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Fostering collaborative research for customer experience – Connecting academic and practitioner worlds

A B S T R A C T

This editorial calls for greater use of academic-practitioner workshops to co-create value for academics, practitioners and wider network actors through promotion of research relevance and sharing of problems, ideas and data. It describes how one such workshop, the 2nd Academic-Practitioner Research with Impact Workshop focusing on the design and decision making for customer experience (CE), co-hosted in Manchester on 18th and 19th of June 2018 by Alliance Manchester Business School, the University of Manchester and Loughborough University’s Centre for Service Management (CSM), was delivered. The key processes for success and issues to consider for future such events are discussed. The workshop resulted in 8 papers (six theoretical and two empirical). This Special Issue advances current understanding of CE through the research considering the role of technology (AI and big data) in CE research, atypical CE (vulnerability, deviance behaviours and service failure and recovery) and focusing on important organizational and B2B issues (business model innovation, and CE Management (CEM) in business markets).

In a recent paper, Benoit, Klose, Wirtz, Andreassen, and Keiningham (2019, 525) suggested that there is a “disconnect between the academic and the managerial worlds”. Several reasons were giving for this phenomenon (e.g., having different priorities and communication practices). This disconnect is unfortunate as academics and practitioners could benefit significantly from a research collaboration. Academics could get access to real life data and practitioners, in return, could gain insights from academia. Research collaborations could especially help bridge the practitioner-academic gap as outlined by Lilien (2011) and improve and focus research relevance (Brennan, Tzempelikos, & Wilson, 2014; Zolkiewski, 2018). Benoit et al. (2019) also discuss several ways in which the observed disconnect could be overcome. One of the presented solutions is to organise co-creation workshops, which bring “practitioners and academics with an interest in a general research topic together to jointly develop research questions.” (Benoit et al., 2019, 533). A further advantage of workshops is the potential to make the academic teams inter-disciplinary with potential for more creative solutions that can ‘make a difference’ (Gustafsson & Bowen, 2017). This Journal of Business Research Special Issue emerged from such a workshop, which will be discussed in the next sections.

1. Hosting research collaboration workshops to connect the academic and practitioner worlds

Widely promoted and planned workshops, within short controlled time-periods, offer an opportunity to bring together a range of scholars from disparate backgrounds, multiple disciplines (Gustafsson & Bowen, 2017; Zolkiewski, 2018) and career stages. This cross-discipline, dialogue driven approach provides an excellent opportunity, via academic-practitioner engagement (Burton, Nasr, Gruber, & Bruce, 2017), to stimulate creative and innovate service research ideas (Gustafsson & Bowen, 2017). It is a good approach to fast track towards research that matters; research that is being used and has an impact on society (Gustafsson et al., 2015). Additionally, workshops provide an opportunity for early career researchers to meet and work with more established colleagues (Palmatier, 2017) bringing new blood into research communities.

Companies need to constantly re-innovate themselves and have limited resources to do so. The underlying idea of academic-practitioner workshops is that a company articulates a problem and academics seek to solve it in novel ways. Academics are able to give these companies a rare gift of unbiased input to this problem as, unlike initiatives to create value via co-opeition, no-one is trying to monetise on a solution to a company problem. Academics also bring a more holistic understanding of how business activity generates value. For example, Kunz, Heinonen, and Lemmink (2019) highlighted that whilst business publications focus on technology, scientific service research focuses more on customer-related technology application. The result of a workshop like this is a typical win–win situation. Academics are given a relevant problem to solve with the possibility of receiving industry data while practitioners get access to unbiased consultation at a very low cost. Attendance at the workshop also gives practitioners the luxury of time and space, away from their normal working environment, to reflect on longer-term strategic planning and share and exchange their ideas in a stimulating environment, with effective and informed academic teams. As industry and academy are at very different timelines, industry tend to want a quick solution while the academic publication process is slow, the risk of revealing proprietary information is low. At the same time, if an earlier reporting cycle can be built into the process, then academic-practitioner workshops can successfully accelerate the ideas/solution phase, providing a two-phased output process, capable of delivering the competing dual desirable outcomes of rigour and relevance (Gustafsson & Bowen, 2017).

1.1. The 1st academic-practitioner research with impact workshop

The first two authors of this JBR Special Issue were involved in the organisation of the “1st Academic-Practitioner Research with Impact Workshop: Customer Experience Management (CEM) and Big Data”. The event was held at Alliance Manchester Business School (AMBS) on
January 18th and 19th 2016 and co-hosted by AMBS’ Customer Management Leadership Group (CMLG) Loughborough University’s Centre for Service Management (CSM). The aim was to bring practice leading professionals from large organisations together with academics (as championed by Kumar, 2017) and to encourage firms to help to guide research agendas (Palmatier, 2017) by sharing current business issues.

