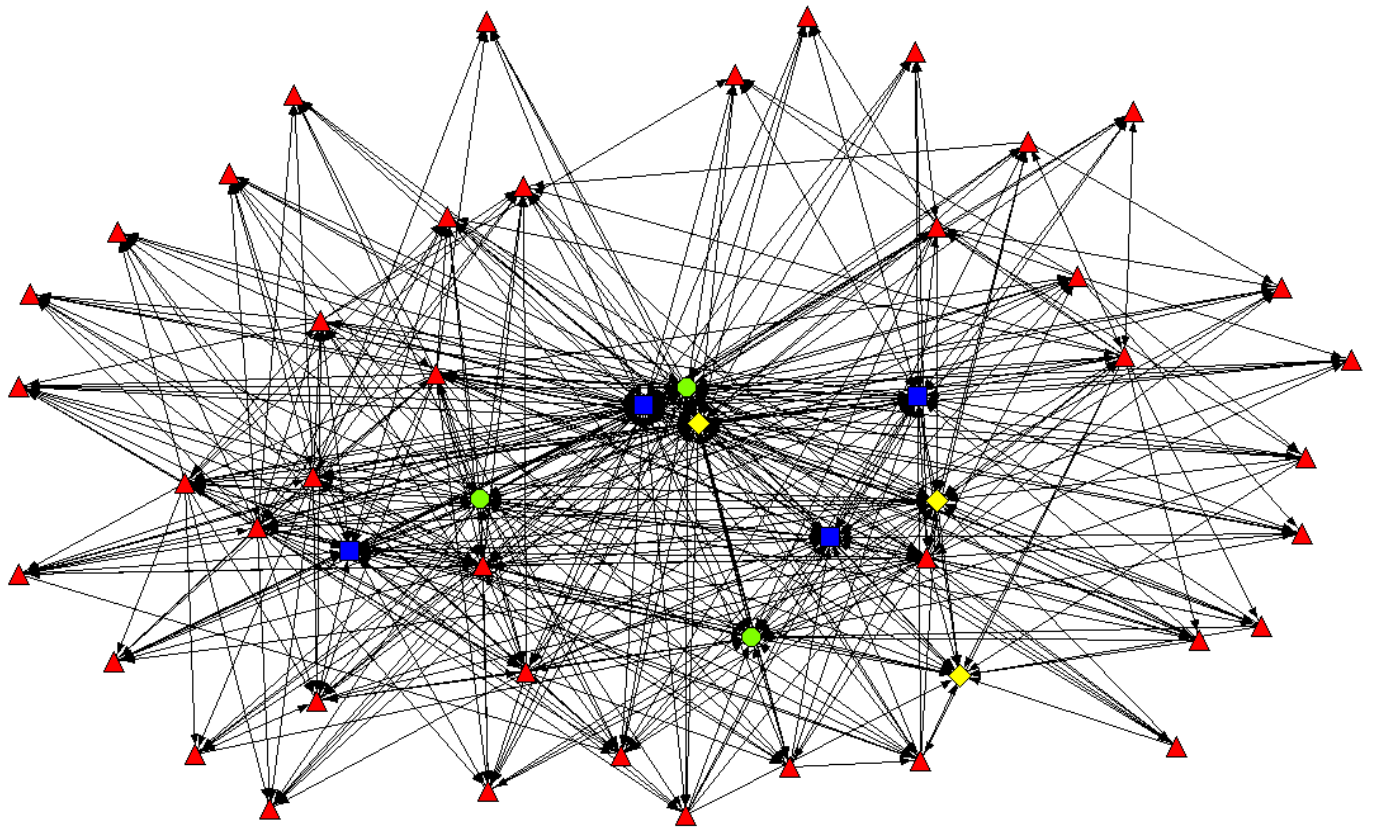
Appendix C

Promotional Information Sharing Network Location X



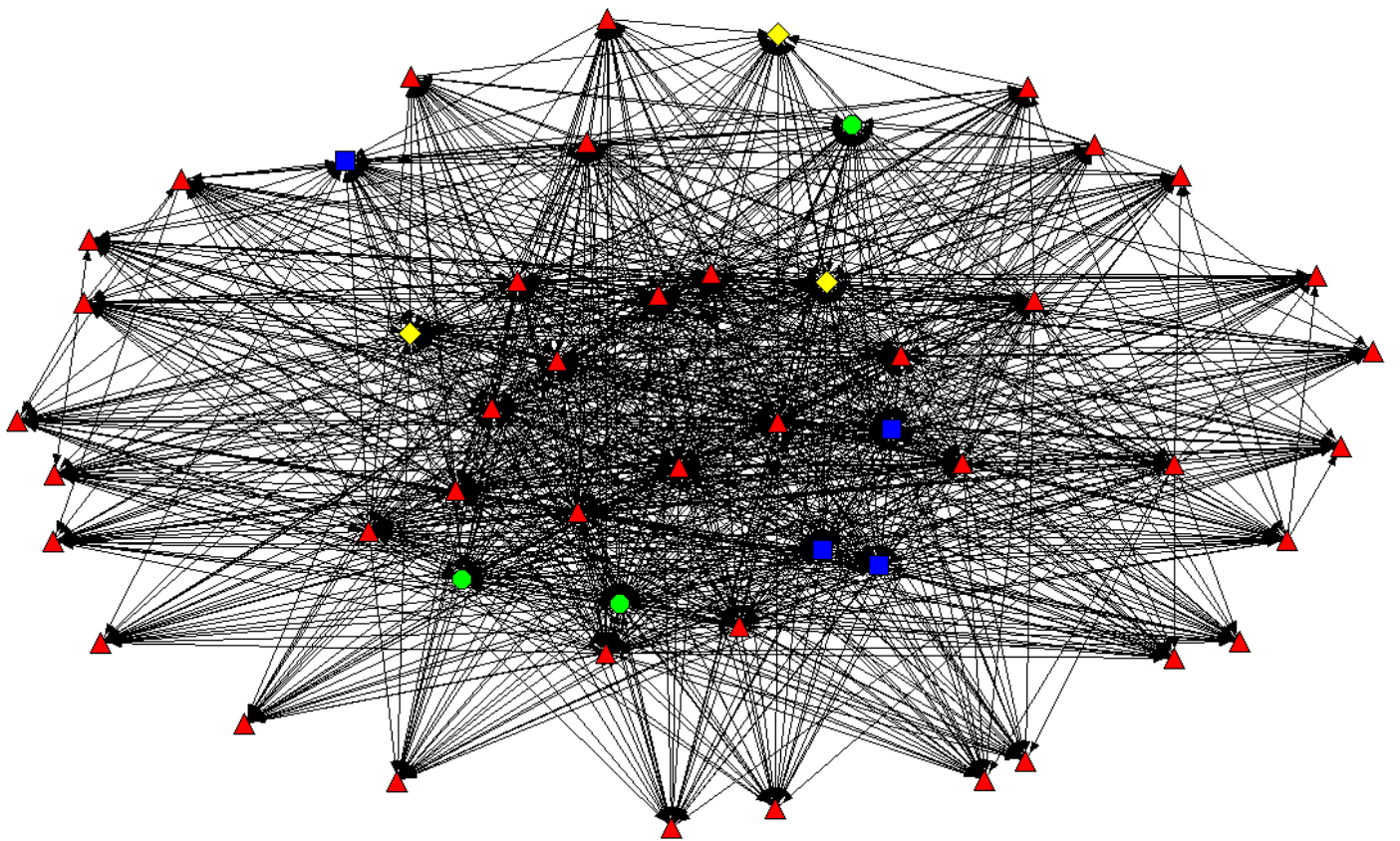
Appendix D

Problem Solving Network Location X



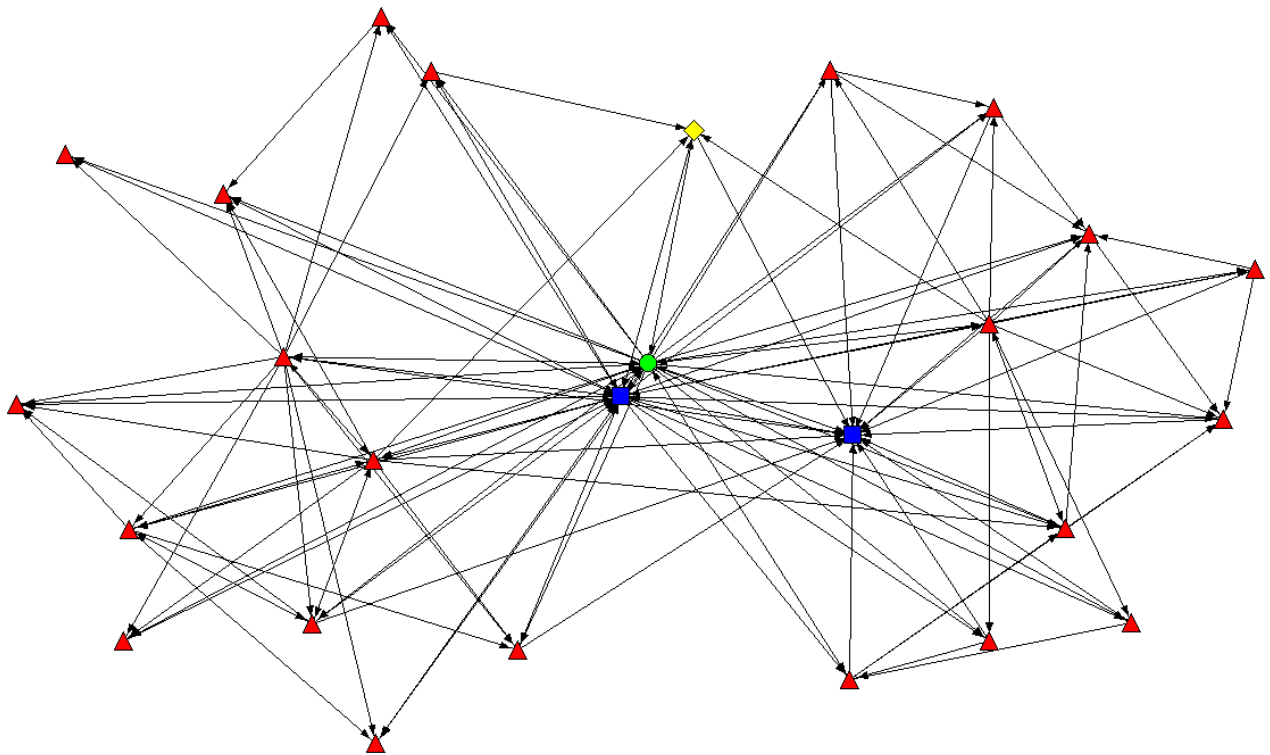
Appendix E

Trust Network Location X



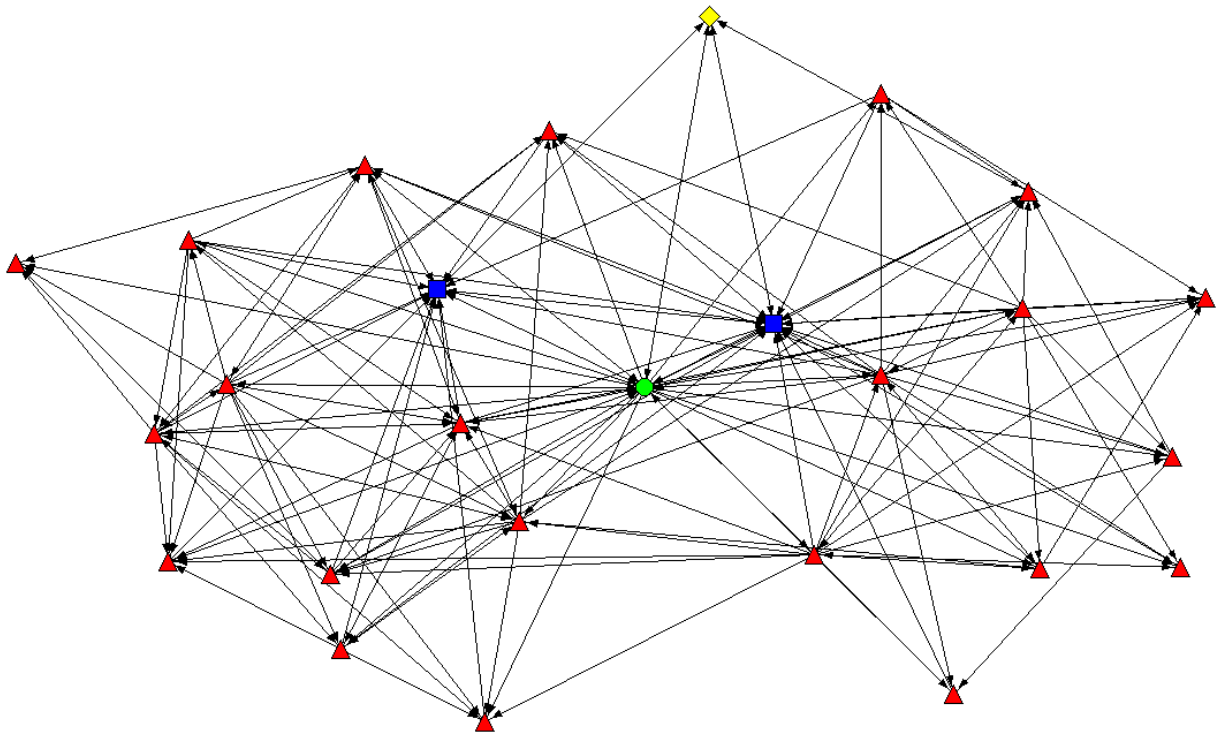
Appendix F

Promotional Information Sharing Network Location Y



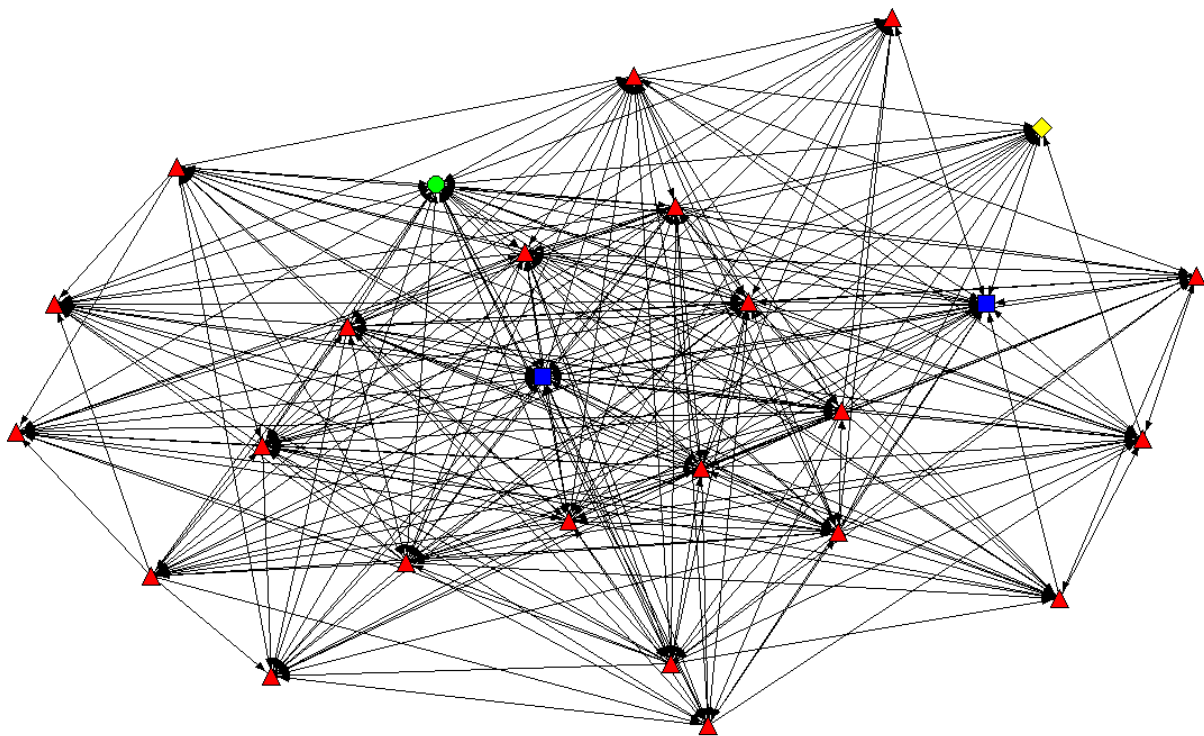
Appendix G

Problem Solving Network Location Y



Appendix H

Trust Network Location Y



Appendix I

Actor Network Embeddedness (Relational adapted from Uzzi, 1997; Structural adapted from Moran, 2005)

Structural Embeddedness

Task Execution contacts

