How Customer-Oriented Companies Create Value with Data

Examining the Customer Insight Process

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Abstract

Today organisations have more information at their fingertips than ever before. While managers have started to realise the benefits inherent in exploiting this phenomenon, often referred to as *Big Data*, the discussion so far has focused on technical solutions. However, there appears to be a strong, current drive to improve the understanding of the managerial aspects. This fuelled our decision to examine how organisations create value with the customer data they have available. Specifically, we examine how customer-oriented organisations work with customer data, focusing on the responsibilities and capabilities that are employed in order to create value.

Based on customer orientation literature and the Resource-Based Theory we conduct a qualitative case study with four case companies. We outline a customer insight process with six phases: *Pre-Phase*, *Formulate Hypothesis*, *Put the Puzzle Together*, *Make Recommendations*, *Share Findings*, and *Take Action*. For each phase, we also (1) identify clearly delineated responsibilities for two roles involved in the process, the researcher and the client, as well as how these interplay and (2) identify resources and capabilities that these two roles employ. Especially the need to employ hygiene factors and the value-increasing function of trust enablers and networking enablers are highlighted, since they support the organisation's creation of sustained competitive advantage. Finally, we identify two propositions pertaining to the organisational context of customer-oriented organisations. All in all, our outlined customer insight process exemplifies but also extends existing theory. More importantly, we take a first step towards explaining how to handle the managerial challenges of exploiting Big Data.

Keywords

Big Data, Customer Data, Customer Insights, Customer Orientation, Resource-Based Theory

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KEY CONCEPTS

This list provides an overview of how we define key concepts used throughout the thesis and is intended as a reference page to help the reader.

Value [creation]: [Using information about target customers and competitors to create] continuously superior customer value (c.f. Slater & Narver 1995).

Customer: End consumer, i.e. the person ultimately using the product, not necessarily the one purchasing it or the first one buying it, e.g. retailers (c.f. Gerber & Bothma 2008).

Target customer: A customer that a company can serve profitably based on its capabilities (c.f. Webster 1994).

Data: The measurement or description of facts or states (c.f. Kettinger & Li 2010).

Knowledge: "a fluid mix of framed experiences, values, contextual information, and expert insight that provides a framework for evaluating and incorporating new experiences and information" (Davenport & Prusak 1998, p. 5, cited in Li & Kettinger 2006).

[Customer] insight: A picture [of the customer] built on many sources of data and interpreted using a broad palette of organisational knowledge (c.f. Day 1994, Kohli & Jaworski 1990).

Big Data: "High-volume, high-velocity and high-variety information assets that demand cost-effective, innovative forms of information processing for enhanced insight and decision making" ("the official Big Data definition" by Gartner 2013).

[Sustained] competitive advantage: What a firm is said to have "[...] when it is implementing a value creating strategy not simultaneously implemented by any current or potential competitors [*and* when these other firms are unable to duplicate the benefits of this strategy]" (Barney 1991, p. 102). Specifically, a sustained competitive advantage should fulfil the VRIN characteristics of being valuable, rare, inimitable, and non-substitutable (c.f. Barney 1991).

Customer orientation: A business philosophy that entails the "[...] organizationwide generation, dissemination, and responsiveness to market intelligence" (Kohli & Jaworski 1990, p. 6).

Resource: A human resource including "[...] the training, experience, judgment, intelligence, relationships, and insight of *individual* managers and workers in a firm" (Barney 1991, p. 101).

Capability: The firm's capacity to deploy resources, including its accumulated coordination skills (c.f. Amit & Schoemaker 1993, Grant 1991).

1 INTRODUCTION

This section provides the background for our research area, outlining its topicality and relevance. Moreover, this section introduces the overall purpose of our research.

1.1 Background

Today organisations have more information at their fingertips than ever before (e.g. CRA 2012, Davenport, Barth & Bean 2012, Nicols 2013, Rogers 2011). In fact, many of the devices and services used daily to make life easier for customers, such as smartphones, online shopping, call centre logs, and GPS, create a deluge of unstructured information as a by-product of their intended functioning (IBM 2012, Nicols 2013, World Economic Forum 2012). In fact, 90 per cent of the data available today has been created during the past two years (IBM 2012) and more written text is produced in two days than the total amount from the birth of civilisation until 2003 (Wark 2013). Under the caption *Big Data* this exponential increase in the amount of data being produced has captured the attention of the business press[1].

Particularly, the interest is directed towards the latent potential in the masses of data. Thus, the promise is that data-driven organisations will be able to direct business according to the customers' needs and desires with greater certainty. As McAfee and Brynjolfsson (2012, p. 63) argue: "The data available are often unstructured – not organised in a database – and unwieldy, but there's a huge amount of signal in the noise, simply waiting to be released." Moreover, already in 1985 Porter and Millar argued for how the information revolution opens new doors for creating competitive advantage.

However, research shows that despite making sizable investments in IT systems to manage the vast amounts of data many companies have failed to achieve a worthwhile return (Galbraith 2005, Marchand & Peppard 2013). In fact, Marchand and Peppard (2013, p. 105-106) make the following observation: "Once the system goes live, no one pays any attention to figuring out how to use the information it generates to make better decisions or gain deeper – and perhaps unanticipated – insights in the key aspects of the business". Accordingly, they argue that "[...] it's crucial to understand how people create and use information" (Marchand & Peppard 2013, p. 106).

Thus, the discussion appears to be shifting from technical aspects to managerial ones (Barton & Court 2012, Davenport et al. 2012, Kale 2004, Marchand & Peppard 2013). That is, organisations have progressed from wondering which systems to implement and how to roll them out to scrutinising what management practices will be necessary to fully exploit the benefits of Big Data

[1] For example, the *Harvard Business Review* ran a spotlight on the topic in the 2012 October issue.

(McAfee & Brynjolfsson 2012, Rust et al. 2010). As Barton and Court (2012, p. 80) establish: "Often companies already have the data they need to tackle business problems, but managers simply don't know how the information can be used for key decisions". This shift has so far been highlighted mainly in recent issues of practice-oriented journals like the Harvard Business Review, McKinsey Quarterly, and the MIT Sloan Management Review (Barton & Court 2012, Biesdorf, Court & Willmott 2013, Davenport et al. 2012, McAfee & Brynjolfsson 2012). Thus, there is a strong, current drive to improve the understanding of the managerial challenges related to Big Data.

1.2 Purpose of Research

In fact, the potential of getting the management side of the Big Data equation right appears to be indisputable. Thus, a recent study from the MIT Center for Digital Business of 330 publically listed companies shows that the more companies characterise themselves as data-driven, the better they perform (McAfee & Brynjolfsson 2012). This further fuelled our decision to focus on managerial practices within the field of data-driven marketing. Specifically, we wish to examine how organisations create value with the customer data they have available.

In order to narrow our scope and derive a more specific research question, we conducted a pre-study, which is described in *Section 2*. Our research question is introduced in *Section 3.3*.

2 PRE-STUDY

This section outlines how we collected insights from a practical perspective in order to focus our research and presents the conclusions that help us narrow our scope.

2.1 Purpose

In order to focus our research area we conducted a pre-study, collecting information from a practical rather than academic point of view. The idea was to get insight into the most pertinent issues within the customer data subset of Big Data being discussed currently by practitioners. In this way we intended to ensure that our final research question is relevant to practitioners in the customer insight field, in addition to providing the opportunity to make a theoretical contribution to a highly contemporary phenomenon (c.f. Holme & Solvang 1997).

2.2 Execution

We chose a qualitative method, as it would allow us to get an overview of the research field quickly and to be open to delve deeper into issues of particular interest to our interviewees (Eisenhardt & Graebner 2007). Specifically, we discussed our topic with customer insight experts in a more informal manner (similar to informant interviews, as discussed by Andersen 1998). While questions of course varied based on the experience of the interviewee, the interviews covered these general topics:

- How customer data is really used in practice (compiled, structured, analysed etc.)
- How organisations make use of customer data (transforming data into insights)
- What barriers exist to the successful application of customer data
- What organisations need in order to make data actionable (in terms of e.g. resources, competencies, structures, and partners)
- What developments have occurred in the industry and what trends are still on the horizon

First, we generated a list of potential interviewees that represent a broad group of experts from research consultancies and B2C companies. From the list we selected a handful that have diverse experiences and engagements that make them particularly relevant for our study. For example two interviewees (Susanne and John) have given lectures on customer insight and (Jonas) combines his work at a customer research consultancy with an academic position at the Center for Consumer Marketing at Stockholm School of Economics, which arguably gives him a highly updated and comprehensive view of the field. Furthermore, during the interviews we asked interviewees to provide ideas for other experts that could be relevant. In addition to adding a new interviewee (Andreas), interestingly, this resulted in interviewees (independently) referring to each other.

Thus, the final group of interviewees included the following highly experienced and peer-acknowledged customer insight experts:

- Andreas Lee, Founder and Account Director of NORM.
- John Almering, Professional Services Manager at CFI Group and responsible for CFI:s Business Manager Analytics course about how to create value with customer data. Previously worked for Synovate.
- Jonas Colliander, Senior Analyst at BlueCarrot and Research Fellow at Center for Customer Marketing at Stockholm School of Economics.
- Susanne Moland, Head of Consumer Insights and Concept Creation, Fazer Group. Previously at Synovate and several FMCG companies.
- Victoria Gelmanovska, Nordic Manager for Consumer & Market Insight at Unilever.

In addition, we gathered insights from our external advisor Sara[2], Analyst at Psi Consulting, mainly pertaining to the process of creating valuable recommendations. Each interview was about an hour long and was conducted by the both of us giving the possibility for discussing the different perspectives of what we had learnt (in line with Voss, Tsikriktsis & Frohlich 2002)[3]. Following each interview, we carefully documented our insights and thoughts. We also sent a summary of our conclusions to the interviewees to give them an opportunity to comment (as suggested by Yin 2003).

2.3 Conclusions

While the interviewees of course had their specific areas of interest, certain key topics emerged. Specifically, the pre-study yielded the following three conclusions:

1. *As data collection methods have become more automated, the research industry has shifted its focus towards developing actionable recommendations.*

Whereas research companies in the past would receive very specific briefs, collect data, and provide clients with (sometimes quite bulky) summaries, the field appears to have become more specialised. Thus, some companies have specialised exclusively in data collection whereas the typical customer research companies has become more like a consultancy. In short, the focus has shifted towards working closely with the client to formulate a research question and providing

[2] The name and company of our external advisor is kept anonymous upon request.
[3] The only exceptions were the interview with Victoria, which was 40 minutes, and the interview with Andreas where one of us could not attend (the interview was therefore recorded).

detailed recommendations. It should be noted that this tendency was observed both in the consultancies and the in-house customer insight functions. Thus, the in-house functions serve as consultants (mainly for the marketing department) and outsource the actual data collection to external parties (e.g. Nielsen and NORM).

☞ Consequently, our study will not focus on the actual data collection but rather the development of the initial question and final recommendation.

2. *Data is not necessarily information.*

When researching Big Data we came across the infological equation, $I = i(D, S, t)$, which states that information is a function of the data available, the frame of reference you apply, the time available for processing, and the process of interpretation (Langefors 1973). Interestingly, all of our interviewees broached some or all parts of this equation. In short, the different parts of the formula were (independently) described by interviewees as factors critical to the successful application of customer data (conversely, if the different parts are absent, they act as barriers). All interviewees emphasised basic understanding of data and what it can and cannot be used for as the corner stone for making appropriate inferences. Susanne also emphasised that due to the mere amount of data available the fundamental problem is making sense of it.

☞ With inspiration from the infological equation and our interviews, our study will focus mainly on the process of interpretation and the frame of reference that people apply.

3. *In the process of creating value with customer data, three roles are primarily involved: The researcher, client, and strategic roles.*

Based on our interviews, we derived three roles that contribute in different ways to creating value with customer data (see *Figure 1*):

- The *researcher* role sources and compiles different types of data, internal and external, for the client role.
- The *client* role provides context for guiding the research (in order to make it more relevant) and acts on it.
- The *strategic* role heads and sets the strategic direction for the research function, supporting the researchers in their work without directly participating in conducting analysis.

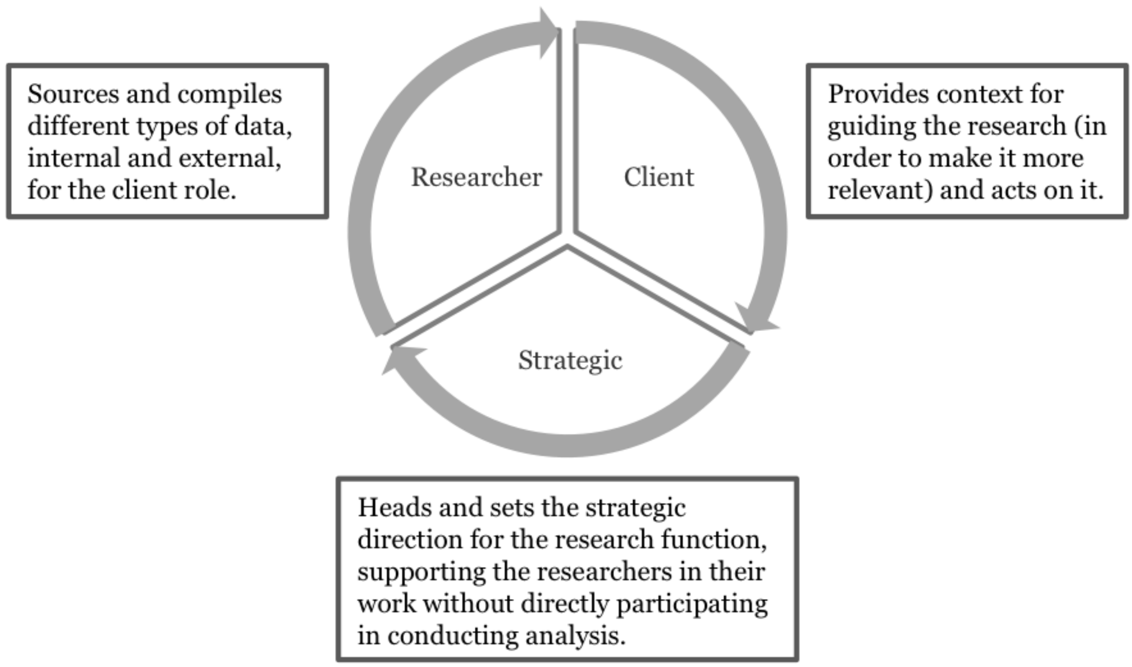

Figure 1: The Three Roles Involved in the Process of Creating Value with Customer Data

These roles were especially clear for the B2C companies since the interviewees (Susanne and Victoria) described how their organisations have separate research departments that other departments "order" research from. Naturally, a more operational data collection and processing role also exists. However, as noted above it falls outside our scope.

☞ Consequently, we will keep these three roles in mind when designing our study and use their different perspectives to more comprehensively illustrate how value is created with customer data.

Finally, the pre-study helped us clarify certain key concepts. Specifically, another inference that can be made from the first two conclusions is that data becomes 'useful' when it has been processed based on organisational knowledge and transformed into actionable recommendations. Moreover, the use of data can be said to 'create value' when it results in actions that increase the perceived value for the *end customer*. Thus, Susanne emphasised that in order to win in the market and create value for shareholders, companies first and foremost must be relevant to customers.

In conclusion, based on our pre-study we decided to examine the process of creating value with data, focusing particularly on question formulation and recommendations (rather than data collection). Furthermore, since the researcher role is responsible for deriving the research question and recommendations, we will take our point of departure in this role, using the client and strategic roles to provide additional perspectives. Specifically, the client role is interesting because it has close daily interaction with and sets the demands for the research role and can therefore provide insights in how the researcher role contributes to the process of value creation. The strategic role, on the other hand, can provide insights into broader organisational issues that affect the way the researcher carries out her tasks. Thus, while our focus is mainly operational, it seems relevant to maintain a linkage to the strategic context of the process.

3 RESEARCH FOCUS

This section aims to delimit our research both theoretically and practically. Thus, it derives a specific research question and outlines our expected contribution to the extant body of knowledge.

3.1 Delimiting the Theoretical Base

The topic of creating value with customer data can, naturally, be addressed from different theoretical starting points. However, we found it difficult to identify an existing framework that lends itself to analysing the entire process. Despite the surge in literature on Big Data, there as mentioned is little theoretical guidance on how to actually manage the process of turning customer data into actionable recommendations. Moreover, despite the widespread agreement within marketing that the customer should be at the centre of all business decisions, little has been said about how to use the host of data available to include end customer preferences in decision making.

In order to construct a theoretical framework that we could use to examine the process, we considered a basic process outline that we received from our external advisor at Psi Consulting[4]. Since our pre-study caused us to focus less on the actual data collection, we disregarded theories that could illuminate this step (such as data management that focuses mainly on technical aspects).

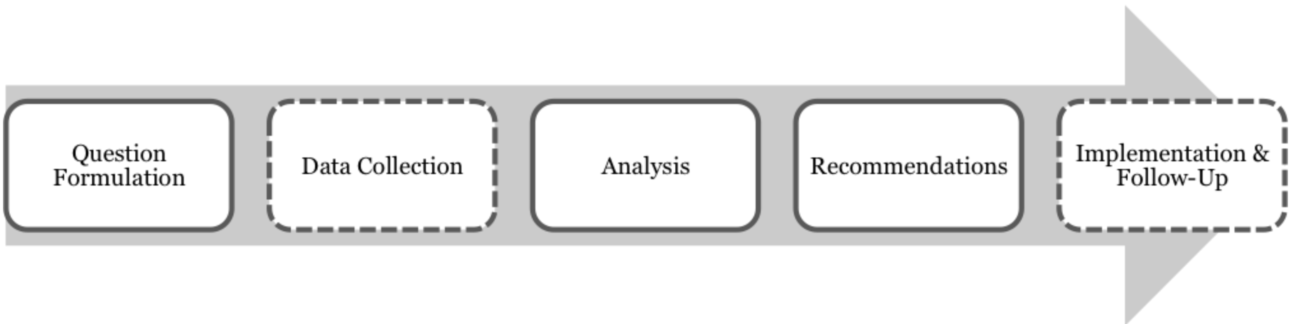

Figure 2: Basic Customer Insight Process (excluded steps dotted)

We then identified two areas of theory that could be practically applicable, namely change management, and behavioural decision making. It was our assessment that the area of change management has been extensively examined with hosts of literature on topics ranging from how to plan the change (e.g. Cohen 2005) to using networks to institutionalise change (e.g. Burt 2000). Consequently, we assessed that the room for novel contributions to this field was minimal. As an extension of this, since the change management frameworks are mainly applicable to the implementation and follow-up part of the process, we decided to place less emphasis on this step in our research.

[4] *Figure 2* represents an adaptation of the research process outlined by Sara in our pre-study.

The field of behavioural decision making could be applied to examine classical cognitive biases in the collection, processing and analysis of data (e.g. Bazerman & Moore 2009). However, based on the pre-study we knew that the data collection and processing would not be a primary focus. Furthermore, the field generally focuses on cognitive processes in individuals, which conflicted with our aim to shed light on the process from an organisational perspective.

Consequently, we decided to widen our gaze to include broader fields of research. The guiding thought was to look at fields that address how making use of data can support building the business around the customer. Thus, we identified a sub-stream of customer orientation literature that takes its starting point in the application of customer data. Moreover, closer examination of the stream revealed the potential for our research focus to fill a gap in the extant theory.

3.2 Creating a Theoretical Framework

The main tenet of the customer orientation field that a company should be structured around the customers (e.g. Galbraith 2005) naturally leads to a focus on using customer research to guide marketing decisions (Myers, Greyser & Massy 1979). However, despite this focus little has been written about how the process itself is structured and carried out also from this perspective. Rather, the most relevant theoretical contributions have focused on integrating knowledge utilisation theory (e.g. Menon & Varadarajan 1992) and incorporating customer orientation with the learning organisation (e.g. Day 1994, Sinkula 1994). These two streams thus cover *whether* customer insights are used and how organisations preserve (market) knowledge as part of their organisational memories.

While this is not our primary focus, two contributions touch cursorily upon our area of interest. Specifically, Day (1994) briefly outlines a process for *market sensing*. However, the author's main focus is to relate the process to organisational memory, and therefore he does not describe the steps of the process in detail. Similarly, in an article commissioned by the American Marketing Association in 1979 to study the effectiveness of R&D for marketing management mention is made of the "multi-faceted role for the marketing research manager" (Myers et al. 1979, p. 22). Specifically, the authors posit that the researcher fills three missions, namely *facilitator* for the commissioning of studies, *gatekeeper* for new research techniques, and *translator* between management issues and research. However, since the study's purpose is to identify ways to improve the dissemination of academic research to industrial practice, little more is said about how these missions are fulfilled in practice.

Thus, we find it relevant to lean on customer orientation literature to examine the process aspect (broached by Day 1994) and the role aspect (touched upon by Myers et al. 1979) in greater depth. Moreover, we see a potential for extending theory by adding the interaction between researcher and client as well as the perspective of the strategic role. Furthermore, since the articles are rather old, it would be interesting to see whether the Big Data explosion has affected their applicability. Since the two contributions provide very little detail on the managerial aspects of the customer insight process, we find it relevant to draw on Resource-Based Theory (RBT) as a supplement to our theoretical framework. Thus, we believe that the theoretical underpinnings of resources and capabilities will provide a useful base for examining the process and responsibilities, whereas the concepts of competitive advantage and strategy will help us bridge operational aspects with the more strategic focus of value creation.

3.3 Research Question

In summation, our aim is to examine the process of creating value with data, focusing particularly on the development of research questions and recommendations. With a starting point in the field of customer orientation, we will use RBT to further examine the capabilities required to derive actionable recommendations, thereby extending extant literature. Specifically, we aim to answer the overall question:

- *What process do customer-oriented organisations employ in order to create value with customer data?*

Taking a starting point in the researcher role, the sub-questions we aim to examine are:

- *How does the fulfilling of different responsibilities contribute to the completion of each phase of the process?*

- *How are different capabilities utilised to complete the phases of the process?*

3.4 Expected Contribution

Through examining the process of turning customer data into actionable recommendations, we aim to make both theoretical and practical contributions.

Firstly, by emphasising the process, responsibilities, and capabilities employed to create value with customer data we pursue the assertions of McAfee and Brynjolfsson (2012) and Rust et al. (2010) that organisations must view Big Data as a management issue in order to wield it successfully. Moreover, we aim to fill a gap in customer orientation literature by extending the contributions of

Day (1994) and Myers et al. (1979). Furthermore, our study will complement recent studies of customer-focused areas, such as customer loyalty (Tokman, Richey, Deitz & Adams 2012) and human capital in customer service (Ployhart, Van Iddekinge, Chad & Mackenzie 2011), that take an RBT perspective.

Secondly, we believe that our results will help managers understand *how* to exploit Big Data. Specifically, outlining the responsibilities and capabilities that support the customer insight process will provide managers with guidance for which fundamental factors need to be in place and which factors may leverage customer value and contribute to a competitive advantage.

4 THEORETICAL FRAMEWORK

This section introduces Customer Orientation and Resource-Based Theory and outline how we will combine them to describe and analyse our empirical findings.

4.1 Customer Orientation

4.1.1 Background

The concept of customer orientation developed as a contrast to the traditional organisation structured around production (Galbraith 2005). It takes its point of departure in the marketing concept, which was first introduced in the 1950s and is attributed by many to Peter Drucker (Elg 2008). According to Ruekert (1992, p. 226), "The marketing concept is essentially a business philosophy or a policy statement which suggests that the long term purpose of the firm is to satisfy customer needs for the purpose of maximizing corporate profits." The development from product to customer focus has not slowed since the 1950s. In fact, Constantinides (2006) argues that the developments in personal computing power and increasing access to global information have only served to augment customer power.

However, in the late 1980s researchers began to take note that very little empirical research existed on the benefits of adhering to the tenet (Elg 2008, Kohli & Jaworski 1990). Ruekert (1992, p. 227) assesses the work in the area as follows: "The early development of the marketing concept, which served as the foundation for the interest in customer orientation that followed, can be summarised as being primarily philosophical, normative and prescriptive." This realisation precipitated the establishment of a strand of research that is particularly interesting to our purpose. More specifically, a number of scholars began to focus on translating the business philosophy into practice (Ruekert 1992).

Following the renewed interest in this research, a number of different labels were coined. In line with Slater and Narver (1995) we do not see a significant difference between the terms *customer-oriented*, *customer-focused*, *market-oriented* and *market-driven* and will therefore consider them all to be synonyms. However, it should be noted that, while the field developed as an attempt to translate the marketing concept to practice (Ruekert 1992), it would be a mistake to refer to it as *marketing orientation*. Among others Shapiro (1988) dismissed this label, as it gives the impression that implementation of the concept is the concern of the marketing department alone. Rather, several scholars have emphasised the importance of making customer orientation the focus of the entire organisation in order for it to be meaningful (Elg 2008, Galbraith 2005, Shapiro 1988, Slater & Narver 1998). Specifically, Slater and Narver (1998, p. 1003) hold that, "A business is market-oriented only when the entire organization embraces the values implicit therein and when all business processes are directed at creating superior customer value."

At the same time, it should be noted that while we do not distinguish between customer and market orientation, we will as mentioned focus mostly on data pertaining to customers[5]. We do, however, still recognise the emphasis that previous literature has placed on a holistic, outwardly focused approach to the market which entails both customers and competitors.

4.1.2 Defining Customer Orientation

As mentioned, we focus particularly on the stream of research that examines the practical implementation of customer orientation, and consequently our definition on the concept is quite action-oriented. Since our primary focus is the use of customer data we are particularly guided by the definition by Kohli and Jaworski (1990, p. 3), stating that "[...] a market orientation refers to the organizationwide generation, dissemination, and responsiveness to market intelligence."

Also noteworthy for our purposes is the contribution of Ruekert (1992), which gathers the seminal works of Kohli and Jaworski (1990), Narver and Slater (1990), and Shapiro (1988). According to Ruekert (1992, p. 227), three common themes are used across these authors to define customer orientation, specifically that "[...] (1) a market orientation results in actions by individuals toward the markets they serve, (2) such actions are guided by information obtained by the marketplace, and (3) such actions cut across functional and divisional boundaries within the organization." Three components are central both to this definition and to our analysis, namely starting with the customer, generating intelligence, and coordinating across functions. Each of these components is discussed in further detail in *Sections 4.1.3, 4.1.4* and *4.1.5*.

Furthermore, as the focus of our investigation is to understand how the process of applying customer data can support value creation, we lean on the insights of Slater and Narver (1995) to specify our definition of value. Thus, we consider the premise of value creation fulfilled when companies use market intelligence "[...] to create continuously superior customer value" (Slater & Narver 1995, p. 63). This definition also means that we choose to place less emphasis on empirical attempts to link customer orientation directly to profitability (Elg 2008, Kohli & Jaworski 1990). Rather, we focus on the indirect link through competitive advantage as for example described by Narver and Slater (1990, p. 21): "Thus, a market-oriented business continuously examines these alternative sources of [sustainable competitive advantage] to see how it can be most effective in creating sustainable superior value for its present and future target buyers."

[5] Thus, it also makes sense for us to use the term *customer orientation* rather than *market orientation*.

Last but not least, in order to identify different levels or facets of customer orientation we find it relevant to draw upon Slater and Narver's (1998) distinction between customer-led and market-driven. These will be discussed in greater detail in *Section 4.1.6*.

4.1.3 Starting with the Customer

In the debate on relative importance of different stakeholders, customer orientation – as the label would imply – leaves little doubt that the customer takes first place. Thus, Webster (1994, p.10) states that "[…] because profit is the reward for satisfying a customer, the best way to serve the other constituencies in the long run is to put the customer first." In addition to prioritising the customer, customer orientation also places emphasis on the strategic selection of a target segment (Webster 1994). Thus, Webster (1994) emphasises the need to match internal capabilities with customer needs. Specifically the author states that "Being market-driven means understanding how customer needs and company capabilities intersect in a competitive context because all of these factors converge to form the customer's definition of value" (Webster 1994, p. 9). In other words, a company must select the group of customers that it is best positioned to serve profitably. As an extension of this notion, Webster (1994) emphasises the importance of acknowledging that selection of certain target groups invariably entails the deselecting of other groups. Thus, the company should prioritise customers who are most likely to remain loyal over the business of other customers even if it means turning them away (Webster 1994).

Furthermore, the dynamic nature of markets and the changing preferences of customers force companies to look beyond stated needs and served markets if they wish to stay competitive (Slater & Narver 1998). This could include observation, lead user interviews, and other forms of direct dialogue with the customers as well as sales report and customer database analyses (Constantinides 2006, Kohli & Jaworski 1998, Slater & Narver 1998). According to Constantinides (2006, p. 413): "Such approaches allow marketers not only to improve communications with their target groups but also to identify the constantly changing and evolving customer needs, respond quickly to competitive movements and predict market trends early and accurately."

☞ For our purposes, the crucial point is the definition of target customer as a customer that a company can serve profitably based on its capabilities (Webster 1994) currently and in the future (Slater & Narver 1998).

4.1.4 Generating Intelligence

As mentioned, the market sensing process of Day (1994) provides some insight into the phases of the process of working with data[6] (see *Figure 3*). For example, the author states that forthcoming decisions or emerging problems can trigger the need to collect data. Furthermore, the author emphasises the importance of interpreting the collected data:

> *Before this information can be acted on, it has to be interpreted through a process of sorting, classification, and simplification to reveal coherent patterns. This interpretation is facilitated by the mental models of managers, which contain decision rules for filtering information and useful heuristics for deciding how to act on the information in light of anticipated outcomes. (Day 1994, p. 43)*

He adds that these mental models not only support the understanding of data gathered, but also guide the collection in enabling the organisation to ask appropriate questions.

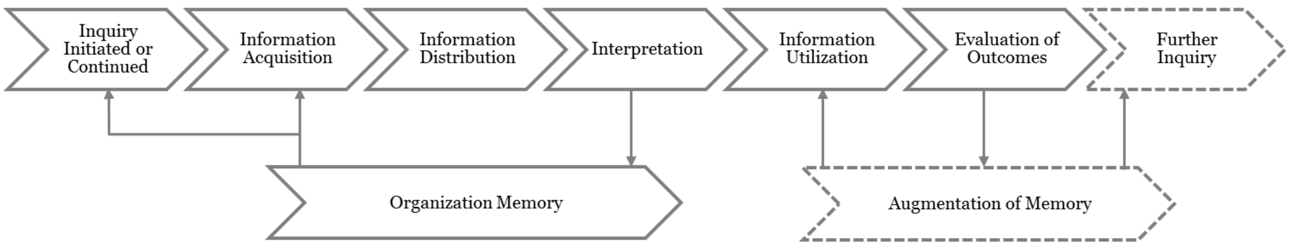

Figure 3: The Market-Sensing Process (Day 1994)

Another important point is that the collection and interpretation of data is not isolated to the marketing department (Day 1994, Kohli & Jaworski 1990). Thus, Kohli and Jaworski (1990) emphasise the importance of ensuring the collective generation of intelligence across departments in the organisation. In addition, Day (1994) highlights the importance of functions knowing which other parts of the organisation may benefit from their information. Lastly, he stipulates that when assumptions about the market are broadly shared in an organisation, it facilitates action in a timely and consistent manner (Day 1994).

☞ Particularly the definition of insight or intelligence as a picture built on many sources of data and interpreted using a broad palette of organisational knowledge (Day 1994, Kohli & Jaworski

[6] As mentioned, the market sensing process is not described in great detail and focuses on the link to organisational memory. Consequently, we do not find it relevant to explain all steps of the process.

1990) should be noted. Specifically, the definition will aid our understanding of the goal but also the various components of the process.

4.1.5 Coordinating Across Functions

Cross-functional coordination goes beyond the collaborative efforts to generate intelligence (Elg 2008, Galbraith 2005, Shapiro 1988). Thus, French, LaBerge, and Magill (2011, p. 8) state that "Without cross-functional collaboration and a clear delineation of roles, it will be impossible to gather, collate, gain insights from, and disseminate data that streams in from every customer interaction." In addition Kohli and Jaworski (1990) hold that cross-functional dissemination of information provides a basis for concerted actions across the organisation. Consequently, the authors state aspects such as interdepartmental connectedness and the organisational structure as a determining factor for customer orientation.

As mentioned, Myers et al. (1979) highlight the role played by the researcher in particular when outlining three 'missions' that she should fulfil, namely facilitator, gatekeeper, and translator. Specifically, they (1979, p. 23) posit that:

> Facilitator *basically relates to planning and conducting studies and projects and bringing together managers and research specialists.* Gatekeeper *involves monitoring new research techniques and ideas, exploring, "filtering," and trying to apply some of them within the organization. The* translator *puts management issues and problems into researchable propositions and converts research findings into managerial terms.*

☞ While the definitions of different aspects of the researcher role serve to inspire our analysis, it is particularly the notion of concerted action that spur our inclusion of additional roles, namely the client and strategic, in our examination of the customer insight process.

4.1.6 Facets of Customer Orientation

According to Kohli and Jaworski (1990, p. 6) it is "[…] appropriate to conceptualise the market orientation of an organization as one of degree, on a continuum, rather than as being either present or absent." In order to exemplify this graduation, we lean on Slater and Narver's (1998) distinction between customer-led and market-driven. The authors state that customer-led organisations can be characterised as reactive and focused on the short-term as they respond chiefly to expressed needs of customers. Thus, the potential for innovation and sustained competitive advantage is limited in rapidly evolving or turbulent markets (Slater & Narver 1998).

