Goutam Challagalla, Brian R. Murtha, & Bernard Jaworski

Marketing Doctrine: A Principles-Based Approach to Guiding Marketing Decision Making in Firms

The authors introduce and examine a new marketing concept that a small set of leading firms has begun to adopt: marketing doctrine. Marketing doctrine refers to a firm's unique principles, distilled from its experiences, which provide firm-wide guidance on market-facing choices. As such, marketing doctrine provides a firm-wide common approach to decision making. Importantly, marketing doctrine helps a firm address the classic consistency–flexibility conundrum by providing high-level guidance to all decision makers in the firm (thus ensuring consistency) but not specifying execution details (thus allowing for local flexibility). Across three samples, the authors explore the concept using a discovery-oriented, theories-in-use approach with 35 executives from several industries. This article makes four contributions. First, it offers a parsimonious definition of the marketing doctrine construct and contrasts it with related constructs. Second, it offers insight into how firms can develop marketing doctrine. Third, it develops a conceptual model that identifies the antecedents and consequences of marketing doctrine use. Finally, the authors explore the moderating effects of three unpredictable environments (competitive intensity, market turbulence, and structural flux) on the marketing doctrine use–performance relationship.

Keywords: marketing doctrine, principles, marketing decision making, common marketing approach, decision-making consistency

Many firms have multiple product lines and operate in multiple geographies. For example, Coca-Cola has more than 500 brands and 3,500 products and operates in more than 200 countries. Marketing scholars note that such firms face a dilemma: On the one hand, a key imperative for firms is to develop a firm-wide common marketing approach to enable consistent decision making (Brown 2005). On the other hand, it is equally important for firms to allow employees the flexibility to adapt marketing decisions to their specific circumstances (Brown 2005). Granting flexibility, however, frequently generates inconsistencies in marketing decision making because managers, even within the same firm, often have different mental models of marketing (Wind 2006). The president of a *Fortune* 500 firm noted the potential consequences of granting flexibility:

> Every country, and even within a country, you've got everyone out there with their own flavor of marketing. It's a totally dysfunctional environment [and] virtually impossible to have any kind of global consistency.... And that's obviously very, very problematic. (President, consumer health division)

Extant literature has offered two general perspectives for developing a common approach to decision making that allow differing degrees of flexibility. The first perspective is that firms may rely on mechanistic approaches that direct decision making by providing standard operating procedures (Homburg and Fürst 2005). These procedures are useful in performing well-structured tasks (e.g., standardized customer support) but are limited in flexibility and their applicability to strategic marketing tasks (e.g., brand positioning, channel design). A second perspective is that firms may rely on organic approaches that inculcate employees with shared values and norms (e.g., teamwork, information exchange) to guide decision making (Homburg and Fürst 2005). These approaches offer more flexibility but are limited in the guidance they provide to firm managers in the course of marketing decision making (Homburg and Pflesser 2000).

We propose a third perspective for developing a common approach to decision making that addresses the seemingly at-odds imperatives of consistency and flexibility. We refer to this perspective as *marketing doctrine*, which we define as a firm's unique principles, distilled from its experiences, which provide firm-wide guidance on market-facing choices. Although it is not yet widespread, this "principles-based" approach has begun to emerge among leading mar-

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keting firms (e.g., Apple, Amgen, Cisco) as well as in the nascent literature on “simple rules” or heuristics for decision making (Bingham and Eisenhardt 2011).

Our qualitative research with executives from diverse firms and our review of related literature on heuristics for decision making (Gigerenzer and Gaissmaier 2011) suggests three main reasons for using this principles-based approach. First, principles are rules of thumb or high-level laws often distilled from experiences (Hunt 1991; Locke 2002). These principles simplify decision making (Wübben and Wangenheim 2008). For example, the principle of a market leader in digital products to “launch early and iterate” simplifies decision making by emphasizing the importance of launching products quickly and obtaining feedback from actual users rather than striving for perfection before a launch. Second, principles help address the classic consistency–flexibility dilemma that firms face. For example, although the principle “Segment based on observable characteristics instead of unobservable characteristics” provides guidance (thus ensuring consistency), it provides few execution details (thus allowing flexibility). Third, principles are relatively easy to remember and communicate to others (Oliver and Jacobs 2007).

In this research, we examine the concept of marketing doctrine in depth and make four contributions to the literature. First, we provide a formal definition of the construct, which we gleaned from a review of the general concept of doctrine from diverse literature streams in which its use is prevalent (e.g., military, religion, law, our field research). Furthermore, we compare marketing doctrine with related constructs (e.g., market orientation, values, routines) and clarify its domain. Second, even among disciplines in which the use of doctrine is widespread, there is surprisingly little systematic knowledge for developing it. Thus, we distill insights, primarily from field research, to address three key development considerations: how to *identify* principles that comprise doctrine, how to *articulate* doctrine, and how to *sustain* doctrine. Therefore, our second contribution is to provide guidance for firms to develop their own marketing doctrine.

Our third contribution is to develop a conceptual model that considers antecedents and consequences of marketing doctrine use. We argue that firms that pursue a diversification strategy or decentralize marketing are likely to experience differences in marketing decision making and, thus, would value a common marketing approach (i.e., marketing doctrine). Accordingly, we identify two types of diversification (i.e., international diversification and product diversification) and two types of decentralization (i.e., decentralization of marketing authority and decentralization of marketing activities) as antecedents of marketing doctrine use.

Our conceptual model also posits that marketing doctrine use can have both direct and indirect effects on firm performance. We explore the effect of marketing doctrine use on novel consequences, such as marketing program creativity and marketing impulsivity. Thus, we shed light on the paths through which marketing doctrine use may affect firm performance. Finally, related research on heuristics for decision making has suggested that marketing doctrine may have a stronger effect on performance in unpredictable environments (Bingham and Eisenhardt 2011). Accordingly, our fourth contribution is to explore the moderating effects of three unpredictable environments (competitive intensity, market turbulence, and structural flux) on the marketing doctrine use–performance relationship. We suggest that the effects of marketing doctrine use are not uniform across contexts; rather, they are nuanced and more valuable in some contexts than in others.

We organize the remainder of this article as follows. Next, we describe our method, after which we explore the marketing doctrine construct and contrast it with related constructs. We then synthesize insights from field research for developing marketing doctrine. Next, we examine the antecedents, consequences, and boundary conditions of marketing doctrine use. We conclude with a discussion of theoretical and managerial implications.

Method

We use the discovery-oriented, theories-in-use approach for this research (Zaltman, LeMasters, and Heffring 1982), which blends the use of in-depth interviews with the extant literature as a means to develop conceptual themes (Malshe and Sohi 2009; Strauss and Corbin 1998). Thus, we complement managerial insights from qualitative interviews with perspectives from a multidisciplinary review of doctrine from law, military studies, and religion. In addition, as Marshall and Rossman (1999) suggest, we complement the interview data with archival data on marketing doctrine from a professional services firm. The archival data consist of 65 case studies, memos, summaries, and presentations from nearly a dozen contributors. From these data, we identified and coded 12 documents with nonoverlapping content.

Qualitative Interviews

Our research involves interviews with three sets of informants (Table 1). In this regard, previous literature has recommended the use of purposive sampling for obtaining a knowledgeable sample that can provide rich insights into an emerging construct (Patton 1990). Accordingly, we drew heavily on the knowledge of a global professional services firm with experience in implementing marketing doctrine for *Fortune* 500 clients. The firm has more than 1,000 consultants across 29 offices. The comanaging partner and 11 partners who had assisted clients in implementing marketing doctrine agreed to participate in the study (Sample 1). Given that the same concept may mean different things to different constituencies (Tuli, Kohli, and Bharadwaj 2007), the second sample used in the research comprised nine clients of the professional services firm across diverse industries (Sample 2).