Who are the key people who contribute the *most* to your ability to do your job as a FLE: Your most valued work contacts?

Promotional Event Launch Contacts

Who are the key people who help you the *most* to formulate new sales ideas or to execute new promotions?

Social Support

Who are the key people that you regard as your most important source of social support?

Relational Embeddedness

5 Point Scale (5 = Strongly Agree)

RE1 I trust this person's decisions. (Trust)

RE2 I can rely on this person without fear that they will take advantage of me when they can. (Trust)

RE3 This person is generally honest and truthful in the information provided. (Trust)

RE4 I confide in this person. (Info Sharing)

RE5 I receive information from this person. (Info Sharing)

RE6 I work with this person when problems come up (Problem Solving)

RE7 When making difficult decisions in the store, I can turn to this person. (Problem Solving)

RE8 When in a crisis, this person works with me to create a solution. (Problem Solving)

Organizational Socialization

5 Point Scale (5 = Strongly Agree) (Taormina, 2004)

OS01TR This company has provided excellent job training for me. (TR)

OS02UN I know very well how to get things done in this company. (UN)

OS03CS Other FLEs have helped me on the job in various ways. (CS)

OS04FP There are many chances for a good career with this company. (FP)

OS05TR The training in this company has enabled me to do my job very well. (TR)

OS06UN I have a full understanding of my duties in this company. (UN)

OS07CS My co-workers are usually willing to offer their assistance or advice. (CS)

OS08FP I am happy with the rewards offered by this company. (FP)

OS09TR This company offers thorough training to improve employee job skills. (TR)

OS10UN The goals of this company have been made very clear. (UN)

OS11CS Most of my co-workers have accepted me as a member of this company. (CS)

OS12FP Opportunities for advancement in this company are available to almost everyone. (FP)

OS13TR Instructions given by my supervisor have been valuable in helping me do better work. (TR)

OS14UN I have a good knowledge of the way this company operates. (UN)