The workshop led to four papers and an editorial commentary in the Journal of Services Marketing (Burton et al., 2017). These papers considered: the interplay of commitment and customer experience (CE) (Keiningham et al., 2017), customer engagement and big data (Kunz et al., 2017), the importance of outcomes-based measures in for B2B customer experience management (Zolkiewski et al., 2017) and the role of emotional intelligence in moderating employee behaviour impact on organizational performance (Keeney et al., 2017). Collectively the four papers have already been cited over 150 times (Google scholar as of 09/04/2020), highlighting the impact and relevance of bringing together leading academics to work with business partners on the challenges that they face.

1.2. The 2nd academic-practitioner research with impact workshop

The second workshop was again held at AMBS on June 18th and 19th 2018, again co-hosted by AMBS’ Customer Management Leadership Group (CMLG) and Loughborough University’s Centre for Service Management (CSM). This time eight academic teams worked together with five practitioner companies (PowerCo, RetailCo, SupermarketCo, RailCo, LogisticsCo). Each team developed a topic at the workshop in the areas of design and decision making for ‘Customer Experience’ (see below for more details). Via iterative discussion with the practitioner representatives before the workshop, eight themes emerged, appropriate academic chairpersons were then identified and invited to lead the eight themes and help groups of invited academics to work on the eight areas. These chairpersons held online meetings with representatives from each of the companies involved to better understand the issues the companies faced. The event was widely promoted through relevant networks and academics applied to join the eight groups. The chairpersons and organizing committee located places to the strongest and most suitable applicants for each topic. The organizations involved welcomed the mix of established and early career academics because they felt that it would lead to more creative and innovative outcomes.

On the morning of June 18th, representatives from the five companies involved attended and made presentations to all academic attendees outlining the issues they faced. Short Q&A sessions followed these presentations. The academics then met with the company representatives in their academic teams and subsequently developed research plans over the afternoon of the first day and the morning of the second workshop day. Professor Steve Baron, Professor Emeritus from the University of Liverpool, visited each of the research teams during this process and then chaired the final plan presentations (to the company representatives and the other academic teams) on the afternoon of the second day. The practitioners valued the event and presentations, highlighting that they lack the time to read multiple studies and valued the opportunity to be introduced to key research. They appreciated having space and time to reflect and think more strategically about the issues they faced. The teams then dispersed, with a plan to continue working remotely on their research and aiming to submit papers to a potential Special Issue of the Journal of Business Research.

The first workshop output was a short research problem proposal document, interpreting and setting out the key issues, most relevant literature and planned research approach, produced within three weeks of the workshop. Thus, the first output phase of the workshop involved a practitioner report which was compiled and shared with the practitioners incorporating the presentation slides and research proposals. Subsequently, after a longer work cycle, full academic papers were developed. Following a thorough review process, consisting of several review rounds, all eight papers were finally accepted for publication as the second output phase of the workshop.

2. Design and decision making for customer experience

The theme of the second workshop evolved via iterative discussion between the first author and the practitioner organizations and was finalized, based on their current challenges, as “Design and Decision Making for Customer Experience”. Customer experience (CE) is an important topic for academics and practitioners alike. Increasingly, organisations strive to remain or become more competitive, differentiate themselves by delivering exceptional customer service and delight, and endeavour to build emotional relationships with customers leading to engagement and advocacy.

Holbrook and Hirschman (1982) introduced the term CE into the (consumer) marketing domain in the early 80s (although the roots can be traced back to the 60s or even 50s), the concept gained in popularity in the late 90s due to Pine and Gilmore’s (1998, 1999) influential HBR article and book on the experience economy. Service researchers have also had a long on-going interest in CE, with it being identified early on as a prominent area for service research activity (Fisk, Brown, & Bitner, 1993).

In 2014, Marketing Science Institute’s (MSI) 70+ member companies considered customer experience so important that they selected it as the highest research priority for 2014–2016 (“Understanding Customers and the Customer Experience”). This in turn sparked a renewed research interest among the academic community, resulting in publications in leading journals (e.g., Lemon & Verhoef, 2016). CE has been defined as a “multidimensional construct focusing on a customer’s cognitive, emotional, behavioral, sensorial, and social responses to a firm’s offerings during the customer’s entire purchase journey” (Lemon & Verhoef, 2016, 71). The idea of a customer journey is important as it shows the dynamic character of CE. A customer journey can be seen as a series of service encounters and each encounter or touchpoint needs to be properly managed as they all have consequences for customer satisfaction and loyalty and willingness to continue the relationship with a company (Bitner, 1990; Bitner, Booms, & Tetreault, 1990). What we see now with the renewed interesting in CE is that the concept in itself is multifaceted and goes beyond attitudes, with large parts of the customer journey taking place at touchpoints that are outside an organization’s control. Added to that are the technological advancements that enable companies to follow the customer journeys both off-line and on-line, but also to capture new metrics such as attitudes as expressed through facial expressions.

