

# **Teaching Strategic Marketing: Applying the Jazz Metaphor**

## **Michael K. Mills, University of Southern Queensland**

### **Abstract**

The article discusses how the metaphor of jazz music making is used to facilitate visualisation and application of strategic thinking and creativity in the strategic marketing course. The evidence shows that students adapt well to and enjoy the metaphor, and find that it facilitates their learning of the subject.

### **Introduction**

The assigned Case Study discussion is about to begin in the author's capstone Marketing Strategy Course. The students are not surprised when the author begins the session with the call "Let's Jam"—they've been through this a couple of times before now in the course with Case Studies especially, and are becoming conversant with applying the jazz metaphor and its associated notions of improvisation and creativity to their analysis. In fact, they think it's rather fun (author's note: students' initial familiarity with jazz does *not* affect their ability to grasp the metaphor), and feel they're becoming much better at strategic thinking and analysis in the process. At times in the discussion, when things may have stalled a bit, enterprising students are likely to take up the "Let's Jam" cry, in a call for the class to re-group, to take a different approach, and to keep the momentum going. Other students are likely to employ the metaphor's notions of leadership, "soloing", knowing the "form" (problem), and of creative listening as the discussion moves along. As selected strategic alternatives are subjected to analysis and evaluation the jazz metaphor is again applied to the case and the way the various elements have cohesively jelled into solutions.

In addition to its use in helping the transfer of knowledge in business, the use of metaphor, including musical metaphors, has been successfully used in the business classroom across a variety of disciplines as mechanism for building creativity and enlightening learning: organisational theory ( e.g. Oswick, Keenoy, and Grant, 2002); strategic management (Weick, 2003); general management (Moshavi, 2001); marketing management (Weinrauch, 2005). The jazz metaphor specifically has been applied to management education in the area of leadership (Lengnick-Hall and Lengnick-Hall, 1999, as well as economics (Tinari and Khandke, 2002), but has not been applied to the strategic marketing classroom. This paper advances the discussion in the literature using the metaphor of jazz music making/improvisation as applied to the teaching of the capstone marketing strategy course.

Metaphor allows us to interpret an organisation by focussing on an image (or symbol) that represents an aspect of that organisation and provides a unique perspective that is bound up in the essence of the image. As noted by Dennis and Macaulay (2007), many famous examples of management metaphors are offered by Morgan (1997) including the organisation as machine, as organism, or as political institution. Indeed Morgan (1997, p.4) suggests that metaphorical thinking permeates all types of business thought: "All theories of organization and management are based on implicit images or metaphors that lead us to see, understand and manage organizations in distinctive yet partial ways."

Jazz has been identified as the dominant metaphor in theory development for organisational studies (Kamoche et al. 2003). Jazz has also been increasingly ubiquitous in a range of

management literature dealing with strategic fit ( Neilsen, 1992),organisational development (Lewin, 1998), new product development (Moorman and Miner, 1998; Kamoche and Cunha, 2001),leadership (Newton, 2004) and organisational networks, (Pavlovich, 2003). The metaphor, however, has to date only *very* limited attention in the general marketing literature, (Dennis and Macaulay 2007).

Based on a twenty year career in strategic marketing (divided between industry and academia), as well as his professional jazz experience, the author believes the reason that jazz is a very useful metaphor for the teaching of strategic marketing, is the relevance of its application to the subject. Like with the jazz idiom, linearity and unbounded predictability are not currently appropriate in strategy given current fast changing conditions. Rather, what *is* required is more creativity, flexibility, new methods of application, and the like. However, even *visualizing* the necessary process for making these changes, must less dancing with them, is often not easy for students. To this end the jazz metaphor can be very useful.

### **The Jazz Metaphor, Improvisation and Marketing Strategy**

As noted by Nachmanovitch (1990, p.17) “when we think improvisation, we tend to think first of improvised music or theatre, or dance, but beyond their own delights, such art forms are doors into an experience that constitute the whole of everyday life. We are all improvisers.” Is improvisation, and particularly the metaphor of jazz music making antithetical to the conduct of marketing strategy and the education of future marketing strategists? Not at all. This paper suggests that the notions of jazz performance are not just useful theoretically, but have a very direct application to improving the effectiveness of students’ marketing strategy development and decision making skills.

