

12-31-2012

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Kolar, T. (2012). Using metaphors as a tool for creative strategic sense-making. *Economic and Business Review*, 14(4). <https://doi.org/10.15458/2335-4216.1234>

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# USING METAPHORS AS A TOOL FOR CREATIVE STRATEGIC SENSE-MAKING

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Received: 15 May 2012

Accepted: 2 January 2013

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**ABSTRACT:** *This paper investigates the use of metaphor as a valuable tool in encountering contemporary challenges in marketing strategy development. A review of the literature indicates how traditional approaches pay insufficient attention to the fact that marketing strategy development rests largely on the processes of intuitive and symbolic thinking. The first part of the paper establishes creative strategic thinking, which includes these processes as a key imperative in marketing strategy development. To show how metaphors can serve as a tool in encountering some of the challenges identified the second part examines the functions of metaphors. The final part of the paper presents a practical example of use of the military metaphor in the process of marketing sense-making and strategy development, followed by proposal of an extended and universal framework for metaphorical transfer and a discussion of the principles of such use.*

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**Keywords:** *marketing strategy, creative thinking, metaphors, military strategy*

**JEL classification:** M31

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## 1. INTRODUCTION

This paper posits that metaphors are helpful tool for coping with one of the key managerial challenges at development of marketing strategy, namely that of assurance and management of creative insight and sense-making. Following Hill (2013), Green (1998) and other (Enright, 2001; Kilroy & McKinley, 1997; Mintzberg, 1994), strategy might also be conceived as a psychological process, which is intuitive (pre-rational) and symbolic, and not merely institutional, formal, conscious and rational. Concurrently it is argued that managers cannot act as perfectly informed scientists as they operate in complex and unpredictable market environments, possess limited insight into their own judgment processes, yet are expected to conceive always new creative strategic solutions with limited resources. In such (i.e. real) conditions autonomous personal judgment is key quality that enables creative strategic decisions (Brownlie, 1998). While literature about strategy development is rich with “rational” analytical tools like SWOT analysis, the array of tools and approaches that are aimed at intuitive, symbolic and pre-rational aspects of strategy is scarce.

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The problem which will be addressed in this paper is over-reliance and over-emphasis on formal, analytical, rational and organizational aspects of marketing strategy development, which hinder strategic creativity, while competences and tools for creative thinking, which is an essential part of creative and successful marketing strategy today, tend to be neglected. These concerns are especially relevant in the marketing field, where a lack of strategic creativity is indicated (Piercy, 2009; Brownlie, 1998). Based on this problem statement we propose, explain and illustrate that metaphors are valuable and useful tool for enhancing creative thinking capabilities of marketing strategists. Key intended contribution of the paper is an improved insight into the function and use of metaphors as a strategic thinking tool. More specifically, the paper focuses on using metaphors for improving thinking and sense-making abilities of managers which pertain to implicit assumptions, intuition, creativity and reflexivity. Theoretical contribution of the paper is evident in proposed dimensional conceptualization of metaphors (see figure 2) and treats the metaphorical and the literal as a continuum, rather than emphasizing the exclusivity of various types and notions of metaphors like dead/live, literary/scientific. For managerial contribution paper presents the detailed “how-to” approach regarding the use of metaphors as creative strategic thinking tool, which is afterward illustrated with a detailed example of how a popular, yet dormant warfare metaphor (i.e. Marketing is war) can be ‘woken up’ and used for creative strategic thinking.

Use of military and other popular metaphors in marketing is usually limited to anecdotal illustrations (see e.g. Whysall, 2001; Ries & Trout, 1986), or as a qualitative research method (see e.g. Cornelissen, 2003), while more operative and systematic use of metaphors for strategic creativity tend to be neglected. Paper is structured in several interrelated parts. In the first, theoretical part, key concepts (marketing strategy, strategic marketing, and creative thinking) and their relationships are defined and clarified. Afterwards contemporary strategic problems and challenges in marketing are discussed, showing how these key concepts are intertwined, followed by proposal of suitable approach for the development of creative marketing strategy. In the second, application-oriented part, several strategic metaphors are discussed and their characteristics and functions are explained. Afterwards the process of systematic use of metaphors for creative strategic thinking is outlined and illustrated on a practical example of military metaphor. In conclusive part an extended and more universal framework for systematic use of metaphors is proposed, together with a reflexive discussion of qualities and weaknesses of strategic metaphors.

## 2. CONCEPTUALIZATION, CHALLENGES AND IMPERATIVES OF MARKETING STRATEGY DEVELOPMENT

Extensive theoretical discussion of the concepts of strategy, marketing role in the organization, creativity and thinking capabilities, are beyond the scope and purpose of this paper. Still, clear understanding of them and clarification of their interrelationships is of crucial importance for contemporary marketing strategists. Because of that key concepts addressed in this paper are first defined and afterwards discussed from a viewpoint of the introductory problem statement.

