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## Marketing strategy implementation impediments and remedies: A multi-level theoretical framework within the sales-marketing interface

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## ABSTRACT

Why do marketing strategies fail? This persistent question attracts significant attention and resource investments given its associated performance implications. Existing research suggests that most marketing strategies suffer due to poor implementation; however, the nuances of strategy implementation impediments and their accompanying remedies remain underdeveloped. To contribute to this line of inquiry, the authors use multi-level qualitative data to capture cross-functional dynamics that traverse the organizational hierarchy and are critical to marketing strategy implementation. The data collection procedure consisted of depth interviews with 48 informants within eight organizations, constituting sales-marketing dyads at three hierarchical levels (senior, middle, and frontline) within each organization. Findings suggest that sales and marketing personnel's varying self-interests at different hierarchical levels motivate them to engage in a distinct set of inter- and intra-functional activities that foment implementation impediments. In turn, findings explicate not only the individual effects of these impediments but also their cumulative between-level (trickle-down) and within-level, within-function (trickle-around) impact as the strategy moves through the hierarchy of the sales-marketing interface. The authors then offer prescriptive remedies embedded in the informal organization that may stabilize the implementation process. Viewed holistically, this study contributes to marketing literature by inductively deriving a theory of marketing strategy implementation within the sales-marketing interface.

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## 1. Introduction

An Inc. 500 technology distribution company was primed to launch a marketing strategy that included new value-added service offerings (e.g., installation, hardware management). While the strategy shift was deemed a smart move for the business, the firm knew that the traction of the strategy would hinge on coinciding adjustments needed from the sales force. In this case, salespeople need to fundamentally change who they identify and call upon to buy equipment (i.e., senior management or CIOs instead of IT managers or purchasing staff), work effortfully to unearth insights regarding what is important to these decision makers, and develop new playbooks to effectively engage these executives (Edinger 2016). Similarly, consider an engineering firm from our sample that was launching a new product deemed strategically important to the enterprise. The success of the launch was in many ways dependent on the sales organization investing in modernized training, marketing managers providing appropriate sales support that coincided with newly developed customer segments and channels of distribution, and salespeople allocating sufficient attention to the new product rather than just selling existing products in their portfolio. In this case, the new product launch faced obstacles since the sales and marketing organizations were not in sync. Such cases reveal that irrespective of a marketing strategy's merits, successful implementation relies on the sales-marketing interface (SMI) and the extent to which these customer-facing functions shift with or present barriers to the strategy.

As noted in similar examples from the business press (e.g., Cespedes 2014; Ritz et al 2018; Sull et al. 2015), implementation misalignments frequently occur within the sequence of marketing strategy formulation to intended tactical decisions to frontline enactment—commonly occurring both within the organizational hierarchy and across the SMI. Although differences are known to exist between effective and ineffective strategy implementation processes, few studies focus on implementation impediments and accompanying remedies. Such a deficit in knowledge may explain why strategy implementation continues to face high failure rates in practice and why academics still struggle to grasp its persistent complexities—leading to calls for research to generate insights on the causes of intended-realized strategy gaps and how to reduce ensuing consequences (Morgan et al. 2019; Vargo and Lusch 2017).

Moreover, limited research has investigated the process of marketing strategy implementation—defined as “translating marketing strategy decisions into a set of detailed and integrated tactics and accompanying those with appropriate actions and resource deployments to enact them” (Morgan et al. 2019, p. 6)—both vertically (e.g., hierarchically) and horizontally (e.g., across the SMI). This scarcity of scholarship is surprising given assertions that strategy implementation does not occur in a vacuum but instead entails significant interaction between sales and marketing counterparts (Johnson and Sohi 2017). Since improved collaboration, integration, and coordination between sales and marketing helps firms navigate the myriad challenges inherent to jointly creating and executing marketing strategy (Hughes et al. 2012; Malshe 2010; Malshe and Sohi 2009a; b), the SMI is a compelling research context for assessing implementation impediments and potential remedies. The SMI is further relevant above and beyond other potential contexts that may impede marketing strategy implementation, such as (a) external firm factors (e.g., regulation, competition) that are disconnected from configurable *alignment* opportunities of firm processes, structures, and people, or (b) alternative internal firm factors (e.g., resource constraints) that are disconnected from targeted *activation* opportunities of individual and organizational behaviors (Moorman and Day 2016).

Our research context is therefore central to studying how organizational actors across the SMI and its hierarchical levels present unique impediments to implementation, yet also hold the keys to reversing such effects. In accord with demands for stand-alone research that captures level-specific realities within the SMI that may work against marketing strategy implementation, as well as related calls for a multi-level perspective (Hayati et al. 2018), we ask the following research questions: What is the nature of impediments to marketing strategy implementation within the SMI? How do the impediments individually and cumulatively derail marketing strategy implementation as it moves down the SMI hierarchy? How do SMI personnel tactically manage implementation impediments to salvage marketing strategy?

To examine our research questions, we employ a discovery-oriented, theories-in-use approach (Zeithaml et al. 2020). We collected data through in-depth interviews with 48 informants within eight organizations—constituting sales-marketing dyads (i.e., sale-marketing counterparts) at three hierarchical levels within each firm. The three sub-types of sales-marketing dyads captured include a senior-level dyad, a middle-level dyad, and a frontline dyad within each firm. Our dynamic research design, coupled with grounded theory analysis, provides insights into the breakdowns that occur across sales and marketing functions and within their hierarchies during implementation, as well as the remedies that may serve to salvage implementation. Specifically, our analysis first reveals that SMI personnel at each hierarchical level harbor dominant self-interests that result in unique implementation impediments: SMI leverage wielding (senior level), marketing mix resource battles (middle level), and opportunistic strategy implementation practices (frontline). Second, we show how these impediments create cumulative trickle-down (i.e., between-level) and trickle-around (i.e., within-level, within-function) effects that further impede implementation. Third, our findings reveal that to smooth out the fault lines linked to the adverse effect of these impediments and to facilitate implementation, managers can initiate targeted, multi-directional remedies within their informal networks: inter-SMI credit gifting, intra-SMI strategy success propagation, marketing strategy resource infusion, frontline game plan modification, and marketing strategy implementation blueprints.

By inductively deriving a data-driven, multi-level theory of marketing strategy implementation, our study offers three theoretical advancements to the marketing literature. First, our findings offer a theoretical framework that explicates unique, level-specific impediments that strategy implementation encounters as it traverses the SMI hierarchy—which individually

and collectively derail implementation. Given that poor implementation is often the cause of strategy failure (Vargo and Lusch 2017), our framework offers theoretical refinement by unpacking the dominant headwinds marketing strategy implementation encounters at each level of the SMI that render the process ineffective. Further, since prior research examines implementation at either the organizational level or via singular hierarchical perspectives, uncertainty exists regarding the interdependent influence of personnel across levels. Our findings thus contribute to extant knowledge by highlighting how implementation impediments at various hierarchical levels within the SMI may come together to jeopardize implementation as the strategy migrates down the hierarchy and between functions. In doing so, our theoretical framework articulates the intricacies involved in the “shaping and adoption process[es] at multiple levels of the organization” (Noble 1999b, pp. 131-132) during strategy implementation.

Second, we identify how informal networks of sales and marketing personnel stabilize the implementation process by tempering the impact of these impediments. By bringing forth the role played by sales and marketing’s informal networks, we highlight how dimensions of social capital within the SMI mitigate impediments to implementation. Our findings thus provide novel extensions to research focused on formal policies (e.g., Chari et al. 2017; Olson et al. 2018) by specifying the added impact of informal activities. Third, the insights derived from our implementation remedies offer prescriptive strategies regarding how SMI personnel enable firms to iterate between making sense of the market and executing malleable marketing decisions (i.e., marketing agility; Kalaiganam et al. 2021). For example, informal networks allow SMI personnel to sense implementation challenges in a timely manner; targeted remedies provide direction regarding where to pivot and pursue new tasks to salvage the strategy. Together, our findings offer prescriptive guidance regarding how SMI personnel may engage varying marketing agility levers to monitor and respond to changing market conditions reflective of how marketing strategy should be executed (e.g., Homburg et al. 2020).

## 2. Background literature

Table 1 provides an overview of literature streams that detail past research on marketing strategy implementation and the nuances of SMI functional tasks. The conceptual insights embedded in Table 1 serve as a foundation to holistically describe the intersection of marketing strategy implementation and SMI theoretical domains, along with identified research gaps and areas primed for contribution. We also review research across broader literature streams, including strategy implementation and cross-functional coordination (see Web Appendices A-B) to form the basis of our knowledge repository and develop accompanying trend lines that inform our research questions. The result of these efforts is a simultaneous understanding of where extant literature offers relevant insights pertaining to our research and where it stops short of providing a theory of marketing strategy implementation within the SMI.

As illustrated in Table 1, marketing strategy implementation research illustrates that, among studies focused on implementation processes (e.g., Menon et al. 1999; Moorman and Day 2016; Thorpe and Morgan 2007), limited discussion of impediments exists (see Web Appendix A). One notable exception is Noble (1999a), which examines impediments (e.g., work politics) from a single organizational level. Extant research also predominately assesses implementation either broadly at the organizational level or in piecemeal form along hierarchical levels. For example, evidence separately emphasizes the importance of the organizational frontlines (e.g., Cadwallader et al. 2010), middle-level managers (e.g., Ahearne et al. 2014; Huy 2001; Noble 1999a), or senior-level leaders (e.g., Olson et al. 2005) when generating insights on marketing strategy implementation. However, since these levels are examined independently, research implies that marketing strategies either succeed or falter at a specific organizational level. Multi-level research is therefore needed to explicate how hierarchical roles independently and interdependently influence implementation. As strategy inertia manifests across levels, such research could assess corresponding impediments and their net effects. Our first research question therefore seeks to explicate the nature of implementation impediments.

To that end, a consensus exists that strategy implementation “takes people to make it all work” (Cadwallader et al. 2010, p. 220), which is where the SMI literature provides contextual insights regarding impediments that lie at the intersection of the functions that come together to design and implement marketing strategies. For example, SMI literature focuses on intersecting sources of tension that stem from differences between sales and marketing—e.g., thought worlds (e.g., customer advocate vs. product advocate; Homburg and Jensen 2007), sub-cultural mental frames (e.g., applied knowledge vs. theoretical knowledge; Beverland et al. 2006), forms of communication and trust (e.g., cognition-based trust vs. affect-based trust; Massey and Dawes 2007), focus of activities (e.g., customer-focused activities vs. market-focused activities; Kotler et al. 2006), and orientations (e.g., short-term orientation vs. long-term orientation; Le Meunier-FitzHugh and Piercy 2007). While such tribalism among sales and marketing personnel helps explain why SMIs do not always work well together as a cross-functional team, research is needed that examines how these SMI dynamics affect marketing strategy processes (see Table 1). Such research could explicate the full and complex process of how a marketing strategy navigates impediments that occur from conceptualization to implementation. Relatedly, research that does focus on marketing strategy creation (e.g., strategy making within the SMI; Malshe and Sohi 2009b) or implementation (e.g., sales buy-in of marketing strategy; Malshe and Sohi 2009a) has yet to depict how SMI dynamics at different levels of the organization create dominant impediments. Multi-level and multi-source research could help resolve uncertainties regarding how SMI dynamics affect implementation—e.g., level-specific mechanisms triggered to derail implementation and the cumulative trickle-down (trickle-around) effects that occur across (within) levels of the SMI. Our second research question thus seeks to advance knowledge by assess-