Conversely, Slater and Narver (1998, p. 1003) state that market-driven organisations employ a long-term focus and "[…] are committed to understanding both the expressed and latent needs of their customers, and the capabilities and plans of their competitors through the processes of acquiring and evaluating market information in a systematic and anticipatory manner." In addition, the authors highlight that these organisations conduct broader market scans and seek more types of customer data, such as observation and experimentation (Slater & Narver 1998).

☞ For sake of simplicity, we will mainly use the term customer orientation or customer-oriented and consider it synonymous with market-driven in our analysis. The purpose of the distinction is mainly to highlight the practical implications of Kohli and Jaworski's (1990) notion of a continuum of customer orientation.

4.1.7 Critique

One of the main critiques of customer orientation research focuses on the purported link to profitability (Elg 2008). However, in a survey of 50 studies of the direct effect of market orientation on business performance, Langerak (2003) concludes that the results are equivocal as to whether and when customer orientation has a positive impact. In addition, Elg (2008) states: "[…] a great deal of research exists that calls this relation into question and that posits that it refers to a very complex process for which other factors are equally important." However, as mentioned this particular stream of customer orientation research is not decisive for our framework, so we do not see a need to address the critique specifically.

Furthermore, customer orientation has been criticised for failing to address the challenge of innovation, thus contributing to trivial product development efforts and myopic R&D programs (Narver & Slater 1998). Specifically, Christensen and Bower (1996, p. 198) posit that the main reason companies fail to maintain their competitive positioning is that "they listen too carefully to their customers – and customers place stringent limits on the strategies firms can and cannot pursue." Narver and Slater (1998) addressed this critique through the distinction between customer-led and market-driven. Specifically, they emphasise the need for companies to consider latent needs and unserved markets, which is reflected in our definition of target customer.

4.2 Resource-Based Theory

4.2.1 Background

The key role that resources play in the growth and prosperity of firms was acknowledged by Penrose already in 1959 along with her view of the firm as a broader set of resources[7]. However,

[7] Other authors viewed as promoters of emphasising internal competitive resources and hence, as influencers of the RBT are Ricardo, Schumpeter (Grant 1991), Barnard and Selznik (Hoskisson et al. 1999).

scholars did not begin to investigate the field of Resource-Based Theory until the 1980s (Barney, Wright, and Ketchen 2011, Hoskisson, Hitt, Wan & Yiu 1999). In 1984 the term *Resource-Based View* was coined by Wernerfelt in his award-winning article *The Resource-based View of the Firm*[8] (Barney et al. 2011), but it was not until the beginning of the 1990s that it gained academic recognition and the attention of practising managers (Slack & Lewis 2008, Wernerfelt 1995).

Today, the Resource-Based Theory (RBT) is one of the most influential strategic management theories (e.g. Barney et al. 2011, Priem & Butler 2001, Slack & Lewis 2008) and the main counterbalance to Porter's market-based competitive forces framework (Spanos & Lioukas 2001). Thus, the RBT takes an inside-out perspective by linking an organisation's resources to its competitive advantage (Connor 2002), whereas the traditional market-based framework takes an outside-in perspective and focuses on the link between a firm's external environment and its strategy (Porter 1980). The underlying argument supporting the RBT is that "[...] competitive advantage rather than external environments is the primary source of inter-firm profit differentials [...]" (Grant 1991, p. 117). Moreover, it is argued that "When the external environment is in a state of flux, the firm's own resources and capabilities may be a much more stable basis on which to define its identity" (Grant 1991, p. 116). Accordingly, the RBT assumes that the way in which a firm acquires resources will impact its strategic success (Slack & Lewis 2008).

The RBT is often described through the core stream resources, capabilities, competitive advantage and strategy (see *Figure 4*), where "[...] resources are the source of a firm's capabilities, [and] capabilities are the main source of its competitive advantage" (Grant 1991, p. 119). Strategic success is furthermore defined as sustained competitive advantage (which will be defined in *Section 4.2.4*). The fundamental aim of resource-based strategy formulation is to maximise return over time (1991). Despite this focus on creating economic value rather than customer value we see no critical contradiction in using the RBT in our research, since we believe that customer value ultimately leads to increased profitability (as discussed in *Sections 2.3 and 4.1.3*).

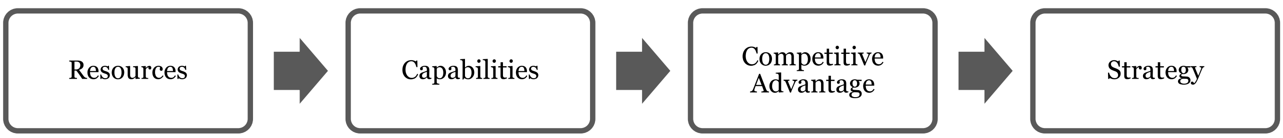

Figure 4: The Resource-Based Theory Core Stream

[8] Wernerfelt's article was awarded best paper published in the *Strategic Management Journal* 1994.

Lastly, in their review of the development of the RBT over the past twenty years[9], Barney et al. (2011) conclude that since critical reviews have been written, integration with other theoretical perspectives has been done and spin-off theories have been created, the theory can be considered as having reached maturity. Hence, the increasingly more common term *Resource-Based Theory* should be used (rather than the Resource-Based *View*).

4.2.2 Defining Resources

While the link between resources and sustained competitive advantage is undisputed among RBT scholars, there are several suggested definitions of resources. In his article from 1984 Wernerfelt broadly describes resources as "[...] anything which could be thought of as a strength or weakness of a given firm" (p. 172). Amit and Schoemaker (1993) further state that resources can be tangible and intangible factors that are either owned or controlled by the firm. One of the most specific definitions can be found in Barney's widely spread article from 1991, where he defines resources as "[...] all assets, capabilities, organisational processes, firm attributes, information, knowledge, etc. controlled by a firm that enable the firm to conceive of and implement strategies that improve its efficiency and effectiveness" (Barney 1991 p. 101, referring to Daft 1983).

Barney (1991, p. 101) further classifies resources into three categories: human, physical and organisational; Human resources "[...] include the training, experience, judgment, intelligence, relationships, and insight of *individual* managers and workers in a firm". Physical resources include the firm's site, equipment, and raw material. Organisational resources include the firm's formal and informal structure, planning, and coordinating systems. Grant (1991) further added financial, technological, and reputational resources in order to facilitate attaining a complete picture of a firm's resources. Process of interpretation and frames of mind

☞ Inspired by Langefors' (1973) infological equation (as discussed in *Section 2.3*), we focus mainly on the frames of reference that people apply in the process of interpretation. Consequently, being able to connect resources with different roles is most important, which is why we define resources according to Barney's definition of human resources.

4.2.3 Defining Capabilities

To clarify the RBT core stream, scholars have distinguished between resources and capabilities. Thus, Grant (1991, p. 119) reasons that few resources on their own can be sources of competitive advantage, whereas a combination of resources can: "Productive activity requires the cooperation and coordination of teams of resources. A capability is the capacity for a team of resources to

[9] Since the first special issue on the topic was published in the *Journal of Management*.

perform some task or activity". Amit and Schoemaker (1993, p. 35) state this role simply as "[...] a firm's capacity to deploy *Resources* [...]".

According to Schreyögg and Kliesch-Eberl (2007), there are even more definitions for capabilities than for resources and a reason for this could be the many related concepts, such as *core competencies* (Prahalad & Hamel 1990) and *dynamic capabilities* (Eisenhardt & Martin 2000, Teece, Pisano & Shuen 1997). Since we are concerned with the overall RBT framework and thus mainly the links within the core stream we do not see a need for outlining these.

Lastly, Grant (1991) and Kraaijenbrink, Spender & Groen (2009) highlight the significance of human resources for turning resources into capabilities. Grant (1991, p. 122) states that "Creating capabilities is not simply a matter of assembling a team of resources: capabilities involve complex patterns of coordination between people and between people and resources". He also acknowledges *economies of experience* in developing these organisational coordination skills, stating that "[...] the skills of an organization are developed and sustained only through experience" (Grant 1991, p. 123).

☞ Identifying the key capabilities for the customer insight process along with the associated resources and human coordination efforts is central for our research. In line with Amit and Schoemaker (1993) and Grant (1991) we thus define capabilities as the firm's capacity to deploy resources, including its accumulated coordination skills.

4.2.4 Defining (Sustained) Competitive Advantage

Interestingly, little divergence exists regarding competitive advantage as a term for the ability to outperform other actors in the same market, which is reflected in the fact that many RBT authors do not even attempt to describe it (e.g. Amit & Schoemaker 1993, Fiol 1991, Miller & Shamsie 1996). Originally, the term was coined by Porter (1980, in Balderston 1985). In his book, *Competitive advantage – Creating and sustaining superior performance*, he describes the concept as growing "[...] fundamentally out of value a firm is able to create for its buyers that exceeds the firm's cost of creating it" (Porter 1985, p. 3).

Barney (1991, p. 102) further says "[...] a firm is said to have *competitive advantage* when it is implementing a value creating strategy not simultaneously being implemented by any current or potential competitors". The equal emphasis on current and potential competitors includes future market situations and thus requires the competitive advantage be sustainable. Thus, Barney (1991, p. 102) continues: "[...] *and* when these other firms are unable to duplicate the benefits of this strategy". RBT scholars share the view that only some resources and capabilities can be sources of sustainability (Wade & Hulland 2004). Thus, Barney (1991) presents the VRIN framework for identifying such resources that should be valuable, rare, inimitable, and non-substitutable; valuable in the sense that they contribute to exploiting opportunities and/or neutralising threats in the competitive environment, rare in comparison to current and potential competitors' resources, inimitable so other organisations cannot obtain or recreate them without earning a cost disadvantage, and non-substitutable in that precisely the intended resource must be employed (Hoskisson et al. 1999).

☞ As the definition of (sustained) competitive advantage by Barney (1991) is easy to grasp we define the term accordingly. Specifically, to be impossible to duplicate sustained competitive advantages should fulfil the VRIN characteristics of being valuable, rare, inimitable and non-substitutable (c.f. Barney 1991).

4.2.5 Critique

Since there is a prominent alternative framework for strategic management, the RBT's fundamental reasoning that profitability is firm-driven (as opposed to market-driven) has naturally been questioned. However, many scholars have proved empirically that firm-specific resources and capabilities are the main drivers for profitability (e.g. Rumelt 1991 and Powell 1996). Thus, Evan and Rangan (2013, p. 21) show that "[…] the difference in returns within an industry – any industry – is several times greater than the difference across industries, no matter which ones"[10]. At the same time, it should be noted that studies acknowledging both the firm's impact and the importance of industry also exist, e.g. McGahan and Porter (1997).

Kraaijenbrink et al. (2010, p. 351) review critique of the RBT and conclude that out of the eight most mentioned categories, three "[…] offer more serious challenges that need to be dealt with […]": the VRIN framework does not explain sustained competitive advantage, value is not specified enough to make the RBT useful, and the definition of a resource is too unspecific[11]. The third challenge is the most pertinent for our research. Thus Foss (1997) labels it a *terminological soup* and argues that scholars use the terms resources, capabilities, assets, and competencies interchangeably. For precisely this reason we clearly state definitions for all our key concepts.

4.3 Reconciling Customer Orientation and Resource-Based Theory

It did not escape our attention that our theoretical framework rests on two diametrically opposed schools of thought. As described, the defining element of RBT is that it takes an inside-out

[10] Returns are defined as compound annual total shareholder return.
[11] The other five categories are that the RBT has no managerial implications, that it implies infinite regress, that the applicability of the RBT is too limited, that sustained competitive advantage is not feasible to achieve and that the RBT is not a theory of the firm.

perspective, whereas customer orientation is solidly grounded in outside-in. However, upon closer examination we did not find these diverging starting points to be irreconcilable, but rather complementary.

This picture emerges when you look at the purpose of both theories, namely to describe how competitive advantage is created. Thus, Slater and Narver (1998, p. 63) state that "[...] the ability to learn [how to create superior customer value] faster than competitors may be the only source of sustainable competitive advantage". Webster (1994, p. 11) adds to this picture by highlighting the potential for advancing theory:

> *The old mass-marketing concept lacked strategic impact because it did not consider the difficult task of matching up customer needs with the firm's capabilities. It never really addressed the question of which customers and which needs the company should focus on, except the relatively unsatisfied ones.*

In fact, we are not the first to suggest that the melding of the two frameworks could be instructive. For example, Day (1994, p. 40) leans on capabilities to explain the behaviour of customer-oriented companies:

> *The visibility and prevalence of these examples of capabilities that have been successfully deployed from the inside out have led some observers to argue that firms should be defined by what they are capable of doing, rather than by the needs they seek to satisfy (Grant 1991). This perspective is unbalanced, because it is the ability of the business to use these inside-out capabilities to exploit external possibilities that matters.*

☞ For our purposes, we find the theories relevant for highlighting different aspects of the process that we wish to investigate. Specifically, customer orientation is useful for examining which functions are involved and what type of decisions could be supported in the attempt to create value. In addition, the RBT is highly instructive in determining the capabilities that underpin the collection and analysis of data and subsequent decision making. Moreover, considering the two theories considered together allows for a deeper understanding of what elements of the process are particularly important to creating value and why.

5 METHODOLOGY

This section describes how we conducted our research and addresses the methodological choices made along the way and the reliability of our research.

5.1 Methodological Starting Point

Our question formulation is the foundation for all methodological choices we have made, in line with Justesen and Mik-Meyer (2011). Thus, our investigation method developed based on our research question and purpose as "[...] the question formulation, the selection of theory and the selection of method are insolubly connected to each other" (Justesen & Mik-Meyer 2001, p. 121)[12].

A study's research purpose is often classified as explorative[13], descriptive, or explanatory (Saunders, Lewis & Thornhill 2009). Explorative studies are appropriate for finding out more about less known circumstances (Andersen 1998, Saunders et al. 2009) and for finding out "[...] what is happening; to seek new insights; to ask questions and to assess phenomena in a new light" (Robson 2002, p. 59, as cited in Saunders et al. 2009). Descriptive studies instead require an established picture of the studied phenomena to be able to provide as much detail as possible and explanatory studies focus on establishing causal relationships between variables (Saunders et al. 2009). Since little is written about the managerial aspects of handling customer data and the process of turning customer data into actionable recommendations, our study is of an explorative nature.

According to Conger (1998, p. 108), qualitative research is more suitable than quantitative precisely "[...] in the exploratory phases of researching a topic area". Holme and Solvang (1997) further argue that a qualitative approach is the most appropriate when aiming to understand social processes and to build theory. Moreover, they say that qualitative research is appropriate when the purpose and research question require physical access to the studied organisation and persons in order to be answered. The complexity incorporated in our aim of examining a process and its associated interactions between different roles implies that we need an internal view. The fact that we view the context as important for the process also calls for a qualitative approach (Holme & Solvang 1997, Justesen & Mik-Meyer 2011). Holme and Solvang (1997, p. 79) state that the advantage of qualitative research methods is that they provide a holistic view and that "Such a *comprehensive picture* makes an increased understanding for social processes and contexts possible".

[12] Please note that we have translated references to literature not originally written in English ourselves.
[13] Explorative studies are sometimes also called exploratory studies.

5.2 Research Approach

We started off working inductively by discerning connections and themes through interpretation of empirical data (Alvesson & Sköldberg 1994, Thomas 2006). While doing so we also worked deductively by testing developing theoretical assumptions on the empirics (Thomas 2006). Hence, we follow an abductive approach where we interpret empirics in the light of theoretical preconceptions and so move between empirics and theory (Alvesson & Sköldberg 1994, Guvå & Hylander 2003, Suddaby 2006). The overall aim of abductive theory generation is to understand underlying patterns (Alvesson & Sköldberg 1994), which reflects the aim of our research well. Peirce recognises the abductive approach to research as more flexible than the traditional inductive and deductive approaches already in 1903 and describes how it leads to generation of new ideas and conceptual views (as referred to in Suddaby 2006). Being able to move between empirics and theory also suits us as researchers, partly as we simply prefer considering the two in parallel to gradually build our understanding of the research area and partly as we have a history of challenging each other's thoughts with different perspectives. Having done previous study projects and studied for several exams together we have learned that we often notice different aspects of the studied subject and consequently discussion always generates new insights. Further, we found great use of this difference between us during the research process, both when interviewing and when interpreting the collected data.

5.3 Case Study Set-Up

When evaluating different qualitative methods, we quickly deemed experiments and observation unsuitable for our investigation. Despite often being used in explorative studies, experiments focus on determining links between variables (Saunders et al. 2009), which is not our aim. Furthermore, this method was not feasible as it requires extensive control over the studied event (Yin 2003). Despite the uncontested richness in data afforded by observation, the method requires a great deal of time to be spent with the case organisations (Saunders et al. 2009), which we did not have.

In order to examine the customer insight process in depth, we instead chose to use a case study set-up based on individual interviews. Firstly, case studies are specifically suitable for explorative studies conducted where there is limited research on the topic, as "[…] the case study researcher may have less *a priori* knowledge of what the variables of interest will be […]" (Benbasat, Goldstein & Mead 1987, p. 370). Secondly, they are appropriate when trying to describe and explain organisational behaviour (Andersen 1998, Yin 2003), because they allow for "[…] interviews of the persons involved in the events" (Yin 2003, p. 8) and hence, facilitate rich data collected in context (Hartley 2004). Thirdly, case studies are useful when the aim is to generate new theory (Benbasat et al. 1987). Last but not least, we prefer the case study method as we find it more interesting to speak directly to people working with our chosen topic.

Whether and when studies based on more cases are better than single-case studies for generalisation purposes has been debated (Yin 2003). Our initial intention was to investigate the customer insight process in one organisation in order to get a deeper understanding of it as well as its context. Our reasoning was that if we interviewed people in the three roles identified in our pre-study (see *Section 2.3*) we would be able to view the process from different perspectives and thereby compare across. Due to difficulties with finding a company willing to invest that much time, we decided to investigate several different case companies and compare across cases as well. Multi-case research has been given prominence as it involves investigating a phenomenon in different contexts and thus increases the external generalisability of the findings (Yin 2003)[14]. Hence, multi-case studies are said to provide a stronger base for theory building (Benbasat et al. 1987, Eisenhardt & Graebner 2007, Yin 2003), which we aim to do by mapping the customer insight process.

In line with Holme and Solvang (1997) the cases were systematically selected according to deliberate criteria. Our primary criterion was that the case organisation could be considered relatively experienced with and committed to working with customer data and thus could be considered customer-oriented. It was our assumption that investigating customer-oriented case companies would make it easier to draw practically useful conclusions. Due to personal preferences and restrictions, we also limited our alternatives to B2C companies[15] located in the Stockholm area. Initially, we also aimed to interview case companies that were customers of Psi Consulting, the brand and communications consultancy we had been in contact with through our external advisor. Not only did this ensure that the previous mentioned criteria were met, but also we believed the intermediary would make it considerably easier for us to get in touch with potential interviewees (c.f. Hartley 2004). After waiting for interview confirmations for some weeks, we decided also to search for case companies ourselves. Among others we asked the two experts at the B2C companies from our pre-study, since we had gotten a good overview of their customer insight process already and we had a positive feeling about their willingness to participate. One of them led to further interviews and at the same time three cases were confirmed through Psi Consulting. Since parts of the customer insight processes could be considered sensitive information, we decided to keep all case companies anonymous. In order to ensure this anonymity details such as names and titles are changed in the empirics and analysis. The four case companies are introduced in *Section 6*.

In order to still be able to compare findings, we attempted to make a purposive selection of our interviewees (Babbie 2007) according to the three roles. For the three cases where Psi Consulting

[14] Note that case studies bring about analytic generalisations, as opposed to statistical generalisation (Yin 2003).

[15] Rather than B2B companies, not-for-profit organisations or civil service departments.

provided the contact, we had less control over the interviewees' roles, but communicated our wishes to our contact person and chose the closest fits when there were alternative interviewees. For each of these cases, we also interviewed one Psi consultant as they arguably are part of those case companies' customer insight process.

5.4 Data Collection

We mainly collected primary data through our case study interviews. Secondary sources, in the form of the respective company websites and the business information database Affärsdata, were only used to find background information[16]. We considered collecting HR documents such as job descriptions from the four case companies in order to confirm and supplement our interview data on required role responsibilities and capabilities. However, after finishing our interviews we deemed that we had sufficient data to compare and that collecting further material would only add time pressure.

Apart from the five interviews from the pre-study, fifteen focused interviews (Yin 2003, referring to Merton et al. 1990) were conducted. All interviews lasted approximately one hour and were conducted in person at the interviewees' offices[17]. Both of us were present at all interviews in order to avoid individual biases (Voss et al. 2002) and to increase the confidence and chance of noticing unexpected nuances in the findings (Eisenhardt 1989). In line with Voss et al. (2002), we sent our research purpose to the interviewees before the interviews. In order to make the interviewees feel comfortable, we also stated in these emails that we were mainly interested in their daily work. Furthermore, we mentioned that the cases and interviewees would be anonymised in our thesis and the interview data would not be shared with anyone (including Psi Consulting in the three cases they provided the contact) except possibly our advisor. Since we both understand Swedish, we also encouraged the interviewees to speak Swedish instead of English if they felt they could express themselves more freely in that way (as Alvesson 2011 suggests).

Furthermore, in line with Yin (2003) we prepared an interview protocol to be able to collect the data needed to answer our research questions systematically. The first part of the protocol focused on neutral background questions about the interviewee as well as basic customer orientation and RBT questions such as "What sets [case company] apart from your competitors?" and "What types of data do you receive regularly?" Apart from providing the basic setting for our theoretical framework, the purpose of these initial questions was to warm up the interviewee and establish a relationship (Alvesson 2011). The second part focused on the customer insight process and was

[16] The specific websites and annual reports are due to the case companies' anonymity not included in the reference list.
[17] The two longest interviews lasted for 74 minutes (including one follow-up phone interview) and the shortest for 36 minutes. See the complete interview list in *Appendix A*.

inspired by Six Sigma-methodology[18]. A guiding principle was to "[…] capture each of the steps, identify their basic function, and connect them in the manner that represents the process" (Gygi, DeCarlo & Williams 2005, p. 252). Specifically, this included mapping the process with post-its and asking "What happens then?" In line with Alvesson (2011) we originally added a third reflection part with questions like "Is there anything we didn't ask you that you think is important for us to know?", but seldom had time to ask these questions. The overall protocol was adapted slightly for each of the three roles; for example, we put more focus on part one when interviewing the strategic role. The three interview protocols are outlined in *Appendix C*.

The protocols guided our questions during the interviews but were not used as strict inquiry forms. Rather, we carried out each interview based on the approach of semi-structured interviews with the structure developing gradually around our main questions (Drever 1995). We wanted to create an atmosphere where the interviewees could speak openly and we could explore interesting topics that surfaced by asking follow-up questions. Thus, we asked a lot of "Why" and "Can you say a little bit more about…"-questions to delve further into such topics.

After each interview we discussed how we could improve the protocols and our interviewing technique. This led to modifications of the protocols and our approach. For example, we decided to exclude the question about stakeholders since the term seemed to confuse the interviewees. Furthermore, we began to introduce the second part of the interview more clearly to avoid confusing the interviewees with our post-its. We also decided not to attempt to map the entire process with all the clients, as we often had already interviewed the researchers and thus considered it to be more informative to build upon their processes. This allowed us to uncover further details and focus more on the resources and capabilities needed in the interfaces, while still adding another perspective on the process. For the companies working with Psi Consulting we also decided to clarify that we were interested in all types of customer research, not only the research they conduct through Psi. As interviewers, we also got better at avoiding leading questions, learned to embrace silence, and to nod and encourage eye contact as it often led to the interviewees elaborating their answers.

All interviews were recorded on two separate devices to avoid inaccuracies in the material due to poor recall (Yin 2003) and to allow us as interviewers to focus on the conversation itself rather than taking notes. Within a week of the individual interviews all interviews were transcribed.

[18] Specifically, we consulted the Six Sigma expert Deniz Kirdar, Diversity & Inclusion Manager at Maersk Group as well as Gygi et al.'s 2005 *Six Sigma for Dummies* (as recommended by Deniz).

5.5 Analysis Approach

In order to conduct our analysis in a structured manner and to ensure we did not overlook important data or themes, we followed the following steps (I to III):

I. First we looked at the cases individually

In line with Yin (2003), we first viewed the cases individually. Specifically, after finishing all interviews for one case, we discussed what we had heard and summarised our thoughts in an initial impressions document. After having transcribed and read through the interviews, we then discussed our material more thoroughly and made notes for a) (see *Figure 5*).

Figure 5: Structure for Analysing the Cases Individually

a) What is interesting about each case company?
- i. Are there any industry 'peculiarities'? (e.g. how does the company reach its customers; how is the industry developing; are there any unique barriers or channels of data)
- ii. What are the traits specific to the company itself? (how is it organised, how do they work with data, how big is the research function and how is it organised etc.)

b) What do we see from a customer orientation perspective? (which quotes are particularly interesting)
- i. How to the interviewees describe the target customer? (what level of detail; how are the target groups derives; how often are they updated)
- ii. What kinds of data do the interviewees mention are used?
- iii. Which functions are typically involved in utilising the data? (who commissions the studies; who uses the results)
- iv. What types of decisions are made based on the different kinds of data?

c) What do we see from an RBT perspective? (which quotes are particularly interesting)
- i. What do the interviewees say about the company's strategy?
- ii. What do they say about competitive advantages?
- iii. What do they say about capabilities?
- iv. What do they say about resources?

Next, we made a brief overview of key aspects to investigate for both parts of our theoretical framework that would help us code our empirics (see *Figure 5*). Where the key aspects were easily defined for RBT, we discussed the best way to capture aspects of customer orientation. Since our theoretical framework emphasises the target customer and building a detailed profile through several sources of data, we decided to include these two aspects. In addition, we used the functions involved and the types of decisions made as proxies for cross-functional coordination and dissemination of information.

We then divided the interviews randomly between us and read them once more. The objective of the second reading was to code relevant quotes according to the identified theoretical categories. When attempting to separate resources from capabilities we found guidance not only in our definitions, as described in *Section 4.2*, but also in the thought of capabilities as contextualised resources and Grant's (1991) idea that capabilities can be sources of competitive advantage in themselves (as opposed to resources). In accordance with Yin (2003), we stored the coded quotes in a uniform framework, namely Excel data lists. These lists can be found in *Appendices E and F*.

The information gathered by looking at interesting aspects about the case companies was mainly used to frame our analysis and is presented chiefly in the empirics. Similarly, we did not intend to compare or synthesise the customer orientation aspects across cases, rather these provide a context for our understanding of the process and are further discussed in *Section 7.1*. Conversely, we saw a need to further compare and group the RBT aspects as these would form the basis of our analysis of the different roles (see step II). Thus, this initial step of the analysis allowed us to outline what we could expect to discuss based on our interview data.

II. Next we looked at the roles

First, we discussed the researcher, client, and strategic roles without taking into consideration the resources and capabilities, but rather looking at what we had heard in the different interviews. We discussed whether our perception of the interviewees' roles had changed through the interviews and whether there were any differences between the interviewees and roles that we should note.

Thereafter we looked at the resources and capabilities of the researcher and client roles (separately) and evaluated whether they could be grouped naturally into constructs. Our procedure was inspired by grounded theory and thus involved gradual coding of data according to emerging patterns (Alvesson & Sköldberg 1994). Like Strauss (1987, as referred to in Alvesson & Sköldberg 1994) suggests, we looked intensively at the resources and capabilities one at a time by dividing our printed quotes (identified in step I.b)) into different piles. The properties of these constructs are described further in *Section 7.3*. We deliberately coded the Psi Consulting interviews separately, to be able to use this external perspective as an additional lens for our analysis.

Once we had coded all resource and capability quotes we considered whether the resources (for each role) could be linked to the capabilities. We also compared the constructs across the two roles to see whether there were commonalities or anything that stood out. Likewise, we compared the internal constructs with the external ones.

Finally, in order to bring out different nuances or themes, we considered the roles in the context of our cases by investigating whether the constructs play out differently in the different organisations.

III. Lastly we looked at the customer insight process

Having discussed both the cases and roles individually we felt we had sufficient overview and knowledge about our collected data to draw cross-case conclusions (Yin 2003) and address our primary research question of uncovering the process that customer-oriented organisations employ in order to create value with customer data. We decided to focus on the studies executed rather than the on-going collection of customer data and as a result, some interviewees' steps were left outside the process[19].

In accordance with the delimitations of our study, we decided to start by looking at the swim lane[20] of the researcher role. More specifically, we considered this swim lane first since it represents first-hand knowledge as opposed to outside perceptions. After establishing a process, we then added the phases as described by the clients for additional nuance[21]. Hence, we first laid out all phases found in the researcher interviews in chronological order, to see if there were any common or unique phases in the different customer insight processes. Thereafter, we went through the same steps with the phases relevant for the researcher swim lane found in client interviews. Finally, we considered the data collected from Psi Consulting in order to illuminate our findings from a different perspective.

5.6 Reliability

Different ways of evaluating the quality and reliability of research have been suggested (Justesen & Mik-Meyer 2011). While not the most commonly used tests (Yin 2003), we have decided to follow Björkgren's (1986) criteria *empirical correctness*, *the interpretation's credibility* and *usefulness of the results*, as they are very distinct from each other and straightforward and thus, easy to review. However, firstly we address the inherent methodological issues that stem from the RBT being such an established field.

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[19] Especially steps mentioned by Alex were left out.

[20] "The swim lane is an effective visualisation technique that enables each functional contributor to a process to understand their role [...]" (Gygi et al. 2005, p. 254), i.e. the researcher's swim lane shows only the steps of the customer insight process that the researcher role partakes in.

[21] Since they are not our main focus, we combined all clients despite the slight variations in functions (brand manager/PR/media). Hence, the finer points of what they do are considered irrelevant. Focus is on how the client role works together with the researcher role.

Studies drawing on RBT suffer from some common methodological issues that we have not fully been able to overcome (Barney et al. 2001, Barney et al. 2011). Above all, Barney et al. (2001, p. 636) state that "The notion of sustained competitive advantage strongly implies a need for longitudinal analysis, involving both quantitative and qualitative approaches." However, as the authors continue, such comprehensive research is too time-consuming for students and should therefore be carried out by senior scholars. Further, identifying resources and capabilities is considered difficult due to organisations' and interviewees' lack of objectivity (Barney et al. 2001) and the concepts' inherent intangibility (Barney et al. 2011). Thus, we do not claim to have identified all resources and capabilities employed by our case companies, but instead assume that the ones mentioned in the interviews are the most significant for the customer insight process and consequently the most relevant for our research purpose.

Empirical correctness refers to whether "[...] a case description from a fact and content point of view gives a fair picture of the studied course of events" (Björkegren 1986, p. 25, referring to Berg 1979). Our case descriptions give fair pictures of the research area based on our limitations and theoretical starting point primarily since we illustrate the research question from the perspectives of different roles and interviewees (Björkegren 1986, referring to Ödman 1979). Our use of interview protocols also ensured that the interviews were focused on the study's purpose and that bias due to poorly designed questions was avoided (Alvesson 2011). Furthermore, by always interviewing in pairs and carefully recording and transcribing each interview, we reduced the likelihood of us misinterpreting the interviewees. Thus, our data collection method increases the reliability of the empirical material. While we firmly believe that we collected enough data to be able to answer our research question, i.e. that we reached theoretical saturation on an overall level (Alvesson & Sköldberg 1994), we acknowledge that we could have conducted further interviews to confirm the resource and capability constructs consisting of only one quote. A way to increase the correctness could have been to ask the interviewees to read our transcripts and revise or supplement the material. However, due to the length of the transcripts[22] and time constraints – mainly on the part of the interviewees – this was not feasible. In cases where we were unsure about facts we called or emailed the interviewees again to clarify.

Our *interpretation's credibility* rests mainly on our extensive and traceable empirical base in the form of initial impressions summaries, transcripts and data lists (Björkegren 1986, referring to Ödman 1979). Further, the fact that the interviewees followed similar lines of reasoning regarding our research topic – which is reflected especially in the data lists –confirms this credibility. Nevertheless, we acknowledge that our analysis is based on our interviewees' perspectives and that

[22] The transcripts are each approximately nine pages long, single-spaced. The shortest was seven pages and the longest twelve pages.

we do not know whether another set of interviewees would highlight the exact same aspects. Moreover, despite the lack of theory in our specific research field we link our findings to our theoretical framework in the analysis, which further strengthens this credibility (Björkegren 1986, referring to Ödman 1979). Again, asking the interviewees to confirm our interpretation could have increased the reliability even further (Björkegren 1986, referring to Ödman 1979), but time constraints precluded this possibility. Moreover, we acknowledge that we were not completely objective when assuming our investigation, but rather had pre-conceptions based on "[...] own experiences, education or other academic research work" (Holme & Solvang 1997, p. 95). While these may of course have steered our choice of research topic in a certain direction, we believe that our genuine interest if anything made us open and willing to learn more and to take in different views.

In line with Björkegren (1986) we regard our generated theory as one way of viewing the studied reality, rather than as the one true picture of it. Hence, the *usefulness of our results* refers to the extent by which our process map and the associated responsibilities and capabilities help understand the studied phenomenon, namely how customer-oriented organisations create value with customer data. Our findings are based on recurring themes from our collected data and should therefore be complete enough to be used within our limitations. Moreover, since our research area is undoubtedly highly topical and – as far as we know –no other scientific map of the customer insight process exists, we believe that our results could provide a useful starting point for future research.

6 EMPIRICS

This section introduces our four case companies and describes the interviewees' views of the customer insight process, specifically focusing on customer orientation and RBT aspects. Furthermore, this section discusses how the three roles differ among the case companies, in order to provide a sound basis for the analysis.