OS15CS My co-workers have done a great deal to help me adjust to this organization. (CS)

OS16FP I can readily anticipate my prospects for promotion in this company. (FP)

OS17TR The type of job training given by this company is highly effective. (TR)

TR—training; UN—understanding; CS—co-worker support; FP—future prospects

Cross-functional Integration Mollenkopf et al, 2000

Collaboration

5 Point Scale (5 = Strongly Agree)

SAI1 Information is communicated by sales people to me through the use of meetings, phone calls, or discussions

OI1 Information is communicated by operations people to me through the use of meetings, phone calls, or discussions

OI2 Information regarding CPG X customers is communicated to me by operations managers

SAI2 Information regarding CPG X customers is communicated to me by sales managers

SAI3 Information regarding CPG X products is effectively communicated to me by sales managers.

OI3 Information regarding CPG X products is effectively communicated to me by operations managers.

Coordination of Activities

5 Point Scale (5 = Strongly Agree)

SAI4 Sales people at CPG X spend time discussing customers future needs with me

OI4 Operations people at CPG X spend time discussing customers future needs with me

OI5 Operations managers at CPG X coordinate promotional events with me

SAI5 Sales managers at CPG X coordinate promotional events with me

Shared Interpretation (adapted from Tippins and Sohi, 2003)

5 Point Scale (5 = Strongly Agree)

SI1 There is often agreement among our company's managers and myself with regard to what our customers want.

SI2 I agree with sales and operations managers in regard to how best to satisfy our customers.

SI3 If given new information about our customers, I usually agree with my manager's on how the information will impact CPG X.

SI4 I tend to be on the same page with managers when it comes to interpreting the needs of our customers.

SI5 I agree with managers on how best to serve our customers in the retail store.

Control Questions

CTR1 I put forward 100% effort all the time.

CTR2 The retail managers on my route are often unwilling to allow promotional displays.

CTR3 I care about maximizing my sales dollars.

CTR4 I am committed to my job as an FLE with CPG X.

CTR5 The retail managers on my route are fairly easy to work with.

CTR6 I am willing to work extra hours to get sales.

Marker Variable - Cognition Scales

COG1 I prefer my life to be filled with puzzles that I must solve.

COG2 I would prefer complex to simple questions.

COG3 It's enough for me that something gets the job done; I don't care how or why it works.

Performance

SQI Service Quality Index

Appendix J

Frontline Network Survey



COMPLETE THIS SURVEY TO BE ENTERED INTO A DRAWING FOR a \$50 VISA Card!!

1 winner will be drawn in each region (16 VISA Cards will be awarded!!)

Dear valued FLE³,

I am conducting research as a student at the University of Tennessee in cooperation with CPG X⁴, on how communication affects marketing promotions and events in retail stores.

The research you are participating in today investigates the experiences of FLEs like yourself, who have “hands-on” experience with selling and setting up promotions, events, and displays in retail stores. This request for your participation has been pre-approved by CPG X.

Your participation in this study is **voluntary and 100% confidential**. Your individual answers will not be included in any reports or publications about this research. There will be no connection to your identity in the reports back to CPG X. **No one from CPG X will ever see your responses to the questions in this survey.** Surveys will be returned directly to me at the University of Tennessee. If you have any further questions about this particular project, please contact Hannah Stolze at the e-mail or phone number given at the end of this survey.

There are no right or wrong answers, only your perceptions. Please answer **ALL** questions. This survey has 4 sections and will take approximately 15 minutes to complete.

Thank you for sharing your expertise and experience!

TO BE ELIGIBLE FOR THE \$50 VISA Card please list your 5 digit Route # here

Please answer the following questions about yourself.

How many years have you been employed with CPG X?

How many years have you been employed as an FLE?

What is your district number?

What type of route are you assigned to?

(e.g. UDS, Account Sales, Bulk, Bin, Mixed Format, Small Account)

How long have you been on this route?

At this time, what is your “to-plan” percentage this week?

At this time, what is your service quality level this week?

Please answer the questions on the following pages about the past 12 months of your employment at CPG X.

³ The actual job title has been changed to FLE to protect the anonymity of the company involved.

⁴ The name of the company has been changed to CPG X to protect the anonymity of the company involved.

Section 1: Who are the key people who contribute the *most* to your ability to do your job as an FLE: your most valued contacts?