**Table 1**  
Overview of Research Domains and Contributions of This Study.

Research Focus	Extant Findings and Insights	Representative Citations	Research Gaps and Contributions of This Study
<b>Marketing Strategy Implementation (MSI)</b>			
Conceptual Insights	<ul style="list-style-type: none"> <li>Implementation requires translating marketing strategy decisions into integrated tactics, accompanied by appropriate actions and resources to enact them.</li> <li>MSI is a complex phenomenon that requires a shaping and adoption process at multiple levels of the organization.</li> <li>The marketing organization affects strategy implementation through alignment and activation.</li> <li>MSI challenges arise from horizontal integration challenges across different functions.</li> </ul>	Noble (1999b); Sull et al. (2015); Moorman and Day (2016); Morgan et al. (2019)	<p><b>Research Gap:</b> MSI research predominantly focuses on implementation processes (e.g., drivers of adoption, alignment, consensus, or performance), with scholarship noting a limited discussion of impediments. Further, MSI has been studied either at the firm level or along hierarchical levels in piecemeal form—which results in claims that marketing strategies succeed or falter either at a specific level or holistically. Research is needed to garner a multi-level perspective that combines MSI impediments across levels to describe their unique and cumulative effects.</p> <p><b>Contribution:</b> This study isolates impediments by level and their effects within/across levels—i.e., how hierarchical roles independently and interdependently influence implementation. This study addresses needs for theoretical refinement on MSI and its impediments.</p>
Frontline	<ul style="list-style-type: none"> <li>Frontline employees are sensitive to the focus of strategic change.</li> <li>Myriad structural devices (training, autonomy, incentive) impact frontline motivation to embrace new strategies.</li> <li>Frontline employee implementation enhances change effects and mitigates losses.</li> </ul>	Ye et al. (2007); Cadwallader et al. (2010); Johnson and Sohi (2017)	
Middle Level	<ul style="list-style-type: none"> <li>Multiple firm (strategy, environment) and personal factors (social identity, group-focus) drive MSI.</li> <li>For downstream implementation, managers must leverage informational social capital and limit employee risk.</li> <li>For upstream implementation, managers must leverage reputational social capital and ensure strategy alignment.</li> </ul>	Huy (2001); Thorpe and Morgan (2007); Sarin et al. (2012); Ahearne et al. (2014); Olson et al. (2018)	
Senior Level	<ul style="list-style-type: none"> <li>Communication reduces perceptual gaps about the new strategy and builds commitment via consensus.</li> <li>MSI depends on horizontal integration across functions, firm structure characteristics, and behavioral emphases.</li> <li>Strategy type, inter-functional connectedness, and control mechanisms interact to influence strategy performance.</li> </ul>	Rapert et al. (2002); Olson et al. (2005); Chari et al. (2017)	
<b>Sales-Marketing Interface (SMI)</b>			
Conceptual Insights	<ul style="list-style-type: none"> <li>SMIs are a set of inter-group ties structured around dimensions of social capital that contribute to such ties.</li> <li>SMIs' role in developing market-based capabilities is contingent on cross-functional coordination and power.</li> <li>SMI dynamics—e.g., communication and collaboration—are critical to superior customer value creation.</li> <li>Sales-marketing cooperation is important in new product development process.</li> </ul>	Guenzi and Troilo (2006; 2007); Ernst et al. (2010); Hughes et al. (2012); Malshe and Biemans (2014); Rouziès and Hulland (2014)	<p><b>Research Gap:</b> Research on SMIs focuses on sources of conflict, consequences, and integration devices—with a focus on collaboration and communication within the interface as key outcomes. A select few SMI articles maintain a focus on strategy creation or implementation as outcomes, with insights derived at the firm level limiting knowledge of how SMI dynamics at different levels create dominant sources of conflict that challenge implementation. Multi-level and multi-source research is needed to show how SMI dynamics generate implementation impediments, as well as to explicate localized (vs. generalized) integration devices that can target level-specific impediments.</p> <p><b>Contribution:</b> This study uses a hierarchical and cross-functional lens to highlight key roles of SMIs in strategy implementation—i.e., depicts the nature of informal integration devices (rather than formalized devices established in literature) to show how these concepts mitigate sources of tension within the SMI that are adversely impacting strategy implementation.</p>

Table 1 (continued)

Research Focus	Extant Findings and Insights	Representative Citations	Research Gaps and Contributions of This Study
Sources of Tension	<ul style="list-style-type: none"> <li>• SMIs are conflict-ridden, owing to various forms of interpersonal and organizational conflict.</li> <li>• SMI tensions stem from disconnected communication, stereotypes of sub-cultural mental frames, thought-world differences, competing demands, poor follow-up, and lack of trust.</li> <li>• Overarching theme is that SMI tensions impede key value-related activities.</li> </ul>	<p>Smith et al. (2006); Beverland et al. (2006); Homburg and Jensen (2007); Massey and Dawes (2007); Sabnis et al. (2013)</p>	
Integration Devices	<ul style="list-style-type: none"> <li>• Firms aim to mitigate tension because strategy development and implementation processes that occur in the SMI.</li> <li>• Improved interaction and integration in SMIs can be managerially directed using structural linkages, market knowledge, processes/systems, organizational culture, dispersion of influence, and/or social capital.</li> <li>• Multiple types of factors influence SMI collaboration—e.g., integrators, facilitators, and management attitudes.</li> <li>• Philosophical and social linkages within the SMI may help bridge the sales-marketing divide.</li> </ul>	<p>Kotler et al. (2006); Le Meunier-FitzHugh and Piercy (2007); Homburg et al. (2008); Troilo et al. (2009); Rouziès and Hlland (2014); Malshe (2011)</p>	
Strategy Creation / Implementation	<ul style="list-style-type: none"> <li>• Successful strategy creation and execution require sales and marketing to be equally invested.</li> <li>• Sales' buy-in of strategies is a function of (a) marketers' objectivity, sensitivity, and responsiveness and (b) sales' involvement in strategy creation.</li> <li>• Firms may facilitate buy-in by dissolving sales-marketing silos and forging closer relationships.</li> <li>• Salespeople must view marketers as credible (i.e., experts, trustworthy, relatable) to participate in strategic processes.</li> </ul>	<p>Malshe and Sohi (2009a); Malshe and Sohi (2009b); Malshe (2010)</p>	

ing how level-specific impediments individually and cumulatively derail marketing strategy implementation as it moves down the SMI hierarchy.

Scholarship on cross-functional coordination provides a connection point between the foci on individual and cumulative impediments, as well as a scarcity of multi-level coordination research (see [Web Appendix B](#)). SMI research correspondingly depicts the importance of integration devices—e.g., organizational factors and mechanisms ([Dewsnap and Jobber 2009](#)), structural linkages and market knowledge ([Homburg et al. 2008](#)), integrating activities and systems ([Kotler et al. 2006](#)), proximal authority ([Malshe et al. 2017](#)), managerial attitudes toward coordination ([Le Meunier-FitzHugh and Piercy 2007](#)), and dispersion of influence ([Troilo et al. 2009](#)). Across these vertical and horizontal integration bridges ([Malshe 2011](#); [Oliva 2006](#)), our understanding of cross-functional integration is more focused on formal devices than informal devices. Further, while research has identified bridging mechanisms ([Lin et al. 2015](#); [Tsai and Hsu 2014](#)) and firm mechanisms that impact the deployment of sales-marketing social capital ([Rouziès and Hulland 2014](#)), our understanding of cross-functional integration devices are also more general than local. Contributions to knowledge can be garnered from research, which could serve as a conduit between implementation impediments and mitigation tactics within the SMI. Our third research question therefore seeks to understand how to remedy emergent impediments by investigating how SMI personnel can tactically salvage marketing strategy.

### 3. Methodology

This study uses a discovery-oriented, theories-in-use approach to develop a theoretical framework from a managerial perspective ([Challagalla et al. 2014](#); [Ulaga and Reinartz 2011](#)). Qualitative methodological approaches, such as the one we employ, are advantageous to our inquiry for multiple reasons. First, current theoretical knowledge regarding impediments to marketing strategy implementation within the SMI is limited. Therefore, using exploratory research techniques that rely on integration of existing concepts from related literature streams and field data (e.g., theories-in-use) are appropriate for early-stage theoretical development ([Eisingerich et al. 2019](#)). Second, in nascent stages of theoretical development, methodological approaches that (a) capture the complexity of a socially constructed organizational phenomena and (b) allow participant views and interpretations to shape the emergent theoretical framework are critical to accurately distill the complex realities experienced by organizational actors ([Homburg et al. 2017b](#); [Laurent 2000](#)). Third, by allowing for the integration of qualitative insights with relevant literature, a theories-in-use approach helps extend previous knowledge and reach the challenging bar of theoretical integration and renewal ([Yadav 2010](#)).

#### 3.1. Data collection

We collected data for the study via in-depth interviews with 48 sales and marketing personnel (24 sales-marketing dyads) across eight large U.S. organizations (revenue > \$1B) that operate in business-to-business markets. The data were collected from first quarter 2016 until first quarter 2017. All the firms we collected data from have been in business for over ten years and operate in competitive markets (i.e., non-monopoly). None of their markets experienced major volatility in the three years prior to our data collection that would dramatically alter their business dynamics and/or how they would develop and implement marketing strategies (e.g., regulation changes, new competitive threats).

Since we aimed to garner perspectives from both sides of the SMI, we interviewed sales-marketing dyads. Each dyad is a pair of sales and marketing counterparts who are peers at the same hierarchical level. We focused on dyadic partners at the same level since we were interested in understanding the level-specific impediments implementation may face as strategy is rolled out. Collecting data from dyadic partners at three different hierarchical levels within each of the eight firms helped us understand the potential trickle-down and trickle-around effects of these impediments on implementation. Our final sample thus consists of sales-marketing dyads at three unique levels within each of the eight firms—i.e., pairs of sales-marketing senior-level leaders, middle-level managers, and frontline personnel (see [Table 2](#)). This multi-level multi-source methodological approach enabled the investigation of strategy implementation processes both vertically and horizontally, which is novel to marketing strategy literature, and provided a data structure that allowed for unique insights into our phenomenon of interest.

We employed theoretical sampling—i.e., a non-random sampling technique—to recruit interview informants ([Kohli and Jaworski 1990](#)). We selected informants based on their ability to offer deep understanding of the implementation process and aid theory development ([Corbin and Strauss 2008](#)). We recruited informants using industry contacts and then relied on referral and snowballing techniques to collect multi-level multi-source data. Specifically, we asked our initial contacts to refer us to their sales/marketing counterpart (dyadic partner), as well as their within-function supervisor and/or direct report (depending on their rank in the hierarchy). We then contacted the individuals we were referred to, requested their participation, and again asked them to refer us to their level-specific sales/marketing counterpart and supervisor/direct report. We confirmed the existence of distinct sales and marketing departments within each firm, as well as discrete functional sales/marketing roles by asking informants about their (and their counterpart's) work responsibilities. We confirmed informant hierarchical levels by discussing span of control, reporting structure, and decision-making/spending authority. Last, since we used referral sampling techniques, we confirmed that informants were indeed dyadic partners by discussing the nature of their dyadic interactions with their counterpart. Together, these steps ensured that we spoke with six infor-



**Table 2**  
Informant Profile.

Firm Code #	Industry	Informant Level	Marketing (Gender, Age)	Sales (Gender, Age)	Strategy Sponsor	Marketing Strategy and Underlying Activities
1	Healthcare (HC)	Senior Middle Frontline	A (M, 48) <sup>a</sup> C (F, 39) <sup>c</sup> E (F, 44) <sup>e</sup>	B (F, 50) <sup>b</sup> D (F, 50) <sup>d</sup> F (M, 52) <sup>f</sup>	Sales	<b>Customer Acquisition:</b> Sales to lead strategy to acquire and develop new customers, launch engagement programs, and initiate trial purchases; Marketing to support the initiative through branding, communication, and research insights
2	Engineering (ENG)	Senior Middle Frontline	A (F, 52) C (M, 33) E (F, 28)	B (M, 63) D (M, 34) F (M, 36)	Marketing	<b>New Product Launch:</b> Marketing to lead new product launch and associated activities—e.g., branding, communication, customer education; Sales to support launch efforts through customer management and new product promotion
3	Technology Services (TS)	Senior Middle Frontline	A (F, 42) C (F, 43) E (M, 32)	B (M, 59) D (F, 45) F (M, 27)	Marketing	<b>Rebranding:</b> Marketing to lead transition from vendor to trusted partner, revamp communication strategy, and enhance service offerings; Sales to support rebranding through consistently communicating and emphasizing new, value-added solutions
4	Financial Services (FS)	Senior Middle Frontline	A (M, 46) C (F, 41) E (F, 40)	B (F, 45) D (M, 39) F (F, 26)	Marketing	<b>Portfolio Communication:</b> Marketing to overhaul brand portfolio communication strategy and launch new objectives / messaging / positioning / channels; Sales to collaborate with marketing in bringing new message to channel partners / customers
5	IT Equipment (IT)	Senior Middle Frontline	A (F, 50) C (M, 53) E (M, 38)	B (M, 44) D (M, 51) F (M, 50)	Marketing	<b>Value-Added Service Launch:</b> Marketing to lead launch of value-added service platform, ensure integration with existing products / platforms, and enhance differentiation; Sales to reinforce launch through customer promotions and support
6	Legal Services (LS)	Senior Middle Frontline	A (M, 42) C (M, 25) E (F, 27)	B (F, 49) D (M, 37) F (F, 26)	Sales	<b>Strategic Account Management:</b> Sales to identify / develop / grow new strategic accounts, enhance account service levels, and develop exclusive value propositions; Marketing to provide promotional support and collect analytics to track the initiative
7	Publishing (PUB)	Senior Middle Frontline	A (M, 55) C (M, 33) E (F, 33)	B (M, 60) D (F, 31) F (F, 26)	Marketing	<b>Customer Experience Enhancement:</b> Marketing to rethink customer journeys, revamp customer touchpoints, provide value-added support, and create new channels for customers to connect with the firm; Sales to ensure customer education about the initiative and offer ongoing customer support
8	Food and Beverage (F&B)	Senior Middle Frontline	A (F, 49) C (M, 44) E (F, 39)	B (M, 50) D (M, 54) F (M, 31)	Marketing	<b>Customer Service:</b> Marketing to overhaul customer service program, offer greater promotional / merchandising support, launch joint campaigns, and share research insights with customers; Sales to educate customers on new initiative, maintain consistent customer engagement, and serve as a customer liaison to marketing