While there are many types of jazz, causing the great jazz trumpeter and composer Miles Davis to note, “Jazz is a mighty big word.”(Carr, 1998), the metaphor is not compromised by this diversity. Indeed it might be argued that the breadth of jazz *improves* the potential application. All forms of jazz require a degree of structure, some improvisation around that structure, cooperation and common goals of performance. More specifically, within the improvisational jazz medium skilful performance requires full knowledge of (1) the context, (2) techniques, options, and creative application of those techniques, (3) virtuosity and artistry, (4) creative listening to work with others in the group, (5) leadership (in whole or part), (6) confidence, and (7) collaboration (rather than competition) between musicians within the group.

By applying the above we can suggest a framework that can provide additional insight and application of marketing strategy elements to the classroom. To introduce the jazz metaphor the author first asks students to role-play, imagining they were in an improvising band and to define the characteristics and elements that they would need to consider for any given successful performance. The “unpacking” of these elements leads to a discussion of the similarities to the elements of the marketing strategy process and decision-making. Elements of the framework, which is then used in case analysis and other aspects of course discussion, are discussed below.

### **Context and Situation Analysis: Knowing the Form, Players, and the Audience**

Jazz players must understand a number of aspects of the context to successfully perform their role. These elements include knowing the song “form” (e.g. is the piece in ABA song form, a

12 bar blues? etc.) and style, the abilities and roles of other players, as well as audience characteristics—the latter having important considerations for the particular repertoire that may be most appropriate or acceptable.

Marketing strategist for their part must also know the “form”, other players, audience characteristics and other contextual aspects to be successful—that is, they must perform careful situational and environmental analysis. Like for jazz musicians these situational elements help to define the degree of freedom within which the strategist can appropriately operate and “improvise”. Students are introduced to the notion that an important contextual determination for marketing strategists is the degree to which the organisation itself is improvisational, and how this relates to its level of market orientation and strategic consideration. For example, an assigned reading from Dennis and Macaulay (2007) suggests that market orientation can embrace improvisation on at least four levels:

- One size fits all organisations embody a low market orientation with low levels of improvisation; they are rigid, overly bureaucratic organisations which reject creative solutions in favour of strict planning.
- Improvisation through pre-planned alternatives can be found in organisations with a low market orientation, with limited strategic planning, but with higher levels of improvisation principally at the operational level.
- Single level improvisers are characterised by high market orientation with low levels of improvisation—with the latter limited mainly to the tactical level
- Multi-level improvisers are organisations with both high market orientation and high levels of improvisation. Improvisation at all levels of the organisation is encouraged by this type of organisation.

While this framework is somewhat simplistic, a knowledge of the degree of improvisation and its characteristic levels within the organisation is an important guideline for strategist, who, like jazz musicians, must “work” the context—as well as work within it.

Analysis of a number of other contextual questions is also helped by an application of the jazz metaphor. These include: Do we understand the form? That is, is the strategic problem appropriately “formed”? Are we tackling the wrong problem? Are the techniques we are applying appropriate to the form? Do we understand and appreciate what all players are doing, as well as their abilities and limitations? Marketing strategists, like jazz musicians, need to have a sense of whether players are in Dennis and McCauley’s (2007) terms more “jazzers” (those who can improvise) or more readers (those who can’t improvise), and their particular role and influence in the group. For example, what about decision-makers? What knowledge and familiarity do they have with both the form (problem) and with strategic techniques? Are they risk takers or risk averse? What views do they have? Do they express new ideas or do they constantly replay the same old tunes, in the same old way?

### **Full Knowledge of Techniques, and Creative Application Options**

Jazz players must have many tools and approaches to play and improvise at will, lest their music making and contribution to the group be limited. They must have a full range of techniques to call upon, and be able to use these in a range of keys, tempos, and styles (Author’s note: My marketing strategy students are told that, indeed, those learning to play jazz are encouraged to learn each piece in all keys, and jazz musicians often “test” other players competencies by calling for a tune to be played in a ‘difficult’ or different key, or in a style or tempo which is not the norm). Jazz players must exhibit flexibility and judgment in

their ability to apply these techniques appropriately to the situation—an oxymoron is a jazz musician who plays the same way regardless of situation.