Full Name of Person and Position (1): _____

(i.e. John Doe, Manager or Jane Doe, FLE)

Agree or disagree with the following statements about this person.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
I can trust this person's decisions.	0	0	0	0	0
I can rely on this person without fear that they will take advantage of me.	0	0	0	0	0
This person is generally honest and truthful in information he/she provides.	0	0	0	0	0
I confide in this person.	0	0	0	0	0
I receive information from this person about products and promotions.	0	0	0	0	0
I work with this person when problems come up.	0	0	0	0	0
When making difficult decisions in the store, I can turn to this person.	0	0	0	0	0
When in a crisis, this person works with me to create a solution.	0	0	0	0	0

Full Name of Person and Position (2): _____

Agree or disagree with the following statements about this person.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
I can trust this person's decisions.	0	0	0	0	0
I can rely on this person without fear that they will take advantage of me.	0	0	0	0	0
This person is generally honest and truthful in information he/she provides.	0	0	0	0	0
I confide in this person.	0	0	0	0	0
I receive information from this person about products and promotions.	0	0	0	0	0
I work with this person when problems come up.	0	0	0	0	0
When making difficult decisions in the store, I can turn to this person.	0	0	0	0	0
When in a crisis, this person works with me to create a solution.	0	0	0	0	0

Full Name of Person and Position (3): _____

Agree or disagree with the following statements about this person.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
I can trust this person's decisions.	0	0	0	0	0
I can rely on this person without fear that they will take advantage of me.	0	0	0	0	0
This person is generally honest and truthful in information he/she provides.	0	0	0	0	0
I confide in this person.	0	0	0	0	0
I receive information from this person about products and promotions.	0	0	0	0	0
I work with this person when problems come up.	0	0	0	0	0
When making difficult decisions in the store, I can turn to this person.	0	0	0	0	0
When in a crisis, this person works with me to create a solution.	0	0	0	0	0

Full Name of Person and Position (4): _____

Agree or disagree with the following statements about this person.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
I can trust this person's decisions.	0	0	0	0	0
I can rely on this person without fear that they will take advantage of me.	0	0	0	0	0
This person is generally honest and truthful in information he/she provides.	0	0	0	0	0
I confide in this person.	0	0	0	0	0
I receive information from this person about products and promotions.	0	0	0	0	0
I work with this person when problems come up.	0	0	0	0	0
When making difficult decisions in the store, I can turn to this person.	0	0	0	0	0
When in a crisis, this person works with me to create a solution.	0	0	0	0	0

Section 2: Who are the key people who help you the *most* to formulate new sales ideas or execute new promotions?

These may include some of the individuals that you listed in section 1, if so **please list them below** but you do NOT need to answer the statements about them again. Please be sure to **answer the questions about anyone not previously listed**.

Full Name of Person and Position (1): _____	Strongly		Neither Agree		Strongly
<i>Agree or disagree with the following statements about this person.</i>	Disagree	Disagree	nor Disagree	Agree	Agree
I can trust this person's decisions.	0	0	0	0	0
I can rely on this person without fear that they will take advantage of me.	0	0	0	0	0
This person is generally honest and truthful in information he/she provides.	0	0	0	0	0
I confide in this person.	0	0	0	0	0
I receive information from this person about products and promotions.	0	0	0	0	0
I work with this person when problems come up.	0	0	0	0	0
When making difficult decisions in the store, I can turn to this person.	0	0	0	0	0
When in a crisis, this person works with me to create a solution.	0	0	0	0	0

Full Name of Person and Position (2): _____	Strongly		Neither Agree		Strongly
<i>Agree/disagree with the following statements about this person.</i>	Disagree	Disagree	nor Disagree	Agree	Agree
I can trust this person's decisions.	0	0	0	0	0
I can rely on this person without fear that they will take advantage of me.	0	0	0	0	0
This person is generally honest and truthful in information he/she provides.	0	0	0	0	0
I confide in this person.	0	0	0	0	0
I receive information from this person about products and promotions.	0	0	0	0	0
I work with this person when problems come up.	0	0	0	0	0
When making difficult decisions in the store, I can turn to this person.	0	0	0	0	0
When in a crisis, this person works with me to create a solution.	0	0	0	0	0

Full Name of Person and Position (3): _____	Strongly		Neither Agree		Strongly
<i>Agree/disagree with the following statements about this person.</i>	Disagree	Disagree	nor Disagree	Agree	Agree
I can trust this person's decisions.	0	0	0	0	0
I can rely on this person without fear that they will take advantage of me.	0	0	0	0	0
This person is generally honest and truthful in information he/she provides.	0	0	0	0	0
I confide in this person.	0	0	0	0	0
I receive information from this person about products and promotions.	0	0	0	0	0
I work with this person when problems come up.	0	0	0	0	0
When making difficult decisions in the store, I can turn to this person.	0	0	0	0	0
When in a crisis, this person works with me to create a solution.	0	0	0	0	0

Full Name of Person and Position (4): _____	Strongly		Neither Agree		Strongly
<i>Agree/disagree with the following statements about this person.</i>	Disagree	Disagree	nor Disagree	Agree	Agree
I can trust this person's decisions.	0	0	0	0	0
I can rely on this person without fear that they will take advantage of me.	0	0	0	0	0
This person is generally honest and truthful in information he/she provides.	0	0	0	0	0
I confide in this person.	0	0	0	0	0
I receive information from this person about products and promotions.	0	0	0	0	0
I work with this person when problems come up.	0	0	0	0	0
When making difficult decisions in the store, I can turn to this person.	0	0	0	0	0
When in a crisis, this person works with me to create a solution.	0	0	0	0	0

Section 3: Who are the key people at CPG X that you consider your friends?