Marketing strategy is traditionally conceived as a part (lower level) of the general corporate strategy, which is according to Johnson et al. (2008, p.3) defined as the “direction and scope of an organization over long term, which achieves advantage in a changing environment through its configuration of resources and competences with the aim of fulfilling stakeholder expectations”. Kotler and Armstrong (2005, p. 53) define marketing strategy as the “logic by which company hopes to achieve strong and profitable customer relationships, which involves deciding which customers to serve (segmentation and targeting) and with what value proposition (differentiation and positioning)”. Strategic marketing concept on the other hand is more focused on the implementation and management of marketing strategy and according to Kotler (2003) refers to the “development and sustenance of the coordination between the goals, capacities, resources and the variable market opportunities of a company”. Other related and relevant concepts, addressed in this paper are marketing thinking, strategic thinking and strategic creativity. Marketing thinking is a “particular type of questioning about how to compete successfully by providing value (creating choice) as defined by target market. It is an active cognitive engagement centered on strategically out-thinking the competition” Hill (2013, p.6). According to Piercy (2009) strategic thinking pertains to major strategic issues (as opposed to tactical decisions) about which strategists need to think about (e.g. growth, imitation, radical innovation, crisis, social legitimacy, speed etc.), while strategic creativity is about new ways of doing business and about new processes of going-to-market.

How these concepts are related and how should they be applied in order to contribute to the development of creative marketing strategy? According to Greenley (2001), marketing strategy is an outcome of a strategic planning process, followed by marketing planning process. Some authors however argue, that relationships among concepts of marketing planning, marketing strategy and strategic marketing and are not so simple and clear. Sharma (1999) asserts that strategic marketing is a new paradigm with broader scope and a more integrative discipline than marketing strategy. He emphasize that recent developments brought marketing strategy closer to the strategic management model and that in such model a shift towards more integrative approach to competitive strategy is evident, where functional boundaries are blurred, where internal mechanisms, processes and capabilities are more emphasized (rather than outside/market activities) and where market orientation is an organization-wide concern. Piercy (2009) for instance does not differentiate between corporate level and marketing strategy and instead of hierarchical strategic planning process proposes an horizontal, organization wide process of going-to-market, where creative strategic thinking is first step in the process of development of value-based marketing strategy. Because of that various aspects of marketing strategy development (i.e. its scope, process, content, outcome, problems, and creative capabilities) need to be discussed more in detail.

Several authors draw attention to the confusion and lack of consensus when considering the concept of marketing strategy, which relates both to its domain and content (Greenley, 2001; Robins, 1994; Varadarajan & Jayachandran, 1999). Consider two kinds of conceptualization in the literature. The first treats marketing strategy in a narrow sense – as a strategy of the marketing business function of (Ferrell, Hartline, Lucas & Luck,

1998; Varadarajan & Jayachandran, 1999). Within the framework of this view, marketing strategy is understood primarily as a result of a marketing plan which deals with the question of how to use marketing resources for attaining marketing goals (McDonald, 2002). The second, broad, understanding of marketing strategy can be described as strategic marketing, as it stresses the importance of decisions about marketing resources and activities in relation to gaining and retaining the competitive advantage of the whole company (Aaker, 2005; Day, 1992).

The essence of marketing strategy, uniting both narrow and broad conceptualizations, can thus be defined as deciding on how to achieve marketing goals that will simultaneously lead to the whole company's success. When dealing with the explanations of the content of marketing strategy we again encounter approaches with different scopes. Greenley (2001) lists five components which define, or compose, a marketing strategy: segmentation and choice of markets in which the company is to participate; specification of the number and range of products offered on the market; marketing mix decisions; determination of marketing entry; and the schedule of strategy implementation. According to this view, the marketing mix (the product, the price, promotion, and distribution) is only one component of a marketing strategy, while some authors define it as the framework or the core of marketing strategy (Foxall, 1981).

Apart from containing these components, the concept of marketing strategy also includes other aspects that, from the perspective of this article, are of crucial importance. Varadarajan & Jayachandran (1999) delineate the content of marketing strategy from the process of its development. The latter consists of decision activities, the application of analytic techniques, and the rules on which decisions are based. They further separate the process of marketing strategy development from its implementation, which includes execution, coordination, and control mechanisms. In terms of this separation into the content, process and implementation aspects of marketing strategy, we focus primarily on the process-related aspects of strategy development. As it will become clear from what follows, a too narrow and overly fragmented discussion of the individual components and aspects of marketing strategy is one of the main challenges of the traditional approach. By traditional approach we mean the so-called marketing management and strategic planning approach, which is mechanistic and based on presuppositions of objectivity, rationality and formality. This approach fits within logical empiricist paradigms and as such is opposed to subjective, socio-political, and emancipatory paradigms in marketing (Saren, 2000).

