



---

## **Personal Legitimising: a Perspective of Marketing Management**

Simon Haslam, Department of Marketing, University of Strathclyde

### **Abstract**

This paper explains the basic social process of "personal legitimizing" and illustrates its influence on marketing activity. Personal legitimising is the process by which individuals manipulate situations to suit their own agenda. The link between personal legitimising and an organization's marketing activity was discovered using a grounded theory research strategy within a UK management consulting firm.

Personal legitimising has two groupings of behaviour, namely "obstructing existing marketing activity" and "driving new marketing activity". Within the former are the categories of "stigmatising", "pseudo endorsing" and "smokescreening". The latter incorporates the categories of "hatching on", "self indulging" and "bragging".

The paper has three parts. The first explains the basic social process of personal legitimizing. The second shows how grounded theory methodology was used in this context. The third develops the possible contribution of personal legitimising to the understanding of marketing.

### **Introduction**

Personal legitimising is about justifying one's own actions or perspective. It is about how individual priorities and prejudice influence an organisation's behaviour.

The use of personal legitimising to influence the marketing activities and style of an organisation has emerged from a grounded theory study into the marketing behaviour of a management consultancy firm.

The UK has some 20, 000 consultancy firms (Keynote 1994). It was commercial interest in management consultancy which led me to study marketing processes in consultancy firms. Although I find it interesting to consider how those tasked with influencing the behaviour of others, namely management consultants, are themselves influenced by their members, the power of grounded theory is the discovery of social processes whose applicability goes beyond the specific research context. Notable examples of this include Bigus, (1972) work on relationship cultivation discovered in the context of a home delivery milk business.

This research is part of a more expansive investigation of the marketing behaviour of management consultants. These findings on personal legitimising are offered as an illustration of what I have seen to date, rather than a fully developed theoretical exploration.

### **Personal Legitimising and its Core Variables**

This section starts with an explanation of personal legitimising as it has emerged from my grounded theory study. I then explain the categories of personal legitimising that the data has suggested following the coding and constant comparison process implicit in grounded theory.

Personal legitimising seems to happen when someone wants to operate outside of the cultural norm of an organisation. Its categories fall into two main groupings, (see Figure 1). In grounded theory parlance these two groupings are "sub core variables" of the process. They are:

- Obstructing existing marketing activity

- Driving new marketing activity

The first sub-core variable is about impeding the progress of marketing ideas and initiatives. The second is the converse and involves the instigation and execution of marketing actions as distinct from those already undertaken by the firm. I will illustrate the three categories within each sub-core variable by referring to the "theoretical memos" developed during the research. Theoretical memos are the researcher's documented stream of consciousness stimulated by the research data. They are the building blocks of theory development in the grounded theory process.

### Obstructing Existing Marketing Activity

Personal legitimising the obstruction of marketing actions is about the moves made by individuals in the firm to prevent marketing ideas being adopted. These are the categories observed.

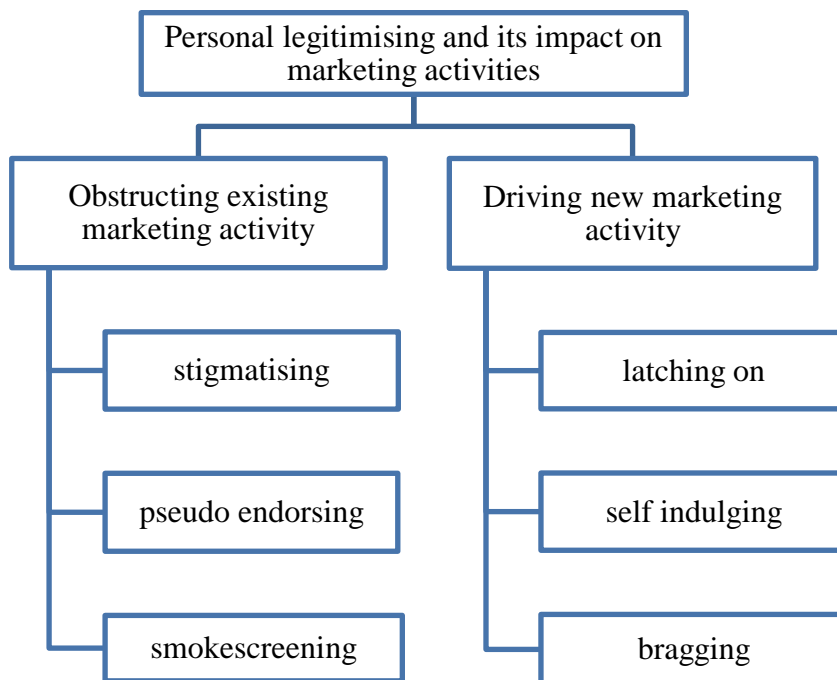


Figure 1: The Basic Social Process of Personal Legitimising

### *Stigmatising*

Stigmatising is where an individual adopts a distorted view to help legitimise a personal perspective, an example of which is shown below:

#### *Theoretical Memo-Stigmatising*

(From an interview with the managing consultant.) His view on running promotional seminars and events for clients is that "we tried them two years ago and they generated 'bugger all' business as far as we can see". He doesn't support the firm's intention of doing more.

Note, the previous seminars did generate some business, albeit not as much as the firm hoped. They contributed to the profile of the firm and generated goodwill with clients who were invited. From its previous attempt others in the firm concluded that their seminar events would be more commercially successful if they paid more attention to the timing and venue of the event, rather than the content. They felt they had learned from the process and were well placed to try again. The managing consultant does not enjoy cultivating business using client seminars, he directly expressed this view which was endorsed by his colleagues.

In an attempt to legitimise his own lack of enthusiasm for this marketing method, he proffered a stigmatised view. The example highlights a possible property of stigmatising, namely the property of using prior experience as the reference point. In the following paragraph from a theoretical memo, another property, the use of external reference points, is exhibited.

I have already encountered this view that a particular marketing method was not appropriate for the firm because "one wouldn't expect a firm such as this to behave in

such a way." Sometimes this is logical, but not always. For example, the notion of issuing newsletters to clients was accordingly dismissed, by drawing attention to the types of firms who used newsletters and voicing an opinion that recipients of newsletters threw them in the bin without reading them. A similar example involved a consultant justifying the non adoption of direct mailing as a marketing method by saying "I don't think it fits with how a firm such as ours should act." People in the firm did accept that newsletters and direct mail can work, and are used successfully by other management consultancy firms.

Within this category, attempts are made to legitimise inactivity by using selective comparison. The next category, pseudo endorsing, happens when the proposed action is initiated.

### *Pseudo Endorsing*

Within this category a marketing action is agreed upon within the company, but implementation is obstructed by withholding the necessary resources. It is associated with giving "lip service" to an idea. It is also achieved by personally judging an agreed task to be of lower priority than others. In this way activity can be thwarted without colleagues perceiving the pseudo endorser as lazy or obstructive. The following brief excerpts from theoretical memos show how the category has emerged from the data. The indicators of the behaviour are in bold.

### *Theoretical Memo - Pseudo Endorsing*

This memo is an evolution of the notes that I made around the open codes of prioritising, dedicating, underresourcing and evaporating. Pseudo endorsing is proba-

bly a selective code compared to the others mentioned which I see as descriptive open codes.

In the course of discussion with a senior consultant the subject of the monthly management meetings arose. The consultant said,

"And we do have that slight problem that in even our management meetings, which is supposed to be next week or maybe the week after, **client meetings come up and there isn't the three line whip, there should be but there isn't emphasis on that. So one by one people have dropped out because** they have more important client meetings on. **So you know for the business the short term pressures mean that we tend to forget the long term priority or the long term interest** and that I expect is the essence of our marketing."

I didn't detect frustration, merely an acceptance that this is the way it works. This person had also "managed" the firm's marketing for a while, and this is how he explained his experience here.

"...the business isn't big enough for people like Colin and myself to have to start spending a lot of time contemplating the broader issues, and the longer term issues, like marketing. I mean I was supposed to look after marketing for about six months after the company split. Nicholas was then supposed to have taken it on in total for about a year, **but I feel he probably didn't have the interest at the time either**, so it's sort of fallen into abeyance."

Looking at this I feel pseudo endorsing includes the properties of committing to something with agreement of the rest of the firm, assigning what you've agreed to a lower personal priority without necessarily seeking approval from colleagues for this,

then just letting this under researched commitment die a natural death. To describe this last aspect, the terms "fizzling" (as in "fizzles out") and "evaporating" were offered by two separate members of the firm.