Our Special Issue is advancing the current understanding of CE by presenting articles that discuss the role of technology (AI and big data) in CE research, atypical CE (vulnerability, deviance behaviours and service failure and recovery) and that focus on important organizational and B2B issues (business model innovation, and CEM in business markets), which are still rather neglected in CE research (Kranzbeueher, Kleijnen, Morgan, & Teerling, 2018). Further, as CE is still a relatively new topic, the number of empirical studies is rather limited (Lemon & Verhoef, 2016). Our Special Issue is addressing this issue by showcasing two empirical studies that use primary data (Baker et al., 2020) and secondary data (Story et al., 2020) respectively. The following section describes the articles in this Special Issue in more detail and explains how they fit in and contribute to the further development of CE research.

3. Articles in this special issue

The sequence of the papers follows the three themes outlined above: role of technology, atypical CE and organizational and B2B issues.

The first paper entitled “Customer experience management in the age of big data analytics: a strategic framework” is authored by Maria
Holmlund, Yves Van Vaerenbergh, Robert Ciuchita, Annika Ravald, Panagiotis Sarantopoulos, Francisco Villarroel Ordones, and Mohamed Zaki. In their conceptual paper, the authors show how big data analytics (BDA) can help companies better understand customer journeys and make better decisions to enhance CE. For most companies, it is still a challenge to collect big data from numerous channels, touchpoints and devices. However, even if companies succeed in collecting data, they may still struggle with gaining valuable customer insights. Analytics can then help making sense of the collected (big) data. The authors present a strategic framework that shows how BDA can be used for managing and improving CE. In particular, they organize different types of CE along two dimensions (solicited versus unsolicited, structured versus unstructured) and explain how companies can use these types of data, which are generated along the customer journey, as a source for CE analytics, which can then lead to three types of CE insights (attitudinal/psychographic, behavioural, and market insights). Holmlund et al. then explain how the gained insights can help companies to enhance CE by linking CE insights to actions. The authors also show how managers can implement the framework by following a step-by-step guide.

The title of the second paper is “Frontline encounters of the AI kind: an evolved service encounter framework”, authored by Stacey Robinson, Chiara Orsinger, Linda Alkire, Arne De Keyser, Michael Giebelhaus, K. Nadia Papamichail, Poja Shams, and Mohamed Sobhy Temerak. Robotics and AI are believed to offer companies a wide range of benefits, such as productivity gains cost reductions, scalability, enhanced reliability, scalability and security (Lu et al., 2020; Wirtz & Zeithaml, 2018). Robinson et al. believe that AI is fundamentally changing service encounters by transforming existing interactions and enabling new interactions at the frontline. They present a framework that distinguishes between different encounter types (customers and frontline employees can either be human or AI) and whether customers and employees are aware of the other being AI. The authors also discuss several important research questions, introduce the concept of counterfeit service encounters and illustrate how such encounters may impact companies and their frontline employees and customers. The potential managerial impact of the framework and its relevance to practitioners is discussed as well.

The third paper entitled “Overcoming vulnerability: channel design strategies to alleviate vulnerability perceptions in customer journeys” is authored by Nancy Wünderlich, Jens Hogreve, Ilma Nur Chowdhury, Hannes Fleischer, Sahar Mousavi, Julia Rötzmeier-Keuper, and Rui Sousa. Consumers do not always have positive experiences. They sometimes feel powerless and lacking control, resulting in a perceived vulnerability. Companies have many ways of reaching out to their customers through different channels (offline, online, mobile or social channels) and channel design initiatives could help address customer vulnerability across the customer journey. There is currently only very limited research on how the design of channels, which is an important element of service design strategies, can be used to ease or preferably even prevent states and perceptions of vulnerability. The authors address this important knowledge gap by presenting a conceptual framework explaining both the causes for, and consequences of, vulnerability. In particular, the authors offer three relevant channel design strategies that service providers could use to reduce or prevent vulnerability: offering flexibility through multiple multichannel paths, providing guidance through constrained channel paths and proactively initiating interactions. Hogreve et al. also make an important contribution to the customer journey literature by recommending the integration of new elements into customer journey maps, which should result in a better understanding of the experience of vulnerable customers.