In addition, to obtain a broader set of perspectives, we conducted interviews with a third sample of informants (unrelated to the first two samples) who could extend or clarify information from prior interviews, as Glaser and Strauss (1967) suggest. We initially contacted 129 executives who were in marketing, who oversaw marketing (e.g., chief executive officers [CEOs]), or who had marketing ties (e.g., vice president [VP] of sales) and requested their par-

TABLE 1
Sample Characteristics

	Sample 1: Professional Services Firm (n = 12)	Sample 2: Clients of Professional Services Firm (n = 9)	Sample 3 (n = 14)
Title			
CEO/managing partner	1		2
President/chief marketing officer		3	
Executive VP/VP		5	3
Business unit leader	2		
Senior/associate/director		1	3
Marketing manager			4
Brand manager/associate			2
Partner/senior partner	9		
Experience (years)			
<10	1		3
10–20	10	4	6
>20	1	5	5
Industry			
Beverages		1	
Chemicals		3	1
Consumer packaged goods		2	2
Health care/life sciences		3	3
Professional services	[a]		3
Technology			2
Telecommunications			3
Annual revenue			
Small/medium (<$1 billion)	[a]		2
Large (>$1 billion)		9	12
Customers			
Business-to-business (B2B)	[a]	4	7
Business-to-consumer (B2C)		5	3
Both (B2B and B2C)			4
Geography			
Regional			6
Global	[a]	9	8
Brands			
Single	[a]	2	9
Multiple		7	5
Channels			
Direct	[a]	2	6
Indirect		3	3
Both (direct and indirect)		4	5

[a]The professional services firm has less than $1 billion in annual revenue and serves B2B clients; the firm is global, it operates in multiple product categories using a single brand, and it uses direct channels.

ticipation. We stated the purpose of the research and asked whether their firms had either explicit or unwritten marketing principles (marketing doctrine): 18 executives did not respond, 76 stated that they were unaware of any, and 35 indicated that they had marketing principles and agreed to be interviewed.

It became apparent that 21 of the 35 executives had mistaken marketing doctrine to mean slogans such as "passionate about delivering solutions to enable customer success." After eliminating these respondents, we had 14 qualified participants who represented different-sized firms that spanned several industries, product categories, and hierarchical levels (i.e., Table 1, Sample 3). Toward the end of this round of interviews, the information reached a saturation point (i.e., became largely redundant; Strauss and Corbin 1998).

Interview Protocol

We followed the general interview guide approach (Patton 1990). The participants from Samples 1 and 2 (i.e., the professional services firm and its clients) were familiar with the term *marketing doctrine*. We could not, however, assume the same of participants from Sample 3. Thus, we used the term *marketing principles* and provided several examples of principles that represent marketing doctrine to ensure that participants understood the concept. We asked participants the following questions: What does marketing doctrine [marketing principles] mean to you? Why did your company (or client) develop it? What key consequences have come from using marketing doctrine [marketing principles]? What was the process for developing the doctrine [marketing principles]? The interviews were transcribed into 532 pages of text.

Analysis and Reliability

We followed the procedure of Strauss and Corbin (1998), as used in marketing studies (Ulaga and Reinartz 2011). Two researchers independently coded the transcripts and archival documents using open coding, whereby they analyzed the text using the terminology of the participants. From this textual analysis, we identified first-order categories (Malshe and Sohi 2009). Next, we transitioned to axial coding, whereby we reassembled the data by identifying relationships between and among the categories to develop second-order categories. The second-order categories are abstract, theoretically distinct researcher-developed concepts (Nag and Gioia 2012). Similar to Ulaga and Reinartz (2011), we had two independent judges verify the accuracy and reliability of the key themes identified in the field data by having them code eight randomly selected transcripts. The interjudge reliability, calculated by the proportional reduction in loss method, was .82, well above the .7 threshold for exploratory research (Rust and Cooil 1994). In the following sections, we present the results from the qualitative analysis that address four key themes: the marketing doctrine construct, developing marketing doctrine, antecedents of marketing doctrine use, and consequences of marketing doctrine use.

The Marketing Doctrine Construct

Defining Marketing Doctrine

Our field research indicates that the use of marketing doctrine is emerging among firms. Many refer to it using a mélange of terms, including "guiding principles," "marketing philosophy," and "marketing beliefs." Table 2 presents a synthesis of perspectives from our field research on the meaning of marketing doctrine. The chief marketing officer (CMO) of a *Fortune* 500 life sciences firm described the concept as follows:

> Marketing doctrine is synonymous with [our firm's] core set of marketing beliefs that apply in many different situations.... They are our consistent standards of excellence that are developed over time.

Many executives echoed the perspective that marketing doctrine represents a firm's key market-facing choices:

> It is how your organization will approach marketing and what good marketing looks like. (Executive vice president [EVP] and CMO, *Fortune* 500 industrial chemicals firm)

Other executives emphasized that doctrine emanates from a firm's experiences:

> Every organization has a point of view, a way they work based on some degree of history. These beliefs become the fundamental principles that guide individuals to make choices that are consistent with how the organization wants to do marketing. (Senior partner, professional services firm)

The insights provided in Table 2 and the aforementioned descriptions of marketing doctrine indicate that marketing doctrine has four key elements: it (1) reflects firm-specific principles, (2) is experience-based, (3) guides firm-wide marketing decision making, and (4) represents a firm's market-facing choices. Definitions of doctrine from law, religion, and military studies also largely reflect these elements (see Table 3). Accordingly, we offer a formal definition that captures these four elements. We define *marketing doctrine* as a firm's unique principles, distilled from its experiences, which provide firm-wide guidance on market-facing choices. Next, we elaborate on each of the key elements.

Firms' Unique Principles

Firms express their marketing doctrine in the form of principles (Table 2). As we previously noted, principles are generalized statements (Woiceshyn 2009) that provide heuristic guidance (Oliver and Jacobs 2007). They provide guidance that simplifies and accelerates decision making (Wübben and Wangenheim 2008). Firms also use principles because they are easy to relate to, remember, and convey to others (Gigerenzer and Gaissmaier 2011). Principles provide relatively simple guidance, which is important for coding into long-term memory (Bingham and Eisenhardt 2011). Another key reason that principles are invaluable is that they allow latitude in decision making. They provide a "70-, 80-, or even 90% solution" (U.S. Air Force 2003, pp. 2–3) but are scarce in execution details, which allows for flexibility. For example, a telecommunications firm's principle to "create customer experiences from the customer's point of view" provides guidance while allowing flexibility to identify specific solutions for a particular product or market.

Most executives indicated the importance of developing firm-specific principles that uniquely reflect a firm's strategy and context rather than simply emulating other firms or theory. For example, the president of consumer health of a *Fortune* 500 firm and a senior partner in a professional services firm stated, respectively:

> It's not to come up with a *Harvard Business Review* set of principles, but rather, it's to come up with a set of principles that would link and enhance the relevance of everything we are going to do at [Firm X] and our company strategy.

> The marketing doctrine for [Company X] must be different from [Company Y in the same industry], given its strategy, the products, the geographic footprint, the culture. All of that actually has a pretty profound impact.

The reason that organizations rely on firm-specific principles is that such principles lend texture, meaning, relevance, and concreteness to knowledge that may otherwise be perceived as abstract or espoused theory (Kolb 1984; Oliver and Jacobs 2007). Furthermore, superior performance comes from the "fit" between firm strategy and marketing activities, and different strategy types require different marketing configurations (Slater, Olson, and Hult 2006).