While the main body of empirics is presented in this section, it should be noted that we also include some further interview information in *Section 7* to exemplify our analysis and make it livelier. Further, to facilitate reading we do not refer to the exact interviewee for each statement. Many statements can however be found in *Appendices E* and *F*.

6.1 Alpha

6.1.1 Secondary data

Alpha is a multinational telecommunications company that employs 2000 employees in the Scandinavian countries and is a relatively new player in the Swedish market. Alpha has set aggressive growth targets, mainly in terms of market share and, among others, emphasises the significance of a positive working environment in order to be able to reach this goal. The industry is characterised by rapid technological advances, which in turn has caused Alpha to focus on developing its technical infrastructure. Lastly, it should also be noted that as Alpha sells directly to its end customer (and due to the type of service they provide), vast amounts of customer data are available to the company in real-time.

6.1.2 Interviewees

Our interviews include four employees and one Psi consultant, covering each of the three roles: Julia is a Market Analyst (researcher), Jesper is the Head of In-House Advertising Agency (client), Pelle is Campaign Leader and Media Manager (client/researcher[23]), Albert is the Head of Analytics (strategic), and finally Frida is a Project Manager at Psi Consulting (researcher). Specifically, Jesper is responsible for all of Alpha's advertising whereas Pelle heads up all campaign project managers as well as Alpha's media purchases and both belong to the Marketing department. In her capacity as Project Manager Frida is responsible for the primary contact with Alpha, as well as all administration tasks for Alpha, selling in projects, and supporting the Psi Analyst.

It should be noted that Julia represents a separate function from the Analytics department, namely Market Research. This is also reflected in the fact that Albert reports to the Head of Operations, while Julia reports directly to the CEO. Albert emphasised that while the two functions work closely together, their responsibilities differ. Thus, Julia works primarily with external data

[23] Pelle's role is difficult to delineate exactly and is therefore discussed further in *Section 6.5*.

whereas the Analytics department works more with the internal database that covers internal and external data on existing customers. As an example, Albert explains that his team builds statistical models to predict which customers are most likely to purchase a product. Julia describes her responsibilities as follows: “[…] I am responsible for most studies that are being bought. […] I have the budget responsibility and the purchasing responsibility, too”.

Detailed interviewee information from all four cases can be found in *Appendix B*.

6.1.3 Primary data

When asked about the company’s goals, one of the first things that all interviewees mention is Alpha’s stated ambition to grow and gain market share. Especially, a strong focus on sales is highlighted with mentions of decreasing churn and increasing revenue. Furthermore, Frida states that brand building is prioritised in order to maintain an edgy brand positioning. According to our interviewees Alpha’s ability to innovate is a clear strength as well as being a young, entrepreneurial challenger in the market. Thus, Pelle emphasises that despite the growth of the company, Alpha still acts as a small company with a flat structure and quick decision making processes. The interviewees also mention that Alpha characterises itself as having good prices, data speed and coverage, as well as an energetic, fresh, and cool brand.

Based on the interviews, it seems reasonable to conclude that the company has a very clear picture of its target customers. Thus, all interviewees mentioned that there are different target groups and all but Julia name three customer profiles by name[24]. The target groups are based mainly on demographics and pieced together with data from several different sources such as media preferences and sales data. Moreover, the targeting is complemented with an understanding that it naturally entails deselecting other potential customers. Thus, Pelle states that you cannot please all target groups and therefore have to focus somewhere. While Pelle accordingly emphasises one target group as Alpha’s core customer at the moment, the interviewees mention that technically, everyone with a mobile phone could be considered a customer.

The focus on growth coupled with the challenger position, arguably is reflected in the way the interviewees describe the role of research. For example, Albert says: “[…] we’re very slimmed and we don’t have this money that [our competitors] have, so we must be more clever, more smarter; we can’t spend money to reach all the population so we need to find the right prospects.” Furthermore, it should be noted that Julia and Jesper both describe the organisation’s vision in terms of the customers. Thus, Jesper says: “We have a guiding-star in mobile communication on

[24] We believe that Julia also knows the profiles, but did not mention them because we did not prompt for specifics. Furthermore, we did not ask all interviewees to describe the three profiles in detail, but believe that they could.

the customers' terms. [...] We will adapt what we do according to [...] how the customer's needs develop". This again is reflected in the way the interviewees describe the work with customer data. Thus, Julia labels the company as analytics-friendly and says: "[...] if you compare us to many other companies I think we are very good at acting on the customer insights we take in". Frida also stresses this when calling Alpha "[...] very attuned to customer insights", also in cases when they challenge the existing internal perception. Frida adds: "[...] they have a great openness towards it and [...] I think it due to the managers that are there, and that they are very open to using that type of data and require that it is being done".

In fact, it seems that Alpha has a comprehensive understanding of how customer data can be used in the daily work. Interestingly, Jesper said after the interview that he at first was hesitant whether he, as Head of the In-house Advertising Agency, was the right person to speak to about customer insight, but that he realised how much he uses data during the interview. For the research functions this focus on data translates into many touch points internally. Thus, Julia describes how she has lunch with people from different departments regularly in order to hear the latest news and discern which topics different persons currently focus on, especially as a preparation for her quarterly reports. At the same time, she describes how she always "[...] works very tightly together with the Head of Marketing and the Project Leaders to follow up on what needs they have". In general, there seems to be a lot of collaboration across functions at Alpha. Frida however mentioned cross-functional collaboration as something Alpha is working on to improve further.

The collaboration across functions is also reflected in the fact that a range of functions, in addition to marketing, are mentioned as users of customer data despite the fact that our interviewees work mainly in the marketing and research functions. According to our interviewees, requests for research can come from the CEO or the Marketing department just as well as from the Infrastructure or Legal departments. Pelle says:

> *It can come from the CEO, saying we should do this. It can be from my boss, saying we should do this. Or it can come from telesales or a department saying 'We're struggling, we need help. How can we improve our numbers?' Since we're so flat it can come from everyone.*

Accordingly, the types of decisions that are based on customer data vary greatly; the interviewees not only mentioned demand planning estimates for how many mobile phones to purchase and investigations regarding reasons for churn, but also store design and decisions on how to improve employer branding. A comprehensive list of functions and types of decisions using customer research can be found in *Figure 6* and *Figure 7*, respectively.

Figure 6: Functions Involved at Alpha

- Board of directors
- CEO
- Customer Care
- Devices
- Head of Marketing
- Head of Operations
- Human Resources
- In-house Advertising Agency (Marketing)
- In-house Media Agency (Marketing)
- Infrastructure
- Internal Analytics
- Legal
- Loyalty
- Market Analytics
- Marketing
- Product
- Region manager (CEO's boss)
- Retail outlets
- Sales
- Telesales
- Top management team

While there does not seem to exist a strict process of how to work with different data, Alpha has clearly divided responsibilities, so everyone "has a certain responsibility, a certain mandate and then you act on that" (Jesper). Jesper describes his way of making sure that the data is used is by breaking it down to very concrete terms of what it means for each person in his team. For example, he would look at the advertising tracking, relate it to what the copywriter did in the last advertisement and try to understand how this affected the tracking. Then they would discuss how she could adapt to the picture given by the data next time. In fact, several interviewees emphasised humility as an important part of working with the data. Both Jesper and Pelle described the importance of being open to continuously questioning your assumptions and your ways of doing things.

Figure 7: Types of Decisions at Alpha

- Adapting strategically to changes in the market
- Adjusting media plan
- Bonus decisions
- Deciding on the optimal target group
- Decisions on in-store communication, design and personnel behaviour
- Decisions on where to improve the infrastructure
- Developing/evaluating advertising concepts
- Evaluations of past campaigns
- How to improve future campaigns
- How to structure offers
- Improving employer branding
- Investigations on reasons for churn
- Media allocations
- Modifications of on-going advertising and campaigns
- Predictions on how many devices to buy from suppliers
- Predictions on what customers that will purchase a certain product
- Product/service decisions
- Segmentation decisions
- Understanding how customers react in certain situations

Moreover, several of our interviewees emphasise starting with the end in mind rather than looking at the data trying to find something interesting. For example, Pelle describes how he starts with a purpose, such as increasing sales for a specific product or through a specific channel, and then uses the data to work backwards to figure out whom he should try to attract with the specific ad campaign. He adds that raw data is useless until you summarise it using your own experience. In fact, he describes the process as building a house where the foundation is the customer data: "Then we build the walls with experience and then sort of the roof with some kind of gut feeling".

Both research departments at Alpha regularly send out and present research results. In this part of the process, Julia emphasises critically selecting the data that is most relevant for individual recipients and that presentations should reflect the current focus of the top management. This she says requires flexibility on the part of the researcher in terms of changing the focus of the analysis from quarter to quarter. Both Jesper and Pelle emphasise the importance of adapting the content to the recipient. Thus, Jesper says that the researcher should select the data points that she thinks he is able to affect in his department. Pelle says that the researcher should take into consideration that the recipient is not necessarily analytical and does not have the time to go through large amounts of data, but rather needs a clear direction for what action should be taken. Last but not least, Julia, Pelle, and Jesper all emphasise taking the time to discuss the findings of the research.

The process maps outlined by Julia and Frida can be found in *Appendix D*.

Due to the nature of its industry, Alpha has an extensive database of existing customers;

> *I mean we collect every information of our customers; how much they spend, who they are calling, what competitors are they calling, if they are calling mostly [certain competitor] customers [...]. I mean we can take out anything. Patterns, behaviour.* (Pelle).

Albert mentions that the company undertook a project to improve the quality of the data contained in the data base and furthermore supplements the internally generated data with purchases of publically available data on demographics such as income and education level. Furthermore, Alpha collects information on the market and competitors on a regular basis, e.g. regarding market share and competitors' campaigns. Alpha also tracks its brand, campaigns, and customer satisfaction. Moreover, Alpha does a lot of concept testing to ensure that new concepts reach the intended sales impact, e.g. focus groups and mystery shopping. Please refer to *Figure 8* for a comprehensive list of types of data.

Figure 8: Types of Data at Alpha

- Advertising concept test data
- Brand tracking data (on customers and firms)
- Campaign tracking data (on customers and firms)
- Competitor data (on campaigns, communication, quarterly results etc.)
- Customer behaviour tracking data
- Customer classification and demographical data
- Customer satisfaction data
- Data from the automatic customer call-ups
- Data on customers' perception of Alpha
- Data on number of sold devices in the market
- Data on the target group's media consumption
- Database on existing customers (incl. sales, demographics, usage patterns etc.)
- Eye-tracking data
- Focus group data
- In-store test data
- Market share data
- Segmentation data
- Store design test data
- Survey data

Figure 9 summarises the stated resources and capabilities that are employed when working with the data. To increase the overview, we list constructs rather than all resources and capabilities mentioned[25].

Figure 9: Resources and Capabilities at Alpha

Resources
- Analytical skills
- Business understanding
- Communication skills
- Calm
- Curiosity
- Experience
- Flexibility
- Humility
- Internal relationships
- Knowledge what data exists
- Project management skills
- Research method knowledge

Capabilities
- Being concrete
- Being relevant
- Clarifying purpose
- Conceptualising the problem
- Connecting insights
- Making recommendations
- Networking
- Translating business issues
- Translating data into action
- Using your judgement
- Writing a brief

6.2 Beta

6.2.1 Secondary data

Beta is a relatively young media company that has approximately 140 employees in Sweden. The company's mission is to provide entertainment and be a good place to work. Like for Alpha, Beta's industry has seen rapid development due to technological advances. The part of Beta's business that we are investigating is Beta's main business. The company reaches its customers mainly indirectly through other media companies, but to a growing extent also directly. However, it should be noted that revenues come mainly from advertisers. Due to customer panels, Beta has a great

[25] In *Section 7.3*, we explain how we summarised all resources and capabilities mentioned into constructs.

amount of customer data broken down on several variables (such as demographics and time period) readily available on a continuous basis.

6.2.2 Interviewees

Four persons were interviewed for the Beta case, three employees and one Psi consultant. The three employees represent one role each: Alex is a Senior Analyst (researcher), Lea is the Head of Analytics (strategic) and Micke is the Head of Public Relations (client). Alex and Lea belong to the Research department where Alex is responsible for research regarding content development and strategy, while Lea is overall responsible for all content research conducted internally at Beta. Micke is part of the Marketing department and is responsible for all press contacts and for creating customer familiarity with Beta's services. The Psi consultant Cecilia is a Senior Advisor and involved in several projects in a strategic role, even though she also contributes to the analysis work.

6.2.3 Primary data

Beta's formal goals of providing entertainment and being a good work place are confirmed by the Psi consultant Cecilia, whereas the employees emphasise being a differentiated niche player with clear goals. Furthermore, the employees consider devoted employees to be something that sets Beta apart from competitors. For example, Lea says: "[…] people that work here […] are super passionate and super dedicated […]". All interviewees also in some way mention growth goals; either as maximising the number of customers and selling contacts to advertisers and thereby making money; as broadening the service (both in terms of increasing the number of sales channels and including more nationally important content); or as growing certain sales channels. Alex also says "our goal is to be the most innovative". Cecilia combines all these goals when explaining how Beta wants to become more mainstream without losing its edge.

One of Beta's strongest competitive advantages is its brand strength among target customers along with its consistent ability to reach these customers. The interviewees also emphasise the small organisation, the competence present internally as well as their abilities to work together across departments and to change quickly.

It seems that Beta has a clear picture of their target customers on a basic level, as all four interviewees directly mention the same age-based group when asked about it. Moreover, Alex acknowledges that they use different more specific target segments "depending on what [content] it is, and what day maybe" and Lea describes the "four sort of personas that we target with different types of [content] and messages". She continues to explain how these personas were defined through a segmentation study three years ago and provide a quite detailed picture of the target customers based on both demographic and psychographic descriptors. The target group descriptions are not dynamic. More specifically, the data being gathered seems to be used to confirm rather than challenge the existing target groups.

The user data received daily through the customer panels is fundamental to Beta's business. In fact, Lea mentions that up to 90 to 95 per cent of decisions are based on these figures while Alex calls them the bread and butter of the company. While other types of customer data do not seem to have been as broadly acknowledged previously, there seems to be an on-going change in the approach to using research for decision making. Thus, Lea says "[...] research is a bit like a spinach some sort of healthy smoothie drink, you know you have to have it, but you don't really want it" and Alex says that the whole organisation has started to push for research. Further, Alex believes that making the whole organisation aware of the significance of research requires acceptance by top management.

Since most analysis work is done in-house, Beta's Analytics department is rather large with ten persons. These researchers act as gatekeepers with external research providers, filtering the information that is passed on to the rest of the organisation. For each study, the types of data used differ and the researchers hence collect data from different sources and bundle it for specific purposes. Another important function of the researchers at Beta is challenging facts that are perceived as truths in the organisation and thereby overcoming cognitive biases formed through people only looking for confirmations to their existing hypotheses.

The Analytics department wants to deliver knowledge and concrete recommendations rather than raw data. To this end, the researchers at Alpha since recently sit (physically) with the team they support in order to be able to partake in the daily discussions and to establish trust. Moreover, Lea says:

> *[...] what I'm trying to get the whole department to do is to take those different sources of data and put it all together and then deliver 'So this is what we recommend', because I think that's what you have to do because all the people who are responsible for [planning], or for marketing, or for [content], they have so many other things to do. They don't have time to read a 20-page presentation, they just don't.*

Cecilia also emphasises the need for the researcher to ensure that the results are relevant and can be used:

> *So it's a lot about sorting out, with all the information that you have, which is the most important and also being able to see what are they going to do with that information –*

not only leaving it at 'Okay I'm going to tell you what it looks like', I'm also going to tell you what you should do to change it.

The customer insight process as described by Alex can be found in *Appendix D*.

The decisions discussed in our interviews were focused on the work with content, which uses mainly (but not exclusively) customer panel data. More specifically, they regarded how data is used to make decisions regarding the content, timing, and marketing. Thus, the Public Relations, Planning, Marketing, and Local production departments were all mentioned. All functions and types of decisions mentioned are listed in *Figure 10* and *Figure 11* respectively.

Figure 10: Functions Involved at Beta

- Analytics
- Content
- Content manager
- Digital media
- Marketing
- Planning
- Planning director
- Public Relations
- Production

Figure 11: Types of Decisions at Beta

- Adjustments of content
- Decisions on planning of content
- Decisions on what content to use (incl. trying to match competitors or not)
- Formulating corporate identity
- How to promote in own channels
- Marketing channel decisions
- Segmentation decisions
- Target segment decisions
- What aspects to push in promotions

As mentioned, user data is heavily used at Beta. Another central type of data is the information on competitors' behaviour, which changes all the time. Beta also tracks their brands and content as well as social media buzz on an on-going basis. Furthermore, the company regularly carries out detailed evaluations of its service and reviews competitor information and trend data at the end of each season. As Head of Public Relations, Micke naturally also emphasised monitoring press visibility and PR-specific company comparisons as well as collecting information from journalists. See all types of data mentioned in *Figure 12*.

Figure 12: Types of Data at Beta

- Brand tracking data
- Content tracking data
- Data on marketing in own channels
- Data on non-content (e.g. logo)
- End-season evaluation
- Familiarity data
- Information about competitors' planning of content
- Information about the competitors' behaviour
- Information from journalists
- Information on the general state of the market
- Market data
- Poor performance evaluation data
- PR comparisons between companies
- Press visibility data
- Segmentation data
- Social media buzz information
- Usage data (general and specific for Beta)
- User insight data

Figure 13: Resources and Capabilities at Beta

Resources
- Analytical skills
- Business understanding
- Communication skills
- Customer understanding
- Humility
- Integrity
- Internal relationships
- Power of initiative
- Pragmatism
- Trust

Capabilities
- Being concrete
- Being relevant
- Clarifying purpose
- Conceptualising the problem
- Connecting insights
- Making recommendations
- Networking
- Translating business issues
- Translating data into action
- Using your judgement
- Writing a brief

Figure 13 summarises the resources and capabilities mentioned (by all interviewees) as employed when creating value with customer data.

6.3 Gamma

6.3.1 Secondary data

Gamma is a family-owned company that employed nearly 1000 persons in 2011. The company operates in the FMCG industry, which is driven by marketing of products and particularly by new launches. Gamma controls the whole value chain and its products are sold through retailers and restaurants. A significant amount of point of sale data exists, but is controlled by the retailers, which can be seen as a barrier. The company vision includes becoming the best in the market and consequently focus lies on drive and innovation as well as quality and sustainability.

6.3.2 Interviewees

We interviewed three employees at Gamma, one researcher and two clients, as well as one Psi consultant. Beatrice is a Customer Insight Manager (researcher) and responsible for deciding what kind of research Gamma purchases as well as sourcing this research and being the main contact for external research providers. This includes “stay[ing] on tip when it comes to new types of data and tracking possibilities” (Håkan) in order to be able to evaluate different methods and suppliers as well as writing the research brief. Ashley is a Brand Manager (client) and Håkan is a Marketing Manager (client). Ashley is responsible for one specific brand and associated decisions regarding for example new launches, design and advertising while Håkan is the overall responsible for a full category of products. All employees we interviewed work in Gamma's Marketing department. The Psi consultant Emma is a Project Manager and thus, like Frida at Alpha, responsible for the contact and all administrative work around Gamma as well as selling in projects and supporting the Analyst in her team.

6.3.3 Primary data

Gamma's formal vision is reflected by the interviewees stating entrepreneurship, quality and enduring for generations as company goals as well as emphasising that meeting customers' needs is central. Entrepreneurship is also highlighted as something that sets Gamma apart from its competitors, along with its flat organisation that enables quick decisions, popular and well-known brands as well as passion for these brands. Håkan phrases Gamma's short-sighted vision in terms of being the best in their field in Sweden and the long-sighted vision as something along the lines of bringing people together. He also combines many of the interviewees' statements about Gamma's strategy and competitive advantage when saying:

> *Our combination of being able to source the market with efficiently produced products – hence, a price that people can afford – and the ability to actually be persons delivering this. [...] So the possibility of being both big enough to make affordable products, but also to be small enough in our minds to react on quick changes and stuff like that.*

Even if Gamma as a whole targets close to everyone, it seems to have a clear picture of the target customers of each of their different brands; "We serve more or less anyone, from the old guys to children, depending on our product" (Håkan). While Ashley gave examples of age-based target groups for two of Gamma's brands, some other brands have target groups based on need or situation rather than pure demographics. Ashley praises social media for providing her with an opportunity to keep an updated view on who the customers of her brand are and to keep track of what they are talking about right now.

According to our interviewees, Gamma conducts fewer studies now than before. Instead they to a greater extent rely on live tests and experiments, for example when launching new versions of their products. In addition, they try to recycle each other's research more. Håkan says:

> *[...] then we got a* ton *of information and some of it we can use immediately and in one or 1,5 years maybe I go back to that research because I have a new question and maybe I find something there. So we try to recycle as much information as possible [...].*

Accordingly, Ashley indicates that the research budget is decreasing. Interestingly, the interviews also point at that failure does not seem to be a big deal at Gamma. That is, making the wrong decision and for example launching a new version of a product that then flops, is not at all viewed as a catastrophe.

Furthermore, the types of research actually conducted at Gamma vary from year to year, depending on if there are new product launches or concepts coming up or if focus lies on observing the brands and the market. Since Gamma almost exclusively purchases finished reports from external research providers and only do minor adaptations internally, they can allow themselves such flexibility. Having Beatrice as a mediator between the external research providers and the organisation also facilitates coordination of research requests and needs. In her responsibility lies also compiling different kinds of data that is then distributed to the different brand teams. Ashley says that she finds these summaries very useful, as there is so much data she could be looking at. She states: "For [her specific brand] we have a lot of research, *a lot of* – and we *like* doing research [laughter], so we have a lot of data. So… then I'm really working with it."

While the Customer Insight Manager is responsible for evaluating research methods and purchasing studies, Håkan points out that every manager's personal attitude towards different types of data influences the decision of what data to use. The objective of the research however seems to be even more influential; Beatrice says:

> *We have a discussion, because the most important thing before we go out for testing is to do a proper problem analysis of course. This is absolutely the most important thing: What do we really need to know? Because we have to create a purpose of the study and […] My mantra is the following: a study can never be better than its purpose.*

Ashley emphasises that as a client she is responsible for knowing the brand and the previous studies done in order to be able to provide context to new data and findings. Furthermore, she mentions that she sometimes provides input for target group selection and checks the questionnaire for focus group studies. Moreover, Beatrice explains that she collaborates with the client to calculate the final business case based on the findings of the research studies. Beatrice adds that following the final presentation to management she is responsible for commissioning additional concept tests if necessary. While the Customer Insight Manager is responsible for market research, Gamma has a separate team working in the Sales department that handles and analyses sales data. Since the cooperation with the Customer Insight Manager is limited and since we did not interview anyone from this team, we do not know how they work with customer data.

The customer insight processes outlined by Beatrice and Emma, the researchers interviewed, can be found in *Appendix D*[26].

Since the Customer Insight Manager is a part of the Marketing department, most decisions based on customer data naturally regard decisions regarding the four P's[27], for example design changes, evaluations of campaigns, and setting the marketing plan. The results however affect also other departments, such as Production and Public Relations. Ashley also tells that she sometimes uses customer data to prove the effects of her marketing work towards other departments than Marketing and Sales and Håkan says that research is used to build negotiation arguments for Sales to use towards retailers and restaurants.

All functions and types of decisions mentioned are listed in *Figure 14* and *Figure 15*, respectively.

Figure 14: Functions Involved at Gamma

- Brand managers (Marketing)
- Customer Insight Manager (Marketing)
- Marketing
- Marketing director
- Marketing managers
- Procurement
- Production
- Public relations
- Restaurant department
- Sales
- Sales Analytics
- Top management team

Figure 15: Types of Decisions at Gamma

- Adjustments of design
- Advertising adjustments
- Building negotiation arguments
- Decisions on changes in the communication platform
- Decisions on how to buy media
- Decisions on whether to continue/invest more in a project
- Developing existing products
- Doing a marketing plan
- Evaluations of marketing concepts, incl. communication, advertising and campaigns
- Marketing decisions
- Media allocations
- Positioning decisions
- Product launch decisions
- Production decisions
- Proving effects of marketing
- Understanding customers' drivers
- Understanding the customers' current desires and concerns

Gamma leans on a wide array of data in its decision making; besides the standard sales figures, this includes brand tracking, social media monitoring, concept testing as well as trend reports and trend presentations from suppliers. In fact, Håkan holds that gathering the data is like completing a puzzle and that the more pieces you can gather, the less risky your decision will be. Besides customer data he also emphasises for example live experiments and input from the sales channels. Further, even though Gamma now commissions fewer research studies, they still from time to time conduct studies on category drivers and market position and once a year, they do trend spotting traveling. See all types of data mentioned in *Figure 16*.

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[26] Emma describes the process from Psi Consulting's point of view.
[27] Product, Place, Price and Promotion, i.e. the marketing mix.

Figure 17 summarises the resources and capabilities mentioned (by all interviewees) as employed when creating value with customer data.

Figure 16: Types of Data at Gamma

- Advertising test data
- Advertising tracking data
- Brand tracking data
- Category driver data
- Channel checks (in stores/restaurants)
- Design test data
- Information from restaurateurs on trends
- Information from suppliers on trends
- Information on general talk about Gamma online, incl. social media
- Launch follow-up data
- Launch test data
- Packaging test data
- Positioning data
- Sales data (own and from retailers)
- Trend reports
- Trend spotting travel data, incl. ethnographical interview data

Figure 17: Resources and Capabilities at Gamma

Resources
- Analytical skills
- Business understanding
- Market knowledge
- Commercial mind-set
- Customer understanding
- Integrity
- Internal relationships
- Passion
- Project management skills
- Research method knowledge
- Research vendor knowledge
- Timing

Capabilities at Gamma
- Approving the research set-up
- Assessing the need for data
- Being humble
- Building hypotheses
- Clarifying purpose
- Challenging
- Conceptualising the problem
- Connecting insights
- Putting into context
- Translating data into action
- Writing a brief

6.4 Delta

6.4.1 Secondary data

Delta is a multinational FMCG company selling products in several different categories through retailers. Just like for Gamma, the industry is characterised by new launches and extensive marketing and access to point of sale data from the retailers is not always given. Delta's goal is to simplify people's lives as well as to grow profitably while caring for the environment. In Sweden, Delta in 2011 employed nearly 800 persons.

6.4.2 Interviewees

We interviewed Erika, Head of Customer Insights (strategic), already for our pre-study. For the case study we therefore interviewed one researcher and one client: Casper is Customer Insight Manager (researcher) and Filip is Brand Manager (client)[28].

Erika is overall responsible for the Customer Insight department, which in turn is responsible for the data collection and contact to all external research providers as well as for ensuring "that the data is accessible and correct" (Casper). Casper's responsibility within this department regards supporting a specific category team and the media tram with research. The Customer Insights department is a separate department reporting to the Region Head. Filip is just like Ashley at Gamma part of the Marketing department and specifically responsible for a specific brand and related decisions regarding the four P's.

6.4.3 Primary data

It seems that the interviewees at Delta have a clear picture of the company's goals, as they mention both the ambitious growth and sustainability targets. The strategy is underpinned with the stated competitive advantages of strong brands and branding knowledge, being able to leverage the size and organisational structure of the company and keeping the customer at heart in decisions.

Just like for Gamma, there is a variety of target customer groups among Delta's different brands. Talking about Delta as a whole, Casper says "if you're between ten and death, you're a possible consumer". Filip however specifies the target group for his category as women over the age of 45 and highlights the importance of relating how this customer group thinks to product and marketing decisions. The fact that Delta from time to time conducts segmentation studies further indicates that the target customers are dynamic.

Generally, the way Delta works with customer data is very structured and widespread. Casper says that they work with data "[...] in every way possible, but also reasonable" in regards to money and labour. There also seems to be organisationwide buy-in for the value of customer data. A symbol for this can be seen in the research function's development over the past decade; it has gone from being a part of Sales and Marketing and as such, a pure market research group providing data, to becoming a separate support function integrated in the process of making use of data. Erika attributes the development to the recent shift in the top management team and the associated shift from focusing on shareholders to customers. She says that this mind-set has cascaded down in the organisation and become the natural way of thinking.

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[28] We considered interviewing Erika a second time, but went through our notes from the pre-study interview and compared it to the interview guide for the strategic role and decided that we already had the most important answers and that Filip and Casper's answers filled the gaps about the background questions.

Being a separate function, the Customer Insight department emphasises their role as not only providing other departments with data, but with full solutions. Moreover, the interviewees highlight their role in defending research conclusions from a customer perspective, or as Erika puts it: being "guardians of the data". This could be against the internal client, but Casper also gives the example of how the international business can put pressure on the local teams to launch certain products or formats and how he then has to argue for why it may not be a good idea. He further mentions that Delta's clear customer focus helps him protect the customer perspective.

It seems to be important to the interviewees to make sense of the masses of customer data they have available; Casper says that due to the amount of data Delta has available, it is very easy to look at the wrong thing and you cannot be sure to find the best or even the right answer. Filip says he could look at data all day if he wanted and emphasised being able to both understand when it is necessary to look at data and how to draw conclusions. Further, Erika states that: "Data is just a dead figure until you interpret it".

In order to be able to interpret the customer data, the researchers focus on getting the research question right. Casper says:

> *It goes back to the hypothesis; everything derives from there, because if you haven't got that one right, you're going to present something that doesn't make sense to them or you present a problem or opportunity that they don't see.*

Recommendations are normally summarised in a one-page form and presented to Marketing and Sales as well as sometimes the Research & Development department. At these meetings, the clients take active part. Filip says:

> *I think it's about airing the questions we have with the results, questioning them on their findings and their conclusions and their recommendations; if they recommend us to do something to really make sure that we understand why do they recommend that. [...] To make sure that we understand where that is coming from, so we don't just take that as a truth.*

The relationship between researchers and clients is hence based on a fundamental layer of trust and challenging each other. Casper says:

Well, basically it's an equation of the relationship and trust that we've built up up to that point. Because if they feel that they can't trust my work, either they won't ask me or they won't really take it into account when making a decision.

Once research results have been delivered, Erika admits that in the ideal case, the researchers would follow-up on recommendations, but that they are not there yet. The complete processes as outlined by Filip and Casper can be found in *Appendix D*.

Brand managers hold a central role in Delta's business and have many touch points, both internally with other departments and externally with different agencies. Each Customer Insight Manager works with a specific product category and in addition, represents an expertise area like media insights. Hence, the research department is "[...] a heavy business partner to Sales and Marketing" (Erika). Casper even says that he works more closely with his product category team than with the rest of the Customer Insight team, despite not sitting (physically) next to the category people. Further, while sourcing data is the responsibility of the Customer Insight team, Marketing is intensively involved when building hypotheses and setting the research questions, and both Sales and Marketing provide customer understanding that helps the researchers draw relevant conclusions.

Due to the Brand managers' central role, most research at Delta is used to make decisions based on the four P's. For example, product launch decisions, positioning, media and sales channels, driving the brand and category, and advertising are mentioned in the interviews. In addition, the interviewees highlighted how Delta uses customer data extensively for setting the upcoming year's strategy; the different studies done throughout the year feed into the picture presented at the yearly business planning meetings. As Casper says:

We work with data in a way to try to make more educated decisions for the future. I mean, we work with follow-ups, but the reason you follow up is to make a better decision next time you're supposed to do something or a similar thing.

All functions and types of decisions mentioned are listed in *Figure 18* and *Figure 19*, respectively.

Figure 18: Functions Involved at Delta

- Brand managers (Marketing)
- Category managers (Marketing)
- Customer Insight
- Head of Customer Insight
- Marketing
- Media managers (Marketing)
- Research & Development

Figure 19: Types of Decisions at Delta

- Brand positioning decisions
- Communication decisions, incl. advertising
- Design decisions
- How to drive the brand/category
- Marketing decisions
- Media allocations
- Price decisions
- Product launch decisions
- Sales channel decisions
- Setting the upcoming year's strategy

The interviewees agreed that Delta has access to a lot of data, both qualitative and quantitative, possibly due to their size and multi-nationality. Still, Delta seems to have a clear picture of the different types of data available and what data to use for what purpose. Thus, Casper described different categories of data that he uses to narrow down the 'answers' for his hypothesis, starting with sales, going through buyer behaviour data, and finally looking at brand data.

The base of all customer data they use is sales data, which Delta continuously receives both through own sources and through retailers. Delta also regularly collects data on the market, their brands, customer preferences and behaviour as well as social media buzz. In addition, specific research studies are often carried out to find out more about e.g. trends, category drivers and price elasticity. See a list of all types of data mentioned in *Figure 20*.

Figure 20: Types of Data at Delta

- Brand equity tracking data, incl. promotion activity tracking
- Brand health data
- Category driver data
- Customer decision tree data
- Customer panel data on e.g. buyer behaviour and distribution
- Data on customers' perception of Delta's brands
- Focus group data
- Information on media coverage
- Media behaviour data, incl. social media monitoring and general talk
- Overall market data
- Positioning data
- Price elasticity data
- Retailer scanner data
- Sales data
- Segmentation data
- Shop along data
- Trend data

Figure 21: Resources and Capabilities at Delta

Resources
- Analytical skills
- Business understanding
- Communication skills
- Customer understanding
- Humility
- Integrity
- Internal relationships
- Power of initiative
- Pragmatism
- Trust

Capabilities
- Being concrete
- Being humble
- Being relevant
- Challenging
- Making recommendations
- Translating data into action
- Writing a brief

Figure 21 summarises the resources and capabilities mentioned at Delta as employed when creating value with customer data.