“Customer deviance: a framework, prevention strategies, and opportunities for future research” is the title of the fourth paper. The authors are Paul W Fombar, Clay M. Voorhees, Mason R. Jenkins; Karim Sidaoui, Sahine Benoit, Thorsten Gruber, Anders Gustafsson, and Ibrahim Abosaq. A positive customer experience does not always have a positive impact on company outcomes (Kranzbuehler et al., 2018). Sometimes customers engage in activities that they enjoy but that have negative consequences for companies. Customer misbehaviour or deviance is a good example for that phenomenon. It involves activities, both online and offline, that negatively impact the experience of employees and other customers and that deplete company resources, lead to lost revenue and the need to implement counter measures. Examples for deviant customer behaviour would be shoplifting, illegal software, music or movie downloads, vandalism and customer rage. Kranzbuehler et al. (2018) distinguish between consumer and organizational perspectives on CE. They believe that a connection between both perspectives is currently lacking. Fombar et al. provide this connection by presenting a comprehensive framework that first explains the customer deviance process (triggers, behaviours, and consequences) and then discusses several strategies (social, design, and technological) that companies can take to prevent customer deviance. The article concludes with an overview of future research questions.

Vicky Story, Judy Zolkiewski, Katrien Verleye, Amin Nazifi, Claire Hannibal, Anthony Graves and Liliane Abboud are the authors of the fifth paper entitled “Stepping out of the shadows: supporting actors’ strategies for managing end user experiences in service ecosystems”. Companies cannot fully control customer journeys and CE (Lemon & Verhoef, 2016). This is even more the case for companies that depend on a wide network of suppliers to provide their service to end users. Further, Kranzbuehler et al. (2018) suggest that more research is needed on the impact of the services of other firms on the focal company’s CE. Following that observation, Story et al. suggest that there are actors in service ecosystems who have a critical role in delivering service experiences but who are not necessarily visible to end users. However, certain circumstances, for example experienced service failures during CE journeys, may make it necessary for these support actors to become visible. Surprisingly, only limited research has been conducted on ways in which actors in service ecosystems manage their synchronization with other actors in the system and also their visibility. The study focuses on the strategies that actors can use to manage the experiences of end users in complex service ecosystems. Using case vignettes from secondary data, the authors present six strategies and they reveal how these strategies impact the CE during normal and atypical (i.e., service failure and recovery) customer (service) journeys.

The sixth paper entitled “Discount venture brands: self-congruity and perceived value-for-money?” is authored by Thomas L. Baker, Simos Charis, Ahmad Daryanto, Julija Dzenkovska, Kemeas Fife, Bryan Lukas and Gianfranco Walsh. Big grocery retailers are under increasing threat by deep-discounters. In the UK alone, the big 4 grocers (Tesco, Sainsbury’s, Asda and Morrisons) have a combined market share of more than 70%, but are expected to lose £1.9bn worth of market share over the next five years as discounters will continue to grow (Nazir, 2020). Big grocers are therefore under increasing pressure to find new ways of improving their customer’s shopping experience in general and to lure them away from the deep-discounters in particular. Tesco, the largest grocer in the UK (Wunsch, 2020), recently introduced so-called discount venture brands (DVs). DVs are a specific type of budget private labels, which are characterised by the following elements: a complete absence of brand owner elements, a deep-discount price that allows them to compete with competitors’ budget price points, and a more upmarket look compared to conventional budget brands. The aim of their empirical study is to examine whether retail customers perceive DVs to offer them greater value-for-money than conventional budget brands and whether customers also perceive the retailer brand to offer them greater value-for-money. Drawing on the concept of self-congruity, the authors use an experimental research design that involved 505 participants. The results show that DVs are likely to be less effective drivers of value-for-money perceptions of retailer and product
brands than conventional budget brands. Retailers should therefore use caution when they launch DVBs to complement or even replace their conventional budget brands.