Distilled from Firm's Experiences

Several definitions from the literature stream on doctrine emphasize that it emanates from experiences (Table 3). For example, as Drew and Snow (1988, p. 164) state,

TABLE 2
The Marketing Doctrine Construct

First-Order Categories and Representative Quotes	Second-Order Categories
Rules of Thumb/Guideposts •[Marketing doctrine is] a little bit like rules of thumb. •Simple rules that support marketing decisions across a range of different businesses or categories in a range of different geographies. •Simple statements that provide an organization an easy filter from which to make choices. •It's guiding principles that direct the operation of how that work is done. •Doctrine at some level is the equivalent of the North Star.... This is what guides us or gives us direction. •They are guideposts;... [they] have to be general enough that they apply to different situations. *Idiosyncratic to the Firm* •It is how your organization will approach marketing. •Something that uniquely reflects our approach;... something that would fit our culture. •It's really our proprietary way of doing marketing. Everybody that works at [Firm X], whether you're there for a year or there for 20 years, it becomes a way of doing things. •Our beliefs about how you're going to do or approach marketing. •Every company's doctrine is different because every company's history is also different. •Bill Walsh has a system, right?... It's kind of like, this is how we play football. These are our operating principles. Marketing doctrine is the same—it is a company's marketing philosophy.	Firm's unique principles
Learning Across Situations •[Principles] developed from many different situations. •Every company tries a bunch of different things, finds that something works pretty darn well, and people teach this to each other. •Success breeds success.... You need a few great [company] examples to teach to others. •Companies actually learn from their and others' mistakes rather than make them all over again. *Learning Over Time* •Synonymous with a set of core beliefs that are developed over a long period of time and many different situations. •And then over time, a repeated pattern emerged from actually doing what we said was working well.	Distilled from firm's experiences
Marketing Activities Rather Than Marketing Function •It's not small "m" marketing function, it's kind of like big "M." •Everyone is able to talk about how to approach a market, define a market, and activate a market in a common way from marketing to technology to sales [functions]. •It is not just the narrowly defined function of marketing, because driving profitable growth requires other functions as well. •Marketing doctrine tends to address problems that are commercially oriented in the marketplace and is not just for the marketing folks. •The broader organization needs to know what are the guiding lights of marketing at [Company X] and be able to use it. *Multiproduct, Multigeography* •If I'm a multiproduct, multicategory, multichannel company, then my doctrine is guiding decisions across the firm. •Regardless of where you're located around the world, we can use the same principles.	Firm-wide guidance
Focus on Strategic Advantage •It's something that we believe will lead to advantage for the company relative to others.… It's kind of the key stuff—most critical ... areas. •We are building a strategy around sustainability. Marketing doctrine guides exactly where we have to invest resources to support this initiative. •These 12 principles are our clear, unequivocal choices on what is important to be successful. *Exemplars* •It is how we make marketing decisions.... These principles are the best way to make these decisions. •Our vision for what marketing success looks like. •A belief in the way of life about how you're going to do marketing, and what good marketing looks like. •Common process whereby information, research, evaluation, [and] the judgments about whether a decision should be a go or a no-go could be more easily shared across markets. •Marketing doctrine [consists of] the statements of what good looks like given the particular scope of the initiative or of the company.	Firm's choices regarding how it should compete

TABLE 3
Definitions of Doctrine from the Literature

Source	Field	Definition
U.S. Armed Forces (2009)	Military—Joint	"Joint doctrine presents fundamental principles that guide the employment of U.S. military forces in coordinated and integrated action toward a common objective. It represents what is taught, believed, and advocated as what is right (i.e., what works best)" (p. I-1).
U.S. Air Force (2003)	Military—Air Force	"Doctrine is those beliefs, distilled through experience and passed on from one generation of airmen to the next, that guide what we do; it is our codified practices on how best to employ air and space power" (p. 1).
Drew and Snow (1988)	Military	"*Military doctrine is what we believe about the best way to conduct military affairs*. Even more briefly, doctrine is what we believe about the best way to do things" (p. 163, emphasis in original).
Futrell (1989)	Military	"A compilation of principles, applicable to a subject, which have been developed through experience or by theory, that represent the best available thought, and indicate and guide but do not bind in practice" (p. 5).
Tiller and Cross (2006)	Law	"Legal doctrine is comprised of the rules and standards created by judicial opinion. It is the 'currency of the law'" (p. 517).
Jacobi and Tiller (2007)	Law	"Decision-making principles that stipulate, with varying degrees of specificity, outcomes that should follow from underlying fact patterns" (p. 326).
Peczenik (2001)	Law	Legal doctrine "aims to present the law as a coherent net of principles, rules, meta-rules, and exceptions, at different levels of abstraction, connected by support relations" (p. 75).
Chan (2004)	Religion	"Doctrines are the authoritative teachings of the Church" (p. 57).
Lindbeck (1984)	Religion	"Communally authoritative teachings regarding beliefs and practices that are considered essential to the identity or welfare of the group in question" (p. 74).
Nagan and Hammer (2004)	Policy—National Security	"Principles that are necessary for the survival of the state and clarify the circumstances under which the state might use its assets (such as military, economic or diplomatic pressure, or propaganda) to defend itself from external threats" (p. 382).
Sempa (2004)	Policy—National Security	"A national security doctrine serves as a guide by which leaders conduct the foreign policy of a country. At its most effective, a national security doctrine is the organizing principle that helps statesmen identify and prioritize their country's geopolitical interests."

> Doctrine is a compilation of those things that have generally been successful in the past. The repeated success or failure of actions over time can be generalized into beliefs that, we hope, will be relevant to the present and the future.

Likewise, the co-CEO of a professional services firm suggested that firms often glean their marketing doctrine from their history of successes and failures:

> Every company tries a bunch of different things, finds that something works pretty darn well, and people teach this to each other.

Action research suggests that learning from a firm's own experiences is valuable because such learning exploits information about the firm's unique context (Stringer 2007). Although firms must learn from their managers' personal experiences at other firms, other firms' best practices, and theory, such learning is perceived as more credible when it is tested and refined within a firm's context (Kolb 1984; Stringer 2007). Furthermore, knowledge grounded in a firm's history represents the shared knowledge of organizational members (Nag and Gioia 2012), which makes it unique and difficult for other firms to imitate (Nonaka, Toyama, and Byosière 2001).

Firm-Wide Guidance

Marketing activities are often diffused throughout the organization (Moorman and Rust 1999). This suggests that, for marketing doctrine to be useful, it should provide firm-wide guidance for marketing decision making. As one EVP and CMO of a *Fortune* 500 industrial chemicals firm, in which marketing activities are dispersed, remarked:

> Marketing doctrine tends to address problems that are commercially oriented in the marketplace and is not just for the marketing folks.

A business unit head of a professional services firm also emphasized an expansive role for marketing doctrine:

> I'll talk about "big M" marketing so that this is not just the narrowly defined function of marketing because driving growth requires a commercial system and commercial organization teed up and aimed to drive that growth.

Firms' Market-Facing Choices

Executives noted that a firm's marketing doctrine must focus on its most critical marketing choices rather than be comprehensive. For example, a consumer packaged goods firm that operates in more than 100 countries has 8 principles (Table 4). Apple Inc.'s doctrine has 7 principles that focus on marketing issues (Table 4). The marketing doctrine of a life sciences firm has 9 principles to guide its marketing decision making across 40 countries (Table 5). Extant literature also supports the field evidence; the U.S. Joint Military doctrine, for example, includes 12 principles (U.S. Armed Forces 2010). These principles do not cover all aspects of war but focus instead on essentials such as mass, offensive, restraint, and surprise. The business unit head of a professional services firm also believed that doctrine should focus on critical marketing choices for competing in a firm's markets.