6.5 Overview of the Three Roles

Table 1 summarises what roles we interviewed in the different case companies. It should be noted that we did not interview anyone in the strategic role at Gamma[29]. Furthermore, two interviewees were difficult to categorise. Firstly, Pelle sometimes acts as a client, requesting studies from the research departments, and sometimes as a researcher, by collating and presenting data to his own team. Secondly, Lea is function responsible for Beta's researcher group, but is also sometimes involved in analysing the data much in the way the researchers do. Further, two of the Psi Consulting interviewees are researchers, whereas one can be considered strategic due to her responsibilities at Psi. The clients all represent different aspects of marketing functions. However, Micke distinguishes himself the most by only receiving data, rather than actively requesting or ordering it.

	Alpha	Beta	Gamma	Delta
Researcher	Julia, (Pelle), *Frida*	Alex	Beatrice, *Emma*	Casper
Client	Jesper, (Pelle)	Micke	Ashley, Håkan	Filip
Strategic	Albert	Lea, *Cecilia*	-	Erika (pre-study)

Table 1: Roles Interviewed per Case Company

We thus acknowledge that the interviewees within each role do not match each other or the role description exactly. However, we do not view the differences as significant and hold to that they still provide three distinct but comparable perspectives of the customer insight process.

Alpha, Beta and Gamma have separated sales data from customer data in different research departments, whereas Delta has one research function working with both. The Internal Analytics department and the Market Analysis department at Alpha, however, work closely together. The research departments at Alpha and Delta are furthermore separated from the Marketing department, as opposed to Beta and Gamma. At Alpha, one research group reports to the Head of Operations and the other reports directly to the CEO. At Delta, the research group reports to the regional Head of Customer Insights.

Distinct from the other case companies, Beta's researchers sit (physically) with the departments that they support. Gamma's researcher also distinguishes herself somewhat from her counterparts in the other case companies as well as from our definition of the researcher role by only rarely providing recommendations to the clients. Instead, her focus lies on sourcing research projects and developing briefs. Thus, she acts as a gatekeeper between Gamma (and the marketing department specifically) and the external research providers.

[29] We are uncertain which person at Gamma holds this position, but believe it is one of the Marketing managers. Unfortunately they were unable to participate in an interview.

Furthermore, the internal and external research roles are comparable, since the way they act is very similar. In the same way as the internal researchers can be viewed as clients in relation to the external researchers, the external researchers can be viewed as clients in relation to the data processing analysts. Thus, they must both clarify the scope and aim of the research and manage the relationship with the client. The only discernible difference is whether the researchers' own clients are internal or external. While we did not interview any external researchers for the Delta case, we see no reason to believe that their roles would significantly, mainly because the resources and capabilities attributed to Delta's researchers are comparable to the ones attributed to Psi researchers. See the relations between the roles in *Figure 22*.

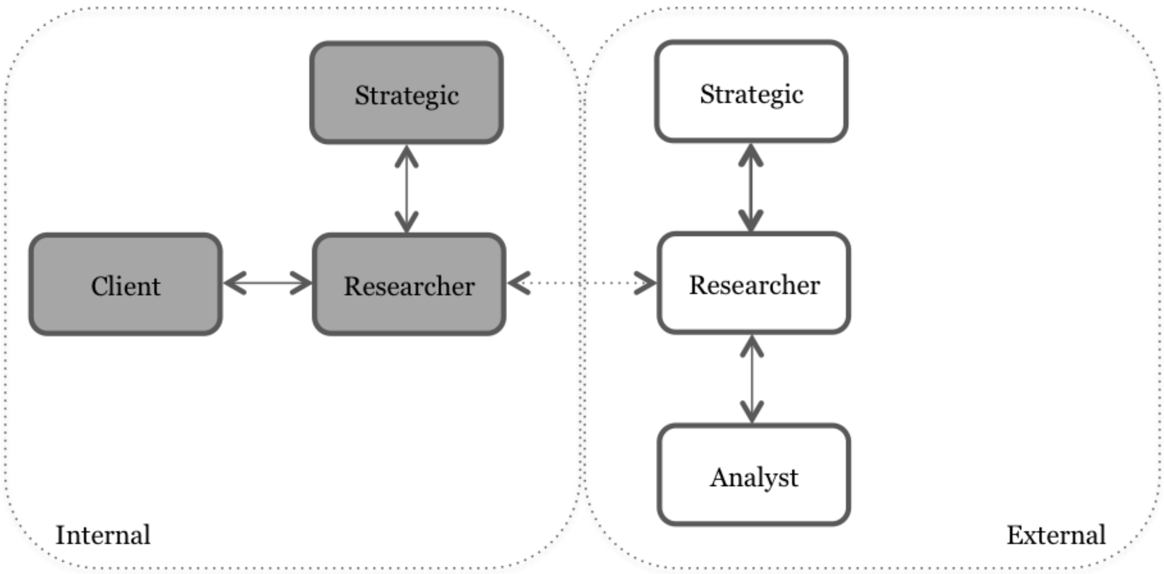

Figure 22: The Relations between the Roles

6.6 Overview of the Cases

In order to clarify a number of parameters that we – in addition to responsibilities and capabilities – find interesting, we provide an overview of all four cases in *Table 2*. We return to these aspects in *Section 7.5*.

	Alpha	Beta	Gamma	Delta
Separate research function	Yes	Yes	No	Yes
Do researchers sit (physically) with client	No	Yes	Yes	No
Who does the research function report in to	CEO/Head of Operations	Planning Director	Marketing Director	Region Head
Customer included in goal	Yes	No	Yes	Yes
Budget viewed as a constraint to research work	No	No	Yes	No
Top management support	Yes	Yes	Yes	Yes

Table 2: Overview of the Four Cases[30]

[30] Here, management support refers to whether interviewees express that they have this support for working with data.

7 ANALYSIS

This section addresses each of our research questions in turn by examining the customer insight process and its central responsibilities and capabilities. First, we apply our theoretical framework to analyse how the companies work with data in general terms. This will serve as the springboard for the subsequent examination of the customer insight process. We will start with mapping the process, outlining the responsibilities of the researcher and client roles. Next, we will describe the identified resources and capabilities. Then we will combine the process with resources and capabilities in order to add greater nuance to our understanding of the process. Last but not least, we will use the differences between the cases to draw preliminary inferences about the influence of the broader organisational context on the customer insight process.

7.1 Setting the Stage

This initial analysis section aims to shed additional light on the basis of our study, namely the four case companies, by using basic properties of customer orientation and RBT theory. Thus, by examining the four aspects of customer orientation (outlined in *Section 5.5*) we make inferences about the generation and dissemination of data and the companies' responsiveness to the data gathered (as outlined by Kohli and Jaworski 1990). As described, we deliberately chose companies that can be characterised as customer-oriented for our study; thus, the purpose of this analysis is not to determine *whether* the companies are customer-oriented (nor to rank them), but rather to highlight the different ways in which this customer orientation influences the work with data.

Furthermore, we map the RBT core stream (as defined in *Section 4.2.1*) for each of the case companies. The purpose is to examine whether the companies use strategy formulations and competitive advantages supported by resources and capabilities that in turn reinforce their customer orientation[31].

In order to ease the understanding and provide a quick overview of the resources and capabilities, we again use constructs rather than listing all the ones that were mentioned in the interviews[32].

7.1.1 Alpha

The strong customer focus in Alpha's strategy and competitive positioning arguably trickles into the way the company works with data. First and foremost, the image of the target customer is detailed and developed based on many sources of data, but the company also tracks developments within the segment in order to capture emerging trends. Furthermore, based on the interviews it is apparent that intelligence is generated across a number of functions (Market Research, Marketing,

[31] The resources and capabilities listed are based on our limited definition of resources, as opposed to the competitive advantage and strategies. Thus, there are certainly more resources and capabilities contributing to the latter two steps of the core stream and we will apply the necessary prudence when evaluating the link between capabilities and competitive advantage.
[32] In *Section 7.3*, we explain how we summarised all resources and capabilities mentioned into constructs.

and Analytics) and disseminated in equal measure. This can for example be seen in the range of decisions that are driven by studies of customer data. These facts taken together with the extensive concept testing and the large investment in procuring data to optimise marketing spend indicates a high responsiveness to customer data. This is again reflected in the stated competitive advantage of acting on customer insights.

At the operational level, the focus on customer research is supported by a number of resources and capabilities. Interestingly, *humility* and the implied willingness or openness to listen to customer data was mentioned as a key resource. Furthermore, the *using your judgement* capability is only mentioned by interviewees at Alpha, which together with for example the *being relevant*, *connecting insights* and *translating data into action* capabilities supports Alpha's characteristics.

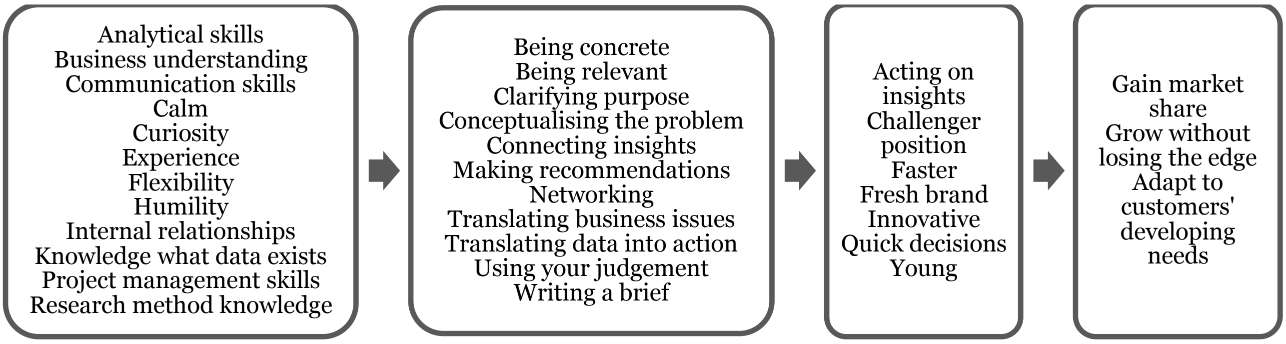

Figure 23: Resource-Based Theory Core Stream for Alpha

7.1.2 Beta

While strategy and competitive advantage formulations of Beta do not explicitly involve the customer, the goal of being an innovative, edgy niche player arguably impacts the way the company works with customer data. Specifically, the interviews reveal a great commitment and responsiveness to data at the tactical level, with a range of content decisions being made on a foundation of customer data. Interestingly, this is achieved with a quite concentrated generation of intelligence (done by the researchers) that is subsequently disseminated broadly in the organisation. It should also be noted that due to the strong focus on innovation, it appears that the company is more responsive at the tactical level than the strategic level. Thus, while the interviewees are certainly able to describe the target groups with great clarity, the description of target segments is not updated continuously and more long-term issues identified in the brand tracking (such as sales channel developments) are given comparatively less attention.

The company has worked quite committedly to expanding the dissemination of data, which is interesting in combination with the competitive advantage that highlights human resources. This is reflected at the operational level with the resources *humility*, *integrity*, *trust*, and *internal relationships* linked to the capabilities of *being humble*, *challenging*, and *being relevant*.

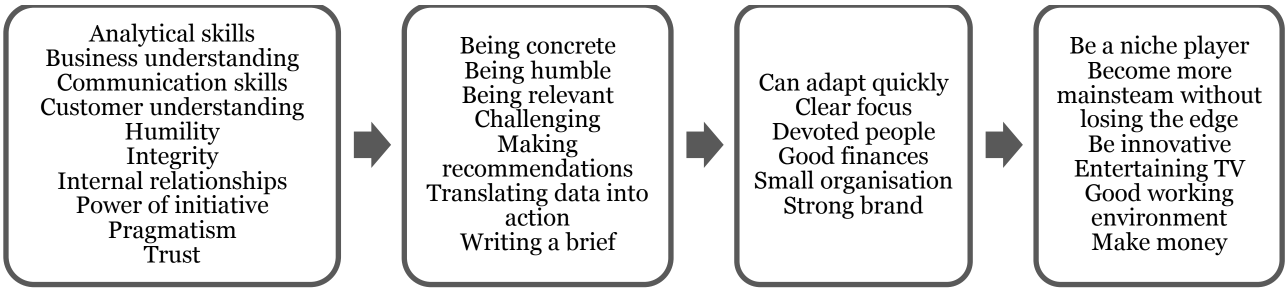

Figure 24: Resource-Based Theory Core Stream for Beta

7.1.3 Gamma

It appears that the interviewees have a clear picture of the target customers, which vary by brand. Naturally, this underpins the strategic goal of meeting the customers' demands. However, we did not find evidence that the company has clearly defined who it does not serve. This could impact the way that data is gathered because it will arguably be necessary to gather data on a wider range of customers.

Since our interviews were all with people from the Marketing department, our ability to draw decisive inferences about the breadth of the cross-functional generation and dissemination of intelligence is naturally limited. On one hand, it seems there is a distinct separation between market research and sales data, whereas on the other hand the marketing people underline the importance of collaborating closely with Sales. Still, it appears that Gamma applies great deliberation in selecting a range of data sources in order to build a reliable picture of customer preferences. This arguably supports the strategic focus on innovation and profitability.

At the operational level, the interviews reveal a clearly defined research role and great deliberation on the part of the clients as to how they can use the resources and capabilities of the researcher role in order to gather accurate intelligence. This is reflected in the resources through the emphasis on *analytical skills*, *research method* and *research vendor knowledge* and in the capabilities of *conceptualising the problem*, *building hypotheses*, *approving the research set-up*, and *challenging*.

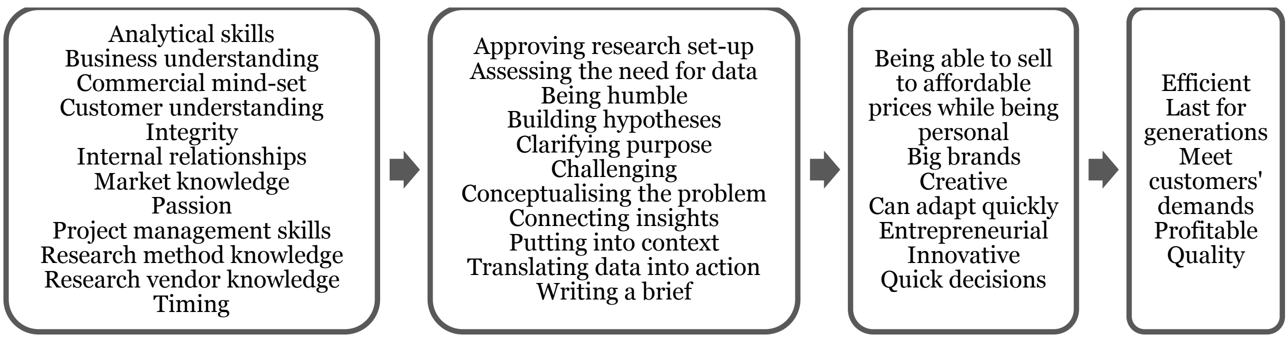

Figure 25: Resource-Based Theory Core Stream for Gamma

7.1.4 Delta

Delta's strategy of filling people's lives with meaning is reflected in the clear picture of target customers that vary according to brand. Unfortunately, our interviews did not focus on how the target customer description is updated over time, so it is difficult to say whether this work supports the growth strategy.

The focus on having the customer at heart has a clear impact on the generation of intelligence. On the one hand it supports generation on the basis of a wide range of sources to get a thorough understanding of the way customers think. On the other hand, the mandate for collection of information rests mainly with the research function supported by sales and marketing, which narrows the cross-functional collaboration. In addition, based on our interviews it appears that the dissemination of the intelligence is mainly focused on the marketing and to some extent sales and R&D functions.

As mentioned, Delta not only has a very clear picture of which data sources provide what kind of input, but also a very structured way of working with the data. This is clearly reflected at the operational level, where there is a deliberate collaboration between researcher and client. This is also seen in the emphasis of resources such as *trust*, *communication*, and *analytical skills* and capabilities such as *being humble*, *challenging*, and *being relevant*.

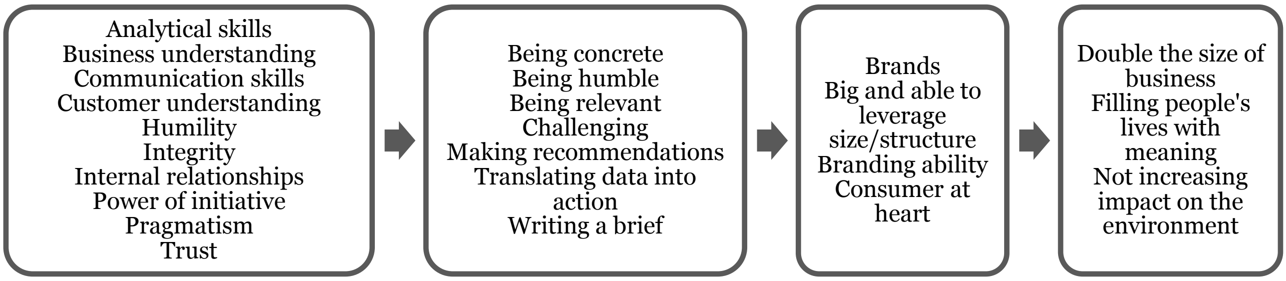

Figure 26: Resource-Based Theory Core Stream for Delta

7.1.5 Implications for Analysis

The four cases taken together are a good reflection of the inference of Myers et al. (1979, p. 19) that an externally focused company will naturally have "[...] a heightened awareness and stronger motivation for information-gathering and marketing research." Thus, we see that the customer focus in strategic goals is not only reflected in the stated competitive advantage, but also in the commitment to working with data. This in turn affects the breadth of sources of data considered as well as functions involved in the generations and dissemination of intelligence.

At the same time, it is possible to discern a range in terms of different implementations of customer orientation in accordance with Kohli and Jaworski (1990). Thus, while the companies can all be said to be customer-oriented they all emphasise different aspects. This is reflected both in the coordination between functions but also the type of resources and capabilities that are employed in this coordination.

This initial section has two important implications for the remainder of our analysis. Firstly, the emphasis in all case companies on employing a customer insight process constitutes an opportunity to create a detailed generic process by compiling the perspectives provided by each case. Secondly, the differences in how the companies have implemented their customer orientation provide a springboard for our discussion of the ways that the organisational context impacts the customer insight process. The prior is the focus of the next three sections that outline the responsibilities and capabilities of the generic customer insight process, whereas the latter is further discussed in *Section 7.5*.

7.2 Mapping the Customer Insight Process

In this section we will outline a generic process for creating value with customer data based on input from our case interviews. Since the process maps we collected were built through semi-structured interviews, the level of details for different stages of the process will naturally vary. This, however, should not be taken as an indication that the stage is less important. As an example the process map for Alpha contains very little detail on taking action; however, other interviews clearly show that the company does indeed act upon customer insights on a regular basis. At the same time, we did not perceive significant differences between the case companies in terms of which process stages were described by the interviewees.

Consequently, we do not find it instructive to outline the individual processes for each case company in this section (however, they are depicted in *Appendix D*). Rather, we have created a composite of the different processes as we deemed that it gives a more detailed picture.

7.2.1 Focusing on Studies

From our interviews it became apparent that most of the case companies have selected a limited number of KPIs that they track systematically and regularly over time. Some of the people we interviewed highlighted how these help them not only to build an understanding of the industry but also to identify patterns and track changes. In turn, this can result in action (in the form of minor, tactical adjustments) or the decision to study the issue further to identify the root causes. Thus, Alex explains that

> *[…] every day we get the [tracking] data from yesterday's [tracking] divided in all kinds of target groups, so that's sort of what we get every day […] so we can respond on that*

immediately. And then we take all of this data and make broader research, looking into things.

This distinction between tracking and studies has consequences for our analysis. Specifically, Day (1994, p. 47) states that:

Processes will differ depending on whether the focus is on using routine tracking information, undertaking continuing inquiries to support other ongoing processes such as product ideation, or making nonrecurring inquiries into new opportunities or threats.

Consequently, our interviews and the resulting process maps focus mainly on the process for carrying out a study that is initiated because of a change in the environment or a gap in knowledge. Thus, our findings say little about for example how you select the KPIs for on-going tracking, when these measures are revised, and how the people responsible for the tracking make their decisions.

At the same time, it should be noted that the exact delineation between on-going tracking and deeper studies is somewhat elusive. Thus, as described by our interviews studies are often commissioned in order to explain findings from the on-going tracking. Similarly, as Filip pointed out the studies can form part of the data that supports the continuous strategy formulation. Thus, while we do not focus on the dynamics of the on-going tracking, it seems relevant to consider it as a pre-phase to the process we have identified, see the next section.

7.2.2 Introducing the Phases

After merging the process maps derived from our interviews, we identified six discrete phases. *Figure 27* is based on a summary of these process maps and outlines each of the phases described and their primary outcomes (*Appendix D* shows all process maps). Taking a starting point in this overview, we examine each of the phases in turn. The aim is to outline a generic process that specifies the purpose of each phase as well as the responsibilities that the researcher and the client take in order to ensure that the output in fact helps create value.

While the process is outlined as linear, it is important to note that reality is likely to be far less linear with phases occurring in parallel or looping back. For example, Alex emphasised that it is difficult to say when things start and end, because many different types of market research take place at the same time and are interlinked in different ways. Furthermore, Casper highlighted the importance of sometimes circling back and reviewing the hypothesis to ensure that the study is focused on the right issues.

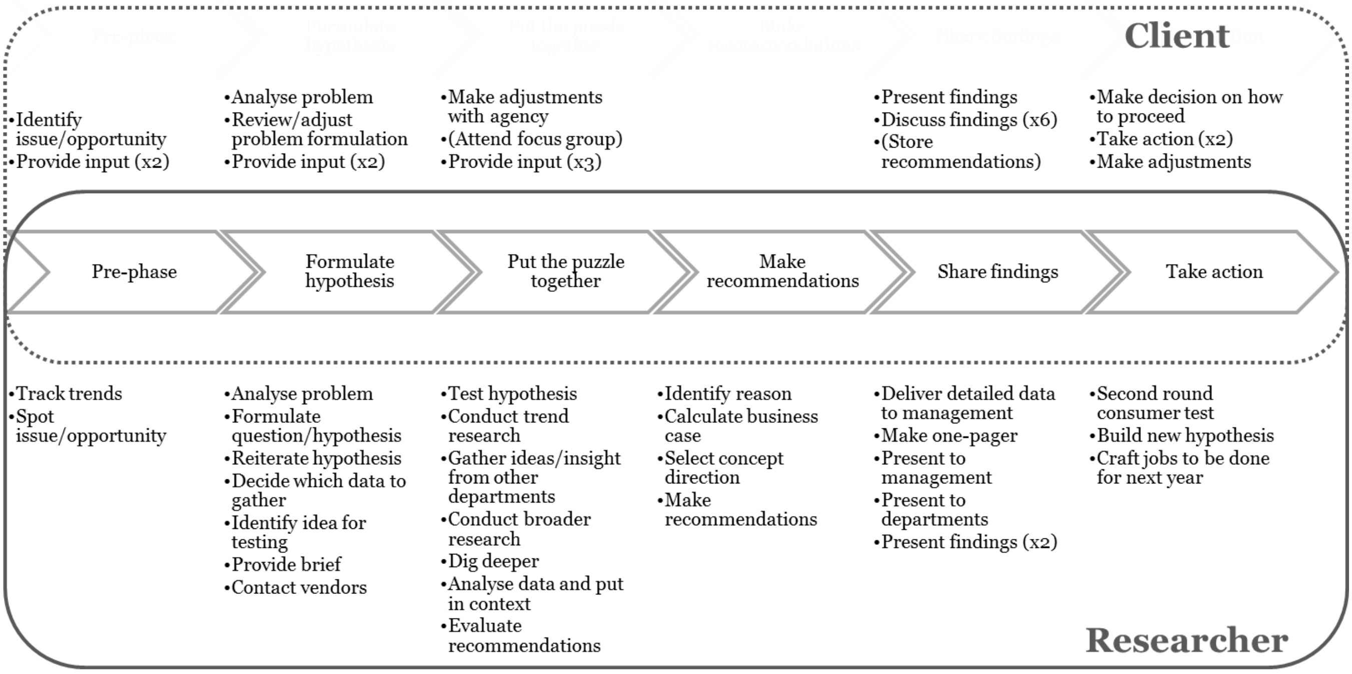

Figure 27: Summary of Interviewee Process Maps

Pre-Phase

In this phase, the responsibility of the researcher is to monitor selected KPIs such as sales data and brand tracking results over a relevant period of time. Furthermore, the researcher is responsible for sharing basic analyses and overviews of developments with internal stakeholders, such as sales and marketing. In addition, several interviewees mentioned the importance of keeping close contact with internal stakeholders in order to engender a deeper understanding of the data they are tracking, as well as to anticipate the needs for data collection.

As mentioned, the purpose of the tracking is to spot patterns and irregularities that might require some kind of action from the company or to identify knowledge gaps that requires filling. However, another important responsibility of the researcher that was mentioned is to challenge the client's perception of the market. Thus, Lea explains:

> *Or that sometimes things just sort of take root; they become truths and you feel like 'Where does that truth come from and how true is it?' [...] So you have all those truths that you need to challenge once in a while.*

On the other hand, our interviews show that the client has the ultimate responsibility for tracking the market and industry developments. Thus, the client supports the researcher by providing input from a wider market scan (including, but not limited to, general media, industry press, blogs and social media) and knowledge of category development in order to help explain patterns in the data. This also allows the client to screen out some issues or opportunities so that they are not considered for further study. For example, one interviewee mentioned a significant spike in sales data that was disregarded because information from the local sales manager revealed it to be the result of a local annual sale.

Depending on the role of the client, he or she may also have a deciding role in determining the mandate of the research function. Thus, one interviewee explained that he and the Head of Marketing would decide how much concept testing should be done in general. Another interviewee described that the type of work the research function performs varies with the current state of the company. Specifically, in periods with a lot of new launches the researcher would be responsible for conducting tests and launch follow-ups whereas in periods with few new launches, the researcher would focus mainly on tracking and monitoring brand developments.

As mentioned there are three possible outcomes of the pre-phase, namely the client can decide to maintain status quo (that is make no changes to current operations), the client can make minor tactical adjustments, or the researcher and client can jointly decide to conduct deeper research based on identified patterns.

In conclusion, the purpose of this phase is to decide whether further research is needed.

Formulate Hypothesis
This phase is only initiated if the client and researcher have identified an issue or opportunity that requires further research.

The responsibility of the researcher is to help the client clarify and conceptualise the issue he or she wishes to investigate. This requires a thorough problem analysis and possibly a number of reiterations of the purpose of the study. Thus, one interviewee explains: “I try to explain what type of issue I have and what my hypothesis about the problem is and then we discuss of course whether or not it’s quant or qual research and what types of options there are.” It may also be necessary for the researcher to challenge the client’s problem formulation. Last but not least, it is up to the researcher – based on the purpose of the study – to specify what *type* of study is best suited and to consider different providers for the task. If the researcher deems that an external research provider should be contracted, she draws up a research brief and contacts the relevant providers.

The client, on the other hand, supports the researcher by providing a clear objective for the study. Several interviewees emphasised the importance of the client having a clear picture of what the goal of collecting the data is. Furthermore, the client helps specify the parameters of the study, for example by providing input on which target groups should be included, providing a specific concept for testing, or selecting ads that should be compared.

This was defined as a crucial phase by several interviewees. Beatrice explains:

> *[…] if you haven't considered carefully what it is you want to know, which [research], which information need you have, then… then you will of course get answers to the wrong things, then maybe you do a study that answers to something, to something that you already knew, or that you have no use of knowing […].*

In conclusion, the purpose of the phase is to uncover what question should be answered through a thorough problem analysis, thereby deriving and clearly outlining the purpose of the study.

Put the Puzzle Together

In this phase, one of the researcher's responsibilities is to manage the relationship with external providers of data. Specifically, this means providing a focus for the commissioned reports and setting up any customer tests that may be carried out. Furthermore, the researcher puts together different sources of data to build a story that can explain the phenomenon under investigation. This includes checking existing data (e.g. from previous studies) as well as gathering information from people in different departments to add another layer of analysis. For example, Håkan explains:

> *We launch products just to test, to get the feedback in what the consumers think and act, because we find it harder and harder to ask people, or at least to get the full picture of what they think, by just asking, so we need to complement that with other types of information gathering.*

On the other hand, the client is responsible for checking the questionnaire for surveys and focus groups to ensure that the right questions are covered. Perhaps most importantly, the client supports the researcher in her analysis by delivering input from a perspective that is closer to reality sales and market-wise. Thus, the researcher may lean on sales for developments in terms of competitors and retailers and on marketing for developments related to brand and communications.

In conclusion, the purpose of the phase is to gather different sources of data and internal information in order to explain what is being studied.

Make Recommendations

In this phase, the researcher is responsible for supporting the calculation of a business case that can be presented to management. Furthermore, a number of interviewees highlighted the importance of plucking out the most pertinent findings and screening results from external providers of research based on the recipient on the data.

Last but not least, the researcher is responsible for adding her own conclusions, recommendations and concrete suggestions for action. Julia describes:

> *[...] I do, based on what I can, I still take something with me, both recommendations and, like, some exclamation marks, to sort of [show that] here one should still keep a check on some things, that may not be here and now, but that may come to get a larger importance later on.*

In our interviews, very few highlighted the role of the client at this stage. In fact, the only discernible responsibility derived from the interview is participating in calculating the business case.

In conclusion, the purpose of this phase is to adapt the data to recipients in order to make realistic and relevant recommendations.

Share Findings

In this phase, the researcher is responsible for relaying her findings in a crisp and clear presentation that accommodates the time-pressure that clients are often under. Furthermore, it is important that the findings are presented in a pedagogical way for non-researchers, that they show how the different measures affect each other and how the researcher arrived at the conclusions. In the presentation, the researcher must represent the unbiased data, while refraining from drawing unfounded conclusions.

Interestingly, several interviewees highlighted discussing the findings, partly as a way to tease out new conclusions. Thus, it is the responsibility of the researcher to ensure that there is time for reflection and tapping into the knowledge of the people in the different departments.

The main responsibility of the client, on the other hand, is to represent the market and add context to the findings of the researcher. Furthermore, some interviewees highlighted this as an opportunity for the client to ask clarifying questions but also to challenge the conclusions and to clarify what can and cannot be done given the constraints of the market. It is also the responsibility of the client to feed the results forward in the organisation. Thus, it is up to the clients to share the results with their own departments by again plucking out the most pertinent findings.

The purpose of this phase is to engage in a discussion to enable the client's understanding of the data and how it can be used to make practical adjustments or product decisions.

Take Action

Our interviews outlined very few responsibilities on the part of the researcher in the final phase. The only responsibilities identified were conducting or commissioning second round concept tests and using the results to identify research projects that should be undertaken next year.

Thus, our interviews showed that actual action is generally decided upon by the client. Specifically, this could be making adjustments to ad campaigns, or incorporating findings into the marketing plan. Moreover, it is the responsibility to initiate action in his or her own department based on the results. Thus, one interviewee explains how it is important to discuss the findings one-to-one with his employees in order to translate the data into relevant actions for each person.

In short, the purpose of this phase is to select the action points to carry out and break the findings from the researcher into concrete action steps for individual employees.

7.2.3 Discussion

By examining the first sub-question to our research question, we begin to derive a more detailed customer insight process. Thus, *Figure 28* outlines how the distinct researcher and client responsibilities contribute to the completion of each phase of the process.

As mentioned, our purpose was not to compare directly to Day's (1994) market-sensing process as he places great focus on its connection to organisational learning, which is beyond the scope of our research (see *Section 3.2*). Still, some commonalities are interesting. For example, our interviews reveal the same pattern in the pre-phase as Day (1994). Specifically, Day (1994) holds that the process can be initiated by forthcoming decisions, emerging problems in the market, or a perceived need for further market-sensing. Moreover, a noteworthy difference emerges when you look at the sequence of steps. Thus, Day (1994) places the distribution of information before interpretation, whereas we found the sequence to be inverted. We consider this to be a reflection of the first conclusion of our pre-study, namely that the researcher role has evolved from merely providing summaries of data to making actionable recommendations.