My dialogue with Julia, who was appointed as marketing person, shows the evaporating property in context. I met her on a day she was obviously unhappy with her role. She was frustrated by the fact she has to provide admin support to two consultants as well as look after marketing projects. I asked her how the various marketing tasks she and I had discussed three months previously were progressing. She said,

"...I've progressed absolutely nothing. I've done nothing with the papers, trying to get into the papers. Colin has the CV and the information that is needed to get into the BBC but he hasn't had the chance.....from the marketing point of view it needs someone who has got the time to actually do something. . . . .at the moment and under tight deadlines, because I work for Colin and Martin as well, I just have not time to do anything. ...I think that's how everything goes. It starts off with lots of enthusiasm and it fizzles out."

I asked her what ideas she had to ease the situation. She said that Colin (chairman) and Barry (MD) had agreed to a meeting to look at how the situation could be improved. I phoned her later to see how the meeting went- it didn't go ahead due to work pressures on their parts. It was never reconvened. Within two months Julia left the firm for the more organised pastures of a larger firm.

The final category within the use of personal legitimising to obstruct marketing actions is what happens after pseudo endorsing. This I've labelled "smokescreening."

### *Smokescreening*

Perhaps the last step in justifying one's inability to support an agreed marketing action involves smokescreening. This is expressing regret at one's own performance but justifying this lack of performance by drawing attention to strong performance in an area recognized in the firm as being more valuable. The area of strong performance acts as a smokescreen, as the theoretical memo on smokescreening shows.

### *Theoretical Memo-Smokescreening*

Comment from a consultant tasked with managing his firm's marketing; "We know that marketing has an important role, but how do you overcome the problem that we are on short term thinking. We are short term thinking not because we can't think in the longer term. Personally the business demands very short term responses. You know like last week I had to write five complicated pieces of development material which required three weeks' to do."

He goes on to emphasise that he and his colleagues are purely client driven in their work. A laudable quality, but also a distraction of attention from other responsibilities.

A consultant's lack of ability to contribute to a client newsletter was justified by the comment:

"This raises the other problem in that all the client work I do is confidential, I can't mention any of it, it's absolutely unmentionable. It's a shame". It is difficult to argue against such a position, but there are ways of producing effective client newsletters without disclosing specific client details.



The two examples suggest three properties within this category of smokescreening. The first is the use of irrefutable arguments. For example, few could disagree with a consultant's decision to place existing client commitments as top priority. Second is the characteristic of apologising for an inability to meet obligations, and third is seeming to give others the choice or right of approval in the matter.

As the research progresses I may find more categories of obstructing marketing activity. I will certainly be able to enhance my comprehension of the properties and characteristics of each category. The second grouping looks at personal legitimising from a different perspective-to drive, rather than obstruct, marketing actions.

### **Driving New Marketing Activity**

This sub-core variable is about how individuals accommodate their personal perspective successfully within the organisation, in the initiation of marketing actions. The first category is 'latching on'.

#### *Latching on*

This is the ability to achieve personal legitimising by aligning one's own opinions or actions with external and highly revered sources. By highly revered I mean not only influential on the person using them, but also with sufficient gravity to influence others. These two aspects of external sources and highly revered ones should be considered as properties of this category. I came across several examples of latching on.

#### *Theoretical Memo-Latching on*

In justifying his (a senior consultant) preference for a particular style of working, namely opportunistic and responsive **he explained his attraction to the strategy writings of Prahalad and Hamel**. He described and was able to use the similarities

between Prahalad and Hamels' views on effective strategy and his own style to help legitimise his own approach to winning client work. Secondly, a senior consultant instigated a follow up exercise after a client spoke very positively about his firm's services at a conference. **The source he latched onto was his wife, who was a former sales director for a company in the USA.** She suggested the follow up exercise, but such an "aggressive" marketing action was beyond the consultancy firm's commercial comfort zone. The follow up was duly completed by the individual and proved effective. Interestingly though, despite what should have been powerful organisational learning there seems no inclination within the firm to engineer more opportunities to replicate the exercise.

The second category within "driving new marketing activity" is self indulging.

### *Self Indulging*

Self indulging is a broad category. It involves individuals choosing actions for self interest and enjoyment. The research revealed many examples of self indulging from a marketing perspective.

#### *Theoretical Memo - Self Indulging*

This awareness of self indulgence within the firm started with my second interview and Diane's (senior consultant) comment: **“there's space for you to do what you want to do here.** And therefore maybe, that people become too self indulged in doing what they want to do.”