These may include some of the individuals that you listed in section 1 and 2, if so **please list them below** but you do NOT need to answer the statements about them again. Please be sure to **answer the questions about anyone not previously listed**.

Full Name of Person and Position (1): _____	Strongly		Neither Agree		Strongly
<i>Agree/disagree with the following statements about this person.</i>	Disagree	Disagree	nor Disagree	Agree	Agree
I can trust this person's decisions.	☐	☐	☐	☐	☐
I can rely on this person without fear that they will take advantage of me.	☐	☐	☐	☐	☐
This person is generally honest and truthful in information he/she provides.	☐	☐	☐	☐	☐
I confide in this person.	☐	☐	☐	☐	☐
I receive information from this person about products and promotions.	☐	☐	☐	☐	☐
I work with this person when problems come up.	☐	☐	☐	☐	☐
When making difficult decisions in the store, I can turn to this person.	☐	☐	☐	☐	☐
When in a crisis, this person works with me to create a solution.	☐	☐	☐	☐	☐

Full Name of Person and Position (2): _____	Strongly		Neither Agree		Strongly
<i>Agree/disagree with the following statements about this person.</i>	Disagree	Disagree	nor Disagree	Agree	Agree
I can trust this person's decisions.	☐	☐	☐	☐	☐
I can rely on this person without fear that they will take advantage of me.	☐	☐	☐	☐	☐
This person is generally honest and truthful in information he/she provides.	☐	☐	☐	☐	☐
I confide in this person.	☐	☐	☐	☐	☐
I receive information from this person about products and promotions.	☐	☐	☐	☐	☐
I work with this person when problems come up.	☐	☐	☐	☐	☐
When making difficult decisions in the store, I can turn to this person.	☐	☐	☐	☐	☐
When in a crisis, this person works with me to create a solution.	☐	☐	☐	☐	☐

Full Name of Person and Position (3): _____	Strongly		Neither Agree		Strongly
<i>Agree/disagree with the following statements about this person.</i>	Disagree	Disagree	nor Disagree	Agree	Agree
I can trust this person's decisions.	☐	☐	☐	☐	☐
I can rely on this person without fear that they will take advantage of me.	☐	☐	☐	☐	☐
This person is generally honest and truthful in information he/she provides.	☐	☐	☐	☐	☐
I confide in this person.	☐	☐	☐	☐	☐
I receive information from this person about products and promotions.	☐	☐	☐	☐	☐
I work with this person when problems come up.	☐	☐	☐	☐	☐
When making difficult decisions in the store, I can turn to this person.	☐	☐	☐	☐	☐
When in a crisis, this person works with me to create a solution.	☐	☐	☐	☐	☐

Full Name of Person and Position (4): _____	Strongly		Neither Agree		Strongly
<i>Agree/disagree with the following statements about this person.</i>	Disagree	Disagree	nor Disagree	Agree	Agree
I can trust this person's decisions.	☐	☐	☐	☐	☐
I can rely on this person without fear that they will take advantage of me.	☐	☐	☐	☐	☐
This person is generally honest and truthful in information he/she provides.	☐	☐	☐	☐	☐
I confide in this person.	☐	☐	☐	☐	☐
I receive information from this person about products and promotions.	☐	☐	☐	☐	☐
I work with this person when problems come up.	☐	☐	☐	☐	☐
When making difficult decisions in the store, I can turn to this person.	☐	☐	☐	☐	☐
When in a crisis, this person works with me to create a solution.	☐	☐	☐	☐	☐

Section 4: How much do you agree or disagree with the following statements?