Metaphorically, in a similar fashion, students discuss that marketing strategists should have a range of analytical tools and techniques, both qualitative and quantitative—a strategy tool box. Students in the capstone course will already have been introduced to a number of potential tools of strategic analysis. However, invariably they have had little “practise” in using and /or coordinating these tools. Further, strategic mastery requires a full complement of techniques, --forming the basis for the introduction of a number of new tools useful for analysing and evaluating the strategic way forward

Like jazz players, marketing strategists must also know the rules—structure, technique and context to appropriately apply the available techniques. But that’s not enough—the holistic requirements of the new business environment mean that strategists, like jazz improvisers, must be free to interpret and apply creativity, and judgment, when required. Students are therefore introduced to notions of creative problem analysis, and the roles, considerations and limitations of various analytical tools in this regard. The jazz metaphor is used to suggest to students that marketing strategists must move toward what has been termed “jazzers” (Dennis and Macaulay (2007) as opposed to “readers”—the latter are those who can’t improvise, or show some creativity.

### **Virtuosity and Artistry**

Strategy is both art and science. Metaphorically, in the case of virtuosity and artistry, students are introduced to the value of “surprise” in jazz playing, as well as its considerations in strategy. They are further told that jazz is a continuously evolving idiom, and jazz musicians are constantly seeking to improve, extend, and revise existing techniques and forms, and more towards the new—with parallel application suggested for marketing strategists. One of the more interesting topics which is discussed in this area is the notion of ‘effortless mastery’ discussed in Werner’s (1997) book *EffortlessMastery: Liberating the Master Musician Within*, which advocates that mastery as a musician (and on a deeper level—in life) can be learned through a creative letting go—a liberation of the master musician within. This does not mean that the aspiring player abandons the practice regime which will make him or her more conversant with the required technical aspects of his art. Indeed, a mastery of technique is a prerequisite for being a capable player. The aim is to go far beyond the capable. A master jazz musician is a player who is technically superb, with a range of technical applications and the knowledge to *creatively* apply them, who is capable of rapid affective response, who pushes the limits of expression and application, plays his own song (e.g. Green 2003; Green and Gallwey 1986; Lieberman,1997) but is nevertheless true to the form (structure) and context. The point is that much of what we need to know is within us. Strategists, like jazz musicians, must learn to tap this knowledge and to trust our instincts .

### **Summary of Other Framework Elements**

Length restrictions prohibit other than a brief summary of how other elements of the jazz metaphor framework are utilised in the marketing strategy classroom. However, in a similar fashion to that discussed above the notions of (1) creative listening, (2) collaboration and synergy, and (3) leadership and confidence are all worked into the coursework, class discussion and case analyses.

As regards collaboration and synergy students discuss how there is nothing quite so metaphoric as the “tight” sound that characterises a jazz group that has played together successfully for a long time. There is a “fusion” and “synergy” that amply displays the notion that the whole is much greater than the sum of the parts. This metaphorically can be applied to evaluation of the synergy associated with a given strategy and its components, for example.

Jazz is an aurally transmitted art. From its historical roots in ‘field hollers’ sung by Black slaves, and the blues, jazz has been a language passed on through listening. It is so today. The requirement to adopt to the changing improvisational nature of jazz means intense and creative listening is key lest the player fail to contribute, or worse, offer contributions that don’t jell with the collaborative flow of the group.

Students discuss that jazz players take chances on stage—jazz is music of the moment. Jazz musicians need to listen to understand when a change is taking place and anticipate where it’s going. They must match up techniques to the requirement of the changing situation. Today’s business environment and its accompanying rapid rate of change, imperfect data sets, and the like point to a tremendous need for creative listening by strategists, and commensurate anticipation of changes and “chances” in corporate decision making.

### **Evaluation of Strategy and Strategists**

Application of the jazz metaphor also suggests performance evaluation criteria that can be applied to each of us as individual marketing strategists---including our level of confidence, our ability to have a full range of techniques, and to creatively apply these, whether we are constantly looking for better answers, and so on. These elements are discussed with students as they apply both to case analysis and growth as individual marketing strategists.

The application of the jazz metaphor also suggests several contextual strategy evaluation criteria that extend more traditional strategy evaluation elements—some of these in relation to the strategy development *process itself*. Students are asked to think about the degree to which the process and solutions are true to the “form”(problem), whether the solution will be well accepted by the various audiences, how appropriately techniques have been applied in the context, and so on.