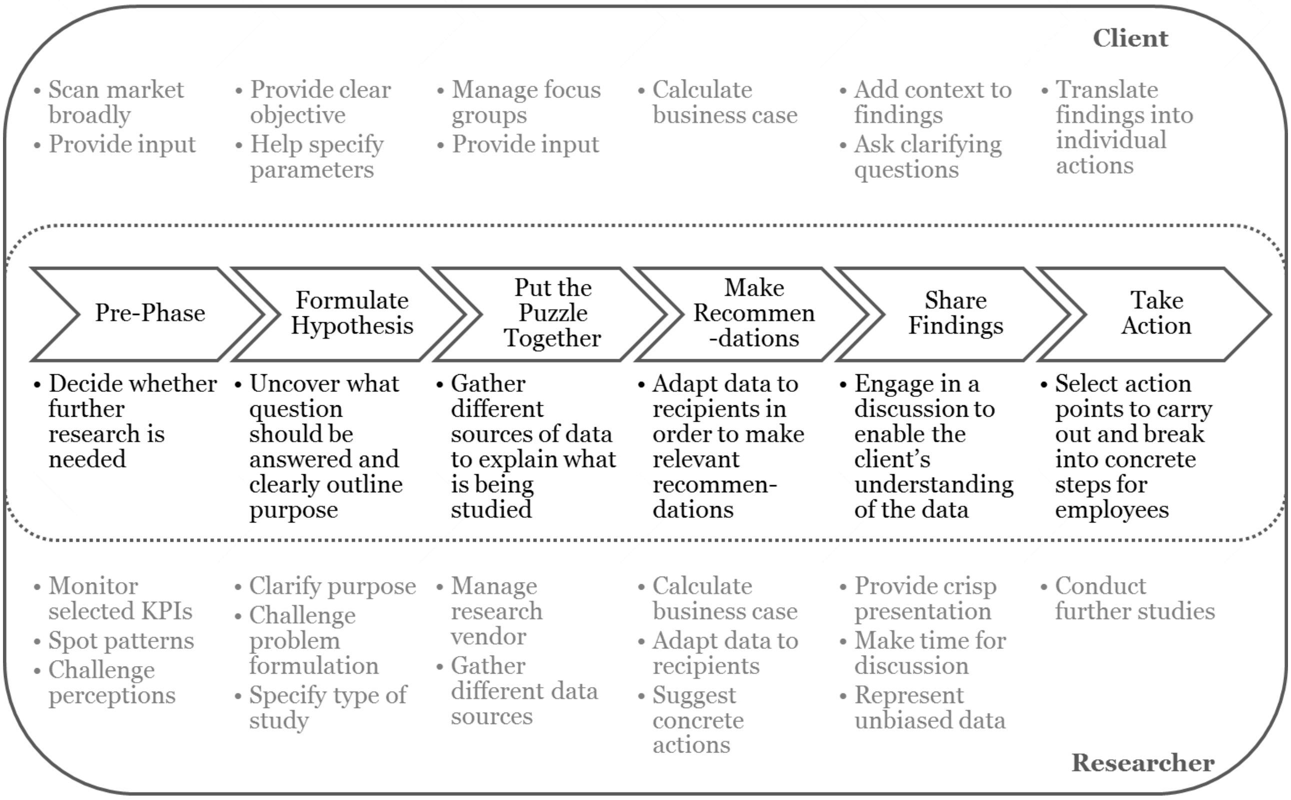

Figure 28: The Customer Insight Process with Responsibilities

In addition, while Day (1994) acknowledges the importance of cross-functional coordination, he does not address how it is carried out in practice by the collaboration of different roles. In fact, most of our interviewees highlighted the importance of close collaboration between researcher and client throughout the process, particularly in the *Formulate Hypothesis*, *Put the Puzzle Together,* and *Share Findings* phases. Interestingly, certain aspects were thrown in relief when we outlined the responsibilities of each role in the different phases of the process, making it possible to see where they diverge.

Particularly, it seems important to highlight the researcher's role in 'connecting the dots' in terms of external data and different sources of internal information. This suggests that the researcher fills the role of a knowledge broker, addressing the need highlighted by Day (1994, p. 44) for "assembling all the needed pieces [of information] in one place". Moreover, very few alluded to the client's role during the *Make Recommendations* phase. This could be a reflection of the researcher's role as described by several interviewees. Specifically, it is up to the researcher to uphold the integrity of the data. Thus, Beatrice explains that it can sometimes be difficult for the client to absorb the recommendations because they are highly invested in the projects. Lea refers to a much more unintentional cognitive bias on the part of the client when she explains that:

> *They just misinterpret it, they choose things that will support them, rather than what is maybe best for the company. It's a human... you just do it. Anyone would do it I think, because they just don't have time to get their heads into the full survey or the full data.*

Another aspect that we found interesting was the frequency with which our interviewees emphasised discussing the findings with the client rather than just presenting them. Thus, it would appear that the *Share Findings* phase fulfils more purposes than simply relaying the conclusions of the study. Rather, it seems that the goal of the stage is to merge the function of each role – with the researcher representing the data and the client the market – to ensure a proper interpretation of the data and its translation into action (putting the data into context). For example, Alex describes:

> *I think you have to process the data, helping the receivers understanding the data, and helping them in explaining in what way they can use the data. Because just giving them non-processed data or whatever, it will just be stuck in the e-mail box never to be used.*

Moreover, the interviewees highlight the importance of using the input of the client, in his capacity as a market expert, to draw further conclusions and implications. Thus, perhaps the discussion can be seen as an attempt to ensure that the results are anchored with the client who is ultimately responsible for implementing the results. In other words, this step could be seen as the necessary precursor to the concerted action that Kohli and Jaworski (1990) describe as an integral part of customer orientation.

☞ In conclusion, we have established a picture of clearly delineated responsibilities for both the researcher and the client and how these responsibilities interplay in putting the data into context. Thus, it is the chief responsibility of the researcher to gather, interpret, and represent the data so it provides a full and accurate picture of the market. Conversely, the client is responsible for guiding the collection and interpretation of data by providing input about the market and has the final responsibility for implementing the findings. Thus, through mapping the process we have begun to exemplify what Kohli and Jaworski (1990) term the cross-functional generation of intelligence.

7.3 Describing Constructs

In this section, we aim to add further nuance to our investigation of the customer insight process by examining our second sub-question. Specifically, we outline the resources and capabilities utilised in the process in order to facilitate understanding of the subsequent section, where we combine the capabilities and the phases of the customer insight process.

In our interviews some basic resources (such as budget and time) were mentioned. While these resources are of course important, they fall outside our definition of resources as human resources (as described in *Section 4.2.2*) and are therefore disregarded. Furthermore, some interviewees listed resources and capabilities that were not directly related to working with data (such as negotiation skills). These are also disregarded in the analysis.

As mentioned in *Section 5.5*, we grouped the resource and capability quotes into constructs. We identified 17 resource constructs and 13 capability constructs for the researcher role and nine resource constructs and six capability constructs for the client role. Among these constructs, 20 could be considered phase-specific while the remaining 25 are universal, i.e. used throughout the whole process of creating value with customer data. When examining the Psi Consulting quotes we quickly realised that they (as expected) form constructs that support the constructs found for internal researchers and clients. All constructs are listed in *Table 3* and a complete list of the quotes constituting each construct is shown in *Appendix F*.

In the following we describe the constructs of greatest importance for the customer insight process. First, we describe the phase-specific constructs and thereafter, we describe those of the universal constructs that can be considered hygiene factors and enablers in the process[33].

7.3.1 Phase-Specific Constructs

In the following the 20 phase-specific constructs are described, focusing first on the 15 constructs specific to researchers and subsequently on the five client constructs.

Researcher Constructs

Research method knowledge involves expert knowledge of research methods, their relative pros and cons and what different insights you can expect. It also involves knowledge of which type of study is suitable for a specific issue, for example ensuring that the target group or sample size is appropriate. Further, it requires the researcher "to always stay on top when it comes to new type[s] of data and tracking possibilities". The capability construct *approving research set-up* represents the accomplishment of this resource construct.

Research vendor knowledge is a similar construct that involves expert knowledge of external research providers and their respective strengths and costs. At the same time, it involves entertaining the relationship with different vendors and as put it understanding that there are persons working behind the data collection and hence, that you cannot have unreasonable demands on their work. The capability construct *writing a brief* draws on the research method and

[33] Seven universal constructs (four researcher ones and three client ones) cannot be regarded as either hygiene factors or enablers and will therefore not be described more than in *Appendix F*.

vendor knowledge constructs and includes the actual writing of a tender and sending it out to selected suppliers as well as discussing the research focus with them.

Pragmatism entails having the approach that you should not conduct (further) research just for the sake of it, but when you know that it will be useful. Alex explains:

> *I think that you also have look upon the data: 'Okay, what can we do with this data?' Don't do research or whatever just to do it. You always have to ask yourself the question 'What's this for? How can I use this very hands on? [...] how can I change things?' That's... to be very sort of pragmatic about things, I'd say works in this organisation.*

The capability construct *building hypotheses* is closely linked to *pragmatism*, since starts with understanding why you are doing the research you are doing and what it is going to be used for, "because if you can't formulate the issue or the opportunity right then you're probably going to look at the wrong thing" (Casper). Hence, the construct involves forming a clear purpose of the study and making good hypothesis. Likewise, the capability constructs *translating business issues* and *conceptualising the problem* draw on *pragmatism*; *translating business issues* does so by involving an understanding of how research studies can help solving business problems and *conceptualising the problem* does so as it includes analysing the problem to determine what really needs to be known and "quantify[ing] the problem in sub-problems to where the problem really is" (Filip). The *challenging* capability construct is on the one hand also related as it implicates questioning the organisation's need and purpose for research, for example when the marketing department wants to conduct research on an idea just because they have been working on it for a long time and are too attached to it to realise that it would not bring anything. On the other hand, it involves "seeing problems that they might not have targeted themselves in the different departments" (Alex), i.e. challenging the organisation's acceptance of the situation.

Knowledge what data exists is about keeping track of all data sources and what data the organisation already has; having "Knowledge that we have this knowledge", as Erika said. Filip described the need for this when saying: "When it comes to bigger studies it's difficult to know what we already have" and meant that sometimes, they lack this resource as they simply do not know what existing data can answer the same question.

Communication skills is a central resource construct that involves being able to formulate yourself and to present your findings well in order to both gather research information and spread the research results. To this end, it involves being a social chameleon that can feel the situation when interacting with other parts of the organisation and adapt accordingly. For example, Lea said that researchers must be “fluent in the [client’s] marketing language”. *Communication skills* are important for the capability construct of *being relevant*, as it involves precisely understanding the receiver of the research and the ability to adjust the information given accordingly. Julia specified when saying that she has to be perceptive to the receiver of her material and select the most relevant parts for them. Jesper also said that the researcher “needs to be pedagogical to me who is *not* an analyst”. Another related capability construct is *being concrete*, which involves clearly stating what insights the research has brought about to the clients; keeping it simple and specific rather than speaking in general terms. The capability construct *connecting insights* also draws on *communication skills* as it entails being able to present research results within their context. Specifically, it encompasses the ability to identify patterns in data as well as to link different data sources with each other and with previous events in order to see the big picture. The *making recommendations* capability construct emphasises a slightly different aspect of *communication skills* by also involving being able to give clear and strategic recommendations for next steps that are not only easy for the client to take in, but that also provide them with new ideas on how to develop their business.

Client constructs

While none of the client resource constructs can be considered phase-specific, five capability constructs can. C*larifying purpose* was emphasised as necessary from the client role in order for the researcher to be able to make a decision regarding study method that ensures receiving useful data. Ashley said “it’s really important for me to say exactly what I want *in the end*” and Filip said that “there can’t be any misunderstandings on what we need to find out”. A related construct is *assessing the need for data*, which involves understanding when you need to look at data and when not. Håkan emphasised considering if data from previous research studies could be recycles.

Translating data into action includes being able to understand the results, prioritising among the data and drawing the most important conclusions. Jesper summarised the construct well when saying that it involves “sort of concretising an outcome to a craft”. It is related to the *putting into context* construct, which entails taking the research results one step further and viewing them in relation to other information available, for example information about the brand and previous research results. Ashley meant that this involves viewing the results through a more emotional lens than the preceding data processing. Moreover, Filip emphasised viewing the results critically “to make sure that we understand where that is coming from, so we don’t just take that as a truth”.

Managing focus groups is a construct specific to the data collection that comprises mainly ensuring that the right questions are asked during the focus groups.

Researcher resource constructs	Researcher capability constructs
Analytical skills (7)	Approving research set-up (3)
Business understanding (11)	Being concrete (2)
Communication skills (7)	Being humble (4)
Curiosity (2)	Being relevant (11)
Customer understanding (4)	Building hypotheses (4)
Experience (2)	Challenging (4)
Flexibility (1)	Conceptualising the problem (5)
Integrity (7)	Connecting insights (10)
Internal relationships (3)	Making recommendations (2)
Knowledge what data exists (3)	Networking (2)
Power of initiative (1)	Representing customers (2)
Pragmatism (1)	Translating business issues (2)
Project management skills (2)	Writing a brief (13)
Research method knowledge (10)	
Research vendor knowledge (4)	
Scepticism (1)	
Trust (2)	
Client resource constructs	**Client capability constructs**
Analytical skills (4)	Assessing the need for data (2)
Calm (1)	Clarifying purpose (9)
Commercial mind-set (5)	Managing focus groups (1)
Customer understanding (4)	Putting into context (4)
Experience (2)	Translating data into action (8)
Humility (6)	Using your judgement (3)
Market knowledge (6)	
Passion (1)	
Timing (1)	

Table 3: Researcher and Client Constructs (Number of Quotes)

7.3.2 Universal Constructs

As mentioned, some of the universal constructs can be considered hygiene factors or enablers. In the following we explain the concepts further and outline how the constructs form these factors.

Hygiene Factors

Among the universal constructs we found ten that arguably are requisite in the customer insight process. Thus, the quotes underlying these constructs indicate that these resources and capabilities are perceived as constant and fundamental. Erika for example said that researchers "of course" need to know about the customers in order for the brand to be relevant (*customer understanding*) and Julia explained *business understanding* with: "[…] every week I do competitor analyses on the others: what campaigns are they coming up with, what special offers, their communication, what does it look like, where do they seem to be heading strategically […]"

Moreover, Håkan listed the brands' key values as well as "the different happenings in the markets" as the fundamental things he would inform new (client) colleagues about (*market knowledge*). Ashley further explained how *analytical skills* are used by clients in many ways when describing them as "being able to understand contexts and what it looks like. Because, we do a lot of research and then it’s important to know how to receive it and analyse it and *do something with it*, that’s important”.

Using your judgement entails clients balancing the information from the data with experience, calm and gut feeling and acting freely within the limits of their mandate. As such, it constitutes the basic check that the results make sense.

These ten constructs, four researcher resource ones, five client resource ones and one client capability one (see *Table 4*), are not competitive advantages in themselves but should be considered hygiene factors to the customer insight process; i.e. they do not directly contribute to the value creation, but impede it if not utilised. Julia’s statement that “if I were not able to analyse [...] then it would be wrong” (*analytical skills*) captures precisely this meaning.

Researcher resource construct	Client resource construct	Client capability construct
Analytical skills (7)	Analytical skills (4)	
Business understanding (11)	Market knowledge (6)	
Customer understanding (4)	Commercial mind-set (5) Customer understanding (4)	Using your judgement (3)
Experience (2)	Experience (2)	

Table 4: Hygiene Factor Constructs

Trust Enablers

Another set of constructs among the universal ones play an important role in the customer insight process by augmenting the relationship between the researcher and the client and ensuring that the customer data is actually applied. As opposed to the hygiene factors, these six constructs, three researcher resource ones, two researcher capability ones and one client resource one (see *Table 5*), increase the value created in the customer insight process the more they are utilised. Without these resources and capabilities, the full benefit of the customer data may be lost and the customer orientation diminished. Hence, we consider them to be enablers.

Erika described *integrity* by calling researchers “guardians of the data” and emphasising their role in preventing clients from jumping to their preferred conclusion. Lea further described how *trust* enables more influential research by saying:

> *So if you build up a very close rapport with the people that you are working with, you build up loads and loads of trust, which means if you’re good at working with them, they will take onboard everything that you say a lot more.*

Moreover, Lea described the client construct *humility* by saying that "what we need from the departments that we work with is that they are very open with what they are doing, so that the researcher get really involved the whole way". Jesper demonstrated that the same is important from the client perspective by saying that you need to be open for analysing rather than prioritising your own department's main concerns.

Researcher resource construct	Researcher capability construct	Client resource construct
Integrity (7) Trust (2) Scepticism (1)	Representing customers (2) Being humble (4)	Humility (6)

Table 5: Trust Enabler Constructs

Networking Enablers

The two universal constructs *internal relationships* and *networking* can also be viewed in combination as they, just like the set of trust enablers, contribute more to the value created with customer data the more they are utilised. They enable a close relationship between the researcher and the client and ensure that research results are in tune with and anchored in the organisation. Hence, they can be viewed as networking enablers.

The *internal relationships* construct naturally involves having a lot of contacts within the organisation. Cecilia further described that the researcher has to be in tune with the rest of the organisation and indicated that this affects the possibilities of spreading the research and actually implementing the results.

Interestingly, the *networking* researcher construct was highlighted both from a client and a researcher perspective; Jesper said about Julia that she "knows who to turn to" for information that will help her as a researcher to make relevant recommendations. Julia herself further emphasised being able to "identify specifically who [...] it is internally that could have more information" in order to be able to make sense of the research data.

Researcher resource construct	Researcher capability construct
Internal relationships (3)	Networking (2)

Table 6: Networking Enabler Constructs

7.3.3 Discussion

By categorising quotes into constructs we elucidate the different resources and capabilities that researchers and clients employ in the customer insight process. We find it instructional to divide these constructs into phase-specific and universal ones and describe how three specific functions can be identified among the universal ones. While the phase-specific constructs are particularly interesting for our discussion of how the identified constructs are deployed in the different phases of the process (and will therefore be discussed in further detail in *Section 7.4*), we believe the hygiene factors and enablers greatly extend our understanding of the process in and of themselves.

When looking at the roles it becomes clear that the researcher and client fulfil different parts of the hygiene factors. Specifically, while it is perhaps not surprising that the researcher is expected to possess *research knowledge* and the client *market knowledge*, it is interesting that both roles must employ *business understanding* (i.e. knowledge about the company's goals). Moreover, we see that the process requires the researcher in particular to lean on networking enablers in order to piece together information from different parts of the organisation.

Furthermore, looking at the resources and capabilities from the perspective of different roles throws into relief the part that enablers play in the customer insight process. Specifically, enablers augment the ability to deploy the process by explaining how the specialised resources of researchers and clients are coordinated. This in turn deepens our understanding of what Grant (1991) terms the complex patterns of coordination between people and resources that are required. In addition, the added lens of the roles allows us to make novel inferences about the nature of the cross-functional coordination outlined by Kohli and Jaworski (1990). Thus, both the trust and networking enablers arguably serve to reduce any barriers to the interdepartmental connectedness that the authors state are a prerequisite for effective generation of intelligence.

Another important aspect relates to *economies of experience* as described by Grant (1991). Thus, we would argue that the coordination skills that an organisation accumulates over time are reflected in the development of enablers. Specifically, enablers fuel the organisation's ability to develop increasingly effective patterns of coordination over time. Thus, the value that the enablers add to the customer insight process increases with *economies of experience*.

Lastly, by examining the managerial issue of developing organisational coordination skills, we begin to couple the process with the creation of competitive advantage. Thus, the enablers play a crucial role in leveraging the value inherent in customer data and transforming it into actionable recommendations. Moreover, this links to the statement of Slater and Narver's (1998, p. 63) that "the ability to learn [how to create superior customer value] faster than competitors may be the only source of sustainable competitive advantage."

☞ In conclusion, whereas the examination of responsibilities emphasised *what* people should do in the customer insight process, the outline of capabilities focuses on what they must *be able* to do and *how* they should do it. Thus, the functions of the hygiene factors, trust enablers, and networking enablers further extends our understanding of how companies can achieve both what

Kohli and Jaworski (1990) term the cross-functional generation of intelligence and, ultimately, sustained competitive advantage.

7.4 Combining Process and Constructs

When we viewed the process and construct findings in parallel it became clear that resources are far less phase-dependent than capabilities. Thus, the majority of capabilities fit neatly into a phase, whereas almost none of the resources do. This finding is supported by literature, for example Day (1994, p. 38) who states that "Capabilities and organizational processes are closely entwined, because it is the capability that enables the activities in a business process to be carried out."

In this section we outline which resources and capabilities appear to be particularly important in the different phases and exemplify how they are applied. Thus, our aim is to add further detail to our second sub-question and how researchers ensure that the phases of the process are completed successfully and by extension that the final recommendations are useful.

7.4.1 Examining the Phases

Pre-Phase

As mentioned, the purpose of this phase is to decide whether further research is needed. Consequently a number of resources are particularly important to researchers in this phase. For example, Alex emphasises that the researcher has to "[...] be able to take [her] own initiatives, seeing problems that they might not have targeted themselves in the different departments." Aside from *power of initiative*, this requires a combination of *analytical skills*, *curiosity*, *scepticism*, and *flexibility*. More specifically, the researcher has to be able to identify patterns in the data that she is tracking, be curious and sceptical enough to dig deeper, and flexible in changing her focus depending on the focus of management.

To some extent *experience* is also interesting as it may increase the researcher's ability to discern what warrants further research and what does not. Casper explains:

> *That's the really tricky part, really, because normally you don't know [how to link the hypothesis with the right kind of data]. And I guess that the more experienced you are, the better you get at getting a hunch on where to start.*

With a solid base in these resources, the researcher can then tap into the capabilities that are particularly important in this stage, namely *networking* and *challenging*. Specifically, the researcher draws on networking to gain insights from different people in the organisation that enhances her ability to interpret the data. This can be viewed as an example of how the networking enablers described in *Section 7.3.2* are applied. Furthermore, by using the resources outlined above and the capability of networking together with trust enablers (also described in *Section 7.3.2*), the researcher can credibly challenge the status quo. For example, Håkan emphasises how he would like the researcher to be proactive in sharing interesting findings and challenging him with questions; at the same time he posits that he would only accept to be challenged if the researcher shows understanding for the market. Interestingly, the challenging seems to have two facets; thus, Mattias highlights the need to sometimes push back and ask the client whether a study is 'nice to have' or 'need to have', whereas Lea also underlines the need to challenge 'truths' that are taken for granted in the organisation.

This brings us to the main client capability for this phase, which is *assessing the need for data*. Specifically, our interviewees highlight the importance of knowing when to look further into the data and trying to utilise previous studies and parallel conclusions as much as possible. Furthermore, Jesper emphasises the resource *calm* in order to ensure that you do not react rashly because the environment is hectic.

In conclusion, the different resources and capabilities in this phase support the researcher and client in critically evaluating the need for gathering further data.

Formulate Hypothesis

As mentioned, the purpose of the phase is to uncover what question should be answered through a thorough problem analysis, thereby deriving and clearly outlining the purpose of the study. To this end, our interviews revealed that the researcher employs her *curiosity* to understand the problem of the client in detail. Furthermore, Casper emphasised accepting that sometimes you will not get the hypothesis right the first time and being open to reiterating it. This can be seen as another way of applying *flexibility*.

The researcher also leans on a unique set of resources that are crucial to fulfilling this step. Specifically, the researcher leans on her *knowledge of what data exists*, what research methods could be appropriate (*research method knowledge*), and which research providers may be able to solve the task (*research vendor knowledge*). Thus, Håkan explains:

> *If I have one type of question, and quite often I have an idea of where this will land, but then she could fuel [...] with their point of view in the question, challenging me, saying 'Is this really the right way to go ahead or should we have a bit broader set-up?'*

All these resources feed into a few key capabilities. First and foremost, the researcher applies the capabilities of *conceptualising the problem* and *building hypotheses*. For example, Filip explains: “I can think of a very specific kind of problem and they can conceptualise the problem or they could quantify the problem in sub-problems to see where the problem really is.” Once the problem has been conceptualised, the researcher applies her capabilities to *write the research brief* and *approve the research set-up*. These key capabilities are supported by *being humble*, *networking* and *translating business issues*, which allow the researcher to tap into expertise in different parts of the organisation and combining it with her own expertise to clearly define what should be investigated and how.

Needless to say, the key client capability in this phase is *clarifying purpose*. Casper explains that “[...] if you haven’t got that one right, you’re going to present something that doesn’t make sense to them or you present a problem or opportunity that they don’t see.”

In conclusion, the completion of this phase is heavily dependent on the specific resources and capabilities of the researcher and on her ability to solicit input from the client (and others) in order to clearly define the problem.

Put the Puzzle Together

As outlined, the purpose of the phase is to gather both external and internal sources of data and internal expertise in order to explain what is being studied. The primary resources that the researcher uses in this phase are thus *curiosity* and *internal relationships*. As mentioned, these resources help the researcher tap into knowledge in the organisation and dig deeper in the data. Pelle explains: “Those numbers are actually telling a story, which makes it very interesting once you’ve given yourself the chance to understand what the numbers are saying.” Particularly, *internal relationships* as a networking enabler (as described in *Section 7.3.2*) help the researcher compile valuable data. Further, *flexibility* again comes into play in this phase as it is important to be open to dismissing or reiterating the hypothesis if necessary. Also, Håkan emphasises employing a good measure of *scepticism*, as customer data is not always an accurate indicator of buying behaviour.

These resources feed into the crucial capability for this stage, namely *connecting insights*. Along with *being humble*, this capability supports the researcher in building a full picture that gives a more solid foundation for making recommendations. Both Håkan and Pelle emphasise collecting as many puzzle pieces as possible in order to minimise the risk of having to base the decision on guess work. Pelle explains:

The more I can get, the clearer the picture I get of the person that I'm trying to attract. So if I only get one component, it's going to be a very vague picture of who I'm looking for. But building up and building up I'm actually getting very close to having a clear picture.

At the same time, the key capabilities for the client are *managing focus groups* and supporting the researcher by *putting data into context*. Particularly, our interviews highlighted attendance at focus group studies as a good way to derive partial conclusions and modifying the questions for subsequent groups to ensure that the data gathered goes into as much depth as possible. Furthermore, both Julia and Casper highlighted the value of clients providing context to the data gathered, which in turn allows additional conclusions to be drawn.

Thus, in this phase the different resources and capabilities mesh to support the researcher in seeking out and sorting out different sources of data and reviewing them critically in order to make a sound foundation for making recommendations.

Make Recommendations

In short, the purpose of this phase is to adapt the data to recipients in order to make realistic and relevant recommendations. To this end, the researcher leans on her *business understanding* and knowledge of the current company focus areas to ensure that her recommendations will be perceived as useful. Julia explains: ”I mean, top management come with new foci every quarter, too, so in some way the analysis has to follow the changed view, I think”. Again, this requires the researcher to tap into the *translating business issues* capability to ensure that there is a link between the data and the client's defined problem. Last but not least, the researcher must enlist the *challenging* and *representing customers* capabilities in order to ensure that the client gets a realistic picture of the market. Thus, Beatrice stresses the importance of not manipulating or downplaying certain parts of the data in order to protect projects that may be dear to the client.

As noted in *Section 7.2* the client involvement is limited in this phase.

In conclusion, in this phase the researcher employs her capabilities to discern which information and recommendations are most relevant for different clients.

Share Findings

As outlined, the purpose of this phase is to engage in a discussion to facilitate the client's understanding of the data and how it can be used to make practical adjustments or product decisions. Our interviews highlighted two resources that are particularly important for researchers in this phase, namely *communication skills* and *pragmatism*. More specifically, several people highlight the importance of knowing the recipient, being pedagogical, and making the presentation itself crisp and clear. Casper explains how the measure of high quality work is in fact whether the researcher is able to take away enough details to make the story simple but still credible.

Furthermore, two important resources that play together in this phase are the enablers *internal relationships* and *trust* (as described in *Section 7.3.2*). Specifically, these resources allow the researcher to make recommendations that do not fall on deaf ears. Specifically, Lea says that a researcher has to work with people for a certain amount of time and build up credibility before her recommendations will be followed – which precisely captures the benefits of trust enablers in ensuring that the customer data is actually being used.

These resources contribute to the researcher's using the most crucial capability to this stage, namely *being concrete*. Lea emphasises expressing the recommendations within the parameters or constraints of the receiver, so that the recommendations are not only specific, but also realistic. This again is underpinned by the capability of *being relevant*. At the same time, *networking* could be an important capability to enlist. Thus, several interviewees emphasised getting the right people to attend the meeting, i.e. the people required to take action on the data.

Last but not least, several interviewees highlighted the importance of the capability *representing the customer*. In this way, the researcher uses her analytical base to ensure that the client does not succumb to cognitive biases. Thus, Lea explains how clients often choose data that supports their view because they do not have the time to examine the full data set.

On the other hand, several people highlighted the client using his resources of *market knowledge* and *customer understanding* to challenge the findings and put them into context. Or as Ashley put it, the client can be more emotional and represent the brand values.

In conclusion, in this phase it is particularly important that both the researcher and the client use their resources and capabilities to expand their understanding of the data and ensure that the conclusions are sound and actionable.

Take Action

In short, the purpose of this phase is to select the action points to carry out and break the findings from the researcher into concrete action steps for individual employees. As mentioned previously, there is little involvement from the researcher in this phase. However, it could of course be argued that – as in the formulate hypothesis phase – *analytical skills*, *business understanding*, and *flexibility* can be enlisted to help draw additional conclusions or build new hypotheses.

On the client side, the most important is to use the *commercial mind-set*, *business understanding*, and *experience* to *translate data into action*. In other words, the client has to evaluate the different recommendations and prioritise them based on his understanding of the business goals. Furthermore, he must use his experience and commercial mind-set to determine the best course of action. Thus, Håkan emphasises the link to the bottom-line. Specifically, he posits that people must be driven not by professional pride alone ("making the best TV campaign in the world") but also by how this can contribute to sales. Last but not least, Jesper highlighted the importance of knowing your own mandate in order to have a clear definition of the parameters within which you can act. This, he argues, makes it easier for people to react quickly.

In conclusion, the capabilities of the client help him connect the strategy of the business with the findings of the study and translate them to concrete and prioritised action steps.

7.4.2 Discussion

By combining the insights derived from the answers to our sub-questions (in *Sections 7.2* and *7.3*), we have derived a detailed view of the customer insight process that companies use to create value with data.

In the outline of our research focus we raised the question of whether findings that were presented in 1979 would remain instructive today given the exponential increase in available data (see *Section 3.2*). However, our own findings are very much in line with what Myers et al. (1979) posit about the role of the researcher. Specifically, our findings support the 'mission' of *facilitator* in planning and conducting studies and acting as the link between managers and research specialists. In addition, our analysis adds to this mission the function of a knowledge broker who connects insights from different parts of the organisation. As outlined, this is reflected both in the *Pre-Phase* and *Put the Puzzle Together* with the associated resource and capability of *networking* and *knowledge what data exists*. Furthermore, our findings lend support to the mission of *gatekeeper* in monitoring and screening new research techniques to find ones that are suitable for the organisation's research purposes. In addition, we would extend the description of Myers et al. (1979) to include filtering which pieces of information from both internal and external sources that are disseminated.

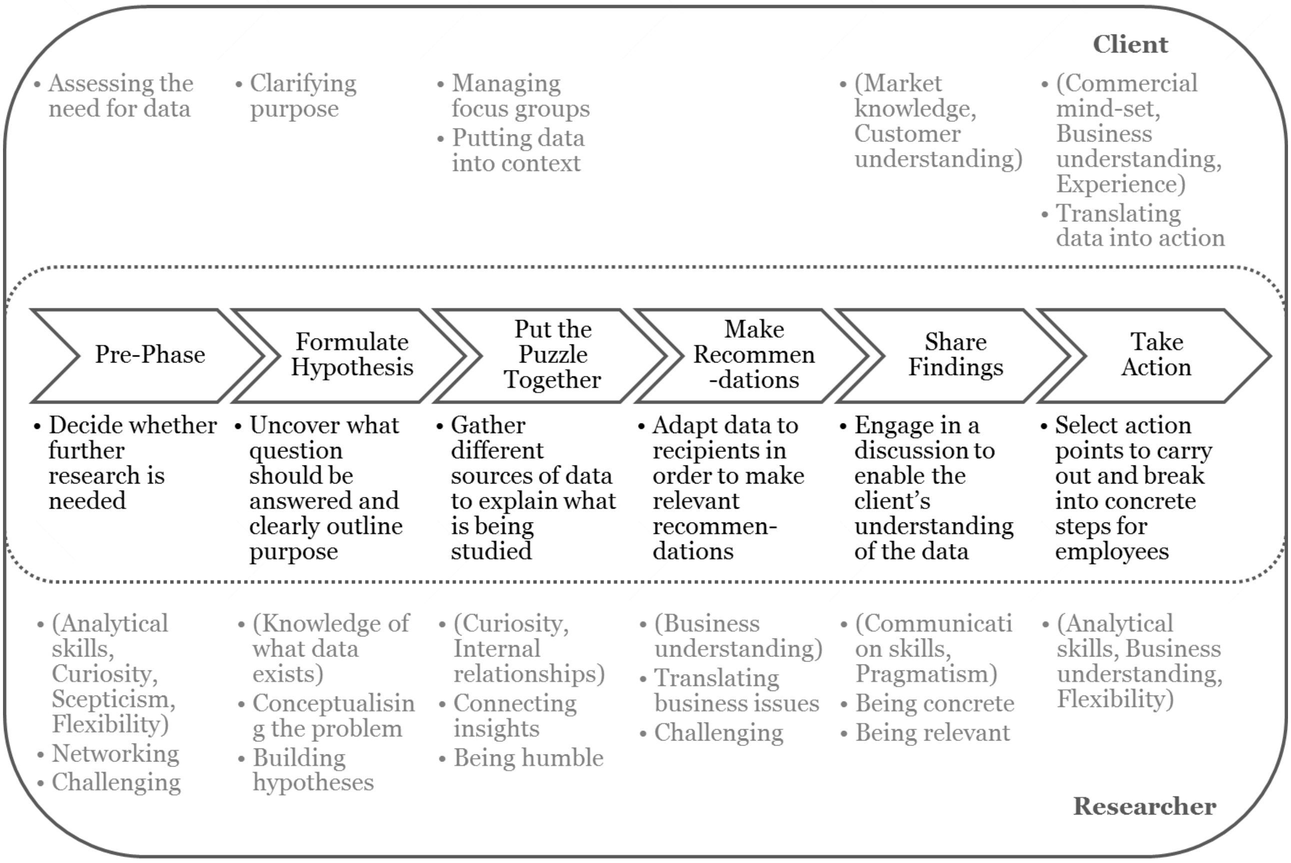

Figure 29: The Customer Insight Process with Capabilities (resources in parentheses)

The last researcher mission outlined by Myers et al. (1979) is perhaps the most interesting for our analysis. Thus, the authors describe the *translator* who "[…] puts management issues and problems into researchable propositions and converts research findings into managerial terms" (Myers et al. 1979, p. 23). In our process, we find that the capabilities of *building hypotheses* and *translating business issues* combined with the phases of *formulate hypothesis* and *put the puzzle together* are key to this mission. In addition, we believe that the development in the role of the researcher as well as the need to mobilise concerted action is reflected in the emphasis on discussing findings. Thus, it would appear that the conversion of research findings into action happens in multiple steps. First the researcher makes her unbiased recommendations, then these findings are discussed and the client evaluates the feasibility of the different actions.