Critiques of the traditional approach relate to a discussion of the content as well as to the process of marketing strategy development. An excessively narrow, inflexible, and unrealistic understanding of the process of strategic planning in marketing is also noted by Harris (1996) and Piercy & Morgan (1994). For them, the key problem is the omission of the organizational and behavioral obstacles to planning. Menon et al. (1999) also point to overlooked aspects of marketing strategy development. They conclude that our understanding of how successful marketing strategies are created is deficient, and they ascribe this to two main reasons. First, to the fragmentation related

to an excessively isolated study of different stages in the development and implementation of marketing strategies. The second reason is the exclusivity of perspectives from which the development of strategies is discussed. The managerial and the academic perspectives usually exclude each other, which results in the absence of a link between theory and practice in this field. The autonomous decisions of marketing managers for instance represent an aspect that is particularly ignored. A motivated manager namely plays an instrumental role in the design of successful marketing strategies (Hutt et al., 1988). According to the findings of the latter, successful managers work in informal and loose networks of communication, which in themselves reach beyond their strictly marketing function; they manage to secure support for the proposed marketing decisions from the beginning, and only later formalize these networks in the form of strategic planning. The thesis that marketing strategy development and implementation do not exist as separate, but as closely tied and simultaneously developing phases is thereby fully in place (Dennis & Macaulay, 2003; Menon et. al., 1999). Moorman & Miner (1998) define such a temporal convergence of development and implementation as improvisation, the latter being especially reasonable in volatile market environments.

Adding another to the challenges resulting from the practical aspects of marketing strategy development is necessary. A grasp of this challenge builds from the discovery that traditional approaches, because of their exaggerated formalization and their emphasis on rationality, blind marketing managers, and therefore limit their intuition, reflexivity and creativity. Only autonomous and personal judgment enables creative strategic decisions, particularly in conditions of increased insecurity, incomplete information, and various interests within the company (Brownlie, 1998). The process of marketing strategy development can thus also be understood as a set of disorderly and disconnected processes in which there is active participation by many individuals and interest groups with different beliefs and thought worlds (Frankwick et al., 1994).

### 3. THE PROPOSED APPROACH AND THE KEY CONCEPTS FOR MARKETING STRATEGY DESIGN

Identified challenges imply the need for approaches that would enable a more integral perspective and openness to different modes of thinking and, as such, overcome the limits of more traditional approaches. Hill (2013) proposes four dimensions of strategic marketing thinking that is Creative, Reflective, Critical and Temporal. For the purpose of the paper however more suitable approach is that of Fodness' (2005) model of strategic thinking, which seeks to overcome the weaknesses of strategic planning: It consists of the following four dimensions:

1. Thinking strategies, which include techniques of critical and creative thinking;
2. Strategic decision making, which relates to the underlying presuppositions of certain decisions and to the question of why these decisions should be made;
3. Strategic competencies, which encompass the development of the capacity to discover alternatives and identify critical factors;

4. Strategy visualization, which means the identification and visual presentation of key strategic elements.

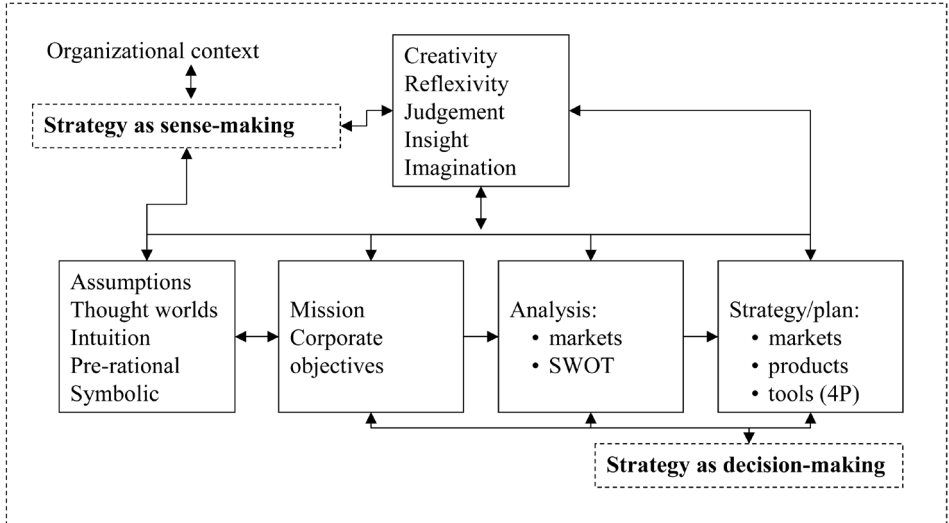
If this model is to be put into practice, we need to understand the concepts and principles that it either includes or to which it intimately relates. Apart from the mentioned improvisation (Moorman & Miner, 1998), which refers to the behavioral component of the strategy, several other concepts on the other hand refer to the thinking component of the strategy. Andrews & Smith (1996), therefore, stress the important role played by imagination in the development of marketing plans. Imagination depends on the nature of managers, as well as on the characteristics of the process of planning. Brownlie (1998) also stresses the importance of creativity, and maintains that a marketing manager should be understood above all as a creative artist, relying much more on managerial judgment than on analysis. This kind of judgment tries to interpret and understand the meaning of information; it is reflexive and critical in the examination of its implicit presuppositions and open to different views of a particular problem. Designing a strategy therefore demands less analysis and planning and more thinking, which also dictates the use of intuition (Enright, 2001; Kilroy & McKinley, 1997; Mintzberg, 1994).