## Exemplar Informant Titles:

- <sup>a</sup> Senior Marketing: Marketing Director, Vice President of Marketing.  
<sup>b</sup> Senior Sales: Vice President of Sales, Director of Sales.  
<sup>c</sup> Middle Marketing: Marketing Manager, Brand Executive.  
<sup>d</sup> Middle Sales: Senior Sales Manager, Territory Manager.  
<sup>e</sup> Frontline Marketing: Marketing Support Specialist, Marketing Executive.  
<sup>f</sup> Frontline Sales: Sales Representative, Business Development Manager.

mants in each firm that spanned across three hierarchical levels and two distinct departments. All informants held their jobs for at least three years.

Each interview was conducted one-on-one between the informant and the lead author, lasting 45–74 minutes. A total of 42 of the 48 interviews were conducted in person, while six were conducted by phone. Across the matched interview samples, we ensured that our conversations centered on the same marketing strategy—i.e., the perspectives from the six individuals within a given firm were all focused on implementation of a singular marketing strategy. Within each of the eight firms, we asked the first person we spoke with to think about and respond to all ensuing questions with respect to one broad-based, top-down marketing strategy their firm had recently implemented. There forward, we ensured that each subsequent interview within a given firm centered on that same marketing strategy. Within six (two) of the eight firms, the strategy discussed was marketing-sponsored (sales-sponsored). In Table 2, we specify the marketing strategies that were discussed and the activities each implementation process entailed. While it is plausible that the nature of marketing strategy may determine the kinds of impediments that may arise, we aimed to mitigate this plausibility by ensuring that the strategies discussed across the eight firms were roughly equivalent. We ascertained this equivalency using proxy measures, such as the total budget allocated for the strategy, duration for which the strategy was likely to be focal, and the expected ROI.

We started each interview with general questions about the informant's role, work responsibilities, interactions with counterparts, and marketing strategy implementation processes within the firm. These initial questions helped us to put informants at ease, develop rapport, and ensure that we were speaking with appropriate informants. Once informants were comfortable, we proceeded to ask "grand tour" questions. Our interview protocol focused on unearthing each informant's phenomenological interpretation (McCracken 1988) of the marketing strategy implementation process within his/her firm

(see [Web Appendix C](#)). Following established qualitative inquiry practice (see [Homburg et al. 2014](#)), we allowed interview informants to “tell their stories” unencumbered by what we expected to find ([Creswell 2007, p. 40](#)) and we worked to eliminate interviewer-induced bias ([McCracken 1988](#)). We audiotaped the interviews and transcribed the audio data. The 48 interviews represent over 51 hours of audio and 470 single-spaced pages of transcripts. We stopped in-depth data collection once conceptual themes started repeating themselves—i.e., when theoretical saturation was reached ([Strauss and Corbin 1998](#)).

### 3.2. Data analysis and analytical rigor

Consistent with the discovery-oriented, theories-in-use approach, we tightly integrated our data collection and analysis to allow the research process to evolve based on earlier findings ([Eisenhardt 1989](#)). Following established qualitative inquiry practices, we started our analysis by examining each interview transcript and coding ideas that informants mentioned as critical to implementation as in-vivo codes ([Strauss and Corbin 1998](#)). In-vivo codes represent base-level codes and contain the actual language used by informants. To be included in subsequent analysis, each in-vivo code had to satisfy three criteria (see [Uлага and Reinartz 2011](#)): Is the idea applicable beyond a specific context? Did multiple informants mention the idea? Is the idea interesting, non-obvious, and previously unexplored in the literature? The next step in our analysis entailed axial coding—i.e., studying the relationships among in-vivo codes and organizing them under first-order categories. We subsequently organized the first-order categories under second-order themes to form the building blocks of our theoretical framework. We relied solely on our inductive analysis to discover the relationships among implementation impediments and the emergent remedies, making sure we proposed only those relationships that were strongly rooted in our data and unequivocally supported by our rigorous analysis. In sum, throughout our analysis, we made sure not to force emergent insights into predetermined categories and/or relationships if they were not analytically supported ([Gummesson 2003](#)). [Table 3](#) illustrates the underlying data structure that exemplifies how we moved from raw data to each of the emergent concepts discussed in our findings.

We ensured the trustworthiness of our findings using multiple checkpoints (see [Lincoln and Guba 1985](#)). The first was using the NVivo software to maintain detailed research records, including informant contact information, interview audio files, and transcripts in a central location. This allowed us to examine our data comprehensively. Next, we used a proportional reduction in loss method advanced by [Rust and Cooil \(1994\)](#) to assess the reliability of our coding. Specifically, we randomly selected 20 interviews (ten dyads) and asked two qualified, independent qualitative researchers to audit our coding. We calculated the proportional reduction in loss by comparing their agreement or disagreement with each of our codes. The resulting proportional reduction in loss for the current study was 0.92, which is above the 0.70 cut-off level ([Rust and Cooil 1994](#)) and in line with recent marketing studies (e.g., [Johnson and Matthes 2018](#); [Tuli et al. 2007](#)). Third, we asked an outside researcher experienced in qualitative methodology to audit our empirical processes so to ensure the dependability of our data. This researcher went through our interview protocol and a randomly selected a subset of 16 interview transcripts (eight dyads) to ascertain whether our conclusions and emergent framework were plausible based on the data. This peer audit provided us with an opportunity to have our analytical insights scrutinized through another researcher’s perspective ([Corley and Gioia 2004](#)).

To ensure analytical validity, we followed five techniques used in prior marketing research (see [Malshe and Sohi 2009b](#)). The first is *respondent validation* (i.e., member checks; [Creswell 2007](#)), which requires that researchers ask a randomly selected group of informants to validate the emergent findings. We shared our findings with 18 informants (six randomly selected informants at each hierarchical level) and asked them to comment on the credibility of our findings. Our informants concurred with our data interpretation and findings. Second, establishing *refutability* requires researchers to critically examine whether the assumed relationships among emergent constructs hold true across contexts. We checked for refutability by evaluating whether the emergent level-specific impediments and/or the mitigating effects of the various remedies held true across industry and company contexts where our data came from. Refutability was supported because our emergent findings showed consistency across contexts—i.e., our findings are consistent across each of our cases and not refuted. Third, *constant comparison* requires that researchers begin the data collection and analysis with a relatively small data set, then expand the effort based on emergent categories. We followed this recursive process and stopped data collection upon reaching theoretical saturation—i.e., when new data stopped offering novel insights ([Strauss and Corbin 1998](#)). We also grouped informant responses across industry contexts based on their hierarchical level to compare their perspectives on central issues (e.g., impediments, remedies). Our findings are comprehensive at each hierarchical level and reflective of holistic analytical insights across multiple industry contexts. Fourth, storing our data in a single central repository and using NVivo to manage the data allowed us to thoroughly examine our data prior to drawing conclusions, which satisfied the criterion of *comprehensive data treatment*. Fifth, *deviant case analysis* entails that researchers actively look for cases that are substantially deviant (i.e., outliers) and that bring into question the overall findings of the study. Upon detailed examination, we did not identify any deviant cases.



**Table 3**  
In-vivo codes, first-order categories, and second-order themes.

In-Vivo Codes	First-Order Categories	Second-Order Themes	Stage
<ul style="list-style-type: none"> <li>• They have the power to derail implementation</li> <li>• We were dependent on their support, and they knew it</li> <li>• They were looking for a return favor</li> <li>• Sales' support was conditional</li> <li>• They had strategy-specific leverage</li> <li>• Everyone shared the same pot of money</li> <li>• Internal competition for budget dollars was intense</li> <li>• Subtle and overt resource battles</li> <li>• Jockeying to influence the mix was very evident</li> <li>• Limited strategy resources and many seeking a greater share</li> <li>• Difficulty integrating new activities with current routines</li> <li>• Hard to change ongoing activities when things are going well</li> <li>• We have a work routine that delivers, and change is uncertain</li> <li>• I must consider what I am giving up to implement the strategy</li> <li>• I need to do what is my best interest</li> <li>• Learn to live with the strategy</li> <li>• Do what you need to do and no more</li> <li>• My superiors do not closely watch what we do</li> <li>• I do not push them, and I just look the other way</li> <li>• Our manager left it to us whether to take up the strategy</li> <li>• If my colleagues do not like the strategy, I want to know why</li> <li>• Negative sentiment can spread fast within sales</li> <li>• I listen when my peers have problems with the strategy</li> <li>• We are in the same boat and my colleague's opinions mattered</li> <li>• I take cues from what my colleagues across the region are doing</li> <li>• Public acknowledgement often motivates them to step up</li> <li>• I may give my counterparts credit for initial wins</li> <li>• Make counterpart function the hero in front of everyone</li> <li>• Show how indispensable counterpart support was</li> <li>• Praised their support in meetings, even when reality was different</li> <li>• Built a positive vibe about the strategy</li> <li>• Sustain excitement about the strategy</li> <li>• Motivated people to share their successes</li> <li>• You must drown out negative sentiment</li> <li>• Influence how sales and marketing think about the strategy</li> <li>• Timely resource infusion was needed</li> <li>• Supported the strategy from faltering initially</li> <li>• A stitch in time saves nine</li> <li>• Address budding problems so they do not grow to derail things</li> <li>• Early failures in key territories do not bode well for the strategy</li> <li>• Territory-specific adjustments</li> <li>• Minor changes to tactics without losing the core of the strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Leverage wielding</li> <li>• Strategy-specific power</li> <li>• Reciprocal expectation</li> <li>• Subtle wrangling for resources</li> <li>• Overt competition for marketing mix dollars</li> <li>• Eyeing greater share of resources</li> <li>• Opportunistic prioritization</li> <li>• Selective implementation</li> <li>• Protecting self-interest</li> <li>• Downward signaling</li> <li>• Sending subtle signals to subordinates</li> <li>• Influence downstream activities</li> <li>• Lateral spread of negative sentiment</li> <li>• Ripples of negativity</li> <li>• Peer opinions matters</li> <li>• Public acknowledgement</li> <li>• Making them heroes</li> <li>• Praise as a motivation</li> <li>• Build and sustain initial excitement</li> <li>• Widely discuss early successes</li> <li>• Positive vibes counter negativity</li> <li>• Timely support</li> <li>• Early intervention</li> <li>• Resource infusion</li> <li>• Activity modifications</li> <li>• Game plan adjustments</li> <li>• Flexibility</li> </ul>	<ul style="list-style-type: none"> <li>SMI Leverage Wielding</li> <li>Marketing Mix Resource Battles</li> <li>Opportunistic Strategy Implementation Practices</li> <li>Trickle-Down Effects</li> <li>Trickle-Around Effects</li> <li>Inter-SMI Credit Gifting</li> <li>Intra-SMI Strategy Success Propagation</li> <li>Marketing Strategy Resource Infusion</li> <li>Frontline Game Plan Modification</li> </ul>	<ul style="list-style-type: none"> <li>Implementation Impediments</li> <li>Cumulative Effects</li> <li>Implementation Remedies</li> </ul>

(continued on next page)

Table 3 (continued)

In-Vivo Codes	First-Order Categories	Second-Order Themes	Stage
<ul style="list-style-type: none"> <li>• Improvised field activity plan to implement better</li> <li>• Made adjustment to align the strategy with the field reality</li> <li>• Flexibility helped implement the strategy better in certain regions</li> <li>• Excitement about the new strategy can slowly decline</li> <li>• Dedicated long-term resources are vital</li> <li>• Implementation roadmaps needed for the long haul</li> <li>• Repository of implementation cases, FAQs, and how-to ideas</li> <li>• Generalizable resources effective at managing ongoing challenges</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing strategy support</li> <li>• Dedicated, long-term support</li> <li>• Dynamic support</li> </ul>	Marketing Strategy Implementation Blueprints	

4. Findings

Our findings begin by explicating how sales and marketing personnel’s varying self-interests across the senior, middle, and frontline levels foment unique impediments to marketing strategy implementation. We then show how these impediments create cumulative trickle-down (i.e., between-level) and trickle-around (i.e., within-level, within-function) implementation barriers. Last, we offer a propositional inventory as we articulate how sales and marketing personnel, in anticipation of and/or response to impediments, tactically activate informal networks to weaken the negative effects of these implementation impediments. Based on our findings, we offer a theoretical model that depicts a multi-level theory of marketing strategy implementation within the SMI (see Fig. 1). Table 4 provides an organized overview of each impediment/remedy, the underlying aims and mechanisms identified which support their proposed relationships, and a propositional inventory. Table 5 provides supporting examples of how the various impediments and remedies manifested in our data, and a quantitative breakdown—by firm and by hierarchical level—of the extent to which our qualitative data supported each of the emergent insights.