However, our findings also point to the crucial role of the client in this context. In the terminology of Day (1994), the client can thus be seen as a means for the researcher to access the mental models that may help her ask appropriate questions and understand the data better. In addition, our process highlights that additional translation occurs when the client discusses the results with his team and specifies and delegates concrete action steps.

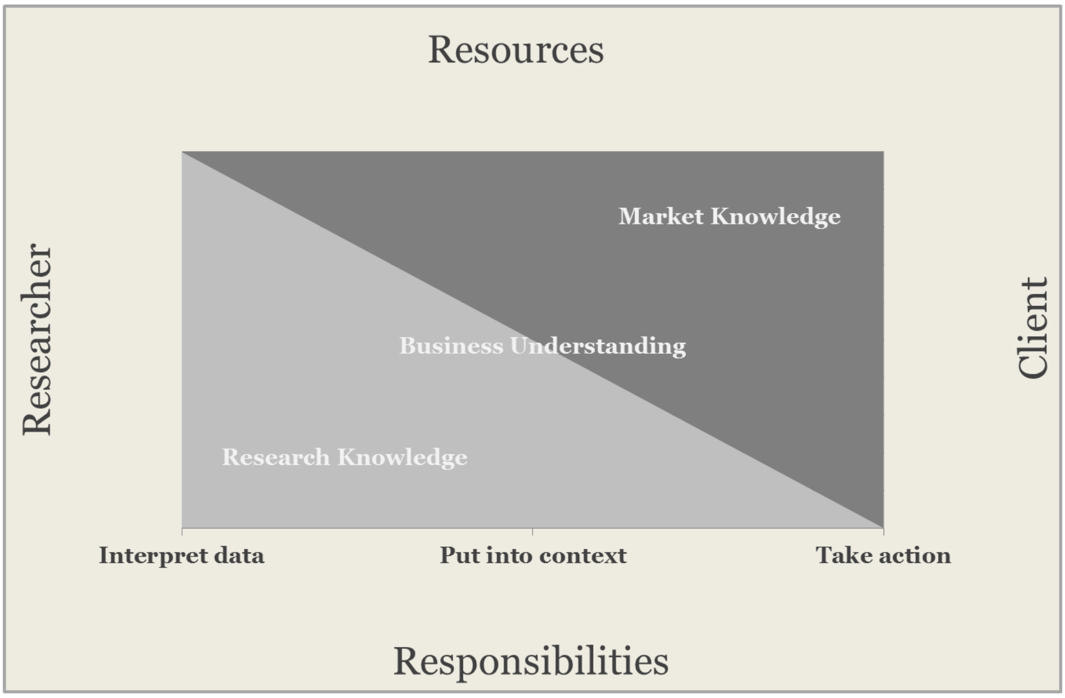

Figure 30: Coordination between Researcher and Client

☞ Figure 30 represents a way to sum up this coordination between the roles and unique resources of the researcher and client roles. Thus, the researcher employs her *research knowledge* to interpret the data, whereas the client owns the implementation of findings and employs his market knowledge to assess the feasibility of different options. Together the researcher and the client employ their unique resources as well as their *business understanding*, including the goals and current focus of the organisation, to put data into context. In short, deploying the resources anchored in researcher and client roles through the customer insight process can be seen as a crucial, overarching capability for creating value with customer data.

7.5 Considering Organisational Context

As a natural consequence of our decision to focus primarily on describing the process of turning data into actionable recommendations, the information we gathered was quite operational in its nature. However, we chose to include the strategic role identified in the pre-study because it can provide insight into broader organisational issues that arguably affect the way the researcher carries out her tasks.

Although the number of interviews in this category was small, certain themes emerged that we think are relevant to highlight. We have clustered these themes in two topics, namely management support and organisational structure; arguably, the prior affects the mandate of the research function, whereas the latter affects the function's ability to overcome barriers to cross-functional coordination.

7.5.1 Management Support

Among others, Kohli and Jaworski (1990, p. 7) emphasise that "[...] the commitment of top managers is an essential prerequisite to a market orientation." Not surprisingly, our interviews confirmed this point. For example, Alex explains how the growing demand for research appears to have started with the management team.

However, our findings also suggest that top management may have significant impact on more than just whether or not research is demanded. For example, we see this reflected in the two poles that emerge in the way budget is discussed. In all of the interviews with Gamma the research budget is mentioned (this is not the case for the other companies). For example, Ashley predicts that the budget for research would decrease over the coming years and Emma mentions that the company sometimes states budget as a reason for not pursuing certain research projects. Conversely, Albert at Alpha states a smaller budget as a reason for investing heavily in customer research. Thus, he explains how the research supports more deliberate targeting of customers.

The investments made under this heading include both the purchase of external research and investments in upgrading the IT infrastructure and improving the data quality. Thus, it could be argued that top management defines whether budget constraints are a limitation or a premise for research. This in turn determines the mandate of the research function, which naturally sets the context for the work that is carried out. For example, the mandate for the researchers at Alpha includes extensive concept testing, whereas the mandate at Gamma does not.

Our interviews suggest that the influence of top management is also reflected in the focus of the tasks, that is whether they are more strategic or tactical. For example, Albert estimates that approximately 20 per cent of the projects his team undertakes come directly from top management. Furthermore, he explains that "[the CEO] will say if someone wants to do something he will say 'Ah, you have to go to the Analyst department and to Julia to hear what they think about this.'" If we look at Beta, Alex and Lea stress that the majority of decisions are made based on customer data. However, based on the interview with Cecilia we can see that the decisions referred to are mainly tactical, whereas it is difficult to gain traction for more strategic decisions. One could argue that whether research is used at the strategic level influences its ability to contribute to the generation of competitive advantage over time. Linking this to Slater and Narver's (1998) distinction between customer-led and market-driven, this shows that the dedication of top management may influence the way in which the company implements customer orientation.

While our data does not provide a solid foundation for drawing conclusions on this topic, further research into the impact of top management support would be highly interesting. This leads us to the following research proposition:

> *Proposition 1: Management support determines not only whether but also how a company enacts its customer orientation.*

7.5.2 Organisational Structure

Kohli and Jaworski (1990) maintain that the structural form of organisations may constitute a barrier to customer orientation. Thus, the authors explain in quite general terms how formalisation and centralisation affect the extent of intelligence dissemination and response implementation. Our findings suggest that there is potential to extend this proposition.

Firstly, based on our interviews it would appear that the generation and use of intelligence is also affected by which function the research function reports into. Specifically, this reporting relationship could have an impact on which functions are likely to implement recommendations based on customer research. Specifically, we found that the breadth of functions that the research function supports was greatest in the company where the function reports directly to the CEO and the head of operations. Thus, the Analytics department at Alpha supports a wide range of departments.

Conversely, having the market research function report into Marketing could serve to entrench the perception that market intelligence is marketing's responsibility. This conflicts with the notion of Kohli and Jaworski (1990, p. 5) that "responding effectively to a market need requires the participation of virtually all departments in an organization." The authors emphasise the importance of a wide dissemination of market intelligence that can flow both to and from the marketing department.

However, it would appear that the other case companies use different ways of ensuring the multi-directional dissemination of intelligence in practice. For example, Julia emphasises the importance of informal relationships in the organisation and taking lunches with people from different departments to keep tabs on developments. Moreover, Beta uses proximity, i.e. the researcher is physically located in the department she serves in order to ensure a broad exchange of intelligence. Both Alex and Lea stress how this allows the researcher to tap into the current issues of the clients as well as learning their terminology.

This brings us to the second point, namely the importance of multi-directional exchange of intelligence as highlighted by Kohli and Jaworski (1990). Thus, the authors maintain that organisational silos, or a lack of interdepartmental connectedness, are detrimental to customer orientation. One interesting lack of connectedness that we identified is that most of our case companies, save one, have separated their market and sales research. Thus, Delta is the only company that has integrated both types of research under the responsibility of one function. Conversely, both Beta and Gamma have a separate research team for sales data. Since we did not interview anyone from these teams, it is difficult to assess the closeness of the collaboration. However, Håkan expressed a wish for his team to be more commercial in its mind-set and consider itself a part of an overarching commercial team together with sales. Furthermore, Ashley explains how an organisational change has diminished the delineation between the marketing and sales departments.

Kohli and Jaworski (1990) maintain that if a company lacks interdepartmental connectedness, it may be difficult to gain traction for findings developed by other departments. Our findings suggest that other issues may also be pinned to the concept of connectedness. Thus, the separation between sales and marketing is thrown into relief by Cecilia who says that it is difficult to accurately evaluate the effectiveness of marketing campaigns without considering impact on sales. While the context is slightly different, i.e. in this case the researcher is external, our findings suggest that the tendency is generalisable to internal research as well. Thus, attempts to quantify the impact of market research projects may be stunted by the lack of coordination between sales and market research.

This leads us to another proposition that we think would be highly relevant to research further:

> *Proposition 2: Careful consideration of organisational structure may help overcome barriers to cross-functional generation of intelligence.*

While our interview findings do not provide a sufficiently solid foundation for making decisive inferences on these topics, we believe that further research on the two suggested propositions could constitute an important contribution to research. Specifically, these issues may provide further nuances to the understanding of the role that customer orientation, and by extension research, plays in creating a sustained competitive advantage. Furthermore, research may prove instructional for practitioners in terms of overcoming barriers to cross-functional coordination.

8 CONCLUSION

This section aims to summarise our findings and how we answer our research question.

The aim of our research was to examine how customer-oriented companies work with customer data, specifically focusing on the responsibilities and capabilities that are employed in order to create value. Thus, by combining theoretical input from the fields of Customer Orientation and Resource-Based Theory we were able to outline the customer insight process with six phases.

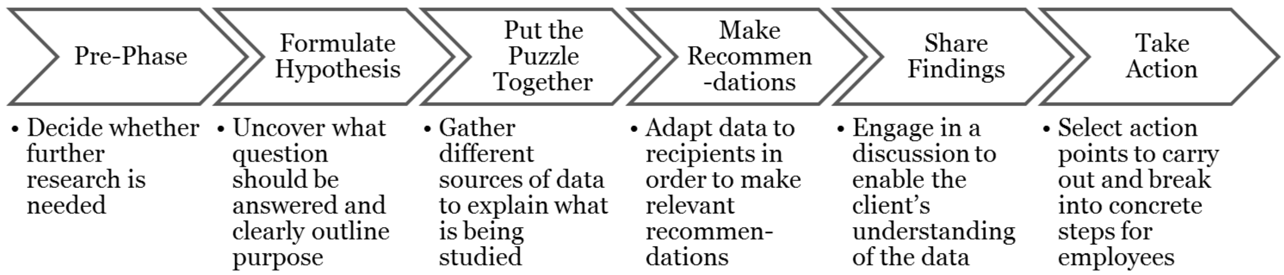

Figure 31: The Customer Insight Process

The first noteworthy finding pertains to the initiation of the process. Thus, we find that most of the case companies have selected a limited number of KPIs that they track systematically and regularly over time. Some interviewees highlight how these KPIs help them not only to build an understanding of the industry but also to identify patterns and track changes. In turn, this can result in action (in the form of minor, tactical adjustments) or the decision to study the issue further to identify the root causes. This is in line with the findings of Day (1994).

Another finding emerged when we examined the first sub-question, namely how different responsibilities contribute to the completion of each phase of the process. Thus, we see clearly delineated responsibilities for both the researcher and the client and how these responsibilities interplay in putting the data into context. Specifically, it is the chief responsibility of the researcher to gather, interpret, and represent the data so it provides a full and accurate picture of the market. Conversely, the client is responsible for guiding the collection and interpretation of data by providing input about the market and has the final responsibility for implementing the findings.

We further refined our understanding of the process by applying RBT in order to examine our second sub-question and the resources and capabilities that are utilised to complete the phases of the process. Particularly, we find that while some of the constructs identified can be characterised as phase-specific others are universal. Among the universal constructs we identify a number that we classify as hygiene factors because they are fundamental requisites for the customer insight process. Furthermore, we identify two types of constructs that we label trust and networking enablers. Specifically, enablers augment the ability to deploy the process by explaining how the specialised resources of researchers and clients are coordinated. Whereas networking enablers facilitate interaction between the researcher and the client that in turn ensure that research results are aligned with organisational priorities, trust enablers augments the relationship between the two roles and ensures that research findings are applied. This in turn deepens our understanding of what Grant (1991) terms the complex patterns of coordination between people and resources that are required. In addition, the added lens of the roles allows us to make novel inferences about the nature of the cross-functional coordination outlined by Kohli and Jaworski (1990). Thus, both the trust and networking enablers arguably serve to reduce any barriers to the interdepartmental connectedness that the authors state are a prerequisite for effective generation of intelligence.

After examining the responsibilities and capabilities together, a pattern emerged in terms of the coordination between the roles and unique resources of the researcher and client roles. Thus, the researcher employs her *research knowledge* to interpret the data, whereas the client owns the implementation of findings and employs his market knowledge to assess the feasibility of different options. Together the researcher and the client employ their unique resources as well as their *business understanding*, including the goals and current focus of the organisation, to put data into context. In short, deploying the resources anchored in researcher and client roles through the customer insight process can be seen as a crucial, overarching capability for creating value with customer data.

Thus, through mapping the customer insight process and adding additional nuance by outlining the responsibilities and capabilities of the researcher and client roles, we have exemplified what Kohli and Jaworski (1990) term the cross-functional generation of intelligence. In addition, our findings support and extend the three researcher missions outlined by Myers et al. (1979) and point to a reversal of the sequencing of distribution and interpretation of information in the market-sensing process of Day (1994).

Finally, we identified two research propositions pertaining to organisational context that could inspire contributions to the extant body of knowledge:

> *Proposition 1: Management support determines not only whether but also how a company enacts its customer orientation.*
>
> *Proposition 2: Careful consideration of organisational structure may help overcome barriers to cross-functional generation of intelligence.*

Specifically, these issues may provide further nuances to the understanding of the role that customer orientation, and by extension research, plays in creating a sustained competitive advantage. Moreover, such studies along with our findings may answer the call for more research on how to handle the managerial challenges of tapping into the potential of Big Data.

9 LIMITATIONS AND OUTLOOK

This section aims to address the limitations of our study as well as to indicate interesting fields to study further.

9.1 Limitations

As described in our methodology, we deliberately chose companies with fairly easy access to data on their customers. Consequently, further research is needed in order to verify whether our findings are generalisable to industries where such data is harder to obtain.

Furthermore, as our research is based on semi-structured interviews, it is difficult to determine whether the described behaviour is carried out in practice. In other words, we cannot verify whether the things the interviewees say they *should* do are actually things they do. Moreover, since we focused mainly on questions about working with data and outlining a process, it is likely that we missed other issues. For example, it could be that the people we interviewed simply did not think of other sources of information that they use because of the focus on the word 'data'. This leaves room for our findings to be confirmed or elaborated with other methods of study, such as observation or quantitative studies. Such research would at the same time overcome some of the methodological issues associated with RBT studies. In fact Barney et al. (1991, p. 637) "encourage future scholars to craft studies incorporating multiple approaches", e.g. ethnography and participative observation, and promote longitudinal studies.

9.2 Outlook

In addition to the research propositions outlined in *Section 7.5 Organisational Context*, we would like to highlight other unexpected discoveries from our data collection and analysis that could inspire further contributions to the body of knowledge. First and foremost, we noted in our exploration of the field of Big Data and in the customer orientation stream focused on intelligence generation that the balance between normatively and empirically based articles seems to tip towards normative. Thus, we hope that further empirical research describing and testing customer insight processes will be done.

Another area that could be highly interesting to investigate is whether there is a learning curve for companies that work with data. More specifically, does the way that companies work with data pass through discernible 'evolutionary' phases? Thus, we see hints of such development in our data. The organisational separation of the marketing and research departments could be one such evolutionary phase. Furthermore, the emphasis on hypothesis-driven research and actionable recommendations as well as the shift towards delivering research proactively could be hallmarks of certain phases of development. Thus, it could be interesting to investigate whether the experience that a company accumulates in working with data impacts the way this work develops over time.

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Appendix A: Interview List

A.1 Pre-Study

Expert	Company	Date	Length	Language
Jonas Colliander	BlueCarrot/SSE[34]	23 Jan 2013	55 min	English
Susanne Moland	Fazer Group	24 Jan 2013	60 min	English
Andreas Lee	NORM	29 Jan 2013	50 min	English
John Almering	CFI Group	29 Jan 2013	55 min	English
Victoria Gelmanovska	Unilever	31 Jan 2013	40 min	English

A.2 Case Study

Case	Position	Name	Date	Length	Language
Alpha	R	Julia	19 Mar 2013	57 min	Swedish
Alpha	C (R)	Pelle	26 Mar 2013	52 min	English
Alpha	C	Jesper	26 Mar 2013	36 min	Swedish
Alpha	*R*	*Frida*	*26 Mar 2013*	*46 min*	*Swedish*
Alpha	S	Albert	10 Apr 2013	50 min	English
Beta	R	Alex	19 Mar 2013	62 min	English
Beta	C	Micke	19 Mar 2013	54 min	Swedish
Beta	*S*	*Cecilia*	*21 Mar 2013*	*59 min*	*English*
Beta	S	Lea	22 Mar 2013	53 min	English
Gamma	R	Beatrice	25 Mar 2013	54 min	English/Swedish
Gamma	R	Beatrice	9 Apr 2013	20 min	Swedish
Gamma	C	Ashley	25 Mar 2013	48 min	English/Swedish
Gamma	*R*	*Emma*	*26 Mar 2013*	*48 min*	*Swedish*
Gamma	C	Håkan	8 Apr 2013	53 min	English
Delta	C	Filip	18 Mar 2013	44 min	English
Delta	R	Casper	3 Apr 2013	62 min	English

Italicised interviews are with persons from Psi Consulting.

[34] Specifically, Jonas Colliander works at the Center for Customer Marketing at Stockholm School of Economics.

Appendix B: Interviewee Details

These lists are based on information the interviewees gave on their own (and sometimes on their colleagues') responsibilities and thus, the exact same details are not included for all persons.

B.1 Alpha

Julia, Market Analyst (researcher) in a department of her own. Reports to the CEO and works closely with the Head of Marketing and Project Leaders. Responsible for sourcing research, e.g. brand tracking from Psi Consulting, advertising tracking and focus groups, the research budget.

Pelle, Campaign Leader/Media Manager (client/researcher) in the Marketing department. Responsible for running the media with the external media agency, together with Alpha's Campaign Project Leaders, incl. e.g. buying and analysing media as well as investigating the optimal target groups for different campaigns.

Jesper, Head of In-House Advertising Agency (client) in the Marketing department. Has twelve own direct reports. Responsible for all of Alpha's advertising, from flyers to TV, and for following up on advertising tracking and helping the team concretise research results to specific tasks.

***Frida**, Project Leader (researcher) at Psi Consulting with one Analyst in her team. Contact person for Alpha. Responsible for administrative work like billing, planning and budgeting, selling in projects, follow-ups on brand tracking and supporting the Analyst with analysis work.*

Albert, Head of Analytics (strategic), which is its own separate department. Reports to the Head of Operations and has five (soon six) own direct reports. Responsible for the function doing analysis on internal data for all other departments.

B.2 Beta

Alex, Senior Analyst (researcher) in the Analytics department. Reports to Lea and works closely with the Head of Development. Responsible for research regarding content development and content strategy, incl. e.g. tracking and post-season follow-ups.

Micke, Head of Public Relations (client) in the Marketing department. Responsible for the rhetorical PR and press work based on Beta's corporate identity, incl. contact with journalists and hands-on work with creating familiarity with Beta's services.

***Cecilia**, Senior Advisor (strategic) at Psi Consulting. As opposed to Psi Project Leaders not part of the operational (day-to-day) work with a certain client. Rather, is involved with a lot of clients and joins analysis work and client meetings when needed.*

Lea, Head of Analytics (strategic) in the Analytics department. Reports to the Planning Director and has three own direct reports. Responsible for all research done internally, e.g. on content and marketing.

B.3 Gamma

Beatrice, Customer Insight Manager (researcher) in the Marketing department. Responsible for decisions on what kind of research to buy, the research budget, creating research briefs, clarifying the purpose of studies, and contact to research vendors.

Ashley, Brand Manager (client) in the Marketing department. Reports to the Marketing Manager responsible for her category. Responsible for everything around the 4 P's for a certain brand, e.g. product launches, commercials and design changes. Orders tests and research from the researcher.

***Emma**, Project Leader (researcher) at Psi Consulting with two Analysts in her team. Contact person for Gamma. Responsible for administrative work like billing, planning and budgeting, selling in projects and follow-ups on brand tracking.*

Håkan, Marketing Manager (client) in the Marketing department. Overall responsible for a certain category and all its brands. The Brand managers working in that category report to him.

B.4 Delta

Erika, Head of Customer Insights (strategic), which is its own separate department. Reports to the Region Head and has five own direct reports. Responsible for the research function's work, incl. sourcing research, control of the research methods, research budget, contact with research providers and "guardi[ng] the data".

Filip, Brand Manager (client) in the Marketing department. Reports to the Category Manager for his specific category. Responsible for everything around the 4 P's for a certain group of brands, e.g. product launches and what is being communicated, and for all external contact points than retailers (which Sales are responsible for).

Casper, Customer Insights Manager (researcher) in the Customer Insights department. Reports to Erika. Responsible for supporting the team for a certain category with qualitative and quantitative research, incl. setting up customer research studies. Also supports the media team with media insights, e.g. following up on campaigns.

Italicised interviewees are Psi consultants.

Appendix C: Interview Guides

C.1 Researcher Role

Don't forget to confirm the purpose, the confidentiality, and the recording before starting the interview.

Short background questions: (aim for 15 minutes; if the researcher is Psi Consulting, ask what his/her perception of the client company is)

1. Could you explain what your role is?
2. How long have you been with the company?
3. Is there a defined mission/vision for the company?
4. Who are your most important stakeholders?
5. Who are your target customers?
6. What (in your opinion) sets your company apart from its competitors? (shortly ☺)
7. How does your company work with customer insights/customer data? (What data do you typically collect "automatically"? What data do you buy?)
8. How do you work with customer insights/customer data?

"We are trying to gain a better understanding of the process of turning customer insights into actionable recommendations. The purpose is to view the process step by step from different angles in order to be able to model what actually happens"

Process questions: (aim for 30 minutes; try to focus on research question/recommendation, since that's the focus of the thesis; ask *why* a lot!)

9. How does the need for data arise? (and how do you manage the different needs?)
10. What happens then? (i.e. try to get the interviewee to describe the process step by step)
11. Who is responsible for the different steps? (go through step by step to identify "swim lanes"; focus on the relationship with different suppliers/clients)
12. What do you think are the most critical (important) parts of the process?

Reflection questions: (aim for 10 minutes)

13. Is there anything we didn't ask you that you think is important for us to know?
14. Were there any questions or terms that you thought were difficult to answer or strange?

Remember to confirm whether it is okay to call/e-mail if we have an additional question or two.

C.2 Client Role

Don't forget to confirm the purpose, the confidentiality, and the recording before starting the interview.

Short background questions: (aim for 15 minutes)

15. Could you explain what your role is?
16. How long have you been with the company?
17. Is there a defined mission/vision for the company?
18. Who are your most important stakeholders?
19. Who are your target customers?
20. What (in your opinion) sets your company apart from its competitors? (shortly ☺)
21. How does your company work with customer insights/customer data? (What data do you typically collect "automatically"? What data do you buy?)
22. How do you work with customer insights/customer data?

"We are trying to gain a better understanding of the process of turning customer insights into actionable recommendations. The purpose is to view the process step by step from different angles in order to be able to model what actually happens"

Process questions: (aim for 30 minutes; try to focus on research question/recommendation, since the rest of the process will lie with the researcher)

23. How does the need for data arise?
24. What happens then? (i.e. try to get the interviewee to describe the process step by step)
25. Who is responsible for the different steps? (go through step by step to identify "swim lanes")

Reflection questions: (aim for 10 minutes)

26. Is there anything we didn't ask you that you think is important for us to know?
27. Were there any questions or terms that you thought were difficult to answer or strange?

Remember to confirm whether it is okay to call/e-mail if we have an additional question or two.

C.3 Strategic Role

Don't forget to confirm the purpose, the confidentiality, and the recording before starting the interview.

Short background questions: (aim for 20 minutes)

28. Could you explain what your role is?
29. How long have you been with the company?
30. Is there a defined mission/vision for the company?
31. Who are your most important stakeholders?
32. Who are your target customers?
33. What (in your opinion) sets your company apart from its competitors?

"We are trying to gain a better understanding of the process of turning customer insights into actionable recommendations. The purpose is to view the process step by step from different angles in order to be able to model what actually happens"

Process questions: (aim for 20 minutes; try to focus on the resources/capabilities/structure needed to support the process rather than the details of the process itself)

34. How does your company work with customer insights/customer data? (What data do you typically collect "automatically"? What data do you buy?)
35. What (in your opinion) is critical for this process to work? Why? What else? (try to get the person to list more things ☺)
36. Who is responsible for the different steps? (go through step by step to identify "swim lanes")
37. What skills does this person need (i.e. go through each step and discuss skills for each)

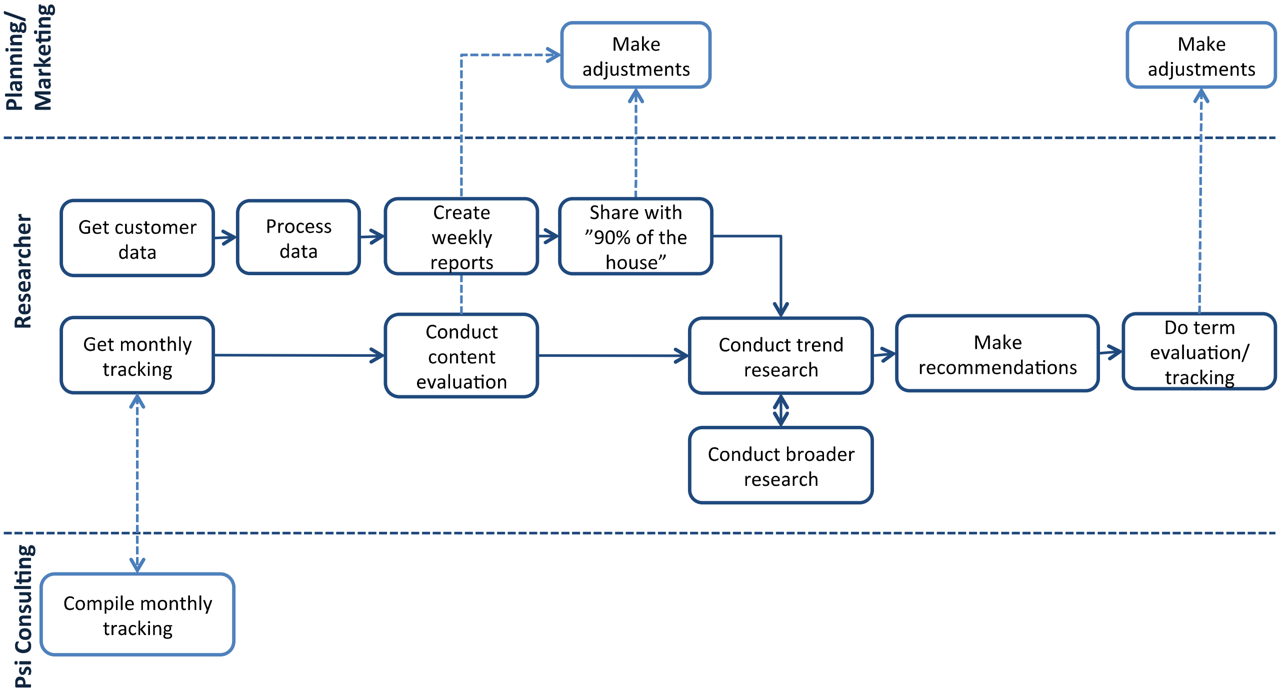
Reflection questions: (aim for 10 minutes)

38. Is there anything we didn't ask you that you think is important for us to know?
39. Were there any questions or terms that you thought were difficult to answer or strange?

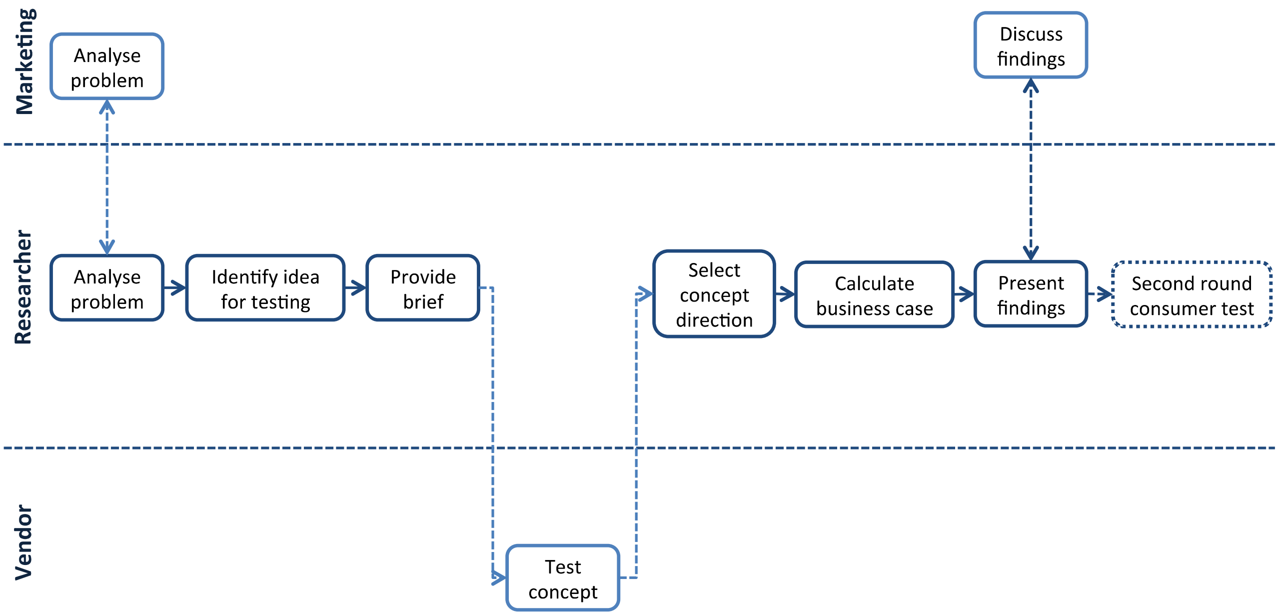
Remember to confirm whether it is okay to call/e-mail if we have an additional question or two.