These are the main contexts of self indulging that I've seen:

- physically locating the business in the area of the UK in which you want to live;

- developing the products and programmes you fancy doing;
- working with the clients and contacts you prefer working on;
- using your hobby as the basis for client entertaining;
- importing your own beliefs in organisational philosophy into the management style of the business and doing lectures on this to outside bodies.

In an earlier memo I described the firm as a "hot house of self indulgence". I retain this view. Following a very early conversation I had with Karen in the executive recruitment team, she said that the firm maintained this activity because "he (the chairman) liked to dabble in recruitment." I confronted Colin (the chairman) with this. I asked how important the executive selection branch was as an introducer of consultancy work. He replied: "Not critical, it's an indulgence of mine." (laughing)

I found it easy to see self indulgence going on. Nobody attempts to hide it, and when it is raised with people (as with Colin) they admit it. Some form of self indulgence, including the idea of "dabbling" seems to be expected.

As well as the recognition of the "dabbling" property, the data suggests further aspects to self indulging, including the righteous justification of it to others, and the championing of any self indulgence through to the achievement of results.

*Theoretical Memo-Self Indulging (continued)*

I spoke with a senior consultant about the problems the firm has with its sales monitoring and incentive system that the consultants supposedly work to. He said:

"The system to incentivise people to sell and deliver? Loosely it is intended to do a little of that, but none of us really believe that...I don't think we are involved in this primarily for extrinsic rewards. I think we're much more intrinsically motivated",

Self indulging has the property of being overly present, it also has the property of being covertly traded rather than negotiated. I have come across no "granting for permission" for self indulgence. Scope for self indulgence is what Martin is including when he talks about intrinsic rewards.

The property of result achievement also becomes evident within self indulging. Points don't seem to be awarded for effort. Scope for self indulging seems to be rewarded by its ability to achieve outcomes for the firm. Nobody seems to be self indulging unsuccessfully. It is as if they champion their indulgence.

I feel that future research and data analysis will enrich and develop my understanding of the impact of self indulging. I see this as a more substantial area than the other categories. This grouping finishes with the category of "bragging".

### *Bragging*

Bragging is about legitimising an approach by demonstrating its effectiveness, usually evidenced by numerical data. Consider this example from the theoretical memo on bragging of the consultant who chooses to sell small items of short term work rather than the organisational norm of longer term projects.

#### *Theoretical Memo - Bragging*

Within the organisation he has become known as the 'works department' because of the jobbing shop mentality. Yet he legitimises his approach by pointing out that at any one time he manages three times as many clients as the other consultants, and that he is the organisation's leading fee earner. The rest of the organisation seem ambivalent to this revelation. The data he quoted was his own research and not the official organisational line. His evidence was neither con- tested nor recognised, and the types of

projects pursued by the rest of the organisation remained the conventional longer term projects.

Bragging happens when facts and numbers can be mustered, irrespective of whether these have an official blessing or not. Individuals claim their own bragging rights. The reason it appears at the end of the process is because the action needs to be undertaken and achieved before performance can be claimed. Properties of bragging therefore look to include that which is experience based, and factual. And as with earlier categories, information is used selectively by the individual.

Further research will develop my understanding of "driving" and the processes I have described. The next part of the paper takes a step back in order to show how the grounded theory methodology was applied to this research, and how the understanding of "personal legitimising" emerged.

### **Explanation of the Procedures Adopted During this Research**

The objective of the grounded theory research method is to create explanations of behaviour beyond a simple description of what people are doing. It seeks meaning from data. Its originators were Glaser and Strauss, who first developed the technique in a study of the terminally ill (Glaser 1992). Glaser describes grounded theory as the "systematic generation from data of a theory that explains most of the variations in the data." (Lowe, 1996).

In grounded theory, data collection and analysis occur simultaneously as analytic interpretations and discoveries shape ongoing data generation. This is because the methodology is based on process discovery rather than on a measurement of units. It is difficult to show the process in a diagram but Figure 2 gives an illustration of some of the main activities.

#### *Data Generation*

My research was made possible by obtaining access to a high profile but small (annual turnover £2m) management consultancy firm. I gathered data by observing its working practices, having conversations with management and administrative staff in both formal and social settings, and attending internal meetings.

