

On the Offbeat: Applying the Jazz Metaphor to Move from Mainstream to More Holistic Marketing Research

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Abstract

The article employs the metaphor of jazz music making to facilitate visualisation and implementation of needed change within the market research profession. The article also contributes to the literature in positing potential new forms of evaluation criteria suggested by the metaphor which might be used in evaluating research (and researcher) quality. An example of how the metaphor might be applied to make the typical research presentation more engaging to decision-makers is also provided.

Introduction

There is a growing amount of discourse in the literature around the idea that market research as a profession needs to make some changes to correct deficiencies in relevancy and in terms of meeting the needs of decision-makers (c.f. Dolan and Ayland 2001; Chadwick 2006; Garcia-Gonzalez, 2006; Gordon 2006; Keegan 2007; McDonald 2008). Perhaps most important in this discussion is the call for the profession to get closer to managerial decision-making, to becoming more flexible, with researchers not being an outsider but more an active participant in the decision-making process, and to practice what Smith (2005) has termed a more holistic approach to research and interpretation. Smith (2005) suggests that “this requires researchers to : draw on multiple sources of (often) imperfect evidence; go beyond the ‘literal’ consumer survey evidence; make various creative interventions to provide fresh insights and new perspective; and also weave customer knowledge together with other types of market, financial and organisational information.”

Given the call to move away from more mainstream, and some would suggest tedious (Piercy, 2006) research to more “offbeat” more holistic research requirements, the author suggests that it is important that research practitioners begin to develop skills that will facilitate more insightful and decision-relevant research. However, even *visualizing* the necessary process for change, must less dancing to it, is often not easy. To this end, the use of metaphor may be very useful.

Metaphors involve the transfer of images or ideas from one domain of reality to another (Weinrauch, 2005). Indeed Morgan (1997) suggests that metaphorical thinking permeates all types of business thought. Jazz has been identified as an important new 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 jazz metaphor, however, has to date only limited attention in the general marketing literature, (Dennis and Macaulay 2007) and has *not* been applied to the marketing research discipline.

Based on a twenty year career in marketing research (divided between the research industry and academia), as well as his professional jazz experience, the author believes the reason that

jazz is a very useful metaphor is the relevance of its application to the subject. Like with the jazz idiom, linearity and unbounded predictability are not currently appropriate in strategy or research given current fast changing conditions. Rather, what *is* required for marketing researchers is more creativity, flexibility, new methods of application, and the like. The jazz metaphor can be used to facilitate discussion and directional changes appropriate to these requirements.

While there are many types of jazz, all forms of jazz require a degree of structure, some improvisation around that structure, cooperation and common goals of performance. Further, the core competences that are required of a jazz group for a successful performance have been identified by Dennis and Macaulay (2007) as musical knowledge, role definition, quasi-autonomous leadership, open communication and self reflexivity. Metaphorically applying these elements and the directions for research called for by Smith (2005) can suggest a framework for improving the relevance of marketing research to decision-making.

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. They 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, researchers should have a range of tools and techniques, both qualitative and quantitative—a researcher's tool box. Like jazz players, researchers 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 research environment mean that researchers, like jazz improvisers, must be free to interpret and apply creativity, and judgment, when required. Factor analysis certainly requires some judgment, and in the hands of an amateur may be dangerous, but the move to greater holistics means that directionally researchers 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. Somewhat relaxing a significance level, for example, may yield a factor solution that is ever so much more meaningful from the decision maker's standpoint.

What do the jazz metaphor and the new research requirements suggest in the way of new techniques and /or new “forms”? Jazz is a continuously evolving idiom, and jazz musicians are constantly seeking to improve and revise existing techniques and forms, and more towards the new. Moving towards a more holistic approach to marketing research, suggests the need for a thorough understanding of existing techniques as they apply both to the mainstream and “at the edges”, to allow for improvisation.

The metaphor also suggests the need for both extensions and/or more creative use of existing techniques, as well as a search for the new. In the research arena, technological developments may help speed the development of techniques both more responsive to the market and *improvisationally* useful, if we are but confident enough to utilise them appropriately. New developments in online qual, bulletin boards, use of internet “blogs”, joint “hybrid” qual-quant techniques and others like them are directionally inline with a more improvisational approach. However, technology itself is only one avenue for potential new research techniques and their applications, and it may be that as equally promising applications,

perhaps many of them qualitative, can come from creative fusion of existing techniques in previously untried ways (c.f. Mills et al 2005).

Role Definition

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?) and style, the abilities and roles of other players, as well as audience characteristics. Researchers for their part must also know the “form” (problem), other players, audience characteristics and other contextual aspects to be successful. Like for jazz musicians these elements help to define the degree of freedom within which the (to use Smith’s term “holistic”) researcher can appropriately operate and “improvise”.

A first important contextual determination for researchers is the degree to which the organisation itself is improvisational, and how this relates to its level of market orientation. Dennis and Macaulay (2007) suggest that market orientation can embrace improvisation on at least four levels. While Dennis and Macaulay’s (2007) framework is somewhat simplistic, a knowledge of the degree of improvisation and its characteristic levels within the organisation is an important guideline for researchers, who, like jazz musicians, must “work” the context— as well as work within it.