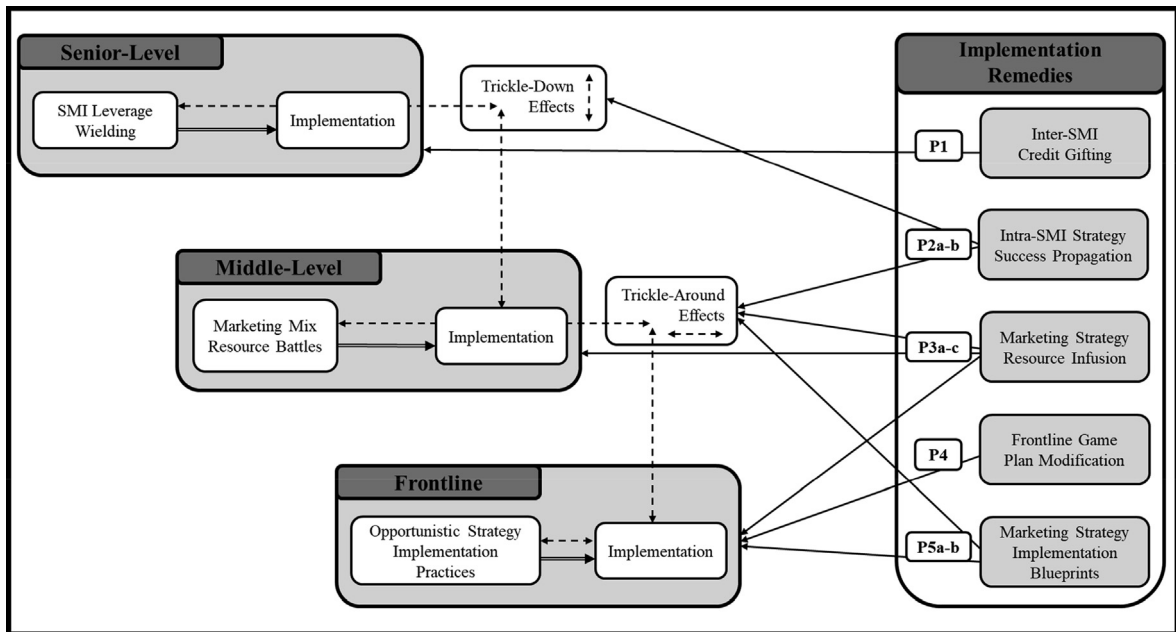


Fig. 1. A Multi-Level Theoretical Framework of Marketing Strategy Implementation. Double lines represent implementation impediments; solid lines represent implementation remedies; dashed lines represent cumulative trickle-down and trickle-around effects (Note: trickle-down / trickle-around effects occur between / within all levels).

**Table 4**  
Marketing strategy implementation impediments and mitigating remedies.

Emergent Constructs	Underlying Aims, Support Mechanisms Derived from Data, and Propositional Inventory <sup>a</sup>	Firm Frequency <sup>b</sup>
<b>SMI Leverage Wielding</b> – Exercising contextual power during strategy negotiations to serve self-interests and secure return favors or advantages	<ul style="list-style-type: none"> <li>• Aim to secure immediate/future favor in return for their support of the strategy.</li> <li>• If senior leaders are unable to obtain return favors, they may: withhold resources, offer vague directives to their deputies to enact frontline activities, or delay functional support of the strategy.</li> </ul>	5/8 (62%)
<b>Marketing Mix Resource Battles</b> – Wrangling inter- or intra-functionally to secure greater share of the finite resources allocated to support the strategy	<ul style="list-style-type: none"> <li>• Aim to secure greater share of allocated resources to serve specific brand/regional needs.</li> <li>• Resource allocation may be inequitable, resulting in a marketing mix that is inconsistent with the strategy</li> </ul>	8/8 (100%)
<b>Opportunistic Strategy Implementation Practices</b> – Combining old and new activities to develop novel, self-serving behavioral routines that prioritize individual productivity over the new strategy	<ul style="list-style-type: none"> <li>• Aim to maintain/enhance individual productivity and/or earning potential.</li> <li>• Perceived opportunity costs of giving up current work routines may result in haphazard enactment of field activities and/or delays in enacting new set of frontline activities mandated by the strategy.</li> </ul>	8/8 (100%)
<b>Trickle-Down Effects</b> – Between-level diffusion of negative signals spiraling down and dampening commitment to the strategy	<ul style="list-style-type: none"> <li>• Aim to signal a lack of enthusiasm toward strategy to subordinates.</li> <li>• Senior-level signals dampen middle-level commitment and amplifies impediment; middle-level signals amplify activity adjustments and frontline impediment; trickle-down effects compound as they traverse levels and hamper implementation.</li> </ul>	5/8 (62%)
<b>Trickle-Around Effects</b> – Within-level and within-function diffusion of negative signals spilling over and dampening commitment to the strategy	<ul style="list-style-type: none"> <li>• Aim to signal a lack of strategy enthusiasm to functional peers</li> <li>• Signals received from an influential peer dampen others' commitment to strategy; isolated trickle-around signals left unattended may spread within-level and within-function hampering implementation.</li> </ul>	4/8 (50%)
<b>Inter-SMI Credit Gifting</b> – Publicly giving SMI counterpart(s) recognition for initial implementation successes, despite their tepid support	<ul style="list-style-type: none"> <li>• Aim to curb counterpart's subtle apathy at source and secure their commitment to strategy.</li> <li>• Witnessing and receiving public credit for initial wins may motivate non-sponsoring leaders to begin actively supporting strategy.</li> <li>• <b>P1:</b> The utilization of inter-SMI credit gifting attenuates the undesirable impact of SMI leverage wielding.</li> </ul>	4/8 (50%)
<b>Intra-SMI Strategy Success Propagation</b> – Concerted efforts to gather and disseminate success stories about the initiative to build and sustain optimism within the SMI hierarchy	<ul style="list-style-type: none"> <li>• Aim to drown out negative sentiment about the strategy within the sales or marketing hierarchy.</li> <li>• Positive stories occupy a greater mindshare to crowd out negative sentiment and diminish effects of cumulative impediments.</li> <li>• <b>P2:</b> The utilization of intra-SMI strategy success propagation attenuates the undesirable impact of (a) trickle-down effect and/or (b) trickle-around.</li> </ul>	6/8 (75%)
<b>Marketing Strategy Resource Infusion</b> – Accessing and investing resources earmarked pre-launch to provide a bridging mechanism to regions/territories struggling to implement the strategy	<ul style="list-style-type: none"> <li>• Aim to mitigate ill effects of middle-level and frontline impediments on implementation.</li> <li>• Alleviates marketing mix misalignments rooted in resource battles and incentivizes the frontline to put strategy over self-interests.</li> <li>• <b>P3:</b> The utilization of marketing strategy resource infusion attenuates the undesirable impact of (a) marketing mix resource battles, (b) trickle-around effects, and/or (c) opportunistic strategy implementation practices.</li> </ul>	5/8 (62%)
<b>Frontline Game Plan Modification</b> – Allowing frontline personnel to make minor, territory-specific adjustments to field activities on a temporary basis	<ul style="list-style-type: none"> <li>• Aim to mitigate ill effects of opportunistic strategy implementation practices on implementation.</li> <li>• Helps salvage key frontline activities from being haphazardly sacrificed and prevents delays in implementation of new activities.</li> <li>• <b>P4:</b> The utilization of frontline game plan modification attenuates the undesirable impact of opportunistic strategy implementation practices.</li> </ul>	5/8 (62%)
<b>Marketing Strategy Implementation Blueprints</b> – Devising and documenting implementation principles that offer guidance regarding implementation continuance in the face of unforeseen obstacles	<ul style="list-style-type: none"> <li>• Aim to ensure field implementation efforts supported beyond initial months (when post-launch resources/excitement taper off).</li> <li>• Readily accessible resources mitigate likelihood of (a) frontline personnel shying away from implementation when faced with threats and (b) within function/level negative sentiments building.</li> <li>• <b>P5:</b> The utilization of marketing strategy implementation blueprints attenuates the undesirable impact of (a) opportunistic strategy implementation practices and/or (b) trickle-around effects.</li> </ul>	4/8 (50%)

<sup>a</sup> Condensed wording of full version propositions provided.

<sup>b</sup> Firm frequency reflects the number of firms (n = 8) from where data were derived to support each impediment/remedy in our findings (see Macdonald et al. 2016).

#### 4.1. Implementation impediments

Our inductive analysis reveals that SMI personnel at each hierarchical level harbor dominant self-interests. As these personnel come together to execute a strategic marketing initiative, the desire to advance or protect their self-interests results in activities that impede implementation. Below, we discuss the nuances of the dominant implementation obstacles at each level of the SMI: SMI leverage wielding (senior level), marketing mix resource battles (middle level), and opportunistic strat-

