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Reflections of a Marketing Educator with Scholarly Ambitions

Some years ago, I had the pleasure of teaching an undergraduate marketing principles class in a 500-seat auditorium at the University of Texas at Austin. Toward the end of the semester, a student in the class came to my office and politely inquired, "Are you Professor Kerin?" "Yes, come in," I replied. An astonished look covered the student's face as he exclaimed, "You look so different up close!" I tactfully ignored the remark but wondered what he expected to see in a close encounter. The same thought surfaced when Terry Clark asked me to write an essay that described the "personal and idiosyncratic aspects of my research, my research process, as well as the story of my formation and development as a scholar." However, I came to view Terry's invitation as an occasion to recall events and experiences, to recognize influential people and perspectives, and to acknowledge the role that choice and chance have played in shaping my academic career and my diverse scholarly pursuits. I also viewed his invitation as an opportunity to reflect on the origin and context of some of my published work and the context in which it was written. In doing this, I touch on my research orientation and highlight how my teaching interests and research endeavors have reinforced each other over the past two decades.

An Accidental Academic

I am now beginning my fourth decade as a marketing educator. My biography shows the receipt of a doctorate in business administration from the University of Minnesota in 1973 and a faculty appointment at Southern Methodist University (SMU) the same year. So much for recorded history.

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The experiences preceding these events would affect my approach to marketing education and scholarship for the next 30-plus years. Let me explain.

I have long considered myself an accidental academic. As a twentysomething pragmatist of the 1960s, graduate business education meant earning an MBA and embarking on a corporate career. Acceptance to the master's program at Minnesota was an auspicious start. I soon found myself immersed in classics such as Alfred Sloan's *My Years with General Motors* and Chester Barnard's *The Functions of the Executive*, enrolling in courses with names such as "Executive Leadership and Business Policy," and satisfying MBA core curriculum requirements. Application-based classes that featured case analyses, role-playing exercises, and field projects were of special interest to me.

My preference for hands-on classes was first noticed by Bill Rudelius, my graduate advisor. As I approached graduation, Bill asked me to join his business and university-sponsored consulting team to help assess retailing opportunities in a lower-income area of Minneapolis. The area of the city had suffered from civil unrest and vandalism of the kind common in the late 1960s, and its commercial structure was distressed. Over the following several months, I interviewed local residents and shop owners, deciphered trade-area census data, and prepared detailed feasibility studies for 14 separate retail outlets being considered for a neighborhood strip shopping center. This engagement was a fitting capstone for the practical graduate education I had sought. The experience of dealing with a consequential problem and of delivering actionable recommendations to an appreciative client on time and on budget was enormously gratifying. I have sought out that same gratification again and again over the years. The Minneapolis study also marked the beginning of a valued friendship with Bill Rudelius, who would become a trusted and tireless mentor. We subsequently published an account of the Minneapolis study (Rudelius, Hoel, and Kerin 1972). However, my attention at the time focused mainly on finding employment, which I secured one month before graduating with my MBA in August 1970.

I was offered a job with General Foods, in White Plains, N.Y., in its Maxwell House division, for the princely salary of \$14,000. However, the next day, I received a letter from the University of Minnesota notifying me that I had been accepted into the doctoral program in marketing. I was dumbfounded, having never applied for admission! After confirming that the letter was not a hoax, and for reasons still mysterious to me, I declined General Foods' offer and

entered the doctoral program. Bill Rudelius agreed to serve again as my advisor.

In the early 1970s, the Minnesota doctoral program had a strong behavioral thrust. The curriculum included courses in psychology, experimental design, inferential statistics, and psychometric theory and methods, as well as requisite courses in marketing theory, marketing research, marketing management, and consumer behavior. Given my interest in general management, I added several classes in organizational theory. All in all, I suspect that my course of study was similar to that in contemporary Big Ten doctoral programs in marketing. My texts included Alderson's *Dynamic Marketing Behavior*; Howard and Sheth's *Theory of Buyer Behavior*; Green and Tull's *Research for Marketing Decisions*; and the Brown et al. casebook, *Problems in Marketing*. Kotler's *Marketing Decision Making: A Model-Building Approach* rounded out my formal graduate education in marketing. At the time, I had no idea that I was reading what would become classics of the field.¹ What I did know was that the experiential learning I had gained during my MBA was less frequent. This was about to change.