Appendix D: Individual Customer Insight Processes

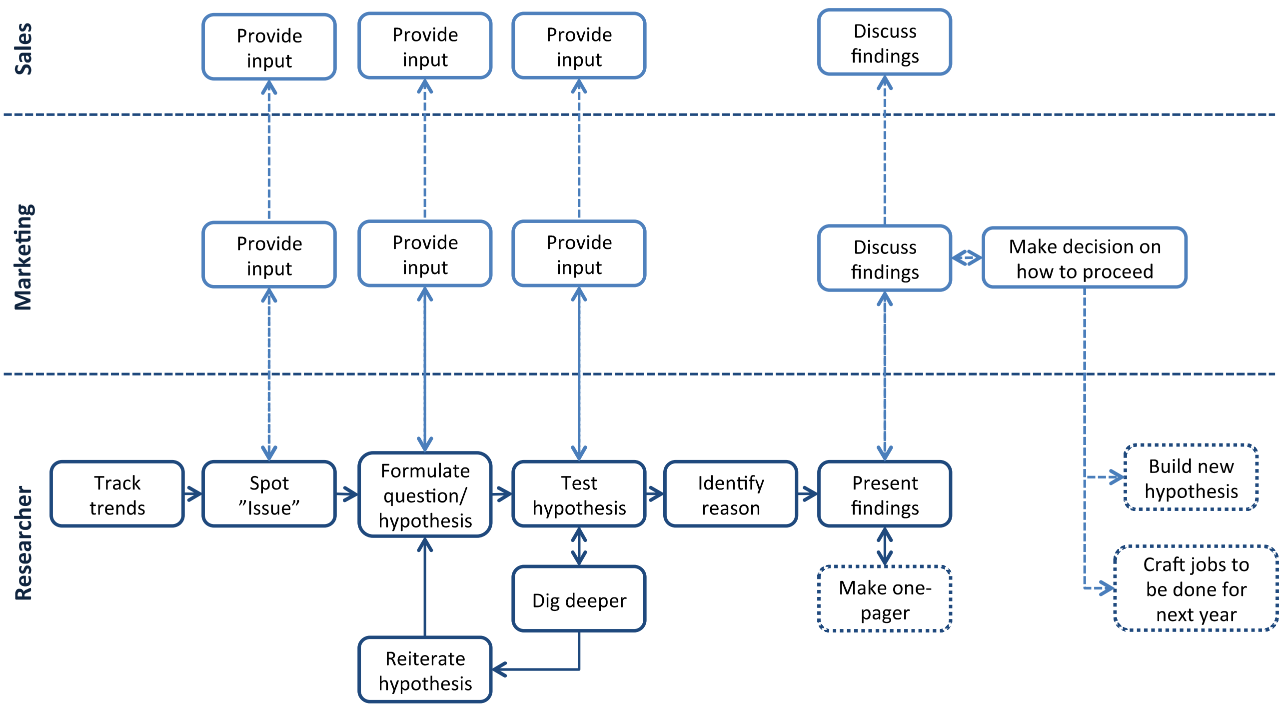
Process Outline Alex



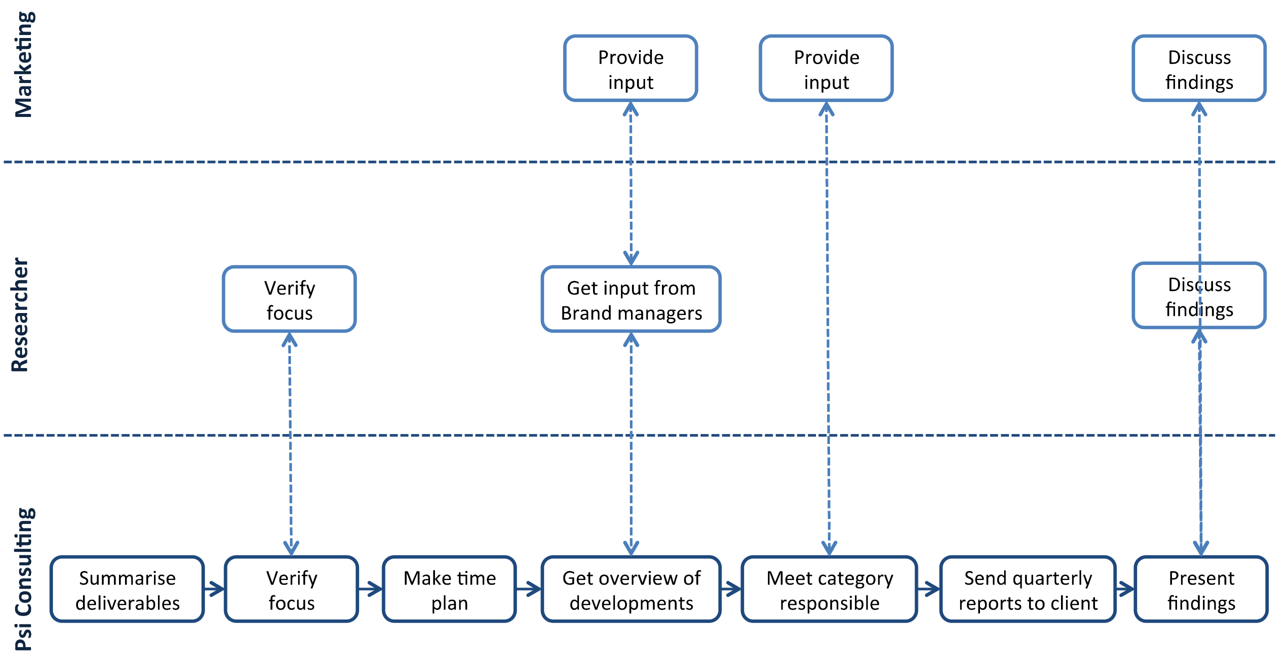
Process Outline Beatrice



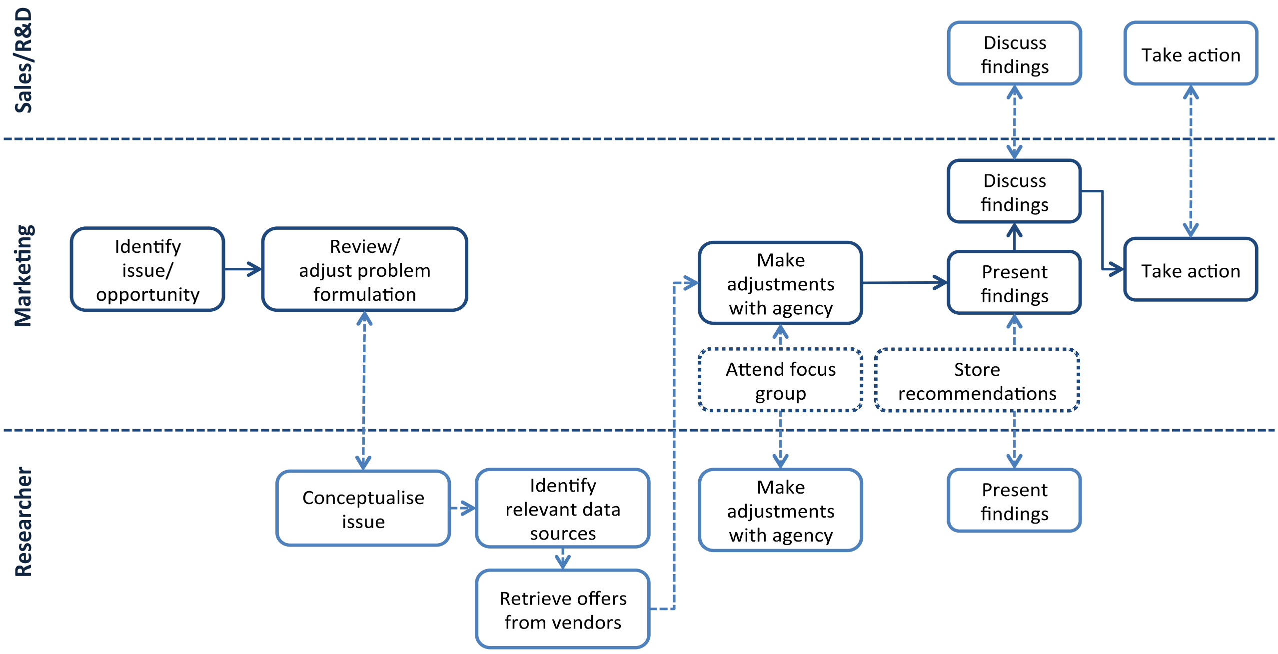
Process Outline Casper



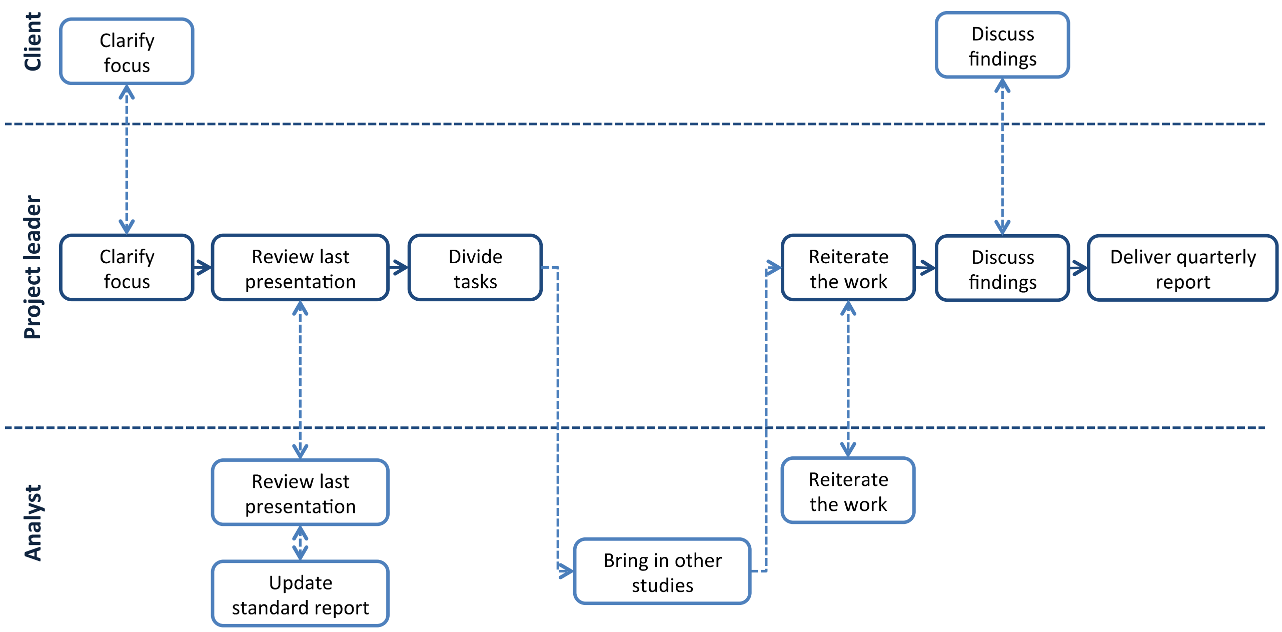
Process Outline Emma



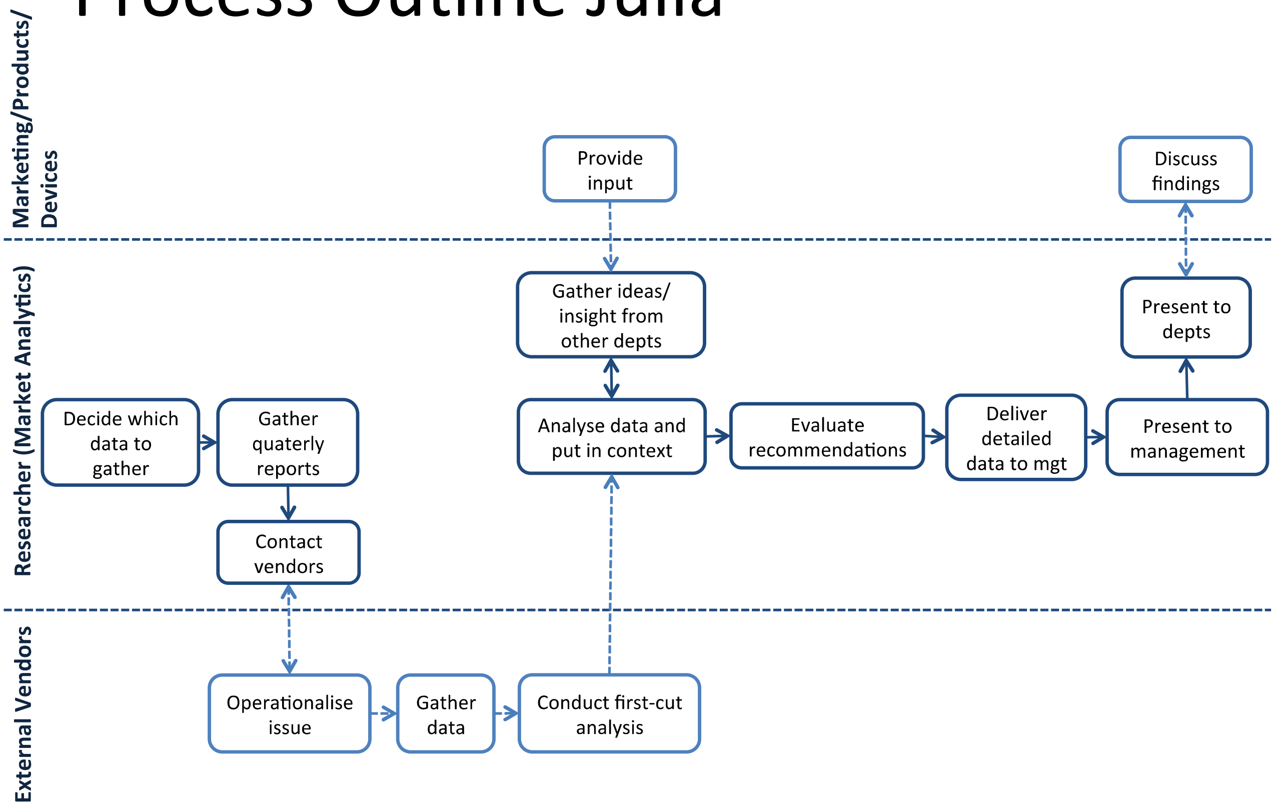
Process Outline Filip



Process Outline Frida



Process Outline Julia



Appendix E: Customer Orientation Data List

Company	CO category	Interviewee	CO content
Alpha	Functions involved	Albert	Board of directors
Alpha	Functions involved	Albert	CEO
Alpha	Functions involved	Albert	Customer Care
Alpha	Functions involved	Albert	Head of Operations
Alpha	Functions involved	Albert	Head of Analysis
Alpha	Functions involved	Albert	HR
Alpha	Functions involved	Albert	Infrastructure
Alpha	Functions involved	Albert	Legal
Alpha	Functions involved	Albert	Loyalty management
Alpha	Functions involved	Albert	Market research (Julia)
Alpha	Functions involved	Albert	Product owners
Alpha	Functions involved	Albert	Responsible for Alpha in Sweden and Denmark (CEO's boss)
Alpha	Functions involved	Albert	Sales & Marketing
Alpha	Functions involved	Frida	External advertising agency
Alpha	Functions involved	Frida	Mainly marketing, e.g. Head of marketing and In-house advertising agency
Alpha	Functions involved	Frida	Product (responsible for structuring the product offering)
Alpha	Functions involved	Frida	Retail outlets
Alpha	Functions involved	Frida	Top management team
Alpha	Functions involved	Jesper	Analysis department (Albert's team)
Alpha	Functions involved	Jesper	CEO
Alpha	Functions involved	Jesper	In-house agency
Alpha	Functions involved	Jesper	Market analyst/External research (Julia)
Alpha	Functions involved	Jesper	Marketing manager
Alpha	Functions involved	Julia	Advertising agency
Alpha	Functions involved	Julia	CEO
Alpha	Functions involved	Julia	Database analysts
Alpha	Functions involved	Julia	Devices
Alpha	Functions involved	Julia	Market analyst (Julia)
Alpha	Functions involved	Julia	Marketing
Alpha	Functions involved	Julia	Marketing manager
Alpha	Functions involved	Julia	Media agency
Alpha	Functions involved	Julia	Product management
Alpha	Functions involved	Julia	Sales management
Alpha	Functions involved	Julia	Top management team
Alpha	Functions involved	Pelle	In-house advertising agency
Alpha	Functions involved	Pelle	Loyalty
Alpha	Functions involved	Pelle	Telesales
Alpha	Target customer	Albert	Private customers: Four segments
Alpha	Target customer	Albert	Business customers: Companies with <99 employees
Alpha	Target customer	Frida	Segmentation of customer database (on existing customers)
Alpha	Target customer	Frida	Three groups based mainly on demographics, but partly also needs
Alpha	Target customer	Jesper	There are three primary target groups

Alpha	Target customer	Jesper	Technically everyone with a mobil phone
Alpha	Target customer	Julia	Main target group <[a certain age] years
Alpha	Target customer	Julia	Everyone with a mobile phone
Alpha	Target customer	Julia	There are different target groups
Alpha	Target customer	Pelle	The three target groups in detail
Alpha	Target customer	Pelle	One target group is their core customer, their focus
Alpha	Target customer	Pelle	When working with target groups, they use different sources of data to get a clear picture of them
Alpha	Target customer	Pelle	Update target groups continuously (probably)
Alpha	Target customer	Pelle	Theoretically everyone is a target customer (but not possible to pursue all)
Alpha	Type of data	Albert	Brand tracking
Alpha	Type of data	Albert	Customer satisfaction index
Alpha	Type of data	Albert	Data from automatic call-up after Customer Care calls
Alpha	Type of data	Albert	Mosaic data
Alpha	Type of data	Albert	Mystery shopping
Alpha	Type of data	Albert	Sales data (incl. usage patterns, billing, age, gender)
Alpha	Type of data	Albert	Studies on what the market thinks about us
Alpha	Type of data	Frida	Brand tracking (Psi Consulting)
Alpha	Type of data	Frida	Campaign tracking (Psi Consulting)
Alpha	Type of data	Frida	Conjoint study (to optimise advertising messages)
Alpha	Type of data	Frida	Evaluating new advertising concepts
Alpha	Type of data	Frida	Focus groups
Alpha	Type of data	Frida	Knowledge database for offers and campaigns
Alpha	Type of data	Frida	Mystery shopping
Alpha	Type of data	Frida	Tests in store (store as communication channel)
Alpha	Type of data	Jesper	Campaign tracking (Psi Consulting)
Alpha	Type of data	Jesper	Conjoint analyses
Alpha	Type of data	Jesper	Customer database
Alpha	Type of data	Jesper	Eye tracking
Alpha	Type of data	Jesper	Focus groups
Alpha	Type of data	Jesper	Mosaic data
Alpha	Type of data	Jesper	Pre-tests of commercials
Alpha	Type of data	Jesper	Segmentation projects
Alpha	Type of data	Julia	Brand tracking on customers (Psi Consulting)
Alpha	Type of data	Julia	Brand tracking on firms once per year (Psi Consulting)
Alpha	Type of data	Julia	Campaign tracking on firms (Psi Consulting)
Alpha	Type of data	Julia	Campaign tracking (Psi Consulting)
Alpha	Type of data	Julia	Competitor data (on campaigns, communication etc., weekly)
Alpha	Type of data	Julia	Customer behaviour (Mediavision, quarterly)
Alpha	Type of data	Julia	Customer database
Alpha	Type of data	Julia	Eye tracking
Alpha	Type of data	Julia	Focus groups
Alpha	Type of data	Julia	Data on number of sold devices etc. (GfK)
Alpha	Type of data	Julia	Market share etc. (every six months)
Alpha	Type of data	Julia	Reports from other actors in the market (quarterly)

Alpha	Type of data	Julia	Store design research
Alpha	Type of data	Julia	Surveys
Alpha	Type of data	Pelle	Customer database (how much the customers spend, their usage patterns and behaviour)
Alpha	Type of data	Pelle	What type of media is consumed by target group (Media agency/Orvesto)
Alpha	Type of data	Pelle	Sales data (weekly)
Alpha	Type of decision	Albert	Allocating media
Alpha	Type of decision	Albert	Bonus decisions for the Customer Care division
Alpha	Type of decision	Albert	Determine the optimal target group
Alpha	Type of decision	Albert	Find reasons for churn
Alpha	Type of decision	Albert	Follow-up on campaigns
Alpha	Type of decision	Albert	How many devices to buy of each sort
Alpha	Type of decision	Albert	Improving employer branding
Alpha	Type of decision	Albert	Predict who will be most likely to purchase a product
Alpha	Type of decision	Albert	Understand how customers react in certain situations
Alpha	Type of decision	Albert	Where to prioritise infrastructure improvements
Alpha	Type of decision	Frida	Decisions about products/services
Alpha	Type of decision	Frida	Developing advertising concepts
Alpha	Type of decision	Frida	How to structure offers
Alpha	Type of decision	Frida	In-store communication
Alpha	Type of decision	Frida	Re-designing stores
Alpha	Type of decision	Frida	The staff's behaviour in the stores
Alpha	Type of decision	Jesper	Advertising improvements
Alpha	Type of decision	Jesper	Buying media
Alpha	Type of decision	Jesper	Developing marketing concepts
Alpha	Type of decision	Jesper	Evaluate creative ideas
Alpha	Type of decision	Jesper	Evaluate pre-tests of commercials and print advertisements
Alpha	Type of decision	Jesper	How to improve future campaigns; keep what's good, avoid what's not good
Alpha	Type of decision	Jesper	Segmentation
Alpha	Type of decision	Julia	Adapt strategically to changes in the market
Alpha	Type of decision	Julia	Bonus decisions for the Marketing department
Alpha	Type of decision	Julia	Change on-going campaigns
Alpha	Type of decision	Julia	Developing advertising concepts
Alpha	Type of decision	Pelle	Adjust media plan
Alpha	Type of decision	Pelle	Buying media
Alpha	Type of decision	Pelle	Change on-going campaigns
Alpha	Type of decision	Pelle	Segmentation
Alpha	Type of decision	Pelle	Tailoring print ads
Alpha	Type of decision	Pelle	What products to advertise to which target groups
Beta	Functions involved	Alex	Content department
Beta	Functions involved	Alex	In-house marketing
Beta	Functions involved	Alex	*Not* so much Sales
Beta	Functions involved	Alex	Planning department
Beta	Functions involved	Alex	Press
Beta	Functions involved	Alex	Sometimes Digital media as well

Beta	Functions involved	Lea	In-house marketing
Beta	Functions involved	Lea	Planning
Beta	Functions involved	Lea	Press
Beta	Functions involved	Lea	Production
Beta	Functions involved	Lea	Sales are *not* included; do not receive factory research
Beta	Functions involved	Micke	Content analysis (Alex)
Beta	Functions involved	Micke	Content manager
Beta	Functions involved	Micke	Planning director
Beta	Functions involved	Micke	Press
Beta	Functions involved	Micke	Sales
Beta	Target customer	Alex	[Age range] and segments depending on content and time period
Beta	Target customer	Cecilia	[One certain age range for one part of Beta's business], females; [One ceetain age range for another part of Beta's business], males
Beta	Target customer	Cecilia	Don't know if there are other criteria beyond age
Beta	Target customer	Lea	Four target groups, very detailed (demographics and needs) but based on [one part of Beta's business]
Beta	Target customer	Lea	[Certain age ranges for Beta as a whole and for two specific parts of Beta's business]
Beta	Target customer	Micke	[Two certain age ranges for two different parts of Beta's business]
Beta	Target customer	Micke	[Beta's market] sells to demographic groups [and not geographical]
Beta	Type of data	Alex	Brand tracking (Psi Consulting)
Beta	Type of data	Alex	Competitor monitoring
Beta	Type of data	Alex	Content tracking (Psi Consulting)
Beta	Type of data	Alex	Usage data
Beta	Type of data	Alex	Data on marketing in own channels
Beta	Type of data	Alex	Season evaluation
Beta	Type of data	Alex	The general usage [of Beta's type of service]
Beta	Type of data	Alex	User insight (Orvesto)
Beta	Type of data	Cecilia	Brand tracking (Psi Consulting)
Beta	Type of data	Cecilia	Content tracking (Psi Consulting)
Beta	Type of data	Cecilia	Usage data
Beta	Type of data	Cecilia	Segmenting
Beta	Type of data	Lea	Brand tracking (Psi Consulting)
Beta	Type of data	Lea	Content tracking (Psi Consulting)
Beta	Type of data	Lea	Usage data
Beta	Type of data	Lea	Evaluation if poor performance
Beta	Type of data	Lea	Everything not content (e.g. logo, about every three years)
Beta	Type of data	Lea	Marketing in own channels
Beta	Type of data	Lea	Press tracking
Beta	Type of data	Lea	Season evaluation
Beta	Type of data	Lea	Segmenting (tns sifo)
Beta	Type of data	Micke	Brand tracking (Psi Consulting)
Beta	Type of data	Micke	Competitors' positioning of content
Beta	Type of data	Micke	Content tracking (Psi Consulting)
Beta	Type of data	Micke	Familiarity etc. (tns sifo)
Beta	Type of data	Micke	Market observation (Retriever)

Beta	Type of data	Micke	PR-barometern
Beta	Type of data	Micke	Social media (Meltwater Buzz)
Beta	Type of data	Micke	Speaking to journalists
Beta	Type of data	Micke	Trends in the general state of the market
Beta	Type of data	Micke	Ungdomsbarometern
Beta	Type of decision	Alex	Deciding position for certain content
Beta	Type of decision	Alex	Determining what kind of content
Beta	Type of decision	Alex	Marketing
Beta	Type of decision	Cecilia	Deciding position for a certain content
Beta	Type of decision	Cecilia	Decisions on marketing in own channels
Beta	Type of decision	Cecilia	Target segments
Beta	Type of decision	Lea	"I would say that 90-95 per cent of the decisions that we make are based on those [usage] figures"
Beta	Type of decision	Lea	"What should we push in the promotion"
Beta	Type of decision	Lea	Content adjustments (paraphrased)
Beta	Type of decision	Lea	Target segments (2010)
Beta	Type of decision	Micke	Choosing the right tonality
Beta	Type of decision	Micke	Crisis management, alternatively reinforce. Such assessments are done in the daily work.
Beta	Type of decision	Micke	Deciding what content to use
Beta	Type of decision	Micke	Formulate corporate identity
Beta	Type of decision	Micke	How to angle corporate information
Beta	Type of decision	Micke	Planning positions of different content
Beta	Type of decision	Micke	What content to focus on in press
Beta	Type of decision	Micke	What media channel to use
Beta	Type of decision	Micke	Where (regionally) to focus press work
Beta	Type of decision	Micke	Whether to try to match competitors' content or not
Delta	Functions involved	Casper	Sales (Key account managers)
Delta	Functions involved	Casper	Marketing (Brand managers and Category managers)
Delta	Functions involved	Filip	Sales
Delta	Functions involved	Filip	Marketing (Customer research, Brand managers and Category managers)
Delta	Functions involved	Filip	R&D (at presentations)
Delta	Target customer	Casper	Ten to death […] So everyone, really
Delta	Target customer	Filip	I work with a target group of [certain age range] women
Delta	Type of data	Casper	Brand perception data
Delta	Type of data	Casper	Customer panel data on e.g. buying behavior
Delta	Type of data	Casper	Market data (Nielsen)
Delta	Type of data	Casper	Media behaviour data (e.g. social media monitoring)
Delta	Type of data	Casper	Qualitative customer research
Delta	Type of data	Casper	Sales data from retailers
Delta	Type of data	Erika	Brand health
Delta	Type of data	Erika	Customer decision tree data
Delta	Type of data	Erika	Customer panel data on e.g. distribution and buyer behaviour (GfK)
Delta	Type of data	Erika	Positioning
Delta	Type of data	Erika	Price elasticity studies
Delta	Type of data	Erika	Scanner data on brand and category level (Nielsen)

Delta	Type of data	Erika	Segmentation
Delta	Type of data	Erika	Shop alongs
Delta	Type of data	Erika	Trends
Delta	Type of data	Filip	Brand equity tracking
Delta	Type of data	Filip	Category insights on drivers and customer perception
Delta	Type of data	Filip	Customer panel data
Delta	Type of data	Filip	Focus groups
Delta	Type of data	Filip	Media (checking stories in the news)
Delta	Type of data	Filip	Promotion activity tracking (part of brand equity)
Delta	Type of data	Filip	Sales data from three different sources
Delta	Type of decision	Casper	How to drive brand/category
Delta	Type of decision	Casper	How to make people buy certain products
Delta	Type of decision	Casper	How to market
Delta	Type of decision	Casper	Integrated business planning process
Delta	Type of decision	Casper	Jobs to be done for next year
Delta	Type of decision	Casper	Product launches
Delta	Type of decision	Casper	Setting next year's strategy
Delta	Type of decision	Filip	Setting next year's strategy
Delta	Type of decision	Filip	Something related to the 4 P:s
Gamma	Functions involved	Ashley	Customer Insight manager
Gamma	Functions involved	Ashley	Design agency (external)
Gamma	Functions involved	Ashley	Marketing
Gamma	Functions involved	Ashley	Marketing director
Gamma	Functions involved	Ashley	Marketing manager
Gamma	Functions involved	Ashley	Media agency (external)
Gamma	Functions involved	Ashley	Restaurant division
Gamma	Functions involved	Ashley	Sales
Gamma	Functions involved	Beatrice	Advertising agency (external)
Gamma	Functions involved	Beatrice	Customer Insight manager
Gamma	Functions involved	Beatrice	Marketing
Gamma	Functions involved	Beatrice	Marketing director
Gamma	Functions involved	Beatrice	Media agency (external)
Gamma	Functions involved	Beatrice	PR division
Gamma	Functions involved	Beatrice	Production
Gamma	Functions involved	Beatrice	Sales Analytics
Gamma	Functions involved	Beatrice	TMT
Gamma	Functions involved	Emma	Advertising agency (external)
Gamma	Functions involved	Emma	Media agency (external)
Gamma	Functions involved	Håkan	Insight/Research manager
Gamma	Functions involved	Håkan	Marketing
Gamma	Functions involved	Håkan	Procurement
Gamma	Functions involved	Håkan	Restaurant division
Gamma	Functions involved	Håkan	Sales responsible for the channel
Gamma	Target customer	Ashley	Different for each brand
Gamma	Target customer	Ashley	[One of Gamma's brands]: [Certain age range] and older people for the [certain

			type of the product]
Gamma	Target customer	Ashley	[One of Gamma's brands] Older men, [certain age]
Gamma	Target customer	Beatrice	Sweden's whole population
Gamma	Target customer	Beatrice	Different for each brand/category
Gamma	Target customer	Håkan	We serve more or less anyone
Gamma	Target customer	Håkan	Depends on the product
Gamma	Target customer	Håkan	Different offers for different situations, rather than persons
Gamma	Type of data	Ashley	Brand tracking
Gamma	Type of data	Ashley	Commercial tracking
Gamma	Type of data	Ashley	Design tests
Gamma	Type of data	Ashley	Facebook
Gamma	Type of data	Ashley	Listen to restaurateurs
Gamma	Type of data	Ashley	Need scope
Gamma	Type of data	Beatrice	Advertising tests
Gamma	Type of data	Beatrice	Advertising tracking (Psi Consulting)
Gamma	Type of data	Beatrice	Ethnographical interviews
Gamma	Type of data	Beatrice	Keeping track on internet
Gamma	Type of data	Beatrice	Launch follow-up studies
Gamma	Type of data	Beatrice	Packaging tests
Gamma	Type of data	Beatrice	Presentations from suppliers
Gamma	Type of data	Beatrice	Sales numbers for the category
Gamma	Type of data	Beatrice	Store/restaurant (channel) checks
Gamma	Type of data	Beatrice	Test launches
Gamma	Type of data	Beatrice	Tests of variations of the products
Gamma	Type of data	Beatrice	Trend reports
Gamma	Type of data	Beatrice	Trend spotting travels
Gamma	Type of data	Emma	Brand tracking (Psi Consulting, quarterly), including comparison to competitor brands
Gamma	Type of data	Emma	Brand tracking (monthly)
Gamma	Type of data	Emma	Trend cases
Gamma	Type of data	Håkan	Advertising tests
Gamma	Type of data	Håkan	Advertising tracking (Psi Consulting)
Gamma	Type of data	Håkan	Brand tracking
Gamma	Type of data	Håkan	Brand tracking (Psi Consulting)
Gamma	Type of data	Håkan	Data on category drivers
Gamma	Type of data	Håkan	General writing in blogs, facebook etc.
Gamma	Type of data	Håkan	Launch tests
Gamma	Type of data	Håkan	Need scope/positioning data
Gamma	Type of data	Håkan	Other categories' research
Gamma	Type of data	Håkan	Packaging tests
Gamma	Type of data	Håkan	Retailer sales data
Gamma	Type of data	Håkan	Sales data
Gamma	Type of data	Håkan	Trend input from the restaurateurs (through the restaurant division)
Gamma	Type of decision	Ashley	Change in communication platform
Gamma	Type of decision	Ashley	Decisions on variations of the product

Gamma	Type of decision	Ashley	Design decisions (e.g. packaging)
Gamma	Type of decision	Ashley	Doing the marketing plan
Gamma	Type of decision	Ashley	Building arguments for sales to use towards customers/channels
Gamma	Type of decision	Ashley	Proving that marketing work has effect
Gamma	Type of decision	Ashley	Restaurateur/product decisions
Gamma	Type of decision	Beatrice	Advertising adjustments
Gamma	Type of decision	Beatrice	Allocating media
Gamma	Type of decision	Beatrice	Changes in production
Gamma	Type of decision	Beatrice	Marketing concepts
Gamma	Type of decision	Beatrice	Positioning
Gamma	Type of decision	Beatrice	Product development (e.g. packaging)
Gamma	Type of decision	Beatrice	Product launches
Gamma	Type of decision	Beatrice	Understand customer drivers
Gamma	Type of decision	Beatrice	Whether to continue/invest more in a project
Gamma	Type of decision	Emma	Campaign improvements
Gamma	Type of decision	Emma	Communication evalutation and improvements
Gamma	Type of decision	Emma	How to buy media
Gamma	Type of decision	Håkan	Advertising concepts
Gamma	Type of decision	Håkan	Campaign decisions
Gamma	Type of decision	Håkan	Design changes
Gamma	Type of decision	Håkan	Launch decisions
Gamma	Type of decision	Håkan	Less and less decisions based on customer information
Gamma	Type of decision	Håkan	Negotiation arguments
Gamma	Type of decision	Håkan	Writing marketing plan, incl. projections

Appendix F: Resource-Based Theory Data List

Company	RBT category	Side	Role	Inter-viewee	RBT construct	RBT quote
Alpha	Capability	Internal	C	Albert	Clarifying purpose	To say "This is the problem" [so that C and R together can find a good solution]
Alpha	Capability	Internal	C	Albert	Clarifying purpose	Explain the problem and purpose of research (paraphrase)
Alpha	Capability	Internal	R	Frida	Translating business issues	Understand what you can use the tracking for
Alpha	Capability	Internal	R	Frida	Translating business issues	Translate your business problems to something that we actually could help them with through the tracking
Alpha	Capability	Internal	R	Frida	Writing a brief	It is very important in that step […] that they are a little open and blurt out problems that they have
Alpha	Capability	Internal	R	Frida	Writing a brief	[Being] Clear about what they want to get out of a study (paraphrase)
Alpha	Capability	Internal	R	Jesper	Being concrete	I think clarity is the key word
Alpha	Capability	Internal	R	Jesper	Being relevant	She needs to be pedagocial towards me, who is *not* an analyst
Alpha	Capability	Internal	R	Jesper	Being relevant	Deliver relevant material (paraphrase)
Alpha	Capability	Internal	R	Jesper	Being relevant	Adapt the statistics sample for each receiver (paraphrase)
Alpha	Capability	Internal	C	Jesper	Clarifying purpose	We need to be very clear about why we do things, what the purpose is. That's the most important
Alpha	Capability	Internal	R	Jesper	Networking	She knows who to turn to
Alpha	Capability	Internal	C	Jesper	Translating data into action	To concretise results to a craft sort of
Alpha	Capability	Internal	C	Jesper	Using your judgement	[To] balance gut feeling and calm (paraphrase)
Alpha	Capability	Internal	C	Jesper	Using your judgement	Act upon your responsibility, your mandate, more; More impulsively
Alpha	Capability	Internal	R	Julia	Being relevant	Be berpective towards [the client]; Pick out […] certain parts that are more relevant (paraphrase)
Alpha	Capability	Internal	R	Julia	Being relevant	Make a presentation about the most important in the analysis (paraphrase)
Alpha	Capability	Internal	R	Julia	Conceptualising the problem	Look over […] what analysis that is needed and that all parts are covered
Alpha	Capability	Internal	R	Julia	Connecting insights	Connect insights from different data sources (paraphrase)
Alpha	Capability	Internal	R	Julia	Connecting insights	Connect to precious events/results (paraphrase)
Alpha	Capability	Internal	R	Julia	Connecting insights	Bearbeta data (paraphrase)
Alpha	Capability	Internal	R	Julia	Connecting insights	Being able to set estimates for different [competitors] (paraphrase)
Alpha	Capability	Internal	R	Julia	Making recommenddati ons	Being able to give strategic recommendations of next steps (paraphrase)
Alpha	Capability	Internal	R	Julia	Networking	[Being able to] identify who specifically […] that could have more information
Alpha	Capability	Internal	R	Julia	Writing a brief	Clear about the focus towards suppliers (paraphrase)
Alpha	Capability	Internal	R	Pelle	Being relevant	Understanding of the recipient of the data (paraphrase)
Alpha	Capability	Internal	C	Pelle	Clarifying purpose	Clear understanding what I will need
Alpha	Capability	Internal	R	Pelle	Connecting insights	Make sense of the numbers
Alpha	Capability	Internal	C	Pelle	Using your judgement	Combining experience and gut feeling with data (paraphrase)