"Characterizing customer experience management in business markets" is the title of the seventh paper. The authors are Lars Witell, Christian Kowalkowski, Helen Perks, Chris Raddats, Maria Schwabe, Ornella Benedettini, and Jamie Burton. We agree with McColl-Kennedy, Zaki, Lemon, Urmetzer, and Neely (2019) that research with a focus on B2B CE is lacking. Witell et al. address this surprising neglect of B2B and CE research by developing a framework mapping B2B CEM dimensions of relationship control (relationship type and which actor has touchpoint control) and customer entity dimensions (actor role level and customer journey stage). The framework also outlines a set of key challenges for B2B CE: relationship expectations challenges, actor interaction challenges and overall challenges relating to the dynamics of customer experience. The framework sets out how, when, where and between whom, interactions are ‘experienced’ in B2B contexts enabling the authors to explain how B2B firms can design and manage customer touchpoints and thus customer experience. The paper concludes by setting out the theoretical and managerial implications for B2B firms and calls for empirical testing of the B2B CEM challenges identified and the network actor capabilities required to respond to them.

Finally, the eighth paper entitled “Customer experience driven business model innovation” is authored by Timothy Keiningham, Lerzan Aksoy, Helen L. Bruce, Fabienne Cadet, Natasha Clennell, Ian R. Hodgkinson, and Treasa Kearney. The authors suggest that the scientific literature has mostly overlooked the customer experience implications of BMI. To address this important issue, the authors present a new business model innovation (BMI) framework that enables and improves the development of CE-driven new services. This innovative framework, which the authors call the Customer Experience Driven Business Model Innovation, particularly helps managers develop an optimal business model while appreciating at the same time that all services that could potentially improve CE will not necessarily represent a good fit (even if they may be viable for other firms). Keiningham et al.’s paper shows how business models and CE are related concepts. It also equips managers with an easy-to-follow, three-step framework that they can use to identify and act on opportunities to improve their company’s competitive situation through better CE.

4. Concluding remarks

Academic-practitioner workshops offer an opportunity for value co-creation between practitioners and academics from differing research domains. The 2nd Academic-Practitioner Research with Impact Workshop was successful due to implementation of key learning from the 1st workshop and the engagement and commitment of all actors involved. Key processes involved (i) pre-planning a long way in advance (comparable to an academic conference), (ii) iterative, ongoing managed discussion and co-ordination with practitioners to co-develop the workshop themes, to ensure that the focus provided value for them, (iii) securing a potential special issue from a widely respected, service relevant, journal with a wide subject remit, that values both inter-disciplinary and relevant research, highly. This latter commitment then ensured full engagement from (iv) a team of committed academic leads, willing to engage in project scoping with practitioners before the event, and to play a key role in driving the research development at the workshop and after the event. Representatives from all five companies attended the first day of the workshop. Practitioners from three of the five companies were able to attend the full two-day workshop (practitioner attendance was only required for the first day) and all three stated, unprompted, that they wanted their organisation to be invited, as soon as the date of the next workshop is confirmed. Subsequent implications of the workshop for practitioners confirmed via follow-up impact interview, included: the value of the unique opportunity to engage with academics and reframe problems from a new perspective; benefits of adoption of fresh approaches for reviewing problems; the generation of thought provoking ideas; and value of collaborative working. A key action for one was a review of their definition of ‘vulnerable’ customers to make it more encompassing to include temporarily dependent vulnerability (e.g. lost, upset, ill customers), an outcome that may have helped this organisation to prepare for the impact of Covid-19 on their customer base.

Key learnings for future events include that we need to consider how to help the practitioners prepare for collaborative working, perhaps giving them more direction in terms of how to get the best out of the day and suggesting pre-work before they attend. Secondly, whilst there was a degree of inter-disciplinary make-up demonstrated in the academic teams, there was clearly greater scope for involvement of academics from a wider set of research domains. As the scope of service research widens still further (Gustafsson & Bowen, 2017), this becomes ever more important and we will need to work harder to look beyond traditional networks to seek future attendees, whilst at the same time balancing a need for customer experience expertise based in traditional services literature. Finally, the balance between relevance and rigour is always difficult to achieve (Gustafsson & Bowen, 2017). The temporally limited nature of practitioner workshop events tends to result in greater numbers of theoretical contributions than empirical works and they tip the balance slightly in favour of relevance, although the involvement of relatively large academic teams helped to also deliver rigour in a timely fashion. Perhaps via future events it may become possible to deliver longitudinal empirical studies that can also deliver greater rigour in conjunction with great relevance.

This resulting Special issue advances current understanding of CE by including articles on technology (AI and big data), atypical CE (vulnerability, deviance behaviours and service failure and recovery) and under researched important organizational and B2B issues (business model innovation, and CEM in business markets). Further work is required in all these areas of CE, particularly in AI, big data, transformative service research in relation to the experience of vulnerable customers, B2B and business model innovation as technology continues to evolve rapidly and the increasingly virtual, post Covid-19 markets and organisations take shape. We call for more academic-practitioner workshops to ensure that this work is impactful and capable of co-creating real value with practitioners.

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