**Table 5**  
Supporting Impediment/Remedy Exemplars and Quantitative Breakdown.

Emergent Constructs	Examples Derived from Data	Firm Code # Frequency <sup>a</sup>	Level Breakdown of Firm Frequency <sup>b</sup>
SMI Leverage Wielding	<ul style="list-style-type: none"> <li>Senior sales leaders in the FS company (#4) made clear the portfolio communication strategy will be supported only if marketing delayed the upcoming price hike on three established portfolios by six months.</li> <li>Senior marketing leaders in the LS company (#6) secured commitment from sales counterparts that if marketing supported the strategic account management initiative, they would be fully behind the marketing launch of service 2.0 initiative next year.</li> </ul>	<ul style="list-style-type: none"> <li>2, 4, 5, 6, 8</li> <li>5/8 (62%)</li> </ul>	<ul style="list-style-type: none"> <li>SS: 5/5 (100%)</li> <li>MS: 0/5 (0%)</li> <li>FS: 0/5 (0%)</li> <li>SM: 5/5 (100%)</li> <li>MM: 0/5 (0%)</li> <li>FM: 0/5 (0%)</li> </ul>
Marketing Mix Resource Battle	<ul style="list-style-type: none"> <li>Marketing and sales managers in the LS company (#6) had open disagreements about how the promotional budgets should be allocated, with marketing claiming they needed more resources to support the sales-sponsored strategic account initiative.</li> <li>Multiple marketing managers in the IT (company #5) lobbied their senior leadership for marketing dollars to support value-added service launch, making the case for why their products needed greater support than some others in the portfolio.</li> </ul>	<ul style="list-style-type: none"> <li>1, 2, 3, 4, 5, 6, 7, 8</li> <li>8/8 (100%)</li> </ul>	<ul style="list-style-type: none"> <li>SS: 1/8 (12.5%)</li> <li>MS: 8/8 (100%)</li> <li>FS: 1/8 (12.5%)</li> <li>SM: 1/8 (12.5%)</li> <li>MM: 8/8 (100%)</li> <li>FM: 2/8 (25%)</li> </ul>
Opportunistic Strategy Implementation Practices	<ul style="list-style-type: none"> <li>Frontline salespeople in the IT company (#5) were unwilling to spend more time discussing value-added services with customers since it took time away from promoting products with higher incentives attached.</li> <li>Frontline salespeople in the F&amp;B company (#8) spent little time on customer education during the launch of the customer service strategy since they saw no direct sales upside.</li> </ul>	<ul style="list-style-type: none"> <li>1, 2, 3, 4, 5, 6, 7, 8</li> <li>8/8 (100%)</li> </ul>	<ul style="list-style-type: none"> <li>SS: 0/8 (0%)</li> <li>MS: 1/8 (12.5%)</li> <li>FS: 8/8 (100%)</li> <li>SM: 0/8 (0%)</li> <li>MM: 1/8 (12.5%)</li> <li>FM: 6/8 (75%)</li> </ul>
Trickle-Down Effects	<ul style="list-style-type: none"> <li>Field marketers in the HC company (#1) neglected research requests from the sales teams after noticing their managers were not overly excited about the customer acquisition initiative.</li> <li>New product launch in the ENG company (#2) faced early challenges when the Western U.S. sales team, with the tacit blessing of the VP of Regional Sales dragged his feet for four weeks on launch activities.</li> </ul>	<ul style="list-style-type: none"> <li>1, 2, 6, 7, 8</li> <li>5/8 (62%)</li> </ul>	<ul style="list-style-type: none"> <li>SS: 3/5 (60%)</li> <li>MS: 3/5 (60%)</li> <li>FS: 5/5 (100%)</li> <li>SM: 3/5 (60%)</li> <li>MM: 5/5 (100%)</li> <li>FM: 5/5 (100%)</li> </ul>
Trickle-Around Effects	<ul style="list-style-type: none"> <li>The new product launch in the ENG company (#2) suffered implementation lapses in MN, WI, and IL since a MN sales manager talked down about the launch strategy with colleagues and dampened their enthusiasm.</li> <li>A senior sales rep for the PUB company (#7) openly criticized the customer experience strategy during a regional sales meeting that affected the rollout and caused other salespeople to doubt the strategy.</li> </ul>	<ul style="list-style-type: none"> <li>1, 2, 3, 7, 4/8</li> <li>(50%)</li> </ul>	<ul style="list-style-type: none"> <li>SS: 3/4 (75%)</li> <li>MS: 4/4 (100%)</li> <li>FS: 3/4 (75%)</li> <li>SM: 2/4 (50%)</li> <li>MM: 4/4 (100%)</li> <li>FM: 2/4 (50%)</li> </ul>
Inter-SMICredit Gifting	<ul style="list-style-type: none"> <li>Marketing leadership in the TS company (#3) presented a special partnership award to the VP of Sales during the national sales meeting to publicly recognize their support of the rebranding effort, even though their overall support was lackluster.</li> <li>For the first five months of the customer acquisition initiative in the HC company (#1), every monthly sales newsletter featured cases that credited how marketing was helping the new initiative succeed.</li> </ul>	<ul style="list-style-type: none"> <li>1, 2, 3, 8, 4/8</li> <li>(50%)</li> </ul>	<ul style="list-style-type: none"> <li>SS 3/4 (75%)</li> <li>MS: 3/4 (75%)</li> <li>FS: 1/4 (25%)</li> <li>SM: 4/4 (100%)</li> <li>MM: 3/4 (75%)</li> <li>FM: 1/4 (25%)</li> </ul>
Intra-SMI Strategy Success Propagation	<ul style="list-style-type: none"> <li>Marketing personnel in the PUB company (#7) circulated strategy success stories in the company newsletter for the first six months that highlighted the positive impact of the customer experience strategy on biweekly sales figures across the country.</li> <li>After the value-added service initiative was launched in the IT company (#5), 15 minutes were set aside at the beginning of the next eight biweekly business review meetings so salespeople could share their successes with attendees.</li> </ul>	<ul style="list-style-type: none"> <li>2, 3, 5, 6, 7, 8</li> <li>6/8 (75%)</li> </ul>	<ul style="list-style-type: none"> <li>SS 4/6 (66%)</li> <li>MS: 5/6 (83%)</li> <li>FS: 2/6 (33%)</li> <li>SM: 5/6 (83%)</li> <li>MM: 3/6 (50%)</li> <li>FM: 2/6 (33%)</li> </ul>
Marketing Strategy Resource Infusion	<ul style="list-style-type: none"> <li>Marketing leadership in the IT company (#5) increased promotional budget for the CA sales team by 15% for one quarter so that they could actively promote the value-added services to four key accounts.</li> <li>Sales leadership in the HC company (#1) did field work in struggling territories and offered targeted guidance to salespeople as they launched the customer acquisition strategy.</li> </ul>	<ul style="list-style-type: none"> <li>1, 2, 4, 5, 6</li> <li>5/8 (62%)</li> </ul>	<ul style="list-style-type: none"> <li>SS: 3/5 (60%)</li> <li>MS: 3/5 (60%)</li> <li>FS: 2/5 (40%)</li> <li>SM: 4/5 (80%)</li> <li>MM: 3/5 (60%)</li> <li>FM: 2/5 (40%)</li> </ul>
Frontline Game Plan Modification	<ul style="list-style-type: none"> <li>The east coast sales team for the PUB company (#7) could alter customer coverage plan for the first three months of the customer experience initiative to ensure it was a success.</li> <li>Field marketers in the FS company (#4) allowed local sales teams to modify promotion schedule with their key customers so they could reach out to more customers with the newly launched portfolio communication strategy.</li> </ul>	<ul style="list-style-type: none"> <li>1, 3, 4, 6, 7</li> <li>5/8 (62%)</li> </ul>	<ul style="list-style-type: none"> <li>SS: 4/5 (80%)</li> <li>MS: 3/5 (60%)</li> <li>FS: 5/5 (100%)</li> <li>SM: 3/5 (60%)</li> <li>MM: 3/5 (60%)</li> <li>FM: 4/5 (80%)</li> </ul>
Marketing Strategy Implementation Blueprints	<ul style="list-style-type: none"> <li>Marketers in the F&amp;B company (#8) developed a dedicated portal (e.g., case studies, best practices, and customer objection handling tips for salespeople) to support salespeople after the customer service initiative was launched.</li> <li>Marketers in the ENG company (#2) developed an app that salespeople could use to access support materials (e.g., articles, videos, product information) of relevance to the new product launch.</li> </ul>	<ul style="list-style-type: none"> <li>2, 5, 7, 8, 4/8</li> <li>(50%)</li> </ul>	<ul style="list-style-type: none"> <li>SS: 3/4 (75%)</li> <li>MS: 4/4 (100%)</li> <li>FS: 4/4 (100%)</li> <li>SM: 3/4 (75%)</li> <li>MM: 3/4 (75%)</li> <li>FM: 4/4 (100%)</li> </ul>

<sup>a</sup> Firm code # frequency reflects the specific firms where data were derived to support each impediment/remedy in our findings; firm code # sourced from Table 2.

<sup>b</sup> Level breakdown of firm frequency reflects distribution of firm data that exhibited each impediment/remedy; n = firm frequency; S/M/F = Senior/Middle/Frontline, S/M = Sales/Marketing.

egy implementation practices (frontline). Findings establish the headwinds that implementation encounters within the SMI as the strategy moves through the firm hierarchy.

**4.1.1 Senior-Level Impediment: SMI Leverage Wielding.** We conceptualize SMI leverage wielding as non-sponsoring SMI personnel exercising contextual power during strategy negotiations to serve their self-interests and secure either an immediate favor or a future advantage from their SMI counterpart in return for their support of the strategy. From an organogram perspective, this construct emerges as senior sales and/or marketing leaders take ownership of a strategic initiative (i.e., sponsoring department). We learn that as sponsoring senior leaders begin discussions around how to bring the new initiative to market, non-sponsoring leaders begin to assess their contextual leverage—i.e., the extent to which successful implementation of their counterpart's proposed strategy depends on their support. Because sales and marketing are responsible for strategy implementation, the leverage that emerges from their counterpart's dependence is limited to the SMI and the specific strategy.

As a byproduct of this assessment and its ensuing power, SMI leverage wielding emerges as the dominant senior-level implementation impediment. If leverage wielding non-sponsoring leaders are unable serve their self-interests during strategy negotiations, they may obfuscate the implementation process via: (a) withholding functional resources, (b) giving vague downstream directives to their deputies, (c) dragging out strategy deliberations without substantive justification, and/or (d) delaying their function's support of the strategy. Below, two senior-level counterparts reflect SMI leverage wielding by sales leadership.

*As we started talking, I made it clear [to my counterpart] that relaunching the customer service initiative will take a lot of work in the field. So, I was looking to get a commitment from them that our efforts will not go unnoticed and that I will have their support for any future initiative that we may bring forward. [Senior Sales, F&B – 8B]*

*For our customer service initiative to succeed, it required significant commitment from our sales teams. So, in a way, we were dependent on them to make it succeed. I knew that their support would not come free... You couldn't help but notice the missed internal deadlines and the delays they [sales] had in releasing field resources. In marketing, we kept feeling like since they [sales] did not get their way, they did not really care about moving quickly to help implement the strategy. [Senior Marketing, F&B – 8A]*

The extent to which SMI leverage wielding presents itself as an impediment varies based on the level of strategy-specific power the non-sponsoring leaders perceive they possess. Our findings suggest the greater the dependence of a sponsoring sales/marketing senior leader upon his/her counterpart's support with respect to the marketing strategy, the greater the likelihood of SMI leverage wielding by a non-sponsoring marketing/sales leader.

**4.1.2 Middle-Level Impediment: Marketing Mix Resource Battles.** We characterize marketing mix resource battles as SMI personnel wrangling inter- or intra-functionally to secure a greater share of finite marketing mix resources allotted to the strategy. This construct emerges within our analysis via suggestions that middle-level sales and marketing managers are jointly responsible for developing a marketing mix that supports the proposed strategy. While these managers may frequently vie for finite resources within their firms, the desire to influence the operationalization of a new strategy amplifies the competition for resources and gives rise to this dominant middle-level impediment. Given the insular focus of marketing mix resources, these battles are isolated to SMI personnel and are specific to the marketing strategy in question.

We learn that such wrangling over resources hinders the development of the intended marketing mix, thereby risking implementation. For example, intra-functional competition for resources among sales managers may lead to sales territories not receiving necessary support. Alternatively, marketing mix resource battles among marketing managers may harm the interests of the portfolio of firm brands when one marketing manager jockeys to steer more resources to his/her brand. The quote below highlights this latter aspect.

*There definitely are undercurrents where everyone is looking out for their own brands. When there are limited resources to go around, it is difficult to not step on someone else's toes. If I don't champion my brands, no one will. [Middle Marketing, LS – 6C]*

Inter-functional battles also jeopardize functional interests and implementation. For example, sales managers seeking resources to offer a trade program or marketing managers seeking resources to run additional advertising may each engage in trade-offs that result in a suboptimal marketing mix. As the quote below depicts, the behind-the-scenes jockeying for finite resources may generate a sub-optimal operational plan that weakens implementation.

*There is a real danger that we may end up with a plan that satisfies no one and does not really address the customer need because of all the conflicting interests and jockeying. [Middle Marketing, IT – 5C]*

Our findings suggest that the extent of the wrangling increases when available resources are scarce and sales/marketing managers' desire to influence strategy operationalization is stronger. Thus, the greater the desire of middle-level SMI managers to secure a higher share of scarce, strategy-specific resources, the greater the likelihood of inter- and intra-functional marketing mix battles between middle-level sales and marketing managers.

**4.1.3 Frontline Impediment: Opportunistic Strategy Implementation Practices.** We characterize opportunistic strategy implementation practices as SMI personnel combining old and new activities to develop novel, self-serving behavioral routines that prioritize individual productivity and earning interests over the success of the new strategy. This construct reflects our data showing that, on any given day, frontline salespeople perform numerous activities (e.g., selling existing products, managing channels) and frontline marketers balance varying demands (e.g., advertising schedules, marketing



material coordination). When a new strategy is launched, frontline SMI personnel face a complex challenge of integrating a new set of activities needed to implement the marketing strategy in the field with their existing set of work routines. This challenge is prominent on the frontlines since these sales and marketing personnel are bound to activate strategies in the field. A frontline salesperson's quote below highlights such a challenge.