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
This company has provided excellent job training for me.	0	0	0	0	0
Information regarding CPG X products is effectively communicated to me by sales managers.	0	0	0	0	0
Information regarding CPG X products is effectively communicated to me by operations managers.	0	0	0	0	0
I know very well how to get things done in this company.	0	0	0	0	0
Other FLEs have helped me on the job in various ways.	0	0	0	0	0
There are many chances for a good career with this company.	0	0	0	0	0
I prefer my life to be filled with puzzles that I must solve.	0	0	0	0	0
I have a full understanding of my duties in this company.	0	0	0	0	0
My co-workers are usually willing to offer their assistance or advice.	0	0	0	0	0
Information regarding CPG X customers is communicated to me by operations managers.	0	0	0	0	0
Information regarding CPG X customers is communicated to me by sales managers.	0	0	0	0	0
I am happy with the rewards offered by this company	0	0	0	0	0
I agree with sales and operations managers in regard to how best to satisfy our customers.	0	0	0	0	0
This company offers thorough training to improve employee job skills.	0	0	0	0	0
The goals of this company have been made very clear to me.	0	0	0	0	0
Most of my co-workers have accepted me as a member of this company.	0	0	0	0	0
I would prefer complex to simple problems.	0	0	0	0	0
Opportunities for advancement in this company are available to almost everyone.	0	0	0	0	0
Instructions given by my supervisor have been valuable in helping me do better work.	0	0	0	0	0
Sales managers at CPG X coordinate promotional events with me.	0	0	0	0	0
Operations managers at CPG X coordinate promotional events with me.	0	0	0	0	0
I have a good knowledge of the way this company operates.	0	0	0	0	0
I agree with managers on how to best serve our customers in the retail store.	0	0	0	0	0
My co-workers have done a great deal to help me adjust to this company.	0	0	0	0	0
The type of job training given by this company is highly effective.	0	0	0	0	0
I can readily anticipate my prospects for promotion in this company.	0	0	0	0	0
Sales people at CPG X spend time discussing customers' future needs with me.	0	0	0	0	0
Operations people at CPG X spend time discussing customers' future needs with me.	0	0	0	0	0
I tend to be on the same page with managers when it comes to interpreting the needs of our customers.	0	0	0	0	0

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
I put forward 100% effort all the time.	0	0	0	0	0
The retail managers in stores on my route are often unwilling to allow promotional displays.	0	0	0	0	0
I care about maximizing my sales dollars.	0	0	0	0	0
Information is communicated by sales people to me through the use of meetings, phone calls, or discussion.	0	0	0	0	0
Information is communicated by operations people to me through the use of meetings, phone calls, or discussion.	0	0	0	0	0
There is often agreement among our company's managers and myself with regard to what our customers want.	0	0	0	0	0
I am committed to my job as an FLE with CPG X.	0	0	0	0	0
It's enough for me that something gets the job done; I don't care how or why it works.	0	0	0	0	0
I am willing to work extra hours to get more sales.	0	0	0	0	0
The training in the company has enabled me to do my job very well.	0	0	0	0	0
If given new information about our customers, I usually agree with the DSL on how the information will impact sales.	0	0	0	0	0
The retail managers at the stores on my route are fairly easy to work with.	0	0	0	0	0

Thank you very much!!!

Your response will be very helpful in my University of Tennessee research project. I appreciate your time and effort to complete this survey.

If you have any questions or comments, please contact me at the number/email listed below.

When you finish the survey please put it back in the envelope it came in. You can seal it to assure confidentiality. You can then put it in the larger University of Tennessee envelope (marked "Return Envelope"). No one from CPG X will see this survey.

Sincerely,



Hannah Stolze Ph.D. Candidate
 Department of Marketing and Logistics
 310 Stokely Management Center
 Knoxville, Tennessee 37996-0530
 (224) 402-1938
hstolze@utk.edu

REMEMBER, TO BE ELIGIBLE FOR THE \$50 VISA Card please list your 5 digit Route #

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VITA

Hannah Stolze was born in Valparaiso, IN to the Randy and Marlene Stoltzfus. She is the middle child of three daughters: Bethany and Sarah. She attended Blackhurst Elementary School and continued to St. Charles High School in St. Charles, MO. After graduation, she enlisted in the United States Army and then headed north to Carthage College of Southern Wisconsin where she was introduced to International Political Economics and the linguistic study of Mandarin Chinese. While a student at Carthage College, Hannah studied abroad in Beijing, China at the Beijing Language and Culture Institute. As an Army Specialist, she served at multiple locations in the U.S. and Germany. She obtained a Bachelors of Arts degree from Carthage College in May 2003 in International Political Economics and Chinese. She then went on to pursue her Master of Business Administration at Lindenwood University in St. Charles, MO. Hannah graduated with a Master of Business Administration in May 2005. She then continued her education with a Doctorate of Philosophy in Business Administration at University of Tennessee at Knoxville, Tennessee.

Hannah's research interests focus on business sustainability through exploring the impact of environmental initiatives and social networks within the firm and the supply chain. Hannah has been actively involved in the Supply Chain Forums at the University of Tennessee. She has published in the International Journal of Physical Distribution and Logistics Management and presented research at the Council of Supply Chain Management Professionals, the American Marketing Association, the University of Tennessee Shopper Marketing Forum, and Decision Sciences Institute.

In June 2012, Hannah completed the requirements for the Ph.D. in Business Administration with a major in Logistics and a minor in Marketing at the University of Tennessee.