> In some industries, it's all about brands, and so a lot of your doctrine has to focus around your brand-building. In other industries, brands may still be relevant, but the rubber really meets the road in terms of your channel and what happens at point of sale, and so your doctrine must focus around distribution.

A primary reason that firms develop relatively few principles is that people have limited capacity for assimilating and retaining knowledge (Oliver and Roos 2005). People can easily encode a few principles into long-term memory and use them to guide their decision making (Woiceshyn 2009). An executive noted this as well:

> People can wrap their minds and the hearts around five or six principles. (President, consumer health division of *Fortune* 500 firm)

Furthermore, firms may limit the number of principles because it is easier to change a few principles than to change many (Bingham and Eisenhardt 2011).

The insights gleaned from our interviews suggest that marketing doctrine guides a firm's marketing decision making. Next, we discuss how marketing doctrine may differ from constructs that also guide marketing decision making.

Marketing Doctrine and Related Constructs

Extant literature has suggested that market orientation, culture, values, and routines also guide marketing decision making within firms (Homburg and Fürst 2005; Jaworski and Kohli 1993). Accordingly, we highlight the differences between marketing doctrine and these constructs.

Market orientation refers to firm-wide generation, dissemination, and responsiveness to market intelligence (Jaworski and Kohli 1993). The purpose of market orientation is to become more customer and competitor focused (Narver and Slater 1990), whereas the purpose of marketing doctrine is to guide marketing decision making (e.g., segmentation, branding) in a consistent manner within a firm. Marketing doctrine is much more specific and directive (e.g., "Brand positioning must be consistent across regions and over time") than the more general behaviors in a market-oriented firm (e.g., "We collect industry information through informal means") (Jaworski and Kohli 1993, p. 66).

Organizational culture is defined as the shared values among employees within an organization that provide them with norms for conduct (Deshpandé and Webster 1989). *Organizational values* refer to generalized beliefs about appropriate modes of conduct within organizations

TABLE 4
Marketing Doctrine of Two *Fortune* 500 Firms

Consumer Packaged Goods Firm[a]	Apple[b]
Focus first on close in opportunities and only then on breakthrough opportunities.	Only enter markets where we can be the best—we must have a compelling differentiation.
Brand positioning must be consistent across regions and over time.	Focus on few products and models.
When launching a new product, keep the overall company picture in mind—avoid cannibalizing a prominent product's position and sales.	Have the courage to cannibalize—don't hang on to ideas from the past even if they have been successful; if we don't cannibalize ourselves, someone else will.
A core customer insight must be based on "human truth," "category truth," and "brand truth."	Take end-to-end responsibility for the user experience.
Differentiation must be supported by "reasons to believe" that are based on tangible attributes.	Put products before profits—push for perfection in products.
All marketing actions must be focused on changing a mindset.	Do not spread product resources or none will be great—do few things.
Never lose the loyalist when pursuing growth.	Read things that are not yet on the page (i.e., discover unmet or unrecognized needs) and don't be a slave to focus groups.
Allocate marketing budgets based on brand potential, not current sales.	

[a]The consumer packaged goods firm was founded approximately 100 years ago. Revenue (2012) is approximately $7 billion. It operates in approximately 100 countries. Marketing and sales expenses are approximately $1 billion. Primary products: portfolio of brands, many of which are household names (cookies, sauces, beverages, soups, dressings). Channels: retail channels. Promotions: the firm does heavy direct-to-consumer advertising, coupons, and social media promotions. Competitive intensity is high, and market turbulence is moderate.
[b]Apple was founded in 1976. Revenue (2012) was $156 billion. It has sales operations in approximately 125 countries. Marketing and sales expenses are approximately $10 billion. Primary products: master brand strategy; consumer electronics, cell phones, and computers. Channels: retail channels; B2B direct sales force. Promotions: the firm does direct-to-consumer advertising. Competitive intensity and market turbulence are high.
Notes: Apple has 14 guiding principles (Isaacson 2012; Ong 2011; Rooney 2011). We present the 7 related to marketing.

TABLE 5
Marketing Doctrine at a *Fortune* 500 Life Sciences Firm

Principle	Rationale
Uncover unmet and unrecognized needs of customers.	Change the game by discovering unmet needs in both existing and new markets.
Focus beyond the physician—develop a deep, visceral understanding of the full range of decision makers and influencers.	It is vitally important to understand deeply the needs of the ecosystem of nurses, hospital administrators, payers, pharmacies, and patients.
Uncover competitor-unconscious tendencies and behavior patterns.	Outmaneuvering the competition can yield extraordinary profits in a regulated industry with patent protection.
A brand must own *one* position across all markets. The position must be unique, relevant, credible, and memorable.	Make a choice. Do not emphasize safety and efficacy, for example, at the same time. Instead, "seize the most compelling customer benefit and center our message on it."
Growth rests on changing one to two customer behaviors. Changing behaviors takes precedence over changing attitudes and motivations.	Marketing plans that "choose" to create awareness, interest, desire, and action are not really making choices. Carefully select one to two customer behaviors that, when changed, will provide disproportionate growth.
Allocate most funds to just one or two stages of the buying process, rather than to every stage of the buying process.	Allocating resources to all stages of the buying process creates a "do everything" mentality. Disproportionately invest on one or two stages of the buying process.
Segment based on observable characteristics instead of unobservable characteristics.	Segmentation based on unobservable variables (unless visible "proxies" are available) is difficult to implement. Rely on a combination of customer demographics *and* customer behaviors for segmenting markets.
Concentrate marketing spend early in the launch cycle.	Long-term success of a product is usually determined within the first 6–9 months of launch. Avoid soft launches.
Begin launch planning at least 24 months prior to launch.	Products miss the window of opportunity (i.e., the first 6–9 months after launch) unless launch planning begins at least 24 months before launch.

Notes: The company was founded approximately 35 years ago. Revenue (2012) is approximately $15 billion. It has sales operations in approximately 40 countries. Number of employees is approximately 18,000. Marketing and sales expenses are approximately $4 billion. Primary products: patented prescription biologic drugs for cancer, kidney disease, arthritis, and psoriasis. Channels: the firm primarily uses direct channels; it relies on its own sales force to educate physicians, nurses, hospital administrators, and payers. Promotions: the firm does heavy direct-to-consumer advertising in geographies where it is permitted. Competitive intensity is low to moderate and market turbulence is low to moderate.

(Kabanoff, Waldersee, and Cohen 1995). Examples of values include teamwork and integrity (Kabanoff, Waldersee, and Cohen 1995). Marketing doctrine differs from organizational culture and values in three ways. First, culture and organizational values focus on people's conduct and affect all employees, whereas marketing doctrine only affects those directly or indirectly responsible for marketing decisions. Second, culture and values have a distal and indirect effect on the performance of marketing tasks (Sinkula, Baker, and Noordewier 1997), whereas marketing doctrine has a more direct effect. Third, marketing doctrine reflects guidance primarily from firm experiences, whereas values and culture are more general "modes of conduct."

Routines refer to detailed sequences of behavior for simple, highly structured problems (Bingham and Eisenhardt 2011). For example, firms may develop detailed routines or standard operating procedures for highly structured marketing activities, such as handling customer support (Homburg and Fürst 2005). Marketing doctrine, in contrast, provides guidance for more complex or unstructured marketing tasks. Furthermore, marketing doctrine requires judgment in application, whereas routines simply require managers to recognize a situation and apply ready-to-use, quasi-automatic solutions (Cohen and Bacdayan 1994). These comparisons also suggest that routines require highly standardized processes for their development, whereas the development of marketing doctrine may be more involved, as we discuss in the next section.