Analysis of a number of other contextual questions may also be helped by an application of the jazz metaphor. These include: Do we understand the form? That is, is the research problem appropriately “formed”? Are we researching the wrong problem? Are the research design (and techniques) appropriate to the form? Do we understand and appreciate our role, vis a vis what other players are doing, as well as their abilities and limitations? For example, what about decision-makers? What knowledge and familiarity do they have with both the form (problem) and with research 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?

Applying the jazz metaphor, for their part decision makers often see researchers as “readers” (those who can’t improvise) rather than “jazzers” (who can). That is, decision makers often see researchers as data obsessed, tentative specialists, who do not have the full business perspective and who will not or cannot communicate results in a way which facilitates and *enables* decisions. Jazz musicians apply creativity, and may take contextually appropriate chances on stage. The requirements of the new “holistic” research suggest that researchers, too, must also learn to go somewhat beyond a comfort level that limits the acceptance and utilisation of research results. This is not to suggest that research quality is sacrificed, rather that we learn how to better deal with today’s research environment.

Leadership

Leadership for researchers and the research industry is a key element to meet the requirements of a new, holistic approach. In a jazz group, all players have the potential for leadership as (at least occasional) soloists. Researchers, who have typically taken a “support role” as regards the decision making process, will, of necessity, become increasingly called upon for contributions, and even perhaps as occasional leaders in the decision making.

Open Communication and Self-Reflexivity/Mastery

There is nothing quite so metaphoric as the “tight” sound that characterises a jazz group that has played together successfully for a long time. The players think, feel, act, and play as part of a well oiled unit. They not only react quickly to what others are doing, but can essentially anticipate directional changes. Each player through his or her own communicational efforts and ideas both feeds and leads the group.

Smith (2005) notes that researchers have typically not been forthcoming, many doubtless more comfortable with a “support role” and, more critically, suggests that researchers have not been forthcoming about technique limitations and foibles. This situation must change with time, as researchers need to become both more confident, and more accepting of the limitations of imperfect techniques and data sets, and must move beyond this to making a creative and useful contribution to the decision making situation. We must apply and *communicate* the relevant knowledge filters—i.e. what we already know about the value and potential limitations of our approach (Smith and Fletcher 2004).

In his book *Effortless Mastery: Liberating the Master Musician Within* Kenny Werner (1996) 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. The aim is to go far beyond the capable. As researchers we can aim metaphorically for the Effortless Mastery called for by Kenny Werner (1996). The requirements of the directional change towards a more holistic approach (Smith 2005) to research imply that we must learn to go beyond the capable, away from an obsession with techniques and facts (Piercy 2006), to trust our instincts and ourselves in the current environment of imperfect data sets, rapidly changing environmental conditions, the need for faster turnaround and results implementation.

Part of moving toward Effortless Mastery (Werner, 1996) involves reflection and evaluation. Smith’s (2005) article suggests that the new research requirements mean that we as a profession must work toward new mechanisms, (and author’s comment---perhaps new metrics) of evaluating research and researcher quality. Application of the jazz metaphor suggests performance evaluation criteria that can be applied to each of us as individual researchers/research suppliers---including our level of confidence, our ability to have a full range of techniques, and to creatively apply these, are we constantly looking for better answers, and new ways of designing and conducting impactful research that aids decision-making? Do we at least occasionally exercise a leadership role in the context of business decisions? are we forthcoming and forthright about the limitations and appropriate applications of the selected research techniques? How well have we collaborated with decision-makers in a successful result?

Implementation: An example

Smith and Fletcher (2004, p.187), among others, note the many “limitations of the ‘old’ market research building block approach to presentations, which include a laborious process of reporting results, and does not usually help the decision-maker make a decision. Using the jazz metaphor can suggest ways of presentation improvement to engage decision-makers. For example, in presenting research results, consider the parallels that exist between the presentation of research results, and the jazz solo. A good jazz solo will tell a story, will

engage and involve the audience, work well with the dynamics of the group, will feature creativity and occasional surprises in its improvisational development, and will lead to a natural climax before ending that may suggest a new direction for the next soloist or chorus.

Applying this to the research setting, to engage and involve the decision-making audience:

- Do presentations in a narrative context—like jazz story telling
- When presenting (soloing) don't paint by the numbers or a formula or play the same old way (e.g. start from the end!)
- Attempt to engage with decision-makers in new and different ways
- Push the limits (at least somewhat), and encourage others to do so
- Where appropriate feature surprises in the presentation
- Adopt presentations to audience
- Think so what? (what is the real climax for decision-makers)
- Consider the notes not played! (e.g. what you don't say, may be the most important consideration)
- Make sure upon ending (as in a jazz solo) that you lead naturally to the next step (e.g. always facilitate decision-making)

Conclusion

Using the jazz metaphor this article has addressed a number of important areas for marketing researchers to consider and apply if the profession is to move in the required directions. More specifically, for researchers, like jazz musicians, skilful performance requires full knowledge of techniques and options, leadership (in whole or part), open communication and self-reflexivity. The jazz metaphor also suggests some evaluation criteria to be applied to both research and researcher quality, as well as a constant search for that which is new, and a certain amount of willingness to go beyond that which is comfortable in the search for truth. It also suggests future research directions, which will need further elaboration and attention.

The article has provided an example of how applying the jazz metaphor can improve research presentations. In a similar way, researchers are encouraged to consciously consider the jazz metaphor as it may apply to all aspects of the research process.

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