Fodness' (2005) model and the concepts it deals with point to some important implications for a more thoughtful and creative approach to marketing strategy development. One implication relates to understanding the process of strategy development, which cannot be understood exclusively as a rational, linear, formalized, objective and analytical process. Following Green (1998), strategy development is a process of generating important insights about the relations between marketing stakeholders and about the meaning of these relations. Such a process allows marketing managers to make these relations intelligible and to explain their strategic significance to others in the company. Only in this way will the marketing strategy realize the two key functions of a business strategy – namely, to direct (show the way) and at the same time animate (make meaningful) (Cummings, 2002). Such an understanding of strategy supports the notion that it relies to a large extent on an intuitive (pre-rational) and symbolic, and not merely a conscious and rational process. Accordingly, marketing strategy can be conceived as a cluster of *sense-making* activities, where some of them precede and some complement formal (decision-making) process of marketing strategy development (Figure 1).

Given that the understanding of strategy as sense-making attributes such an important role to abstract and subjective concepts such as meaning, intuition and sense, it becomes imperative for marketing managers to use proper techniques and tools to help them manage these concepts. Metaphors are such a tool. Their potential in marketing strategy development, however, seems to be poorly utilized – in spite of their common use. Managers very often use metaphors in their everyday communication (Doyle & Simms, 2002; Foster-Pedley, Bond & Brown, 2005). Their use, however, is usually unconscious, expressive, and directed towards the goal of persuasive communication, while the systematic, planned use of metaphors as incentives for creative strategic thinking rarely exists. Such a gap can be attributed to the prevailing consideration of metaphors as a tool for advancing scientific theories (Arndt, 1985, Hunt & Menon, 1994, Tsoukas, 1991, ) and/or in-

depth understanding of consumers (Coulter & Zaltman, 2000; Woodside, 2008; Zaltman 2003; Zaltman & Zaltman, 2008).

Figure 1: *Marketing strategy as a decision-making and as a sense-making*



(source: own)

#### 4. CHARACTERISTICS AND USEFULNESS OF METAPHORS

Metaphor is a figure of speech which connects two concepts or domains (e.g. time is money). Various authors stress different aspects of this connection. Tsoukas (1991) defines the metaphor as a transfer of information between a known and a lesser known domain; Hatch (1997) defines it as an understanding of a certain experience in terms of another experience; Tynan (1999) defines it as the transfer of a name, of a descriptive expression, or a phrase, to an object or an action. A transfer of meaning from one domain (e.g. time) to another domain (money) is therefore an essential characteristic of metaphor. That they suggest a figurative (connotation, symbolic meaning) and not a literal (denotative) sense is another of their essential characteristics. Because of this, metaphors are partial and incomplete models (Arndt, 1985) and cannot be true in a scientific sense. They can, however, be “connotatively true” (Hunt & Menon, 1995). The basis of their usefulness lies precisely in the nature of metaphors as imaginatively suggestive forms of a constructive lie (Tynan, 1999). Metaphors can be understood as lenses through which certain phenomena, experiences, and concepts are seen in a new and different way (Lakoff & Johnson, 1980; Nogales, 1999). This is why they are potentially useful as tools for critical thinking, persuasive communication, and also in attempts to influence behavior.

The most important distinction in the classification of metaphors is the one between theoretical and literary metaphors, cited by many authors (Coulter & Zaltman, 2000;



Ghychy, 2003; Hunt & Menon, 1995; Tynan, 1999; Van den Bulte, 1994). Theoretical metaphors stimulate systemic research and imply relations between different concepts. Literary metaphors are mainly useful for vivid descriptions and articulations in everyday communication, which often turns them into clichés, causing them to lose their capacity to stimulate. It is in this sense that Tsoukas (1991) differentiates between living metaphors, which contain the potential for further development of concepts, dead metaphors, which we no longer recognize as metaphors and therefore only understand them in their literal sense, and sleeping metaphors, those we understand literally, but which nevertheless still possess creative potential which has to be woken up. Rindfleisch (1996) lists metaphor's fundamental character, instrumentality, systematicity, selective character, experiential basis, and capacity to shape thought and action, as its key characteristic. Since these characteristics have important implications for how metaphors are used, we examine them more closely in what follows. Metaphors are fundamental because they structure our thoughts, our world-view, and consequently also our reality (Arndt, 1985; Tynan, 1999). They are fundamental cognitive tools, with which we form the meaning of concepts and phenomena. The concept of time is, for example, easily explainable to a three-year-old child by way of metaphors (e.g. one hour is like... a cartoon). But it is also scientists and managers who use metaphors in order to concretize and make coherent the abstract world, while developing their conceptualizations of it. The production and mediation of meaning is especially important in strategy development that takes place in uncertain business environments (Hill & Levenhagen, 1995). Foster-Pedley et al. (2005) stress the central role played by metaphors in the articulation of business strategies, while also concluding that managers are usually not aware of their everyday use.