*We are fighting fires every day. When I get a new strategy in hand I often pause and think about how I am going to achieve everything in 24 hours. I often talk to my counterparts and we negotiate how much time I will spend on dealing with the ongoing (expletive) and how much will be on launching the new strategy. [Frontline Sales, HC – 1F]*

This challenge is felt more intensely when frontline personnel's existing work routines engender consistent sales revenue and/or incentive dollars. Subsequently, the process of counterbalancing the needs of the new strategy and their own self-interests engenders the dominant frontline impediment of opportunistic strategy implementation practices. That is, frontline SMI personnel negotiate with counterparts or functional supervisors regarding: (a) what specific new activities they will (not) pursue, (b) when and where they will (not) pursue new activities, and (c) which current activities they will (not) give up. In turn, opportunistic strategy implementation practices impede implementation since it results in haphazard enactment of field activities. This facet is manifested in frontline employees implementing activities in the field that do not complement each other and/or not implementing the newly mandated strategy-related activities in a timely manner. Below, two frontline counterparts highlight how this haphazard enactment weakens implementation.

*There was no way we could initiate three new activities. There is not enough time in a day to do all that. So, we began chatting with field marketers to see how to resolve this issue. We proposed that we would do two of the three activities since doing all three would require a major change in our daily routine. But marketing was not willing to budge. They insisted we take up all three since each of the activities was an important strategic pillar. In the end, we struck a deal. We would do all three activities with only a select customer group and they reluctantly agreed. [Frontline Sales, TS – 3F]*

*There was no way we would let them not initiate all three activities. The strategy would be haphazardly implemented if any single activity were missing. So, there was a lot of give and take. In the end, we decided that they would do all three activities in select markets. I did not particularly like it, but I viewed it as a trade-off between not implementing the strategy at all and implementing it fully, even if it was in select markets. [Frontline Marketing, TS – 3E]*

Analytical insights suggest opportunistic strategy implementation practices increase in scope proportional to the tension between old and new activities, as well as the perceived opportunity costs of giving up existing activities. Thus, the greater the conflicting demands of old and new activities required of frontline salespeople or marketers with respect to the strategy and perceived negative implications on productivity and earnings, the greater the likelihood of opportunistic strategy implementation practices by frontline sales and marketing personnel.

#### 4.2. Cumulative implementation impediments: trickle-down and trickle-around effects

We learn that communication patterns within and across the organization impact the diffusion of information regarding the strategy—e.g., knowledge about impediments that marketing strategy faces at senior- and middle-levels diffuses both vertically and horizontally within the SMI. These vertical and lateral effects impact other SMI personnel's adoption of and participation in the implementation process. Consistent with literature which catalogs patterns of trickle effects—whereby perceptions, feeling, attitudes, or behaviors of a source impact the same of a recipient (Wo et al. 2019)—we term these phenomena of cumulative effects and identify two means by which they manifest during implementation. The first is the trickle-down effect, conceptualized as between-level diffusion of negative signals from sales or marketing supervisors spiraling down and dampening commitment to the strategy among downstream sales or marketing personnel. The second is the trickle-around effect, conceptualized as within-level and within-function diffusion of negative signals from functional peers spilling over and dampening commitment to the strategy (e.g., Western Region Sales VP / Brand A Marketing Manager negatively influencing the Eastern Region Sales VP / Brand B Marketing Manager).

**4.2.1 Trickle-Down Effects.** If a senior leader who wielded SMI leverage during deliberations is unable to extract return favors from his/her counterpart, s/he may send subtle negative signals downstream to his/her deputies that suggest a minimal commitment (i.e., trickle-down). In the quote below, we hear from a senior sales leader who was unsuccessful in securing a return favor telling his team to just “figure out a way to live with the strategy.”

*To tell you the truth, we hardly end up in a win-win situation. There are so many times when it is a win-lose situation. Unfortunately, the party that loses goes out and tries to figure out a way to live with the outcome and then do whatever they need to do. I won't go into specifics but, at times, I have told my teams to just figure out a way to live with the strategy. I know it means their actions may not be consistent with what marketing wants or they modify the message completely. I am not going to watch them because I myself do not agree with marketing. [Senior Sales, ENG – 2B]*

Middle-level sales or marketing managers often absorb such negative cues from their supervisors, which in turn affects how they approach strategy operationalization. For example, the quote below illustrates that when middle-level managers sense leadership's anemic support of the strategy, they feel emboldened to drive a hard line during strategy implementation.

*When we heard rumblings that our VP was not fully supportive of the new strategy, we felt like we had the permission to not go along with what sales managers were asking of us. I hate to admit, but we were not very flexible while negotiating with sales managers and working out operational details. It was not the most ideal way to support our sales organization. [Middle Marketing, LS – 6C]*

Together, senior leaders and middle managers who are unable to serve their respective self-interests influence the implementation process by sending negative signals downstream, which build negative sentiment about the new initiative within their functional hierarchy. The presence of such sentiment impacts sales or marketing rank and file's overall commitment to the initiative and weakens implementation. That is, the greater the impediment to marketing strategy implementation at the senior level due to SMI leverage wielding, the greater the likelihood of marketing mix resource battles at the middle level via the trickle-down effect. Additionally, the greater the impediment to marketing strategy implementation at the middle level due to marketing mix resource battles, the greater the likelihood of opportunistic strategy implementation practices at the frontline via the trickle-down effect.

**4.2.2 Trickle-Around Effects.** Our analysis further suggests that beyond the snowball effect that occurs as negative sentiment accumulates downstream, sponsoring leaders must pay close attention to whether impediments are growing within a specific level of their counterpart's function. While such impediments may appear isolated or limited in scope, they have the potential to spread laterally (i.e., trickle-around) and grow exponentially to cause a widespread implementation impediment. The quote below from a senior sales leader highlights the exponential potential of leverage wielding creating a trickle-around effect.

*In my experience, it is crucial that I get everyone in the marketing leadership to fully embrace the strategy because one unhappy camper can influence their peers. In our company, this can happen during marketing leadership summits where we are not present. It can then become a bigger problem to manage. [Senior Sales, HC – 1B]*

At the middle level, if a sales manager in a bellwether territory is not excited about a marketing-sponsored strategy—owing to him/her losing out in the marketing mix resource battle—then s/he may engender trickle-around effects and derail implementation. For example, a disgruntled sales manager may informally talk down the strategy to his/her peers (i.e., sales managers in other regions), thereby potentially jeopardizing implementation on a wider scale. A middle-level sales manager shared her experience in this regard.

*Sales managers are a tight-knit group. In that group, you have folks who have been around for 20–25 years and many of them serve important markets. For us, its LA and Boston. When any new strategy is launched, we watch sales managers there closely. If they are displeased with the strategy, they may talk badly about it and make other sales managers to start doubting the strategy and then rumor mills can start. And before you know it, you may have bigger problems on hand. [Middle Sales, TS – 3D]*

A similar effect may be observed for a sales-sponsored strategy. For example, the informant quote below highlights an instance wherein a middle-level marketing manager—who had significant clout amongst his peers and whose brand portfolio served as a key anchor for a sales-sponsored strategy—was unable to get his brands the prominence he desired in the strategy. As a result, he talked down the strategy to his marketing peers whose brands were co-featured in the same strategy. As the quote highlights, negative signal from such an influential peer triggered a trickle-around effect that resulted in a sub-par implementation of the strategy.

*Veteran brand managers who command respect among their peers can sometimes use their clout to derail a good strategy. I will give you an example. Our new customer acquisition strategy that featured three major brands did poorly. As we analyzed what happened, we learned that Andy, a brand management veteran around here, was singularly responsible for that failure. Apparently, since his brands did not get to lead the strategy, he talked the strategy down among his peers. Slowly but surely, we had all three brand managers dragging their feet. One unhappy brand manager killed the whole strategy. It is insane. [Middle Sales, HC – 1D]*

Together, sales and marketing personnel who are on the losing side of the level-specific marketing strategy impediment may influence the implementation process by not only creating downstream bottlenecks but by also sending negative signals to their functional peers. These trickle-around effects thereby impact sales or marketing's within-level and within-function commitment to the initiative, weakening implementation.

#### 4.3. Implementation remedies

Our findings reveal that despite encountering level-specific impediments and the trickle-down / trickle-around effects they trigger, the workings of an informal organization within the SMI hold the key to implementation. We view informal networks as inter- and intra-functional social networks that sales and marketing personnel cultivate by forging personal ties. For example, marketing leaders network with respected middle-level and frontline sales personnel, and/or frontline salespeople cultivate informal relationships with senior- and middle-level marketers.

Our analysis highlights that sales and marketing personnel's informal networks enable senior- and middle-level strategy-sponsoring managers to quickly sense how emergent impediments at various hierarchical levels may individually or collectively derail implementation. To curb the adverse effect of these impediments and facilitate implementation, managers ini-

tiate targeted, multi-directional remedies within their informal networks. Given that emergent impediments are not always anticipated and/or gain momentum as strategy is rolled out, remedies are enacted during the launch stage to reflect the ongoing work required to implement marketing strategies. Our analysis reveals five remedies that curb the occurrence of impediments and/or mitigate their adverse effects, thereby facilitating implementation: inter-SMI credit gifting, intra-SMI strategy success propagation, marketing strategy resource infusion, frontline game plan modification, and marketing strategy implementation blueprints.

**4.3.1 Inter-SMI Credit Gifting.** Senior non-sponsoring leaders who unsuccessfully wielded SMI leverage during strategy negotiations may privately remain tepid about the strategy. In such instances, they may respond to role demands by (a) providing bare minimum functional support, (b) not being fully immersed in the strategy, and/or (c) not proactively bringing new ideas to the table to support the strategy. On the other side of the dyad, sponsoring leaders may hear about their counterpart's apathy from their informal network contacts and/or notice the effects of the same on implementation, which would make it evident for them that they must get their counterparts to enthusiastically commit to the strategy. An informant stated her perspective.

*Strategies are an all-hands-on-deck phenomenon. We need our counterparts not just onboard, but we want them energized and fully committed. It is only then that they can rally their troops. To me, that is a critical pre-requisite for implementation. [Senior Marketing, TS – 3A]*

Strategy sponsoring leaders may achieve the goal of curbing their counterpart's apathy and getting them to enthusiastically commit to strategy by using a remedy we term inter-SMI credit gifting. As a remedy, this construct involves sponsoring leaders publicly giving SMI counterpart(s) recognition for initial implementation successes, despite their tepid support. We learn that strategy-sponsoring managers may use this tactic more actively and be more pronounced in gifting credit to their counterparts when they perceive that the counterpart's apathy toward the strategy is higher, and the consequent need for boosting the strategy is greater. Sponsoring managers may choose weekly newsletters, team meetings, sales meetings, and/or company intranets as venues to credit their counterparts for the strategy's initial wins. We learn that a combination of (a) witnessing the initial wins and (b) receiving public credit for those wins (despite minimal support for the strategy) may motivate non-sponsoring personnel to jump in and more actively support the strategy. The quote below highlights this notion.

*Salespeople like to win and the victory is sweeter if there is a public recognition in the company that you were instrumental in helping the team win. I have tried to use this philosophy with my sales colleagues. There have been times where I publicly acknowledged their efforts in some of the early strategic wins last year with our product launch—even when they were less supportive of the strategy when we were implementing it. It is human nature. Flattery is a great way to melt away stubborn subtle resistance and it has worked more than once in my experience. [Senior Marketing, ENG – 2A]*

Sharing the glory of initial wins through inter-SMI credit gifting helps sponsoring leaders bring apathetic counterparts into the fold. At a minimum, if counterparts are increasingly attached to the outcomes of a marketing strategy and/or see the potential of further wins, this tactic can lessen the conditional nature or impact of their support. As such, we propose:

**Proposition 1:** *The utilization of inter-SMI credit gifting during marketing strategy implementation attenuates the undesirable impact of SMI leverage wielding.*

**4.3.2 Intra-SMI Strategy Success Propagation.** Disgruntled senior leaders and their middle managers in non-sponsoring departments may perpetuate negativity about the strategy. For example, a disgruntled senior leader may adversely influence subordinates (i.e., trickle-down) or a middle-level manager may unfavorably influence peers (i.e., trickle-around), thereby impeding implementation. In this regard, strategy-sponsoring personnel's informal network connections among the rank and file of their counterpart's department provide the opportunity for them to recognize such negative sentiment. The quote below is pertinent in this regard.