During the summer of 1971, Dick Cardozo asked me to join him in a case development effort at General Mills. I had completed Dick's marketing management case study course the previous term, and he was about to introduce me to case writing. The time spent at General Mills preparing the "General Mills: Jet 24" case study was a crash course in new product development and commercialization for consumer packaged goods. Jet 24 was a fruit-flavored concentrate that could be sprayed into a glass of water from an aerosol can. The product was the firm's first venture into the beverage market, and it was a commercial failure. Our task was to document General Mills' new product planning for Jet 24 from concept development through an early attempt at premarket testing, thus leading to the launch decision. Interactions with General Mills' executives ignited a passion in me for case writing and teaching, which endures to the present day. However, Bill Rudelius wisely pointed out that a collection of case studies "does not a thesis make," and he urged me to begin thinking about a dissertation topic while preparing for my comprehensive exams.

My thesis examined the quality of self-report data in mail survey research. I would later publish two thesis-related articles followed by a review and synthesis of empirical and methodological research on self-report data quality. However, the real impact of my thesis (for me) was a collaborative relationship with Bob Peterson. But I'm getting ahead of myself. A week after defending my thesis, I

¹It would take me several years to appreciate fully my doctoral training. For example, while I was preparing a commemorative essay on the sixtieth anniversary of *Journal of Marketing* (Kerin 1996), I uncovered the readings packet and lecture notes from the marketing theory class taught by Edwin Lewis and discovered an orderly, historical account of marketing thought from the early 1900s through 1970. As a student of Wroe Alderson, Ed's perspective on the development of marketing theory and practice was an invaluable reference for me.

packed my few belongings and drove to Dallas, where I joined the marketing faculty at SMU. I was deeply appreciative of the position, given the weak job market at that time.

When You Come to a Fork in the Road, Take It —Yogi Berra

The School of Business at SMU was in transition when I arrived in August 1973. The school's emphasis on undergraduate education and teaching had been gradually broadening to emphasize its MBA program and faculty scholarship. New faculty recruitment was viewed as the best way to achieve this. The opportunity to be involved in this transformation appealed to me, and the faculty (notably Dick Hansen, the department chair and fellow Minnesota graduate) welcomed my enthusiasm for teaching and saw publication potential in my research.

The environment at SMU was ideal for me. Course development was encouraged, and consulting was common. In six years, I prepped eight different courses (ranging from sales and business forecasting to consumer behavior); I taught undergraduate, MBA, and executive MBA classes; and I authored a dozen case studies (many based on my consulting). Early success in teaching indicated promise as an educator at SMU; however, the same could not be said for my scholarly achievements. As things turned out, my scholarly ambitions were kindled while visiting the University of Texas at Austin during the 1976–77 academic year.

I visited Austin primarily to work with Bob Peterson, another fellow Minnesota graduate. Bob's scholarly talent was already obvious when, in 1970, Bill Rudelius introduced us; Bob was finalizing his dissertation, and I was completing my MBA. We became reacquainted shortly after I settled in at SMU. To my surprise, Bob was familiar with my thesis research and suggested the possibility of collaborative work. Bob invited me to visit Austin, and I accepted without hesitation. The results of my visit far exceeded my expectations. Bob and I crafted several papers that year that lay the foundation for many future studies. For good measure, we delivered the first of (now) ten editions of our casebook, *Strategic Marketing Problems: Cases and Comments*. At that time, Bob also introduced me to Vijay Mahajan, a future SMU colleague and an indefatigable coauthor. Collaboration with Bob Peterson fueled my appetite for research. However, our research efforts were not much related to my teaching and case writing interests. I considered myself at the proverbial fork in the road, believing that my pedagogical interests were incompatible with my nascent scholarly ambitions. Coincidence and opportunity would intervene to prove me wrong.

Adventures in Serendipity

Upon returning to SMU, I reverted to case writing and course development. The summer of 1980 found me at LaQuinta Motor Inns, preparing a case for an MBA marketing management course. The case focused on the company's decision to broaden its target market beyond business travelers to include pleasure travelers. While I was writing the case, the question arose of how the company could compare the complete preference order of motels in

the two segments to determine LaQuinta's relative position in the motel industry. As fate would have it, I was also a committee member on an SMU statistics department doctoral thesis that examined alternative approaches for determining rank-order agreement on a common set of objects between two separate groups (albeit from a theoretical perspective). A light bulb went off, and I suddenly understood the LaQuinta problem as a practical application of the method (later published by Palachek and Kerin [1982]).