Metaphors are at the same time instrumental, since their characteristics and functions make them useful for many different purposes. For the purposes of this article, it is their function in the process of creative thinking that is the most important. As they move concepts out of their usual contexts into new, unusual, and surprising contexts, metaphors liberate us from our existing beliefs, incite imagination, and, therefore, stimulate creative thinking (Rindfleisch, 1996; Tynan, 1999; Weick, 2003). The process by which metaphors enhance creativity and the practical application of metaphors are thus key issues in this regard. As the application of metaphors as tools for creativity will be thoroughly discussed below, it suffices to emphasize here that the creative potential of metaphors originates from differences that stretch beyond the known similarities of two concepts (Cornelissen, 2005). Metaphors improve the creative process in an organization particularly in those situations in which there is an overabundance of information in the environment, in the early stages of thinking (at the level of basic ideas and outlines), and when existing knowledge turns out to be equivocal, and problems badly structured (Hill & Levenhagen, 1995).

Metaphors also serve as a tool of communication, since they have the capacity to present difficult and complex concepts in a concise, understandable way (Rindfleisch, 1996). Compared to literal descriptions, metaphors enable a more vivid and conceivable way of communicating the concepts we want to present. As a tool of communication, metaphors are also useful in teaching, which holds especially for the field of creative strategic

management (Cummings, 2002; Weick, 2003). They can also be used in research and the production of knowledge, since they enable the articulation of intuitive insights. Metaphors, that is, suggest and direct approaches in research (Arndt, 1985), while at the same time enabling the articulation of implicit into explicit knowledge (Nonaka, 1991). By relying on imagination and symbols, metaphors enable intuitive understanding, which does not demand further analysis, examination, and generalization. That is why they serve as a kind of trigger in the process of producing new knowledge.

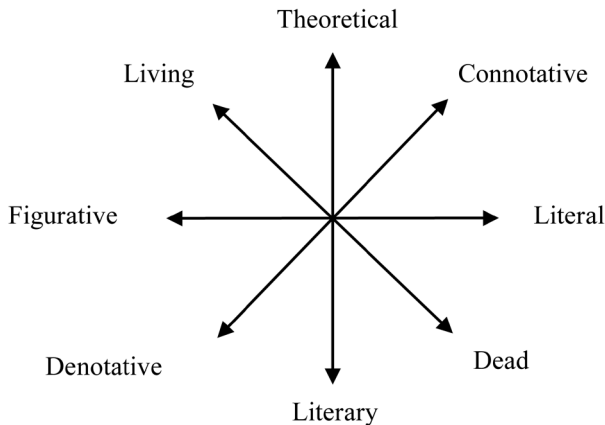
Apart from their function as a trigger, many authors also stress the motivational function of metaphors (Foster-Pedley et al., 2005; Hunt & Menon, 1995). Because of their partial falseness metaphors create a certain tension, which represents their motivational potential. Since they are logically inconsistent, paradoxical, and emotional, metaphors stimulate us in the direction of solving conflicts and tensions (Cornelissen, 2005; Hill & Levenhagen, 1995). Confusion, different meanings, lack of clarity, conflict, and doubt about self-evident presuppositions have, therefore, huge creative and motivational potential – as long as companies know how to make good use of them (Nonaka, 1991). Rindfleisch (1996) names some other functions of metaphors in addition to the ones listed above. Metaphors are, according to his conclusions, both systematic and selective. They are systematic in the sense that they connect whole domains and not merely their individual, isolated elements – especially when one speaks of so-called fundamental or deep metaphors (Arndt, 1985; Zaltman & Zaltman, 2008). The metaphor ‘time is money’ therefore includes different meanings of money and relates them to the domain of time. But metaphors are at the same time selective, since they foreground the individual elements of two domains, while pushing others into the background, which gives metaphors their character of partial truthfulness (Tynan, 1999).

Another important characteristic of metaphors is their experiential basis and the shared meaning they have for various users. Metaphors are based on the interactions between the people who use them and the physical and cultural context. They are functional because of shared meanings which they carry for both the sender and the receiver. The metaphor ‘time is money’, can, however, carry different meanings in different cultural environments and between different speakers. Tynan (1999) finds that the power of a metaphor results primarily from the meaning that the receiver is capable of placing in its internal contradictoriness. The new meanings enabled by the use of metaphors are therefore primarily an outcome of subjective interpretations of the latter, which bears consequence for their use.