*If you know people on a personal level, they will let you in on their conversations. Over the years, I have built many connections in sales. I call some of them [salespeople and sales managers] my friends. So, whenever we [marketing] bring forth a new initiative, I make a few phone calls and I know what people [in sales] are talking about and what they are being told by their leaders. [Middle Marketing, PUB – 7C]*

While strategy-sponsoring managers expect the level of excitement about the new strategy to vary within the SMI, it is the detection of negative sentiment within the non-sponsoring department's hierarchy that demands a remedy to counter its adverse impact on implementation. In response, strategy-sponsoring managers engage in a tactic we term intra-SMI strategy success propagation—i.e., concerted efforts to gather and disseminate success stories about the initiative to build and sustain optimism within the SMI hierarchy. This remedy aims to use excitement during early stages to regulate the nascent negative sentiment about the strategy within the SMI hierarchy. We learn the intensity of intra-SMI strategy success propagation efforts are proportional to how widespread sponsoring managers perceive the negative sentiment about the strategy to be within the non-sponsoring function's hierarchy.

Managers may propagate strategy success at the organizational-level by organizing periodic calls with senior- and middle-level managers from critical regions/brand portfolios and encouraging their ties to share success stories. To this

effect, they may informally work with their network ties to develop stories related to how the new strategy facilitates long-term wins and/or produces inroads with elusive accounts. Below, we hear from a senior marketing leader who sensed negative sentiment about a marketing-sponsored strategy early on. In response, she worked with a sales counterpart that she had personal relationships with to develop case studies about how the strategy was being successfully implemented regionally. As the quote highlights, sharing positive case studies during calls with the field teams helped counter the negative sentiment about the strategy that emanated at the top of the region's sales hierarchy.

*Our sales teams in the south were apprehensive about the customer service initiative since the sales VP there was not in favor. I knew if I let that go on, it was a matter of time before they would call it quits. For two months in a row, during our monthly calls with sales managers in that region, I invited Nolan [Sales VP – Midwest] as a guest speaker to talk about their experience with the strategy. He discussed success stories in his region, talked about challenges, and how their teams came up with solutions. He offered a balanced perspective on the strategy, which was a powerful counter to the signals they were getting from Rick [Sales VP – South]. It showed them the strategy had real potential and it was not toothless as they were led to believe. [Senior Marketing, F&B – 8A]*

Intra-SMI strategy success propagation also helps mitigate trickle-around effects and their negative impact on strategy implementation. For example, sponsoring managers may enlist influential field-level network contacts—especially those that functional peers look up to and view as opinion leaders—to disseminate success stories and counter negative sentiment about the strategy being circulated by other peers (i.e., trickle-around effects). The quote below highlights how stories of big wins in major markets may counter the negative word of mouth about the strategy that may exist among the middle-level sales managers.

*Stories are powerful, and we make every effort to spread good stories. My supervisor and I have a lot of great connections in the field since both of us came from sales. So, whenever a new initiative is rolled out, we call our friends in the field and ask them to share stories. Salespeople are motivated by stories. When they hear that someone in Chicago or Atlanta had a big win, it boosts their confidence and helps fight the negative word-of-mouth that may be present. [Middle Marketing, F&B – 8C]*

We learn strategy-sponsoring managers' active efforts to propagate strategy successes through positive stories serve to build and maintain excitement about the strategy. Subsequently, the excitement about the strategy helps strategy-sponsoring leaders drown out negative strategy sentiments that exists cross- and within-level in their counterpart's function. Thus, we propose:

**Proposition 2.** *The utilization of intra-SMI strategy success propagation during marketing strategy implementation attenuates the undesirable impact of (a) trickle-down effects and/or (b) trickle-around effects.*

**4.3.3 Marketing Strategy Resource Infusion.** Our analysis reveals that senior strategy-sponsoring leaders set aside resources (e.g., money, time) pre-launch and keep discretionary reserves tucked away. Such resources are set aside as a cushion, with the intention of using them in a flexible manner to provide support to the implementation process in time of need—often during early stages. With this backdrop, we characterize marketing strategy resource infusion as strategy-sponsoring leaders accessing and investing resources they earmarked pre-launch to provide a bridging mechanism to certain regions/territories that may be struggling to implement the strategy. We further learn that the amount of resources set aside determines how extensively (selectively) sponsoring leaders can deploy them in aid of implementation.

Resource infusions allow strategy-sponsoring managers to mitigate the negative effects of not only marketing mix resource battles, but also the plausible trickle-around effects they may trigger on implementation. As an example, strategically infusing resources in critical sales territories (e.g., allowing concerned sales managers to offer special pricing to their strategic accounts if they previously ceded control of this resource) helps prevent the negative effects of marketing mix resource battles on implementation. Further, such resource infusions nullify the plausibility of these sales managers talking negatively about the strategy to their peers and triggering trickle-around effects. For sales-sponsored strategies, additional promotional dollars may allow specific brands, which would otherwise not be featured during implementation due to resource tensions, to have greater visibility in certain territories. In the quotes below, we learn how a senior leader's informal contacts allowed him to sense emergent needs and deploy resource reinforcements through a marketing manager, which helped revive a faltering strategy.

*We began to realize within the first four weeks that the strategy was not heading in the right direction. Our market is one of the most important ones on the West Coast. So, as we were getting ready to raise red flags, our marketing leadership sent someone from the HQ to assess what was going on. This individual, I think he was a marketing manager, was authorized to help us out. So, we had a discussion and he agreed to release additional funds for our region to prop up the strategy and he did that right away. I have never seen marketing act that quickly. [Frontline Marketing, ENG – 2E]*

*If it were not for some additional reinforcement, I don't know how we would have handled the challenge. The timely intervention helped us. It gave us time to rethink everything and then redeploy additional resources so we could win. We did eventually turn things around. [Frontline Sales, ENG – 2F]*

Marketing strategy resource infusion also mitigates the negative effects of opportunistic strategy implementation practices on implementation. For example, senior leadership may utilize time they have set aside for the strategy to work shoulder-to-shoulder with field personnel. The presence of a senior leader in the field serves as a resource that motivates frontline personnel to strike the right balance between their existing activities and newly mandated activities. The quote below from a senior marketing leader illustrates this point.

*During the early stages of the launch, I make it a point to go and do some fieldwork. My presence signals to salespeople that it is an important strategy, and they feel motivated to test out some field activities in their territories. So, my presence gives them the reason to stick to the new strategy. [Senior Marketing, FS – 4A]*

Our analysis indicates that marketing strategy resource infusion alleviates resource misallocation and within-function spillover effects, as well as incentivizes frontline personnel to dedicate attention to implementing the strategy (vs. self-interests). We thus propose:

**Proposition 3.** *The utilization of marketing strategy resource infusion during marketing strategy implementation attenuates the undesirable impact of (a) marketing mix resource battles, (b) trickle-around effects, and/or (c) opportunistic strategy implementation practices.*

**4.3.4 Frontline Game Plan Modification.** We characterize frontline game plan modification as senior strategy-sponsoring leaders allowing frontline personnel to make minor, territory-specific adjustments to field activities on a temporary basis to aid implementation. We learn that well-functioning informal networks help leaders sense the need for such modifications in real time. In response, frontline game plan modifications tend to ensue after consulting with concerned middle managers, signifying a calculated decision at the top to make quick frontline adjustments rather than field personnel going rogue and improvising without authorization. In the quote below, a frontline salesperson narrates how having direct access to his leader allowed him to circumvent formal channels and share unfavorable market feedback on a new initiative in a timely manner, which resulted in receiving flexibility to adapt the strategy.

*We were struggling and no one in the marketing hierarchy was willing to listen to us. We tried to talk with field marketing and their supervisors, but the answer was always the same; “you can’t modify the plans just for your region.” That’s when I picked up the phone and called the head of marketing. I explained how we needed to redraw our territory maps if the strategy had any chance of success. It required some changes to how we would activate the strategy. They listened to me carefully and within a week, we were given the flexibility to adapt the strategy. [Frontline Sales, TS – 3F]*

We learn that when frontline game plan modifications are allowed, they alleviate the negative effects of opportunistic strategy implementation practices on implementation. Modifications provide frontline salespeople the flexibility to balance their needs with those of the strategy and help salvage field activities that may otherwise be haphazardly sacrificed, thus mitigating the negative effect on implementation. As for frontline marketers, the ability to modify game plans allows them to reallocate field support resources under their control (e.g., promotional dollars) to balance their own needs and those of the sales personnel they support—thereby aiding implementation. The quote below from a frontline marketer highlights this aspect.

*Three of the salespeople we serve in this region handle key accounts. Naturally, their support needs are different than the rest. They need dedicated, customized support that takes a lot of our time, attention, and resources. For every major strategy, we negotiate with people higher up about things we will do for them and how we will manage our other tasks such as supporting other salespeople or ongoing strategies. We can’t do everything all the time, so we pick and choose. [Frontline Marketing, LS – 6E]*

Drawing upon the discussion above, we posit that game plan modification enables greater flexibility on the frontline to enact field-level activities that support the marketing strategy. We therefore propose:

**Proposition 4.** *The utilization of frontline game plan modification during marketing strategy implementation attenuates the undesirable impact of opportunistic strategy implementation practices.*

**4.3.5 Marketing Strategy Implementation Blueprints.** Our data suggest that even after taking preemptive steps, firms may encounter unforeseen challenges (e.g., negative customer reactions to strategy, new competitive threats) that derail implementation. As the quote below highlights, informal networks play a crucial role in helping leaders quickly learn about such unforeseen challenges before they pose a significant threat to implementation on a wider scale.

*You may do all the legwork and still experience unexpected bumps in the initial stages. There is no antidote to that, but what you can do is use your connections in the field and quickly learn what the problems are and how it’s affecting implementation. Those insights can be crucial. [Senior Marketing, IT – 5A]*

We learn that strategy sponsoring managers may use these emergent insights to develop and maintain what we term marketing strategy implementation blueprints. We characterize this construct as strategy sponsoring leaders devising and documenting an elaborate set of principles that offer guidance regarding implementation continuance in the face of unforeseen obstacles. Our analysis suggests such blueprints may reside on a dedicated online portal and be populated with ele-



ments such as (a) roadmaps regarding how to handle known and emergent challenges, (b) lists of resources to draw upon in the face of challenges, (c) white papers/case studies on how to handle implementation impediments, and/or (d) videos of interviews with middle-level and frontline field personnel who have successfully navigated unforeseen challenges.

The importance of such blueprints in facilitating implementation is understood when juxtaposed with the realities that set in during/after launch. Strategy support is not evergreen in many firms, and it is common for the enthusiasm of the strategy to taper off over time. Subsequently, lacking ongoing support from the strategy-sponsoring department, unexpected challenges may increase the likelihood that frontline personnel are unprepared to address impediments and/or middle-level managers reconsider their support of the strategy. These challenges engender opportunistic strategy implementation practices and trickle-around effects. In such instances, the availability of marketing strategy implementation blueprints signals to the non-sponsoring function's hierarchy that their counterparts have planned for the natural ebb and flow of support by providing more permanent resources. Below, an informant highlights how the sponsoring department views blueprints as a long-term, ongoing support mechanism.

*Ongoing implementation support is critical but hard to do. We use our contacts in the field to understand ongoing challenges and create new resources in response and make sure they [people in the field] have a long-term, detailed roadmap and a set of resources to turn to as—and when—challenges pop up in the field. [Senior Marketing, PUB- 7A]*

Access to blueprints provides instructive intent regarding how to handle challenges when the strategy meets the marketplace, or an understanding of peer perspectives on navigating customer issues. Blueprints thus provide frontline personnel with a resource they can turn to and reduces the likelihood that they will resort to opportunistic strategy implementation practices. For middle-level managers, blueprints reduce the likelihood they may be overly influenced by their peers' negative perspectives on the strategy, as depicted in the sales manager excerpt below.