Alpha	Resource	Internal	S	Albert	Business understanding	Know how the business works
Alpha	Resource	Internal	S	Albert	Project management skills	Knowledge of how to drive projects
Alpha	Resource	Internal	S	Albert	Research method knowledge	Statistical background
Alpha	Resource	Internal	R	Frida	Business understanding	She knows their industry
Alpha	Resource	Internal	R	Frida	Research method knowledge	She isn't just knowledgable about research and insight
Alpha	Resource	Internal	C	Jesper	Calm	Some kind of foundation, a kind of calm [towards a stressful situation]
Alpha	Resource	Internal	R	Jesper	Experience	Experience
Alpha	Resource	Internal	C	Jesper	Humility	You have to be open towards receiving that criticism and view it very constructively
Alpha	Resource	Internal	C	Jesper	Humility	You probably have to be very prestigeless […] towards what you are doing
Alpha	Resource	Internal	C	Jesper	Humility	You probably have to be very […] humble towards what you are doing
Alpha	Resource	Internal	C	Jesper	Humility	Open for making anlyses [rather than letting creativity direct you]
Alpha	Resource	Internal	R	Julia	Analytical skills	If I was not able to analyse […] then it would be wrong
Alpha	Resource	Internal	R	Julia	Business understanding	And the experience you have [about what has happened in the company is important]
Alpha	Resource	Internal	R	Julia	Business understanding	Keeping a continuous check on the competitors (paraphrase)
Alpha	Resource	Internal	R	Julia	Business understanding	Business focus (paraphrase); Management comes with new foci each quarter, so […] the analysis has to follow
Alpha	Resource	Internal	R	Julia	Business understanding	Knowledge about what has happened
Alpha	Resource	Internal	R	Julia	Business understanding	Input from other departments in connection to presentations (paraphrase)
Alpha	Resource	Internal	R	Julia	Communication skills	Enjoying giving presentations
Alpha	Resource	Internal	R	Julia	Flexibility	Flexible
Alpha	Resource	Internal	R	Julia	Internal relationships	Very important to know a lot of people internally; Have a pretty solid relationship
Alpha	Resource	Internal	R	Julia	Knowledge what data exists	Have continuous check on all data sources (paraphrase)
Alpha	Resource	Internal	R	Julia	Project management skills	To be able to plan (paraphrase)
Alpha	Resource	Internal	R	Julia	Research vendor knowledge	Have a good relation to research companies (paraphrase)
Alpha	Resource	Internal	R	Pelle	Analytical skills	Like working with numbers (paraphrase)
Alpha	Resource	Internal	R	Pelle	Analytical skills	Understand the numbers (but not necessarily be an analytical person)
Alpha	Resource	Internal	R	Pelle	Analytical skills	Patience to find a story in the data (paraphrase)
Alpha	Resource	Internal	R	Pelle	Communication skills	Communication/presentation skills (paraphrase)
Alpha	Resource	Internal	R	Pelle	Curiosity	Curiosity
Alpha	Resource	Internal	C	Pelle	Experience	Then we build the walls with experience
Alpha	Capability	External	R	Frida	Establishing a helping relationship	It is after all up to us to try to get them to understand and to help us help them
Alpha	Capability	External	R	Julia	Doing in-depth	Being able to make a deeper analysis of the data

					analysis	(paraphrase)
Alpha	Capability	External	R	Julia	Making recommendations	[Being able to give] as sharp recommendations as possible from the start is of course important
Alpha	Capability	External	R	Julia	Making recommendations	Being able to provide recommendations and actions
Alpha	Capability	External	R	Julia	Making recommendations	Dare to draw conclusions (paraphrase)
Alpha	Capability	External	R	Julia	Making recommendations	Acting lika a consultant; delivering actionable need-to-know studies (paraphrase)
Alpha	Resource	External	R	Frida	Business understanding	Understand their business and what their potential problems could be
Alpha	Resource	External	R	Frida	Business understanding	It is important to have knowledge about the industry
Alpha	Resource	External	R	Frida	Service-mindedness	It is important that we can be flexible
Alpha	Resource	External	R	Julia	Business understanding	That they are willing enough to understand the market
Alpha	Resource	External	R	Julia	Customer knowledge	Having a good relationship with the client (paraphrase)
Alpha	Resource	External	R	Julia	Service-mindedness	It is important that it is a person who is e.g. contactable
Alpha	Resource	External	R	Julia	Service-mindedness	Then it's important that the suppliers can deliver at the point of time I want it
Alpha	Resource	External	R	Julia	Service-mindedness	That they can be a little flexible
Beta	Capability	Internal	R	Alex	Being concrete	[So always be very] concrete
Beta	Capability	Internal	R	Alex	Being relevant	Seeing their [all the different departments'] specific needs
Beta	Capability	Internal	R	Alex	Being relevant	Being able also to adjust the information [to the listener]
Beta	Capability	Internal	R	Alex	Challenging	Seeing problems that they might not have targeted themselves in the different departments
Beta	Capability	Internal	R	Cecilia	Writing a brief	Providing a focus area (paraphrase)
Beta	Capability	Internal	R	Cecilia	Writing a brief	Collecting all their thoughts and inputs
Beta	Capability	Internal	R	Lea	Being humble	You have to be humble in your interactions with the person that you're working with, because they are the experts of what they are doing
Beta	Capability	Internal	R	Lea	Being relevant	Highlighting the most relevant things (paraphrase)
Beta	Capability	Internal	R	Lea	Being relevant	Editing the information given by external providers (paraphrase)
Beta	Capability	Internal	R	Lea	Making recommendations	I think you have to be very specific when you give them recommendations
Beta	Capability	Internal	C	Micke	Clarifying purpose	Delivering a true picture (paraphrase)
Beta	Capability	Internal	C	Micke	Translating data into action	Prepare them [the research presentations] so that they feel sensible and become understandable for my staff; Make the presentation more optimal and relevant
Beta	Resource	Internal	R	Alex	Communication skills	Able to communicate with people
Beta	Resource	Internal	R	Alex	Power of initiative	Take your own initiatives
Beta	Resource	Internal	R	Alex	Pragmatics	So always be very pragmatic
Beta	Resource	Internal	R	Cecilia	Internal relationships	How in tune they are with the rest of the organisation

Beta	Resource	Internal	R	Lea	Analytical skills	Statistically minded
Beta	Resource	Internal	R	Lea	Business understanding	As a researcher you have to know everything that goes on in the whole company, basically
Beta	Resource	Internal	R	Lea	Communication skills	Fluent in the marketing language
Beta	Resource	Internal	R	Lea	Communication skills	Sociable so that you can feel the situation
Beta	Resource	Internal	R	Lea	Communication skills	You need to be a bit of a chameleon, sort of blend in well is important
Beta	Resource	Internal	C	Lea	Humility	What we do need from the departments that we work with is that they are very open with what they are doing, so that the researcher gets really involved the whole way
Beta	Resource	Internal	R	Lea	Integrity	Unbiased (paraphrase)
Beta	Resource	Internal	R	Lea	Trust	Credibility (paraphrase)
Beta	Resource	Internal	R	Lea	Trust	Trust
Beta	Resource	Internal	C	Micke	Analytical skills	Logic
Beta	Resource	Internal	C	Micke	Customer understanding	Good contact with customers/media channels (paraphrase)
Beta	Resource	Internal	C	Micke	Humility	[One should always be] listening
Beta	Capability	External	R	Cecilia	Doing in-depth analysis	Making the solid information useful for the client (paraphrase)
Beta	Capability	External	R	Cecilia	Engaging customer in workshop	Engage customer in workshops (paraphrased)
Beta	Capability	External	R	Cecilia	Power-networking	Getting the right people to attend the presentations
Beta	Capability	External	R	Micke	Doing in-depth analysis	What gives extra good quality, that is engagement in the material
Beta	Capability	External	R	Micke	Doing in-depth analysis	Deliver content rather than vanity (paraphrase)
Beta	Capability	External	R	Micke	Taking different perspectives	That they can see it [the material] with *our* eyes
Beta	Resource	External	R	Alex	Business understanding	They have to understand your business
Beta	Resource	External	R	Alex	Service-mindedness	Service-minded
Beta	Resource	External	R	Cecilia	Analytical skills	Everybody here has to be analytical
Beta	Resource	External	R	Cecilia	Market knowledge	A good understanding of what's happening in the industry
Beta	Resource	External	R	Cecilia	Business understanding	Knowledge of the company (paraphrase)
Beta	Resource	External	R	Cecilia	Business understanding	Knowing which channels are important in the industry (paraphrase)
Beta	Resource	External	R	Cecilia	Creativity	Creative
Beta	Resource	External	R	Cecilia	Curiosity	Curious
Beta	Resource	External	R	Cecilia	Customer knowledge	We want every project leader to be more of a relationship-builder with the client
Beta	Resource	External	R	Cecilia	Customer knowledge	Social
Beta	Resource	External	R	Cecilia	Customer knowledge	Knowing who our listener is
Beta	Resource	External	R	Cecilia	Experience	I would say it's only experience that can enable it [knowing what is relevant]
Beta	Resource	External	R	Cecilia	Proactivity	Pro-active
Beta	Resource	External	R	Lea	Business understanding	Know our business (in the sense of both company and industry)
Beta	Resource	External	R	Micke	Business	That you feel, that you know the product you are

					understanding	covering; That they can see nuances
Beta	Resource	External	R	Micke	Perceptiveness	It of course requires perceptiveness from them
Delta	Capability	Internal	R	Casper	Being humble	Caring to involve Sales/Marketing to understand context (paraphrase)
Delta	Capability	Internal	R	Casper	Being humble	Questioning your own hypothesis (paraphrase); I guess that you need to be open to the fact that you don’t get it right the first time
Delta	Capability	Internal	R	Casper	Building hypotheses	Make good hypotheses (paraphrase)
Delta	Capability	Internal	R	Casper	Conceptualising the problem	Link the hypothesis with the right type of data
Delta	Capability	Internal	R	Casper	Connecting insights	Identifying patterns ("And then we have to see if we can find patterns to hook it on")
Delta	Capability	Internal	R	Casper	Connecting insights	Seeing the big picture ("You looked at something very closely but then when you took a few steps back you realised that it was dependent on something else")
Delta	Capability	Internal	R	Casper	Representing customers	Safe-guarding/representing the consumer [customer] perspective (paraphrase)
Delta	Capability	Internal	R	Casper	Representing customers	Representing local interests (paraphrase)
Delta	Capability	Internal	R	Erika	Being relevant	Knowing how to meet people's needs
Delta	Capability	Internal	C	Filip	Assessing the need for data	You need to be able to understand when you need to look at data
Delta	Capability	Internal	R	Filip	Challenging	It’s a good opportunity to get some challenges on results of our categories and brands
Delta	Capability	Internal	C	Filip	Clarifying purpose	To make sure we don’t go too wide or to narrow; to be specific to our problem
Delta	Capability	Internal	C	Filip	Clarifying purpose	Being clear on the objectives; there can’t be any misunderstandings on what we need to find out
Delta	Capability	Internal	R	Filip	Conceptualising the problem	They can conceptualise the problem
Delta	Capability	Internal	R	Filip	Conceptualising the problem	They could quantify the problem in sub-problems to see where the problem really is
Delta	Capability	Internal	C	Filip	Managing focus groups	Making sure the right questions are asked [during focus groups]
Delta	Capability	Internal	C	Filip	Putting into context	Critical questioning ("To make sure that we understand where that is coming from, so we don’t just take that as a truth")
Delta	Capability	Internal	C	Filip	Translating data into action	Identifying patterns (paraphrase)
Delta	Capability	Internal	C	Filip	Translating data into action	Prioritise in the data/understand once you get to the findings, what is actually important
Delta	Resource	Internal	R	Casper	Communication skills	Communication skills, how you formulate yourself into words (crisp, clear, straight to the point)
Delta	Resource	Internal	R	Casper	Experience	I guess the more experienced you are, the better you get at getting a hunch on where to start
Delta	Resource	Internal	C	Casper	Experience	Experienced with a lot of background information (paraphrase)
Delta	Resource	Internal	R	Casper	Experience	An understanding of which figures and metrics and relations belong together
Delta	Resource	Internal	R	Erika	Analytical skills	Like working with data
Delta	Resource	Internal	R	Erika	Analytical skills	Be analytical
Delta	Resource	Internal	C	Erika	Commercial mind-set	(Marketing needs) Business-focus, as they have many touch points with others
Delta	Resource	Internal	R	Erika	Curiosity	A curious mind
Delta	Resource	Internal	R	Erika	Customer understanding	Awareness of that one person's taste or behaviour cannot be generalizable
Delta	Resource	Internal	R	Erika	Customer understanding	Acknowledging that there can sometimes be a grain of truth in what you sense [in one person]

Delta	Resource	Internal	R	Erika	Customer understanding	Be interested in people
Delta	Resource	Internal	R	Erika	Integrity	Not jumping to conclusions
Delta	Resource	Internal	R	Erika	Integrity	Standing your ground (for the recommendation)
Delta	Resource	Internal	R	Erika	Integrity	Being neutral/true to the data
Delta	Resource	Internal	R	Erika	Knowledge what data exists	Knowledge of that data exists; Knowledge that we have this knowledge
Delta	Resource	Internal	R	Erika	Scepticism	Healthy scepticism
Delta	Resource	Internal	C	Filip	Analytical skills	Definitely analytical skills
Delta	Resource	Internal	C	Filip	Market knowledge	We do have a lot of knowledge in our categories that we are working in
Delta	Resource	Internal	R	Filip	Customer understanding	An understanding of consumers [customers] and how consumers [customers] think
Delta	Resource	Internal	C	Filip	Customer understanding	An understanding of consumers [customers] and how consumers [customers] think
Delta	Resource	Internal	R	Filip	Knowledge what data exists	Knowing what (parallel) data can answer the question ("When it comes to bigger category studies it's difficult to know what we already have")
Delta	Resource	Internal	R	Filip	Research method knowledge	Know which type of study is suitable for a given issue (paraphrase)
Delta	Resource	Internal	R	Filip	Research method knowledge	Make sure that we get enough data to be able to draw conclusions from it
Delta	Resource	Internal	R	Filip	Research vendor knowledge	Know the research providers and costs (paraphrase)
Delta	Capability	External	R	Filip	Taking different perspectives	They can certainly have a new set of eyes to look at a certain problem
Delta	Resource	External	R	Filip	Integrity	But it's important to really qualify what they have quantified
Gamma	Capability	Internal	R	Ashley	Approving research set-up	Check if the research set-up fulfils demands on target group (paraphrase)
Gamma	Capability	Internal	R	Ashley	Approving research set-up	[Check] that the questionn[aire] is correct
Gamma	Capability	Internal	R	Ashley	Being humble	Asking me [the client] a lot of questions [before contracting a research org]
Gamma	Capability	Internal	C	Ashley	Clarifying purpose	It's really important for me to say exactly what I want *in the end*
Gamma	Capability	Internal	R	Ashley	Connecting insights	Summarise and analy[se] different kinds of data
Gamma	Capability	Internal	C	Ashley	Putting into context	I can see the big picture, because I know the brand and I have all the other research
Gamma	Capability	Internal	C	Ashley	Putting into context	Emotional [when interpreting results]
Gamma	Capability	Internal	C	Ashley	Translating data into action	It's important to know how to ta mot det [data]
Gamma	Capability	Internal	C	Ashley	Translating data into action	[It's important to know how to] analysera det
Gamma	Capability	Internal	C	Ashley	Translating data into action	Analysing the results and drawing conclusions
Gamma	Capability	Internal	R	Ashley	Writing a brief	Decides what kind of companies that we are going to talk to to get the [tender]
Gamma	Capability	Internal	R	Ashley	Writing a brief	Writing the brief [to research org]
Gamma	Capability	Internal	R	Beatrice	Approving research set-up	[Approve] questionnaires
Gamma	Capability	Internal	R	Beatrice	Building hypotheses	Understand shy he or she should do what analyses it is you should do and what we are going to use them for
Gamma	Capability	Internal	R	Beatrice	Building hypotheses	Clear with the purpose

Gamma	Capability	Internal	R	Beatrice	Building hypotheses	Create a purpose of the study
Gamma	Capability	Internal	R	Beatrice	Challenging	Challenge Brand managers purpose of research (paraphrase)
Gamma	Capability	Internal	R	Beatrice	Conceptualising the problem	Do a proper problem analysis [to find out what we really need to know]
Gamma	Capability	Internal	R	Beatrice	Connecting insights	Present the results within its context
Gamma	Capability	Internal	R	Beatrice	Writing a brief	Write a brief
Gamma	Capability	Internal	R	Beatrice	Writing a brief	Clarufy questions [for the research companies]
Gamma	Capability	Internal	R	Beatrice	Writing a brief	Have preparatory discussions with the research companies to get the right focus of the analysis (paraphrase)
Gamma	Capability	Internal	C	Håkan	Assessing the need for data	Recycle as much information as possible [from previous research projects]
Gamma	Capability	Internal	R	Håkan	Challenging	Challenging me
Gamma	Capability	Internal	C	Håkan	Clarifying purpose	Explain what type of issue I have and what my hypothesis about the problem is
Gamma	Capability	Internal	C	Håkan	Clarifying purpose	Create a hypothesis
Gamma	Capability	Internal	C	Håkan	Putting into context	Go beyond the findings reported from th research firm
Gamma	Capability	Internal	C	Håkan	Translating data into action	Explain the research results (paraphrase)
Gamma	Capability	Internal	R	Håkan	Writing a brief	Developing a research brief into a research product
Gamma	Capability	Internal	R	Håkan	Writing a brief	Find the right partners
Gamma	Capability	Internal	R	Håkan	Writing a brief	Write the research brief
Gamma	Resource	Internal	C	Ashley	Analytical skills	Analytical skills, that is super important
Gamma	Resource	Internal	C	Ashley	Analytical skills	[To] be able to understand contexts
Gamma	Resource	Internal	C	Ashley	Market knowledge	You need to have a good, *great*, understanding of brands and how they work
Gamma	Resource	Internal	C	Ashley	Market knowledge	Knowing the current brand buzz (paraphrase)
Gamma	Resource	Internal	R	Ashley	Business understanding	She needs to have an uderstanding of the brand
Gamma	Resource	Internal	C	Ashley	Commercial mind-set	Keeping the relation between Marketing and Sales good and tight
Gamma	Resource	Internal	C	Ashley	Commercial mind-set	[Being] commercial in our thinking
Gamma	Resource	Internal	R	Ashley	Integrity	Objective
Gamma	Resource	Internal	C	Ashley	Passion	You have to be engaged and passionate and be passionate about what you do
Gamma	Resource	Internal	R	Ashley	Research method knowledge	Expert knowledge of how to reach the needed result/answer (paraphrase)
Gamma	Resource	Internal	R	Beatrice	Integrity	Be very clear when it comes to the results and honest and not to manipulate
Gamma	Resource	Internal	R	Beatrice	Integrity	Be extremely honest and objective when presenting the results
Gamma	Resource	Internal	R	Beatrice	Project management skills	And then of course I am a project manager
Gamma	Resource	Internal	R	Beatrice	Research method knowledge	Especially that I have method knowledge when it comes to studies
Gamma	Resource	Internal	R	Beatrice	Research method knowledge	I know a lot about statistical methods

Gamma	Resource	Internal	R	Beatrice	Research vendor knowledge	[It is] not all clients that understand that, that it is a craft and people behind the data collection […] you cannot have unreasonable demands
Gamma	Resource	Internal	R	Beatrice	Research vendor knowledge	Know[ing] which research companies that are good at what
Gamma	Resource	Internal	C	Håkan	Market knowledge	[Knowing the] key values that we search for when it comes to this brand
Gamma	Resource	Internal	C	Håkan	Market knowledge	[Knowing] the basics of the brand
Gamma	Resource	Internal	C	Håkan	Market knowledge	[Knowing] the different happenings in the markets
Gamma	Resource	Internal	R	Håkan	Business understanding	A general knowledge of […] the roles of our different brands
Gamma	Resource	Internal	R	Håkan	Business understanding	Understand what the market dynamics of our portfolio [are]
Gamma	Resource	Internal	R	Håkan	Business understanding	Understand the logic of our business and our portfolio
Gamma	Resource	Internal	C	Håkan	Commercial mind-set	Be much, much more commercial
Gamma	Resource	Internal	C	Håkan	Commercial mind-set	Be interested [in selling more, not making the best TV commercial]
Gamma	Resource	Internal	C	Håkan	Customer understanding	Understanding what's important for consumers [customers]
Gamma	Resource	Internal	C	Håkan	Customer understanding	Understand how to reach the consumer [customer]
Gamma	Resource	Internal	R	Håkan	Internal relationships	Has a lot of contact with the business
Gamma	Resource	Internal	R	Håkan	Research method knowledge	Stay on top when it comes to new type of data and tracking possibilities
Gamma	Resource	Internal	R	Håkan	Research method knowledge	Knows pros/cons with different research alternatives (paraphase)
Gamma	Resource	Internal	R	Håkan	Research method knowledge	Insight where the research results will lead
Gamma	Resource	Internal	R	Håkan	Research method knowledge	Stay very, very updated when it comes to research techniques
Gamma	Resource	Internal	C	Håkan	Timing	And timing, timing is also [important]
Gamma	Capability	External	R	Emma	Doing in-depth analysis	A large part of our work consists of sort of being creative and coming up with what kind of analysis we should do
Gamma	Resource	External	R	Ashley	Integrity	They are so […] objective
Gamma	Resource	External	R	Ashley	Research method knowledge	[Ensure] that we have the correct target group, the amount of people
Gamma	Resource	External	R	Beatrice	Proactivity	That she […] is proactive when it comes to looking at analyses
Gamma	Resource	External	R	Beatrice	Proactivity	That they sort of come in and on their own initiative do specific target group analyses, for example
Gamma	Resource	External	R	Beatrice	Research method knowledge	*Knowledge,* that I instinctively feel that here is a person that […] know methodology
Gamma	Resource	External	R	Emma	Business understanding	It requires that you […] really know what's going on […] in the market
Gamma	Resource	External	R	Emma	Customer knowledge	[It requires that you know] what they think
Gamma	Resource	External	R	Emma	Presentation skills	Build a story […] tell it in the most exciting way
Gamma	Resource	External	R	Håkan	Integrity	Don't try to be a truth teller. Tell what your data […]

						can tell [with statistical significance]
Gamma	Resource	External	R	Håkan	Integrity	Be true with the numbers
Gamma	Resource	External	R	Håkan	Integrity	Never to make conclusions about an industry […] that you can't back up
Gamma	Resource	External	R	Håkan	Integrity	Not try to take it the next step and analyse it too much
Gamma	Resource	External	R	Håkan	Presentation skills	To be quite crisp and clear [when presenting]
Gamma	Resource	External	R	Håkan	Presentation skills	Don't try to have a lot of information in the same slide
Gamma	Resource	External	R	Håkan	Research method knowledge	Ability to get consumers [customers] to not lie so much
Gamma	Resource	External	R	Håkan	Research method knowledge	To get a representative group of consumers [customers], not only when it comes to age, gender etc.
Gamma	Resource	External	R	Håkan	Research method knowledge	Get people to tell the truth
Gamma	Resource	External	R	Håkan	Research method knowledge	Interview skills
Gamma	Resource	External	R	Håkan	Research method knowledge	Setting the right type of questions

Company	**RBT category**	**Interviewee**	**RBT content (paraphrased)**
Alpha	Comp. adv.	Albert	Innovative
Alpha	Comp. adv.	Albert	Fresh brand
Alpha	Comp. adv.	Albert	Cool brand
Alpha	Comp. adv.	Albert	Best network
Alpha	Comp. adv.	Albert	Good prices
Alpha	Comp. adv.	Albert	Challenger
Alpha	Comp. adv.	Frida	They can make very quick decisions
Alpha	Comp. adv.	Frida	Perceptive to customer insight (even if it challenges internal perceptions)
Alpha	Comp. adv.	Jesper	We are a little faster
Alpha	Comp. adv.	Jesper	We are more innovative
Alpha	Comp. adv.	Jesper	More energy in the brand
Alpha	Comp. adv.	Jesper	Challenger position
Alpha	Comp. adv.	Jesper	*Not management by* process; everyone acts according to their mandate
Alpha	Comp. adv.	Julia	Innovation (more and more)
Alpha	Comp. adv.	Julia	Being at the front edge
Alpha	Comp. adv.	Julia	Good at acting on customer insights
Alpha	Comp. adv.	Julia	[Product specific characteristics]
Alpha	Comp. adv.	Julia	Analytics-friendly
Alpha	Comp. adv.	Julia	Young
Alpha	Comp. adv.	Julia	Quick decision making
Alpha	Comp. adv.	Pelle	Our organisational structure is very flat so it’s very easy to [make a] decision
Alpha	Comp. adv.	Pelle	We are an entrepreneurial company
Alpha	Strategy	Albert	Gain market share
Alpha	Strategy	Albert	Sell more
Alpha	Strategy	Albert	Churn less customers

Alpha	Strategy	Albert	Connectivity to all the people
Alpha	Strategy	Albert	Higher revenue
Alpha	Strategy	Frida	Strong sales focus
Alpha	Strategy	Frida	Gain market share
Alpha	Strategy	Frida	Grow without losing the edge
Alpha	Strategy	Frida	Clear sales goals
Alpha	Strategy	Frida	Build brand (but very focused on sales)
Alpha	Strategy	Jesper	Grow and become number [x] in the market (short-term goal)
Alpha	Strategy	Jesper	Growth (long-term goal)
Alpha	Strategy	Jesper	Vision: Connectivity on the customers' terms
Alpha	Strategy	Jesper	Adapt according to the customers' developing needs
Alpha	Strategy	Julia	Innovate
Alpha	Strategy	Julia	Create mobile experiences for customers
Alpha	Strategy	Julia	Growth: gain more customers
Alpha	Strategy	Pelle	Sales is focus
Alpha	Strategy	Pelle	Gain market share on our competitors, especially [x]
Alpha	Strategy	Pelle	The vision is to keep growing
Alpha	Strategy	Pelle	For us sales is the focus
Beta	Comp. adv.	Alex	Right person in the right place
Beta	Comp. adv.	Alex	Small and can change quickly
Beta	Comp. adv.	Alex	Devoted people
Beta	Comp. adv.	Alex	Clear view of [content]
Beta	Comp. adv.	Alex	Freedom
Beta	Comp. adv.	Alex	Small and can work together across different departments
Beta	Comp. adv.	Cecilia	Devoted people
Beta	Comp. Adv.	Cecilia	I think they are one of the companies that actually has the best finances in the industry
Beta	Comp. adv.	Cecilia	Efficient organisation
Beta	Comp. adv.	Lea	Super passionate and super dedicated [employees]
Beta	Comp. adv.	Lea	Consistent in terms of branding
Beta	Comp. adv.	Lea	Top management team involves all employees [in why things are happening]
Beta	Comp. adv.	Micke	Strong accuracy of aim in the target group
Beta	Comp. adv.	Micke	Super strong brand in the target group
Beta	Comp. adv.	Micke	Consistent [identity]
Beta	Comp. adv.	Micke	Clearer focus
Beta	Comp. adv.	Micke	High competency
Beta	Strategy	Alex	Clear differentiation strategy
Beta	Strategy	Alex	Our goal is to be the most innovative
Beta	Strategy	Alex	Growing [vertain parts of Beta's business]
Beta	Strategy	Cecilia	They want to make content that's entertaining
Beta	Strategy	Cecilia	Niche
Beta	Strategy	Cecilia	Creating value for the user
Beta	Strategy	Cecilia	Make money
Beta	Strategy	Cecilia	Good working environment
Beta	Strategy	Cecilia	Become more mainstream without losing their edge

Beta	Strategy	Cecilia	Balancing being sort of an edgy media company and still wanting to improve their [number of users]
Beta	Strategy	Cecilia	That's their objective: trying to get as many people to use [their service]
Beta	Strategy	Lea	Top management team sets very clear goals
Beta	Strategy	Lea	To entertain Sweden as much as we possibly can
Beta	Strategy	Lea	The goal is to sell contacts to advertisers and make money
Beta	Strategy	Lea	Maximize number of users
Beta	Strategy	Micke	Higher national importance
Beta	Strategy	Micke	Broadening the business
Beta	Strategy	Micke	Being best within the main target group
Delta	Comp. adv.	Casper	Big (and ability to leverage structure/size)
Delta	Comp. adv.	Casper	We have the customer at heart
Delta	Comp. adv.	Filip	Brands
Delta	Comp. adv.	Filip	[Ability to] market brands
Delta	Comp. adv.	Filip	[Strategy for] Brand development
Delta	Strategy	Casper	I mean obviously we're talking about the sustainability and crafting brands for life, filling people's lives with meaning and all that
Delta	Strategy	Filip	To double the size of the business
Delta	Strategy	Filip	[Not] impacting the environment more than […] today
Gamma	Comp. adv.	Ashley	Innovative
Gamma	Comp. adv.	Ashley	Creative
Gamma	Comp. adv.	Ashley	Entrepreneurial
Gamma	Comp. adv.	Ashley	Involved/Really care for their brands
Gamma	Comp. adv.	Ashley	Good at communication
Gamma	Comp. adv.	Ashley	Good at variations of the product
Gamma	Comp. adv.	Beatrice	Entrepreneurs
Gamma	Comp. adv.	Beatrice	Big
Gamma	Comp. adv.	Beatrice	A lot of freedom and possibility to do quite quick changes
Gamma	Comp. adv.	Beatrice	Possibility to make quick decisions
Gamma	Comp. adv.	Beatrice	Can adapt quickly to the market's needs
Gamma	Comp. adv.	Beatrice	Control the entire value chain
Gamma	Comp. adv.	Beatrice	Big brands
Gamma	Comp. adv.	Håkan	Combining family-owned with size; being able to sell at affordable prices while having a *person* behind it
Gamma	Comp. adv.	Håkan	Small enough in our minds to react on quick changes
Gamma	Comp. adv.	Håkan	Quick decisions
Gamma	Strategy	Ashley	Quality
Gamma	Strategy	Ashley	To have products that customers like
Gamma	Strategy	Beatrice	Efficient
Gamma	Strategy	Beatrice	Profitable
Gamma	Strategy	Beatrice	Despite large-scale production still meet all of its customers' demands
Gamma	Strategy	Beatrice	Remain for generations
Gamma	Strategy	Beatrice	Entrepreneurship
Gamma	Strategy	Håkan	Best production in Sweden is the short-sighted vision
Gamma	Strategy	Håkan	Bringing people together is a long-sighted vision

Appendix G: Combining Process and Constructs

	Phase 0	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Researcher resources						
Analytical skills	X	X	X	X	X	X
Business understanding	X	X	X	X	X	X
Communication skills					X	
Customer understanding	X	X	X	X	X	X
Curiosity	X	X	X	X	X	X
Experience	X	X	X	X	X	X
Flexibility	X	X	X	X	X	X
Integrity	X	X	X	X	X	X
Internal relationships	X	X	X	X	X	X
Knowledge what data exists		X				
Power of initiative	X					
Pragmatism					X	
Project management skills	X	X	X	X	X	X
Research method knowledge		X				
Research vendor knowledge		X				
Scepticism	X	X	X	X	X	X
Trust	X	X	X	X	X	X
Internal researcher capabilities						
Approving research set-up		X				
Being concrete					X	
Being humble		X	X			
Being relevant	X	X	X	X	X	X
Building hypotheses		X				X
Challenging	X	X		X		
Conceptualising the problem		X				
Connecting insights			X			
Making recommendations				X		
Networking	X	X	X		X	
Representing customers	X	X	X	X	X	X
Translating business issues		X		X		
Writing a brief		X				
Internal client resources						
Analytical skills	X	X	X	X	X	X
Market knowledge	X	X	X	X	X	X
Calm	X	X	X	X	X	X
Commercial mind-set	X	X	X	X	X	X
Customer understanding	X	X	X	X	X	X
Experience	X	X	X	X	X	X
Humility	X	X	X	X	X	X
Passion	X	X	X	X	X	X
Timing	X	X	X	X	X	X
Internal client capabilities						
Assessing the need for data	X					
Clarifying purpose		X				
Using your judgement	X	X	X	X	X	X
Managing focus groups			X			
Putting into context			X			
Translating data into action			X	X	X	X