This serendipitous episode changed my perspective on how case writing and research might be linked. I began to appreciate how case writing could provide topics and ideas suitable for academic study. A then recently published report by the Commission on the Effectiveness of Research and Development for Marketing Management (Myers, Greyser, and Massey 1979) offered encouragement for the research orientation that I envisioned for myself. The report recognized problem-oriented research as a legitimate scholarly activity to the extent that the issues, methods, or problems studied evidenced generalizability. It concluded with a statement that I have often come back to: "Understanding practice, and contributing to it, can lead to major contributions to knowledge-development" (Myers, Greyser, and Massey 1979, p. 29).² This report also conceded that problem-oriented research still lacked the respectability of basic research for knowledge building by the academic marketing community and therefore was not without risk as a career choice. Undeterred, I decided to revisit previous studies and to pursue future case study (and consulting) settings with promising problem-oriented research opportunities and publication potential.

The decision to stake my scholarly future on case writing and consulting activities fit my inductive approach to research. Fortunately for me, the SMU marketing faculty had become populated by kindred spirits, including Bill Cron, Dan Howard, Michael Levy, and Vijay Mahajan, who were also inclined to turn problem-oriented research projects into scholarly manuscripts. Our joint efforts included applying conjoint analysis to the design of channel-directed support programs; identifying marketing and trade show strategy-related variables that affect trade show performance; developing a methodology for assessing market penetration opportunities and saturation potential for multi-store, multimarket retailers; and modeling word-of-mouth effects in the diffusion process for new products. Dan Howard and I would explore causal relationships among variables that influence "value-for-the-money" perceptions of supermarket shoppers and would show empirically that brand name sound and meaning affect consumer brand-source inferences, while also highlighting the implications of this result for trademark infringement and brand name research. Raj Sethuraman, Bill Cron, and I would use our collaboration with a large consumer electronics firm to show that choice-based conjoint analysis tasks conducted in

²During my term as editor of *Journal of Marketing* (1988–90), I would frequently cite this study and quotation. I like to think that some of the best articles published during my editorial term were based on problem-oriented research that contributed to practice improvement and knowledge development in marketing.

an online environment may yield different (and more valid) results than those observed in conventional paper-and-pencil methods in new product research.

To the casual observer, this bevy of projects may appear to be unrelated, but they shared a common purpose, consistent with the research orientation I had adopted. All these projects originated from, benefited from, or were inspired by field-based case-writing efforts and consulting engagements, and all aimed to improve the marketing practice of the phenomenon under investigation. Equally important, as a marketing educator, I found the coalescence of case writing and problem-oriented research indispensable to course development (and vice versa.)

Course Development and Programmatic Research

New and ongoing course development has played a central role in motivating my research and textbook writing (Kerin et al. 2003). For me, course development and case writing are synonymous. Since 1973, I have authored some 60 case studies and have been involved in the creation of a dozen courses. What I have found is that course development efforts discipline my examination of marketing phenomena. For example, I developed an MBA course ("Interactive and Multichannel Marketing") to determine how marketing concepts and practices (as I understood them) were affected by the Internet. Although case writing is time consuming and labor intensive, I have discovered that for me, as an element of course development, it has a triple purpose: (1) It serves as a pedagogical device, (2) it aids deeper thinking, and (3) it stimulates innovative research. Two of my course development experiences stand out in this regard.

During the summer of 1981, I began revising a popular executive MBA and MBA course that featured Abell and Hammond's *Strategic Market Planning: Problems and Analytical Approaches*. The revision was initiated by student requests to broaden the case assignments beyond the technology-based companies that appeared in the text. I chose to write a case on Zale Corporation, which then was one of the largest publicly held diversified specialty retailing companies in the United States and the world's leading retailer of jewelry merchandise. My original intent was to illuminate market strategy and resource allocation options for a multidivisional retailing firm. However, a more interesting question soon became apparent: Are corporate sales and asset growth objectives on the one hand and financial policies on the other hand synergistic (or otherwise) in creating shareholder wealth? This question sparked my curiosity about the interface between marketing and finance in strategy formulation, implementation, and evaluation. The Zale Corporation case prompted three articles coauthored with finance faculty who also thought the topic worthy of study. The first article (Higgins and Kerin 1983) documents sustainable growth challenges for a cross-section of retailers, outlines marketing and financial "solutions" for balancing sales and asset growth and earnings, and indirectly examines the influence of each on shareholder wealth creation. The second article (Kerin and Varaiya 1985) explores the shareholder wealth consequences of retail mergers and acquisitions and demonstrates why this popular growth strategy rarely yields the intended value to stockholders of