Developing Marketing Doctrine

Firms may find the process of developing marketing doctrine challenging because previous research has provided little guidance on developing it. Our field research yielded three key development considerations: how to identify the principles that constitute marketing doctrine, how to articulate marketing doctrine, and how to sustain marketing doctrine. We address each of these next.

Identifying Principles in Marketing Doctrine

To develop marketing doctrine, firms leverage their experiences. The notion of learning from experiences has a foundation in action research (Lewin 1946; Stringer 2007). Action research suggests that accumulated experiences become the basis for observation, reflection, testing, and, eventually, generalization (Lewin 1946; Stringer 2007). Firms need mechanisms, however, to translate these accumulated experiences (Bingham, Eisenhardt, and Furr 2007) into meaningful principles. This translation often occurs through discursive dialog that involves relatively small, multilevel, cross-functional groups (Oliver and Jacobs 2007). The EVP of a *Fortune* 500 chemicals firm noted:

> We had a cross-functional, cross-business, and global team that had spent a lot of time together. Ten to fifteen people from technology, marketing, sales, and several different business organizations were represented.

Knowledge sources for identifying principles in marketing doctrine. Our field research reveals two insights on this issue. First, teams identified repeated experiences as a means to unearth principles. Action research proposes that repeat experiences are valuable for developing generalizations that are likely to hold across contexts (Stringer 2007). Furthermore, it is easier to identify causal links by drawing on and examining repeat experiences (Argote 1999). A marketing manager of a *Fortune* 500 consumer packaged goods firm stated the importance of such experiences:

> We started seeing success with this principle ["Don't launch until you test and learn"]. However, we weren't going to fully commit the dollars until we had tested our way through it and learned from piloting it. So, we took the concept and used it throughout the business and eventually created a whole process based on successes that we've seen.

For the identification of principles from experiences, the most common internal sources were "post-action" reviews (e.g., case studies, win-loss analyses) of marketing decision making and interviews with executives either responsible for or intimately familiar with successful and unsuccessful marketing decision making. Furthermore, although firms actively examined external sources (e.g., best practices from other firms, advice from consulting firms, theory) for exemplars, they were cautious in adopting lessons that did not have clear parallels within the firm, mainly because external lessons may seem to be sound but may not apply easily to a firm's unique context. An executive reiterated this point:

> What happens is that a lot of consumer packaged goods companies look at [Procter & Gamble (P&G)] as best practice. They end up adopting many of the same principles, but they can't use them or necessarily live up to them as well as P&G does. And that's why P&G will often still win and beat them. (Partner, professional services firm)

Evaluating principles. Teams evaluated potential principles in terms of their fit with firm strategic orientation, whether they reflect clear choices with legitimate alternatives, and whether they have firm-wide relevance. Strategic orientation refers to the decisions that a firm makes to compete in its markets (Slater, Olson, and Hult 2006). For example, a firm with the strategic orientation of a "prospector" seeks to exploit new product and market opportunities (Slater, Olson, and Hult 2006). Fit with firm strategic orientation is important because superior performance is often the result of a "fit" (i.e., alignment) between firm strategy and its activities (Slater, Olson, and Hult 2006). For example, Apple's marketing doctrine (Table 4) is consistent with the firm's differentiation strategy and focuses largely on developing breakthrough products and delivering memorable customer experiences. Similarly, the president of consumer health at a *Fortune* 500 firm noted that marketing doctrine must fit with a firm's strategic orientation:

> What made them ultimately important was the fact that they are relevant and resonate with our particular company and our particular strategy and mission.

Principles also must reflect clear choices for competing in the firm's markets. Executives suggested that these choices have legitimate alternatives:

> The principles "satisfy your customers" or "be customer-centric" are nonsense because they have no alternative. There is no choice. Am I going to dissatisfy my customers? So you have to say something like, "Focus on this aspect of customer satisfaction," or "Try to satisfy customers in a certain way." (Co-CEO, professional services firm)

Finally, principles must display firm-wide relevance. That is, they must be contextually relevant (i.e., applicable across a firm's contexts), hierarchically relevant (i.e., applicable to organizational members at all levels), and temporally relevant (i.e., applicable to a firm's present and future). The president of consumer health of a *Fortune* 500 firm shared an effective way to illustrate contextual relevance:

> We tried to bridge the gap between principles and application. And to do that for each of the principles, we always had an example of what it would look like actually applied to something specific at [our firm].

A VP at a *Fortune* 500 industrial chemicals firm emphasized the importance of field-testing doctrine in different geographies to establish contextual relevance.

> And we'd do it in three or four countries. And, inevitably, you learn something about, "Well, this doesn't work," or "This is always the same," or something like that. And then we step back,... we discuss it, we debate it.... Then you take it back out to the field and say, "Does this make sense to you, and does this work?"

To evaluate hierarchical relevance, the president of the consumer health division of a *Fortune* 500 firm went through a process of soliciting input and engaging in multiple discussion sessions with company leadership:

> The global team got input from marketers at various levels.... We also had multiple sessions with the most senior leadership of the company. I'm not talking about functional marketing heads. I'm talking about presidents of business units. But that was very important to know whether the principles were unique and specific to [our company].

Finally, with regard to establishing temporal relevance, a senior partner at a professional services firm noted the importance of the principles having long-lasting quality:

> [Principles] should be enduring. And so there is something about their endurance and resilience and relevance through different periods of the company that are important. That makes particular principles good.

Teams stated that, in addition to the need to identify principles, it is critical to articulate marketing doctrine in a way that resonates with the firm. We discuss this next.

Articulating Marketing Doctrine

Firms that develop marketing doctrine must pay close attention to the degrees of flexibility, simplicity, and explicitness. The executives emphasized that firms must articulate marketing doctrine in a manner that affords flexibility. The president of the consumer health division of a *Fortune* 500 firm remarked:

> Marketing doctrine must strike the balance between being appropriately prescriptive but, at the same time, flexible. You have to have a set of principles that, on the one hand, can give clear guidance to all of those individuals, but, on the other hand, allows efficient adaptability.

Our field and secondary research suggests that firms articulate principles with differing degrees of flexibility. For example, consider two principles on positioning that vary in flexibility: "A brand must own *one* position across all markets" (Table 5), and "Brand positioning must be consistent across regions" (Table 4). The former affords less flexibility (i.e., "own *one* position") and may be considered more rule-like, whereas the latter allows for more discretion and may be regarded as more standard-like (Schipper 2003). We find that although firms' marketing doctrine may include both rule-like and standard-like principles (Tables 4 and 5), standard-like principles tend to dominate, possibly because standard-like principles offer more decision-making autonomy (Sullivan 1992), which is especially valuable for firms that operate in multiple contexts (e.g., geographies).

Marketing doctrine must reflect simplicity or be easily understood. Simplicity facilitates assimilation, usage, and communication (Oliver and Jacobs 2007). Indeed, respondents used expressions such as "principles must be easy to understand," "use simple language but each word means something," and "strike a really interesting balance between simple and powerful." Finally, we suggest that firms benefit more from written (explicit) marketing doctrine because written information is easy to understand and communicate and is less prone to distortion (Nonaka and Von Krogh 2009). The majority of firms in our samples had written doctrine. Only in a few cases was it unwritten and rooted in informal practices (e.g., "It's not written down, [but they are] definitely mantras that we talk about"). Firms that had explicit doctrine disseminated it through booklets, wall signage, pocket cards, and formal training.