The tensions produced by metaphors are functional and creative when they are approached in an appropriate, that is, in a constructive and dialectical manner. The use of a metaphor as a lens in a thoughtful and systematic manner by a reflexive subject suggests that metaphors in themselves are not automatically and independently functioning instruments or providers of conceptual substance. They are lenses through which the person using them interprets the meaning of some concept, object, or act - yet this lens does not convey a rigid meaning. From this standpoint a dimensional (i.e. dynamic, evolving, constructive) conceptualization of metaphors as depicted in figure 2 seems

more adequate than exclusivist binary distinctions between various types and notions of metaphor (dead/live, literary/scientific, truth/false, objectivist/subjectivist). Nogales (1999, p. 6), for instance, argues that “the metaphorical and the literal form a continuum, rather than existing as noncontiguous sets”. In addition metaphors interact, overlap and blend (Lakoff & Johnson, 1980; Zaltman & Zaltman, 2008).

Figure 2; *Dimensional conceptualization of metaphors*



(source: own)

The question of the metaphorical/literal is thus a matter of interpretation and *extent*. Such a conceptualizations offer an intelligible explanation of why one metaphor starts out as lively, and provocative, gradually loses its creative potential and ends up as dormant - or why a certain metaphor is in dispute in this regard.

## 5. THE USE OF STRATEGIC METAPHORS AS TOOLS FOR CREATIVE THINKING

Strategic metaphors are often used in the strategic management and marketing literature. The warfare metaphor is widely accepted as the dominant metaphor (see e.g. Kotler & Singh, 1981; Ries & trout, 1986; Rindfleisch, 1996, Whysall, 2001; Talbot, 2003) and indicates how strategic approaches and knowledge from military field could be applied in the business field. Ho & Choi (1997) for instance use Sun Tze’s warfare stratagems as a basis for development of model of business strategy development. Sun Tze’s thirty-six stratagems illustrate various strategic ruses (tricks) and thus employ “strategy as deception” metaphor. In a different manner Kim & Mauborgne (2004) use (blue) ocean metaphor, which implies that effective strategy is not necessary deceptive, but should instead make competitors irrelevant. Other relevant strategic metaphors are Jazz (Dennis and Macaulay, 2003), Theater (Kanter, 2002) and Design (Liedtka, 2000). Their common point is that strategy should be understood in a more open, improvisational and flexible manner than it is conceived in the traditional strategic planning framework. In similar

vein Prahalad and Ramaswamy (2004) use “strategy as discovery” metaphor, suggesting that strategy is a process of continuous experimentation, innovation and discovery, which need to be co-created with customers and collaborators. In this respect an interesting work is also that of Minzberg et al. (1998), who use ten different animals as metaphors for illustrating differences among ten different schools of strategy. In marketing field frequent metaphors are Marriage (Tynan, 1997) for customer relationship management and “brand as person” metaphor (Aaker & Fournier, 1995) for brand management. Metaphors are also useful for market research purposes, as illustrated by Zaltman & Zaltman (2008) who found and explored several “Deep Metaphors”, which are defined as basic, unconscious orienting structures of human thought and proved to be useful for better understanding of and communication with customers.

What are the key characteristics and functions of metaphors which enable their usefulness in marketing strategy development? In the first place metaphors open new perspectives at thinking and decision making, while at the same time are motivating and inspiring. Still, we need a more operative answer to the question: How does one choose the appropriate metaphor and use it as a tool for strategic thinking? Unfortunately, the literature dealing with this question mostly offers answers to the issue of what metaphors and what kinds of use are *not* appropriate, while offering very few concrete instructions for their appropriate use. One could, of course, hardly expect the assurance of some formalized and structured algorithm when speaking of creativity. Nevertheless, the use of metaphors can be deliberate and systematic. Tynan (1999) stresses that carefully deliberating the choice of an appropriate metaphor constitutes the first and very important step. In choosing a metaphor one must, above all, avoid two threats - first, the use of literary and dead metaphors, since these, used in a literal sense, no longer provoke thought. Second, a resemblance exists between the two domains connected by a metaphor that is either too strong or too weak. Many authors find the difference between two domains to be the precondition for a metaphor’s capacity to provoke (Cronelissen, 2005; Dahl & Moreau, 2002; Ghychy, 2003; Nonaka, 1991; Rindfleisch, 1996). Metaphors therefore have to connect two domains with enough in common to ensure interesting resemblances, while at the same time not making these resemblances too obvious and literal. Hunt & Menon (1995) add conceptual richness as one of the key criteria for the selection of appropriate metaphors. Conceptual richness is reflected in the number of concepts we compare between the two domains and also with respect to how well these concepts develop in their original domains. The concept of strategy is, for example, very well developed in the military domain, which makes it conceptually rich and interesting in comparison with marketing strategies.