In the first two months of the project I spent eight working days on site with the firm. This was followed by further visits over the next nine months and the gathering of more data including in-depth taped interviews with six of the firm's 20 staff.

Between research interventions I coded the data, wrote and analysed theoretical memos, then decided what I needed to collect next, as the notion of "personal legitimising" began to emerge. The term given to this continual focus for the field work is Theoretical Sampling. In grounded theory, the researcher undertakes sufficient data collection around a particular concept (which has emerged from the data) to saturate the understanding of it.

### *Coding*

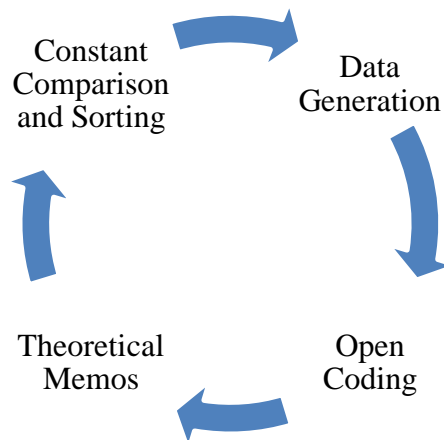
Coding is the part of the process of how data is developed into an explanatory theory.

Coding starts with "open coding" which involves the fracturing of data by isolating significant incidents such as events, issues, processes or relationships, and labelling them using respondent or researcher expressions. The label assigned to a code is usually a gerund, i.e. the form of a verb ending in "ing". This helps sensitise the researcher to the processes and patterns which may be revealed at a later stage.

Open codes are simply the first attempt to highlight data which the researcher believes may have an importance beyond the simple description of the context of the data. When interesting and thought provoking ideas are seen in the data they are carefully and systematically catalogued, and built into theoretical memos (see below). This allows the re-

searcher to trace codes back to source and context, which is essential for the constant comparison process (see later), The six taped interviews in the research created over 40,000 words of dialogue, which in tum generated 109 open codes.

The synthesis of open codes creates "selective codes". This is achieved by the interplay of theoretical memos and the constant comparison process. The shift of perspective from the descriptive open codes to conceptual selective codes requires the researcher to engage both intuition and intellect. As the open coding gathers pace the researcher begins to see that several of the open codes are logically related to each other. For example, the category of "pseudo-endorsing" evolved from open codes on "prioritising" "dedicating" "under-resourcing" and "evaporating".



**Figure 2. The Grounded Theory Process**

### *Theoretical Memos*

Theoretical memos are described as "the theorising write up of ideas about codes and their relationships as they strike the analyst whilst coding" (Glaser 1978). They are a means to abstraction and conceptualisation and are used throughout the grounded theory process. Initially they may be as short as one sentence, but as the analysis moves on, they are updated and de-

veloped and can be several pages in length. Although there is not a strict single format for a theoretical memo, they should contain at least four aspects.

- A title, which is usually an open code label;
- A description of the categories of the concept to which the memo relates;
- The properties within each category; and
- Indicators, illustrations taken from the data which highlight the properties and categories within the memo.

### *The Constant Comparison Method*

Theoretical categories are developed through a process of tentative conceptualisation whereby categories are created and then theoretically sampled to see how they fit across new data. Categories are redefined and refined as relationships clarify. By constantly comparing the data and by looking for negative occurrences of relationships it is eventually possible to elaborate and integrate data to the point where no new evidence occurs within a category.

The sorting of theoretical memos in grounded theory is best done manually (as in this case) in order to retain an intimacy with the data. In sorting, the researcher taps into the bank of theoretical memos which have been written up as the research has progressed. Sorting happens several times during a piece of research to ensure that the indicators are able to be upgraded to core categories. The process of personal legitimising and its constituent categories are the result of the constant comparison process being applied to my interview transcripts, field notes, and secondary data from the management consultancy film.

### *Core Variables*

Grounded theory is concerned with the discovery of basic social processes which explain the resolution of the problem or issue which confronts people in the substantive area



being studied. Theory generation happens around the core variable. A core variable accounts for most of the variation in a pattern of behaviour. A fully integrated grounded theory is likely to have several inter-linking core variables. For example in the study of the merging of corporate entities, (Lowe 1997), the core variables of default remodelling are cultivating relationships by supporting, terminating relationships, coercive isolating, and neglecting relationships by benign denial. These are all fully integrated with each other. Take one of them away and the theory collapses. My research has identified the one core variable of personal legitimising so far. I expect that as the study progresses then the constant comparison process will reveal others to provide a more integrated theory.