Sustaining Marketing Doctrine

A key challenge for firms is to maintain the relevance of marketing doctrine over time. On the one hand, our field research and literature review suggests that marketing doctrine should be relatively enduring. As the CMO of a *Fortune* 500 global biotech firm remarked, "[Good] principles seem to stand the test of time." Previous literature has endorsed this perspective. For example, the U.S. Armed Forces (2009, p. A-1) notes that doctrine "incorporates time-tested principles." However, on the other hand, our field research indicates that a business context requires that doctrine be adaptable to reflect successes and failures, new experiences, technological changes, and shifts in capabilities. The VP of marketing at a *Fortune* 500 consumer packaged foods firm noted the importance of adapting marketing doctrine to new experiences:

> You need a mechanism to make sure [that] whatever doctrine ... you put in place, you can revise and integrate new learning, or you will be left in the dust.

To maintain the relevance of marketing doctrine, firms may do periodic assessments when they encounter a novel situation (e.g., entry into a very distinct market). Such evaluations are likely to lead to elaboration, whereby a firm fills gaps in its marketing doctrine, or simplification, whereby a firm prunes and simplifies its marketing doctrine (Bingham and Eisenhardt 2011). Furthermore, to overcome organizational rigidities that stem from previous successful experiences, firms may engage in vigilant market learning, which enables them to detect market shifts, and in adaptive market experimentation (Day 2011), which enables them to test the boundaries of their marketing doctrine.

Antecedents to Marketing Doctrine Use

Marketing doctrine provides a common approach for marketing decision making, which is important to mitigate differences in decision making across a firm (Davis, Eisenhardt, and Bingham 2009). We suggest that the likelihood of differences in marketing decision making increases when firms pursue a diversification strategy (Fang et al. 2007); that is, they operate in diverse geographies (international diversification) or expand their product portfolio (product diversification). Similarly, the likelihood of differences in marketing decision making increases when firms decentralize marketing structure (Davis, Eisenhardt, and Bingham 2009); that is, they delegate marketing decision-making responsibility (decentralization of marketing authority) or disperse marketing activities throughout the firm (decentralization of marketing activities). Accordingly, we present propositions that examine the relationship between the aforementioned types of diversification and decentralization and marketing doctrine use. We define *marketing doctrine use* as the extent to which a firm relies on marketing doctrine for decision making.

Diversification

International diversification refers to expansion into new global regions or countries outside a firm's home market (Hitt, Hoskisson, and Kim 1997). Firms that participate in multiple geographies are likely to recognize that they benefit from the transfer of experiential marketing knowledge from one geography to another because it accelerates learning and eliminates mistakes (Fang et al. 2007). Furthermore, a common marketing approach eliminates the need for different geographies to recreate the wheel and discover their own marketing solutions, thus enhancing efficiency (Davis, Eisenhardt, and Bingham 2009). Marketing doctrine also represents generalized knowledge and, thus, is more readily transferable across geographies. Indeed, the co-CEO of a professional services firm noted that a client in the beverage industry is able to use marketing doctrine across multiple geographies:

> [Beverage company] serves something like 200 countries. They're in the same category in all of those countries. But the local circumstances really do vary. So they had an opportunity to go and say, "How do I optimize physical delivery?" in all these different countries, and "What's the best way to segment?" And what you find over time is certain principles about how to segment or how to build a marketing plan emerge that can be used globally.

As such, the preceding arguments suggest the following proposition:

> P_1: The greater a firm's internationalization diversification, the more likely it is to use marketing doctrine.

Product diversification refers to expansion into product areas new to the firm (Hitt, Hoskisson, and Kim 1997). Firms may broaden their scope by engaging in either related or unrelated product diversification (Hitt, Hoskisson, and Kim 1997). Our field study samples are limited to firms that engaged largely in related-product diversification; thus, we focus on this variable. We address unrelated-product diversification in the "Discussion" section.

Related-product diversification refers to firms that diversify into new products within an industry (Hitt, Hoskisson, and Kim 1997). Firms that engage in related-product diversification tend to serve similar customer bases, use similar channels and promotional methods, and have similar resources and processes (Ellis et al. 2011). Such firms are likely to recognize that these similarities make it feasible to use a common marketing approach and gravitate toward using marketing doctrine.

For example, although a firm such as P&G operates in multiple product categories (e.g., diapers, toothpaste, detergents, razors) within the consumer packaged goods industry, it primarily serves consumers and sells through retail channels. Furthermore, it promotes the various products using similar means (e.g., mass media, event sponsorships, company websites, social media). The similarities in the customer base, channels, and promotional methods make it viable for managers in one product category to learn from the experiences of another product category. Such learning makes decision making faster and more efficient (Davis, Eisenhardt, and Bingham 2009). The co-CEO of a professional services firm commented on the feasibility of using marketing doctrine across different product categories for firms that engage in related-product diversification:

> [Client X] is able to use marketing doctrine [because] they have learned that the same principles are applicable to all their consumer packaged goods businesses.

> P_2: The greater a firm's related-product diversification, the more likely it is to use marketing doctrine.

Decentralization

Decentralization of marketing authority refers to the extent to which marketing decisions are delegated to a firm's subunits (Jaworski and Kohli 1993). Decentralized firms delegate marketing decision making to subunits because they believe that this flexibility helps each subunit to be customer oriented and responsive to market demands (Lin and Germain 2003). However, such firms are likely to observe that the decentralization often duplicates efforts (Lin and Germain 2003) and repeat mistakes across subunits (Davis, Eisenhardt, and Bingham 2009). As the business unit head of a professional services firm noted,

> [Company X] is one of the most decentralized companies. Everyone got to do marketing the way they wanted to. It was very inconsistent and very inefficient.

This quotation highlights that the flexibility for decision making that decentralized firms grant often results in inconsistencies and inefficiencies. Thus, such firms are likely to recognize that they need a common approach that provides guidance but permits flexibility and, therefore, develop and use marketing doctrine.

> P_3: The greater a firm's decentralization of marketing authority, the more likely it is to use marketing doctrine.

Decentralization of marketing activities involves the extent to which functions other than marketing perform marketing activities (Workman, Homburg, and Gruner 1998). It is increasingly the case that other functional areas within a firm (e.g., operations) perform traditional marketing activities such as product management, pricing, and customer service (Webster, Malter, and Ganesan 2005). However, employees in nonmarketing functions often have different "thought worlds" compared with those in marketing (Homburg and Jensen 2007). As such, nonmarketers often lack marketing competence and have an ambiguous understanding of marketing activities (Webster, Malter, and Ganesan 2005), which results in unsophisticated marketing decision making. The EVP and CMO of a *Fortune* 500 chemicals company noted the problems that his firm faced by having nonmarketers perform marketing activities and explained the rationale for using marketing doctrine:

> You don't have much success because the technology guys develop the wrong product that doesn't actually meet customer needs. And the business guys aren't making good choices around where to deploy resources or sell to the best segments to ensure that we actually do serve the ones that are the most attractive.... One of the reasons for a program like marketing doctrine is to raise the institutional capability around understanding markets and how you want to go after them.

> P_4: The greater a firm's decentralization of marketing activities, the more likely it is to use marketing doctrine.

Consequences of Marketing Doctrine Use

Marketing doctrine provides a common approach for marketing decision making. When firms provide such guidance, employees tend to rely on it, rather than on their own personal ideologies or mental models, for decision making (Bailey and Maltzman 2008). The founder of a professional services firm noted the key benefit of having a common marketing approach: "This common approach substantially improves consistency of decision making."

Our field research suggests that, in addition to its contribution to decision-making consistency, marketing doctrine use affects marketing program creativity, marketing impulsivity, perceived marketing value, and firm performance. Accordingly, we develop propositions that examine the relationship between marketing doctrine use and these four outcomes. Subsequently, we develop propositions for three environmental variables that moderate the relationship between marketing doctrine use and firm performance.