However, the choice of an appropriate metaphor is not enough. Utilization of metaphor in the process of creative thinking should be managed – by means of deliberate metaphoric transfer. Metaphoric transfer between the two domains enables the realization of the creative potential of particular metaphors. Metaphoric transfer is a result of cognitive and emotional associations between two domains, and involves three principles: a good understanding of the research problem, a choice of the appropriate dimensions of the transfer and an explicit comparison of the selected dimensions of the transfer (Hunt

& Menon, 1995). They list four key dimensions, based on which a transfer between two domains is possible: ontological (key concepts), conceptual (key ideas and concepts), theoretical (rules and models that connect the concepts), and value dimension (values and norms). The choice of a metaphor is only a trigger for the creative thought process, while the further course of this process has to be more structured, able to foreground differences, and clarify oppositions. This demands a systematic comparison of resemblances and differences between the domains. A discussion of differences, ambiguities, and paradoxes is especially important in this process, since it is only through such a discussion that the production of new cognitions and meanings becomes possible (Cornelissen, 2005; Rindfleisch, 1996).

The proposed principles of metaphor use have to be placed in the process of creative thinking, which unfolds in three steps. In the first step, one focuses on the problem and creates a relaxed environment. In the second, central step, one sets aside the problem, which means that one consciously directs the focus away from the initial problem. This is achieved precisely with the use of metaphors, which lead the participants away from a rationally grounded problem with the help of an imaginary scenario (Maddox, Anthony & Wheatley, 1987). In this way what is known is made unfamiliar; and this enables a new view of what is familiar (Pečjak, 1989). As we take familiar concepts out of their usual, everyday context, we are able to recognize in them a new meaning (Weick, 2003). This is followed by the third step, in which one again focuses on the problem, including a systematic and explicit comparison, an interpretation of new meanings, and their association in a summary picture (Coulter & Zaltman, 2000).

## 6. AN EXAMPLE OF THE USE OF MILITARY METAPHORS IN MARKETING STRATEGY DEVELOPMENT

In this part, using the example of military metaphor, we show the practical applicability of metaphors in the development of marketing strategy. According to the above mentioned principles of metaphor use, we first determine the problem we will try to solve and creatively think through. This problem is presented in the form of all the challenges in marketing strategy development discussed in the first part of this article. Accordingly, we define the problem in terms of a consideration of the relations between the active marketing participants, including the basic presuppositions, critical factors, and alternative directions of the marketing strategy.

A selection of the appropriate metaphor follows a definition of the problem. In the present case, the study focuses on the military metaphor. The military metaphor, in spite of its common use (Kotler & Singh 1981; Ries & Trout, 1986) and the criticism leveled against it (Tynan, 1999; Wyshsall, 2001), is appropriate for the selected problem, because the domains of business (marketing) and military strategies share many common features (see Rindfleisch, 1996), while they are sufficiently different as to provoke thought (this is confirmed by the divided opinion of the defenders and critics of using this metaphor). In selecting this metaphor we have paid special attention to the fact that one should not

chose a metaphor based on its truthfulness, but on the basis of its creative potential, that is its conceptual richness – which is powerfully expressed in the military metaphor (Hunt & Menon, 1995). Finally, the strength of a metaphor stems mostly from the meaning infused into it by the recipient, and we shall try to show how strong the military metaphor can be if we resuscitate and use it in a constructive way.

In the second step, the systematic use of the chosen metaphor demands that one consciously sets the problem aside and later looks at this problem from a different perspective. In our case, we present a short outline of the historical development of military strategy (Box 1) as an imaginative scenario which temporarily leads us away from the problem and offers a view of it within a military perspective.

Although the term strategy stems from Ancient Greece, military strategy is a relatively new concept. The first to write about military strategy in the modern sense was von Buelow in 1799. He understood strategy as the art of leading military operations from a command post with the aid of plans and calculations (not directly from the field, as was the case in military practice up to that time). For him and his contemporaries, the skill of warfare was reduced to geometry (Van Creveld, 2000). War, however, with the central idea of destruction and killing, in its essence denies rationality. That is why a German military theorist of that time, Georg von Berenhorst, defended a completely opposite thesis: namely, that what counts in the practice of war is willpower, or the morale of the army. These opposing views were overcome by von Clausewitz (1989), who formulated a modern concept of military strategy. For him, war was primarily an act of violence, in which sheer force is the main reason for victory. The basic goal of military strategy is, according to his conception, the total (material and moral) destruction of enemy forces and the occupation of the capital of the enemy state. Following his conception, war is a continuation of politics by other means, which in turn determines its goals and places it exclusively in the domain of the state.