### **Personal Legitimising - Implications for Marketing**

The third part of this paper therefore suggests the possible value of "personal legitimising" to the understanding of marketing.

In grounded theory, the review of literature around the substantive area of study does not take place until the stage of the creation of an integrated theory. The purpose of the literature review is to situate the emerged theory in the context of other academic work. Since this theory is still emerging it is difficult for a literature search to be more than indicative. However, it is useful to approach this starting as close as possible to the research context (i.e. UK management consultancy) and then moving towards greater abstraction.

Literature on management consultancy tends to focus on consultants, contributions (or otherwise) to clients, rather than their marketing activities. What exists is practitioner based and aimed at informing rather than explaining. For example, Bianco-Mathis (1996) on the consequences of client referrals, and Russam (1996) on network approaches.

One possible position for personal legitimising is helping our understanding of the marketing management process. Brownlie (1991) comments that most studies in marketing management focus on the technical rather than broader managerial aspects. This observation leads to Brownlie's call for greater attention to be paid to understanding of the general management aspects of the marketing process. As an illustration in support of Brownlie's view, Cunningham et al. (1987) focus entirely on a rational view of marketing management with logical processes, analysis frameworks, and transparent decision-making techniques in their text *Marketing A Managerial Approach*. Slater et al. (1994) highlight research which indicates that a market-oriented culture is most likely to develop in an organisational environment where there is strong top management commitment to the concept. This indicates a link between personal influence and marketing performance.

Personal legitimising is also suggesting a link between personal influence and an organisation's marketing approach. Few would challenge the importance of an organisation's people on the style of its marketing in today's service-dominated environment. It is perhaps in this situation, helping understand how the "people" marketing mix variable works in practice. The broader managerial literature seems to carry a greater discussion of the types and consequences of personal influence. Egan (1993), for example, raises the notion of "self serving deals" and the accommodation of "individual idiosyncrasies" in what he terms the organisation's "shadow side" or "arationalities". This seems sympathetic to the processes and behaviours I observed within personal legitimising.

The various categories of personal legitimising seem to be recognised individually within social sciences literature. For example, Lowe (1997) in his study of the default remodelling of relationships, mentions the work of the sociologist Goffman around stigma and

stigmatizing. Stigmatising is one of the categories my research indicates. If personal legitimising is to contribute to our comprehension of marketing activity it is likely to be as bringing together of such building blocks into a process capable of describing behaviour.

### References

- Bianco-Mathis, V. and Veazey, N. (1996), "Consultant Dilemmas: Lessons from the Trenches" *Training and Development*, July, pp.39.
- Bigus, O.E. (1972), "The Milkman and his Customer: a Cultivated Relationship" *Urban Life and Culture*, pp. 131-165.
- Brownlie, D. (1991), "Putting the Management into Marketing Management" In *Perspectives on Marketing Management*, (Ed) Baker, M.J, Wiley, pp.30.
- Cunningham, W., Cunningham, I. and Swift, C. (1987), *Marketing -A Managerial Approach*, South Western Publishing Company, pp.38-63.
- Egan, G. (1993), "The Shadow Side" *Management Today*, September, pp.33.
- Glaser, B.G. (1978), *Theoretical Sensitivity*, Mill Valley, CA: Social Press, pp.83.
- Glaser, BG. (1992), *Basics of Grounded Theory Analysis*, Sociology Press, pp. 10.
- Key Note Market Review (1994), "Management Consultancy" In *Industry Trends and Forecasts*, Key Note Publications, pp. 148.
- Lowe, A. (1996), "Interview with Barney Glaser: unpublished transcript" *Department of Marketing, University of Strathclyde*.
- Lowe, A. (1997), "Default Re-modelling - the re-designing of business relationships" *The Grounded Theory Review*, October. (in press).
- Russam, C. (1996), "Teams, teamwork and the independent consultant" *Term Performance Management*, 2, No. 3, pp.49-55. MCB University Press.

Slater, S., Narver, J. and Aaby, N. (1994), "The Strategic Profile of a Market-oriented Business" In *Enhancing Knowledge Development in Marketing*, American Marketing Association, pp.11.

© Haslam 1999