Marketing Program Creativity

Marketing program creativity refers to the extent to which a firm generates novel approaches to market a product (Andrews and Smith 1996). Much research has asserted that freedom in decision making is necessary for intrinsic motivation, task enjoyment, and, ultimately, creativity (Amabile and Gitomer 1984). Accordingly, one may argue that the use of marketing doctrine may reduce creativity because firms' adherence to principles may decrease their perceptions of freedom. Our field research, however, suggests otherwise. The founder of an advertising agency highlights the importance of marketing doctrine for creativity:

> It's a young team, a talented team, an artistic team, and ... if I just said, "We need to figure out a cool event for a client," they'd all be silent. But if I said we need a cool event that "curates a lifestyle" [i.e., a principle of this firm], then, all of a sudden, there's all these cool ideas that are associated with it. To just give a blank canvas to the majority of people, including clients, often gets a blank stare.

This executive's comment demonstrates that when her team had the "freedom of the blank page" (i.e., excessive choice), they were less creative. Indeed, research has shown that when decision makers have excessive choice, they must select from numerous paths, which takes inordinate effort and minimizes opportunities to be creative (Chua and Iyengar 2008; Joyce 2009). Marketing doctrine provides some structure with flexibility for decision making, which managers appreciate.

> Just thinking back to my experience using principles, the way that I would position it is, I always felt like I had freedom within a framework. (Marketing manager at a *Fortune* 500 consumer packaged goods firm)

Creativity research has suggested that "freedom within a framework" focuses people on fewer alternatives (Goldenberg, Mazursky, and Solomon 1999), which frees their cognitive resources for deeper exploration and creativity (Dahl and Moreau 2007).

> P_5: The greater the marketing doctrine use in a firm, the greater the firm's marketing program creativity.

Marketing Impulsivity

Impulsivity refers to the degree to which a firm pursues initiatives with little foresight (Dickman 1990). Firms that succumb to marketing impulsivity are likely to have little discipline in prioritizing marketing activities. The EVP and CMO of a *Fortune* 500 industrial chemicals firm described marketing impulsivity at his firm as follows:

> They end up chasing too many things, have too many fragmented resources across all those opportunities, and then, as a result, even if they think they're doing a bunch of stuff in the market, nothing ever happens because they never actually concentrated enough critical mass to win in anything they were doing.

A partner at a professional services firm lamented that marketing professionals are particularly prone to such behavior:

> The biggest challenge I think most marketing people have is they just pick up a shotgun and shoot at everything, hoping something sticks.

Marketing doctrine has the propensity to curb this impulsivity because it focuses attention on a firm's important priorities. In this regard, the founder of an advertising firm shared two principles that channel her firm's energies on delivering exceptional client value: "Always show clients what they ask for and then what they really want," and "Go down telling the client what is right rather than go down following their decision." Such guidance focuses attention (Gigerenzer 2008) and reduces undisciplined decision making.

> P_6: The greater the marketing doctrine use in a firm, the lower the firm's marketing impulsivity.

Perceived Value of Marketing

The *perceived value of marketing* refers to the extent to which marketing is regarded as contributing to the success of the firm (Moorman and Rust 1999). Many scholars note that senior executives are often unclear about marketing's role and value (Moorman and Rust 1999; Webster, Malter, and Ganesan 2005). Indeed, the CMO and EVP of the *Fortune* 500 industrial chemicals firm suggested that marketing's status was in question in his firm:

> Marketing just had never really played much of a role. We are a technology and ... upstream manufacturing shop where the whole idea of even having a CMO was anathema to them. And when they got one, they didn't really know what to do with him.

Marketing doctrine clarifies a firm's marketing choices for competing in its markets. As noted previously, these choices fit with firm strategic orientation. When managers understand that their firm's marketing doctrine is aligned with firm strategy, they are more likely to appreciate it and see how marketing adds value. Furthermore, because marketing doctrine is distilled from a firm's experiences, managers are likely to find it contextually relevant and credible (Stringer 2007). Thus, we anticipate the following:

> P_7: The greater the marketing doctrine use in a firm, the greater the perceived value of marketing within the firm.

Firm Performance

We refer to *firm performance* as a firm's revenues and profitability relative to that of competitors (Moorman and Rust 1999). Marketing doctrine is likely to affect a firm's performance both indirectly and directly. For example, consistency in marketing decision making and lower marketing impulsivity are likely to enhance profitability by increasing efficiency (Davis, Eisenhardt, and Bingham 2009). In addition, our field research suggests that the use of marketing doctrine is likely to influence performance directly because it guides decision making toward a firm's tried and tested choices. The organizational learning literature has suggested that the more a firm uses knowledge that reflects tried and tested means, the more likely it will experience improvements in performance because the overall quality of decision making improves (Argote 1999). In this regard, as the marketing director of a *Fortune* 500 consumer packaged goods firm stated,

> The results for [our firm] have been excellent. There have been superior decisions, which have been made because of marketing doctrine, which have really improved margins and the bottom line.

P_8: The greater the marketing doctrine use in a firm, the better the firm's performance.

The effects of doctrine use on firm performance are, however, unlikely to be uniform (Oliver and Roos 2005). Thus, in the next section, we examine the role of moderators on this relationship.

Moderating Effects of Unpredictable Environments

Research has suggested that the guidance from marketing doctrine–like approaches for decision making may be more valuable in unpredictable environments (Bingham and Eisenhardt 2011; Gigerenzer 2008). Accordingly, we explore the moderating effects of the three types of external and internal unpredictable environments (i.e., competitive intensity, market turbulence, and structural flux) on the marketing doctrine use–firm performance relationship.

Competitive intensity refers to the degree of industry rivalry (Jaworski and Kohli 1993). When competitive intensity is high, managers experience significant stress that causes them to "muddle through," be hasty in their decision making, and inadvisably imitate competitors (Lieberman and Asaba 2006). The guidance from marketing doctrine is especially valuable under such circumstances. It focuses managers' attention and efforts and prevents them from blindly imitating competitors and deviating from practices that a firm has identified as important for market success (Oliver and Roos 2005). In contrast, when competitive intensity is low, there is less uncertainty about competitor actions, which provides firms with an opportunity to devise appropriate responses. Thus, we propose the following:

P_9: As competitive intensity increases, there is a stronger positive relationship between marketing doctrine use and firm performance.

Market turbulence refers to the rate of change in customer preferences and composition (Jaworski and Kohli 1993). Turbulent markets can exhibit discontinuous change (Day 2011) whereby, for example, current offerings may need to be completely revamped or traditionally effective communication channels may need to be redesigned (Jaworski and Kohli 1993). Executives mentioned that, in such cases, marketing doctrine could become misaligned with the market. This is consistent with research suggesting that organizational inertia may limit a firm's ability to adapt its approaches (e.g., marketing doctrine) to match the rate of environmental change (Hannan and Freeman 1984; Nystrom and Starbuck 1984). These inertial forces are present because firms that learn from their own experiences have a tendency, at least initially, to discount new evidence (Lord, Ross, and Lepper 1979). Although firms that engage in vigilant market learning and market experimentation can overcome these inertial forces and adapt their marketing doctrine in turbulent environments, most firms are only moderately effective at doing so (Day 2011). These arguments, therefore, suggest that firms that use marketing doctrine will be more resistant to adapting their principles to turbulent environments, at least initially.

P_{10}: As market turbulence increases, there is a weaker positive relationship between marketing doctrine use and firm performance.

Structural flux refers to the rate of internal change in a firm (Maltz and Kohli 1996). In firms with high structural flux, there are more frequent personnel changes (Frazier et al. 1994; Maltz and Kohli 1996), which can result in significant transition costs. The marketing director of a *Fortune* 500 consumer food company alluded to these costs:

> [We] had many different businesses who all felt that they had the right way of making marketing choices, but each of those ways was different. And if somebody transferred from one business to another, they had to learn it all again.