the acquiring firm. The third article (Varaiya, Kerin, and Weeks 1987) explores shareholder wealth creation and erosion from the perspective of value-based planning models, which were then receiving extensive but uncritical coverage in the business press. This research examines the empirical validity of these models for assessing corporate strategy and cautions prospective users to the conditionality of their prescriptions for managerial action. I wrote a supplemental course note to summarize this research to accompany both the Zale Corporation case and the course lecture titled “Strategic Financial Analysis.”

By 1986, the strategic market planning course had been substantially revised. Vijay Mahajan was teaching a companion class at the time, and he suggested that we document the changes reflected in our course material. He would introduce me to Rajan Varadarajan, whose encyclopedic knowledge of the literature was instrumental in our preparation of a “state-of-practice” article on strategic market planning (Mahajan, Varadarajan, and Kerin 1987). We would later elaborate on this work with the publication of *Contemporary Perspectives on Strategic Market Planning* (Kerin, Varadarajan, and Mahajan 1990). A few years later, the Vice President of Strategic Planning at a large telecommunications firm showed me a dog-eared copy of the book and asked me to deliver an executive seminar on the material he had highlighted. The seminar led to an invitation to integrate our material into the firm’s planning process. A valuable lesson on implementation issues in market planning was, in turn, brought back to the classroom.

My research on consumer product and brand management and an MBA course with the same title benefited from multiple cases written at Frito-Lay and a 20-year association with Dwight Risky, presently the Senior Vice President for Consumer and Customer Insights at PepsiCo. Dwight’s eye for strategic issues and fondness for challenging case development were instrumental in the formation of my views and writing on first-mover advantage, product cannibalism, brand equity, and brand valuation. For example, insight I gained in chronicling Frito-Lay’s successful pioneering effort with SunChips Multigrain Snacks resulted in two articles. The first article (Kerin, Varadarajan, and Peterson 1992) proposes a conceptual framework for identifying the sources of first-mover advantages and product-market contingencies that moderate the relationship between order of entry and competitive advantage. The second article (Kerin, Kalyanaram, and Howard 1996) shows that the magnitude of order-of-entry effects depends on whether a firm pioneers a product class or product form and whether a new brand or brand extension strategy is used.

My interest in brand valuation was stimulated while I was drafting a case on Frito-Lay’s marketing and financial analysis, before the acquisition of the Cracker Jack brand from Borden in 1997. Subsequent research (Kerin and Sethuraman 1998) inspired by this case helped identify a positive relationship between a firm’s accumulated brand values and its ratio of market value to book value, but it also revealed that the functional form of the relationship appears to be concave, with decreasing returns to scale. An additional dividend from my association with Dwight Risky has been his willingness to work with me on writing intelli-

gible and practicable supplemental class reading materials to accompany course case studies and lectures. We would subsequently publish two of these course notes: one on product cannibalism (Kerin and Risky 1994) and the other on PepsiCo’s global brand equity model (Kish, Risky, and Kerin 2001).

Closing Thoughts

As I look back on my educational and professional experiences, I humbly acknowledge that I have been fortunate in many ways. My mentors, notably Bill Rudelius and Dick Cardozo, provided opportunities and guidance at critical moments in my graduate education. Both have been role models for me whenever I have been called on to guide graduate students. Providential introductions to Bob Peterson, Vijay Mahajan, and Rajan Varadarajan stimulated my intellectual curiosity and furthered my research and writing interests. I am deeply indebted to this charmed circle of marketing scholars as well as to my many talented coauthors. They, more than me, can describe the idiosyncratic aspects of my research style.

Above all, I have been fortunate in being able to combine my passion for case writing and teaching with scholarly pursuits. In doing this, I take some satisfaction in developing course content that is uniquely my own, for better or for worse. Continuous course development through case writing and related research fuels my enthusiasm for the subject matter, which I hope is conveyed to and appreciated by students.

In writing this essay, I have no illusions that my research orientation and process is suitable for everyone, let alone anyone. However, it has served me well. I fully expect that tomorrow, if not the next day, will bring a case-writing opportunity that will change my view on marketing practice and plant the seed for a new course or research topic. This is a comforting thought as I embark on my fourth decade as a marketing educator.

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