### **Conclusion**

The use of metaphor itself is well recognised in management theory, and the jazz metaphor is the dominant one in the management literature. This article has shown how the jazz metaphor can be used to facilitate thinking about strategic concepts and creative solutions in the Strategic Marketing course. The author has found that students have related well to the metaphor and have reported it did facilitate their strategic thinking.

Importantly, like jazz musicians, students (and instructors) can all *learn* to be better strategic thinkers, improvisers, and leaders, and as with many things, the learning is often in the doing. The jazz metaphor utilised in this article provides training directions and examples that can aid us in the quest for effective mechanisms for facilitating student learning. Operationally, the author’s experience is that this is a very easy metaphor for students to translate and understand, and that they indicate it really does facilitate their learning

### **References**

- Carr, L. (1998) *The Definitive Biography of Miles Davis*, Harper Collins, London
- De Bono. E. (1990) *Lateral Thinking: A Textbook of Creativity*. London, Penquin.
- De Bono. E. (2000) *New Thinking for the New Millennium*. London: Penquin.
- Dennis, N. and Macaulay, M. (2007), Miles Ahead—Using Jazz to Investigate Improvisation and Market Orientation, *European Journal of Marketing*, 41,5/6.
- Green, B.(2003). *The Mastery of Music*. Broadway Books, New York.
- Green, B. and Galway, W.T. (1986) *The Inner Game of Music*. Doubleday, New York.
- Kamoche, K. and Cunha,M.P. (2001) Minimal Structures: From Jazz Improvisation to Product Innovation, *Organization Studies*,22 95) 733-764.
- Kamoche, K., Cunha,M.P. and Cunha, J.V. (2003) Towards a Theory of Organizational Improvisation: Looking Beyond the Jazz Metaphor, *Journal of Management Studies*, 40 (8)2023-2051.
- Lengnick-Hall, M. and Lengnick-Hall, C. (1999) Leadership Jazz: An Exercise in Creativity, *Journal of Management Education* 23(1) 65-70.
- Lewin, A. Y. (1998) Jazz Improvisation as a Metaphor for Organizational Theory, *Organization Science*, 9 (5) 539.
- Lieberman, J. L. (1997) *You Are Your Instrument: The Definitive Musician's Guide to Practice and Performance*
- Moorman,C. and Miner,A.S. (1998) The Convergence of Planning and Execution: Improvisation in New Product Development, *Journal of Marketing*, 62, (3), 1-29.
- Morgan, G. (1997), *Images of Organizations*, Sage. Thousand Oaks, CA.
- Moshavi, D. (2001) Yes, and ...Introducing Improvisational Theatre Techniques to the Management Classroom, *Journal of Management Education*, 25(4) 437-449.
- Nachmanovitch,S. (1990), *Free Play: Improvisation in Life and Art*, Jeremy Tarcher/Putnam/Penquin Books, New York,N.Y.
- Neilsen, A. (1992), A New Metaphor for Strategic Fit: All That Jazz, *Leadership & Organization Development Journal*, 13 (5) 3-6.
- Newton, P.M. (2004), Leadership Lessons From Jazz Improvisation, *International Journal of Leadership in Education*, 7 (1), 83-99.
- Oswick,C., Keenoy,T., and Grant, D. (2002) Metaphor and Analogical Reasoning in Organization Theory: Beyond Orthodoxy, *The Academy of Management Review*, 27 (2), 294-303.

Pavlovich, K. (2003), All That Jazz, Long Range Planning, 36 (50) 441-458.

Tinari, F. and Khande, K. (2002) From Rhythm and Blues to Broadway: Using Music to Teach Economics, The Journal of Economic Education, 31 (3) 253.

Weick, Wagner, C. (2003), Out of Context: Using Metaphor to Encourage Creative Thinking in Strategic Management Courses, Journal of Management Education, 27 (3), 323-43.

Weinrauch, J. D. (2005) An Exploratory Use of Musical Metaphors to Enhance Student Learning, Journal of Marketing Education, 27 (2), 109-121.

Werner, K. (1996) Effortless Mastery: Liberating the Master Musician Within, Jamey Aebersold Jazz, Inc, New Albany, IN.