Another executive suggested that the guidance provided by marketing doctrine brings about a degree of stability that is particularly helpful for coping with structural flux:

> If you have marketing people in Australia or in Japan working off the same marketing doctrine, you can stick them in the U.S., and they'll be okay because of having a common marketing approach. (Partner, professional services firm)

These comments suggest that, as structural flux increases, firms that use marketing doctrine can more efficiently cope with personnel changes across the firm. Thus,

P_{11}: As structural flux increases, there is a stronger positive relationship between marketing doctrine use and firm performance.

Discussion

The concept of doctrine has roots in several domains (e.g., military, religion) and, as our research suggests, is beginning to be adopted by a small set of leading firms. The purpose of the present article is to introduce the concept and to provide a critical examination of marketing doctrine. By doing so, we address recent calls for conceptual and organic contributions to marketing thought and practice (MacInnis 2011), and we lay a foundation for further research on the topic.

Theoretical Implications

Scholars have argued that a key role of marketing professionals is to generate firm-specific knowledge because it represents a source of competitive advantage (Griffith and

Lusch 2007; Nonaka and Von Krogh 2009). We suggest that firms may rely on their unique experiences for developing such knowledge. Drawing from experiences, however, is insufficient to improve performance (Bingham, Eisenhardt, and Furr 2007). As such, firms need a mechanism for translating these experiences into usable knowledge. The marketing literature in general has not explored the notion of experience-based, firm-specific principles as a potential source of competitive advantage. In response, our research contributes to the literature by proposing that marketing doctrine represents a means for converting an organization's unique experiences into choices that guide the way a firm competes in its markets.

Many scholars have noted that marketing may be "losing its seat at the table" (Webster, Malter, and Ganesan 2005), largely because senior executives are unclear about marketing's role and value (Webster, Malter, and Ganesan 2005). Indeed, they often have a narrow view of marketing and equate it with marketing communications. In this regard, marketing doctrine presents an opportunity to clarify marketing's role and strengthen its identity within firms. When senior executives from other functions more clearly understand their firm's core marketing principles, they are more likely to appreciate the role and value of marketing.

Marketing doctrine clarifies the crucial marketing choices that a firm should make to compete in its markets. These choices guide decision making and, therefore, can help curb marketing impulsivity. In the same vein, these choices may guide the deployment of adaptive marketing capabilities, such as vigilant market learning (Day 2011). In today's data-rich environment (e.g., customers' web-surfing patterns), organizations engaging in vigilant market scanning without sufficient guidance may be overwhelmed by information overload. We suggest that marketing doctrine can provide direction to a firm's vigilant market scanning. For example, a firm such as Apple may direct vigilance toward identifying next-generation technologies or suppliers in line with its principle "make complex products simple." Thus, our research has important implications for an exploration of the interaction between marketing doctrine and adaptive marketing capabilities.

Similarly, marketing doctrine may be a complementary capability to firms that strive for a market orientation. A meta-analysis has revealed that the relationship between market orientation and performance may be positive, nonsignificant, and even negative (Kirca, Jayachandran, and Bearden 2005). A potential explanation for the nonsignificant and negative association is that firms may generate market intelligence, which is a core element of market orientation (Jaworski and Kohli 1993), but the intelligence may have insufficient focus on a firm's most crucial marketing choices. We propose that marketing doctrine may direct these intelligence generation efforts toward a firm's critical marketing decisions. Thus, a market-oriented firm that also has a marketing doctrine would still generate market intelligence, but its marketing doctrine would guide these activities.

Managerial Implications

Traditional approaches in the literature suggest that firms may focus on either consistency or flexibility. For example, firms may rely on mechanistic processes (e.g., routines) for attaining consistency and on organic processes (e.g., values, norms) for providing flexibility (Homburg and Fürst 2005). Our research suggests that marketing doctrine can help address both imperatives by providing a common approach to marketing while allowing people the flexibility to tailor their approach to local conditions. Such guidance is particularly amenable for performing unstructured marketing activities (e.g., channel design), for which it is exceedingly difficult to develop optimal models (Gigerenzer 2008).

Many firms perform marketing activities on an ad hoc basis without a clear understanding of how these activities add value to the firm (Webster, Malter, and Ganesan 2005). Executives frustrated by these scattered efforts view marketing investments with skepticism (Webster, Malter, and Ganesan 2005). Marketing doctrine can help align marketing activities with firm strategy. Specifically, a key criterion for evaluating marketing doctrine is whether it "fits with firm strategic orientation." Thus, marketing doctrine enhances the likelihood that a firm will perform marketing activities that support organizational strategy.

Marketing doctrine facilitates discipline by preventing firms from chasing competitor actions or market trends and fads. This discipline, however, may hurt firms when they operate in highly turbulent environments. Large market shifts fundamentally change an industry's operating rules (Jaworski and Kohli 1993), which means that some tried and tested experiences may no longer generalize to the new environment. We offer proactive solutions that firms may take to maintain the relevance of their marketing doctrine in such environments. Specifically, we recommend that firms engage in periodic reviews when experiencing novel conditions. Furthermore, firms should engage in vigilant market learning and adaptive market experimentation (Day 2011). The former helps firms proactively scan the environment and detect changes, while the latter helps firms test the boundary conditions of marketing doctrine.

Firms should not assume that marketing doctrine automatically yields benefits such as enhanced marketing program creativity or superior performance. Several executives in our field research cautioned that such benefits are less likely if decision makers use it in a cursory manner (i.e., a manner that complies with the letter, rather than the spirit, of the marketing doctrine). Indeed, an executive expressed concern that some managers use marketing doctrine "as a substitute for intelligent thinking." While further research may investigate this issue in depth, it seems that employees with continuance commitment (i.e., those for whom the perceived costs of leaving an organization are high; Johnson, Chang, and Yang 2010) may use it superficially. Thus, firms should consider their employee composition and be realistic about expectations from marketing doctrine.

Limitations and Future Research Directions

We gained insights by coupling an interdisciplinary literature review with field-based interviews. Although our interviews covered a wide range of firms and industries, additional research is necessary to test the ideas we present herein. For example, the development process that we identified was drawn largely from firms that were clients of a professional services firm. Other firms may use very different processes. Thus, more research would shed light on the development process.

Most of the firms across our samples were relatively large, single-industry firms with related-product diversification that used a single marketing doctrine. However, it is not clear whether firms with unrelated-product diversification should have a single marketing doctrine or multiple marketing doctrines. Firms such as General Electric or Samsung serve business-to-business (B2B) customers, with products such as aircraft engines and ships, as well as business-to-consumer (B2C) customers, with products such as appliances and mobile phones. These firms are likely to use different channels and promotional methods and have different marketing resources in their respective B2B and B2C businesses (Ellis et al. 2011). Thus, further research should endeavor to shed light on whether multiple marketing doctrines might be appropriate. For example, it might be the case that firms that engage in unrelated-product diversification would benefit from approximating U.S. military doctrine, which has a joint doctrine as well as separate doctrines for Army, Navy, Marines, and Air Force.

There is evidence that some firms create principles to guide the performance of specific marketing activities. Unilever (2010) has eight principles to guide global marketing communications (e.g., "In marketing communications representing meals, the foods portrayed should be shown in the context of a balanced diet"). The interplay between marketing doctrine and the principles for these more specialized activities is worth exploring.

Firms may articulate marketing doctrine as more rule-like (less discretion) or standard-like (more discretion) (Schipper 2003). For example, rule-like doctrine is likely to engender less decision-making bias, whereas standard-like doctrine offers more decision-making autonomy (Schlag 1985; Sunstein 1995). Thus, further research might consider more fine-grained implications from articulating marketing doctrine as more rule-like or standard-like.

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