*When things are tough, we turn to our peers for advice. If the person we turn to is in the same boat, it is very likely we are influenced by their negative views about how bad things are. So, after the initial excitement [about the strategy] has settled, if there is ongoing support available from marketing then it helps us maintain perspective and learn from many experiences—not just the ones we turn to. [Middle Sales, IT – 5D]*

Our informant perspective suggests strategy-sponsoring managers may draw upon their network to ensure marketing strategy implementation blueprints are easily accessible to the field, populated with implementable tools, and generalizable to emerging challenges. In such instances, implementation blueprints fill the support gap middle-level managers and field force personnel otherwise may experience if/when they confront unforeseen challenges. Having access to such a persistent resource reduces the likelihood that frontline personnel will begin to shy away from implementation when faced with threats, as well as the likelihood of within function/level negative sentiments building up. We therefore propose:

**Proposition 5.** *The utilization of marketing strategy implementation blueprints during marketing strategy implementation attenuates the undesirable impact of (a) opportunistic strategy implementation practices and/or (b) trickle-around effects.*

## 5. Discussion

The current study inductively develops a theory of marketing strategy implementation by utilizing a discovery-oriented, theories-in-use approach. Our theoretical framework illustrates (a) how the multi-level, inter- and intra-functional interactions within the SMI individually and collectively engender significant headwinds to implementation, as well as (b) how the informal networks of sales and marketing personnel help sense such impediments and be purposefully activated to cushion the implementation process from these impediments. Each of these findings addresses key knowledge gaps and serve as the basis for theoretical and managerial advancements to the marketing strategy implementation and SMI domains (see [Table 1](#)).

### 5.1. Theoretical implications

Our findings offer a theoretical framework that explicates the divergent impediments within the SMI hierarchy that slow down the execution of marketing strategies. We suggest that oft-discussed differences within the SMI (e.g., sub-cultural mental frames, cognitive orientations, systems of meaning; [Beverland et al. 2006](#); [Homburg and Jensen 2007](#)) engender analogous self-interests in sales and marketing personnel at a given hierarchical level. Such interests (a) stem from identification with one's department (sales or marketing) and organizational level (senior, middle, or frontline) and (b) take on meaning and influence during marketing strategy implementation. Our insights extend what has been established in past literature, as well as indicate that when personnel identify strongly with their role or function (e.g., "I am a marketer"), self-interests and tribal interest merge. Sales and marketing personnel judge the value of the marketing strategy from both an individual and collective perspective (e.g., [Macdonald et al. 2016](#)), which in turn influences how much support they give to implementation. This valuation triggers self-serving behaviors that impede agility during implementation.

These findings also illustrate that the nature of self-interests and behaviors differ more among, rather than within, hierarchical levels—e.g., SMI leverage wielding at the senior level, marketing mix resource battles at the middle level, and oppor-

tunistic strategy implementation practices at the frontline level. Our findings also explicate a complex phenomenon suggesting that while sales and marketing counterparts (i.e., across SMI functions) at the same level may have different sub-cultural mental frames and thought worlds, they may be driven by similar self-interests. Additionally, while sales and marketing personnel at different hierarchical levels (i.e., within SMI functions) may share thought worlds and sub-cultural mental frames, they may be driven by differing self-interests. As such, proactive anticipation and subsequent examination of implementation impediments requires a simultaneous consideration of thought worlds, mental frames, and self-interests at different levels within the SMI hierarchy.

Second, marketing scholars often examine the implementation phenomenon at the organizational level (offering a macro-level view of implementation) or through the lens of individual hierarchical levels (offering a piecemeal view of implementation). These gaps are troublesome given that SMI dynamics at different levels of the organization create unique challenges to the implementation of marketing strategy. Our study findings uniquely address these gaps by highlighting how divergent implementation impediments occurring at various hierarchical levels can successively engender both (a) cross-level and (b) within-level/-function impediments that compound implementation challenges within the SMI. Through cumulative trickle-down and trickle-around effects (Wo et al. 2019), our assessment focus on intricacies within the SMI hierarchy that influence the implementation process and reconciles perspectives on this phenomenon. Further, our study findings respond to calls for research on marketing strategy implementation content and processes (Morgan et al. 2019) by developing novel insights that reflect the realities of adverse between-level and within-level influences on implementation.

While the marketing organization is known to affect strategy implementation through alignment and activation (Moorman and Day 2016), extant research primarily focuses on formal organizational structure, administration, and policies for both levers (e.g., Chari et al. 2017; Olson et al. 2005; Olson et al. 2018). With this backdrop, our third contribution lies in our explication of the role played by social capital within the SMI in mitigating implementation impediments. Social capital (i.e., the ability to capture value from one's social context) is based on access to unique informational resources embedded in a social network, the reach or connectedness of the individual, and the power provided by the employee's organizational position (Munyon et al. 2021). While evidence exists in marketing regarding the value of informal networks (e.g., Rouziès and Hulland 2014), our findings offer unique insights regarding the role that such networks play in mitigating implementation impediments. For example, our findings regarding the game plan modification remedy illustrate an example of a frontline employee engaging a senior leader for help outside of formal communication channels. As an added result, being connected socially (i.e., beyond the organizational chart) also enables senior leaders to have quick access to discrete information and the agility to adjust as needed. Thus, our theoretical framework suggests that a robust social network allows for the timely flow of insights, directives, and resources across key network actors. Such informal mechanisms are based upon relational and cognitive ties across structural sales and marketing levels, in turn providing the crucible for strategy implementation within the SMI. Such insights are imperative since implementation continues to face extreme rates of failure, even with formal organizational administration policies in place.

Finally, the collective insights derived from these theoretical implications align with an emerging priority for the marketing organization to drive growth activities through simplified structures and processes, fast decision making, and trial and error learning (i.e., marketing agility; Homburg et al. 2020). Given that marketing agility is related to the speed at which the firm responds to current market conditions—via sensemaking, decision making, and execution (Kalaiganam et al. 2021)—our study contributes to the understanding of factors that aid the nimbleness of bringing intended strategies to market. For example, our discovery-oriented, theories-in-use approach (see Zeithaml et al. 2020) helps us illustrate that propagating success stories is critical to implementation. Such a remedy includes sensemaking from the senior level to understand strategy sentiment from the SMI's rank and file. Rather than formal channels, however, we show that sensemaking happens through stakeholder's social networks and informal relationships. Behind-the-scenes communication deliberately set up via informal relationships aids the flow and speed of information that is critical to marketing agility. Communication happens up and down the hierarchical chain through these informal channels to comprehend the challenges being faced at the frontlines and recognize initial wins during the rollout. Further, this information can be used to modify the game plan, disseminate favorable stories more widely, and/or develop action plans for combating resistance points—i.e., diffuse implementation impediments. Similarly, remedies such as marketing strategy resource infusion, frontline game plan modification, and the establishment and sustenance of marketing strategy implementation blueprints offer perspectives on how sponsoring leaders may engage in trial and error learning, iterate activities, and pivot work processes if feedback suggests the need for further adaptation; while remedies such as inter-SMI credit gifting smooth out sources of SMI tension and free the strategy to gain momentum as it moves forward. Together, study findings offer a peek into how SMI personnel may empower the firm to be agile while implementing marketing strategies.

## 5.2. Managerial implications

Our findings can help managers understand the SMI fault lines that may hamper marketing strategy implementation. While firm contexts can bring forward generalizability uncertainties, managers must acknowledge that unique impediments to implementation occur at different hierarchical levels within the SMI and are rooted in distinct self-interests of SMI personnel. Thus, managers may make specific efforts to limit the role self-interests play in driving sales and marketing personnel's behavior by stimulating greater organizational identification while reducing the functional identification of sales and marketing personnel.

Our findings also suggest that managers must build well-functioning informal networks within the SMI that span functional and hierarchical boundaries since such networks allow for spontaneous, one-to-one communication that enables sales and marketing personnel to anticipate and counter dominant implementation hindrances. As a means of strengthening such networks, managers could follow political skill guidelines to build network centrality (Bolander et al. 2015) and/or navigation guidelines to build influence (Plouffe and Barclay 2007), in turn ensuring they receive timely implementation-specific information. Practicing managers may then direct the flow of resources toward specific territories to stabilize and/or salvage implementation.

At a micro-level, our findings detail remedies to combat impediments at each level of the SMI. At a macro-level, we suggest managers consider organizational levers that could facilitate implementation. For example, for managers to be able to invest designated resources into strategies as needed, firms must accept trade-offs associated with these costly endeavors. Risk propensities should be applied to marketing strategy resource infusion during implementation. As another example, for managers to empower field personnel to amend their work routines (i.e., frontline game plan modification), organizations may first need to develop their own ambidexterity (Raisch and Birkinshaw 2008). Otherwise, organizational rigidities may stunt firm capabilities necessary for transforming dynamic resources and strategies into value offerings.

Finally, our multi-level, cross-functional framework illustrates cumulative effects, which should remind managers to remain vigilant about negative sentiments pertaining to a strategy that emanate from their SMIs. Specifically, managers must remain mindful that negative signals apparent at the senior- or middle-level of their counterparts' hierarchies can ultimately travel downstream and/or cross stream, exponentially reducing commitment within the SMI. Despite not being formal directives, these signals create inertia around a strategy that are observable to subordinates or functional peers. To counter the cumulative buildup of such negative sentiment, strategy-sponsoring personnel must actively manage the messaging (e.g., intra-SMI strategy success propagation) at the territory-level and organizational-level. This includes ensuring that success stories abound among SMI personnel to mitigate negative cross-level sentiment. To counter such effects amongst functional peers, managers may release targeted, timely resources and continue to supplement an infrastructure of generalizable resources (i.e., marketing strategy resource infusion, marketing strategy implementation blueprints).

### 5.3. Limitations and directions for future research

Given the size, scope, and variation of perspectives captured in the sample, our findings outline the primary challenges of and remedies for managing marketing strategy implementation. Nevertheless, our results are not an exhaustive list of impediments or remedies. Further, we have not explicated all potential mechanisms and/or their respective nuances through which the remedies may aid and/or impede implementation. Our findings, however, may still encourage scholarly thinking about how they generalize and what they mean to firms (Lehmann 2020). We outline future research opportunities that emerge from our findings below.

This study follows accepted practices in qualitative research by using individual informants to examine a functional-level phenomenon (Kohli and Jaworski 1990; Tuli et al. 2007). Furthermore, findings were validated through multiple techniques used in marketing scholarship (see Malshe and Sohi 2009b). Nonetheless, general sampling tendencies exist (e.g., our sample predominantly consists of large firms) and generalizability of our findings may be uncertain. As an example, the extent of relative power balance across the sales and marketing departments within our sample is unspecified. To the extent that organizations vary in this regard (e.g., sales/marketing more powerful than marketing/sales, matched relative power) and these dynamics influence emergent impediments/remedies, the generalizability of our results across organizations may have limits. Future scholarship may employ complementary research methodologies to extend our research—e.g., scholars could compare whether implementation processes diverge across industries given potential differences in SMI configurations, across firm sizes given potential differences in SMI directives in small/medium/large organizations, and/or across cultures given potential differences in SMI norms in emerging/developed markets.

Second, our emergent implementation impediments may be progressive in nature and thus call for mitigation strategies that also evolve over time. Quantitative and/or longitudinal research designs that naturally capture such factors may enable future scholarship to bring further nuance to our findings. Time-series data could capture the velocity of our impediments to assess the extent to which their rates/directions of change create influence (see Palmatier et al. 2013)—e.g., strategy implementation may be hampered by increasing stakes in SMI leverage wielding and/or increasing frequency of marketing mix resource battles. Longitudinal research could also examine post-launch outcomes that assess the marketing strategy implementation, ideally providing a mixture of objective outcomes that are long-term and broad (e.g., financial performance), short-term and focused (e.g., product KPIs, strategy ROI), and/or customer-centric (e.g., account-based performance, customer loyalty).

Finally, given that marketing strategy implementation is not solely the job of sales and marketing, and may involve the orchestrated collaboration of many departments within the firm (e.g., operations, procurement, finance, HR), network and systems-based research could provide advancements to this study. Future research may therefore expand their focus to nuances reflective of the complex network connections involved in strategic processes—e.g. SMI counterparts upstream (e.g., R&D; Homburg et al. 2017a) and downstream (e.g., service; Rapp et al. 2017). Such scholarship may specifically explore diagonal dyads to assess how multiple organizational stakeholders holistically come together to facilitate inter-organizational exchange.

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## Appendix A. Supplementary material

Supplementary data to this article can be found online at <https://doi.org/10.1016/j.ijresmar.2021.10.002>.

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