The further development of contemporary military strategy at the end of the 19<sup>th</sup> century is linked by some authors to the American naval theoretician Alfred Thayer Mahan (Talbot, 2003). Mahan stressed the importance of logistics, preventive strikes, and the limitation of enemy activity, which had long-term consequences for the concept of military strategy and was reflected in World War II. This doctrine relied on the presupposition that it is possible to achieve victory without complete destruction or frontal conflict, in which case flexible maneuvering with resources is as important as fire-power itself. As a consequence of this doctrine, states have become an irrelevant factor, war is globalized, and economic and productive elements become central to military strategy.

As emphasized by the contemporary military analyst Van Creveld (2000), today there are two predominant views on the future development of armed conflicts. One is the military doctrine of the USA, the so-called Revolution in Military Affairs (RMA), which stresses the importance of technological and informational superiority. The other is the so-called Low Intensity Conflict doctrine (LIC), or fighting in swarms. This doctrine has to be used by states overpowered by the enemy (e.g. Iraq) as well as by non-state organizations (revolutionaries, guerilla fighters, terrorist groups, religious movements, cartels, armed bands, and groups of radical activists) which are becoming increasingly important actors in armed conflicts. Unlike the technological-informational doctrine, the doctrine of fighting in swarms foregrounds the importance of ideological, religious, political, cultural beliefs as well as of purely profiteering motives (Arquilla and Ronfeldt, 2001).

*Box 1: A short outline of the historical development of military strategy*

By using the above outline, we can avoid the problem of an outdated understanding of military strategy. According to Whysall (2001), the supposed ineffectiveness of the

military metaphor relates to a failure to consider it in its contemporary context. Even in the most in-depth contributions, the authors mostly refer to von Clausewitz's classical theory of war (see, for example, Kotler & Singh, 1981; Ries & Trout, 1986) and to the wisdom of two-thousand-year-old wisdoms by authors such as Sun Tzu (e.g. Ho & Choi, 1997). Pech & Duden (2003), on the contrary, confirm the significance and usefulness of contemporary military approaches such as, for example, maneuver warfare. This brief excursus through the history of military strategy offers us a different viewpoint for thinking about marketing strategy from those existing in traditional marketing doctrine. For this purpose we have taken the ontological and the conceptual dimension of metaphors, as Hunt & Menon (1995) suggest, serving as a starting point for a systematic comparison of resemblances and differences between both domains.

Participants in a war, its organizational structure, resources and means for fighting, and, most of all, the military doctrine that reflects the fundamental presuppositions and principles of warfare represent the key ontological entities of the military metaphor. As is clear from a historical overview, the idea of avoiding immediate conflict and of the importance of logistic activity eventually superseded von Clausewitz's idea of total destruction. Taking this into account we can recognize a certain resemblance with the successful marketing strategies of companies such as IKEA and ZARA, who compete against their rivals not by engaging in price wars, but by focusing on a radically different production system, in which logistics plays the primary role of ensuring competitive advantages (Kumar, Scheer & Kotler, 2000; Mazaira, Gonzalez & Avendano, 2003). An analysis of the military metaphor is also interesting with respect to the relationship with consumers. Along these lines, Talbot (2003) claims that this is the point at which the military metaphor breaks down, since it is not entirely clear who would be the consumer in the context of warfare. In this view, the basic military presupposition – that of a conflict of interests – is especially questionable. This, however, makes the military element provocative and stimulates us to reflect on some fundamental presuppositions of marketing strategy. It is a fact that consumers are often disloyal (Knox, 1996; Reicheld, 1996) and increasingly distrustful, cynical, and combative, which is all reflected in the growth of consumer activism and in the increasing number of consumer boycotts (Brabbs, 2000; Micheletti, Follesdal & Stolle, 2004). We are unable to explain these trends by presuming the existence of a harmonious marriage with consumers as the traditional approach toward marketing strategy does. Accordance of interests can thus be a questionable starting point for an effective response to these trends. If a conflict with consumers is an actual reality, then it is necessary to admit its existence, find a better explanation, and a proper response. This then dictates that the existing doctrine of consumer satisfaction be complemented by an insight into the conflictual aspects of relations, as well as by developing strategies for the resolution of conflicts with consumers.

Consider the conceptual level of the military metaphor that has stimulated us toward further consideration of marketing strategy development. One of them is the concept of intelligence, which is singled out by the technological-informational doctrine as one of the key factors in establishing dominance on the battlefield. The main goal is the information superiority which results from the war of sensor systems (Cebrowsky, 2002).



Contemporary warfare relies heavily on information technology which enables commanders real-time perusal of front lines, while their intelligence function attempts to determine the sensory capacities of the enemy. Unfortunately, marketing is still a long way from such a vision, since it still predominantly relies on the ad hoc collection of information, which is usually not employed as support for strategic decisions. Consequently, marketing does not have the appropriate navigational influence on corporate business strategy (Aaby & McGann, 1989; Cowan, 1994). In this sense it would also be productive for marketers to think of a more systematic development of competitive intelligence capacities, or competencies, which would enable the perusal of the market position in real time, as well as competitiveness on the basis of the capacity to perceive the market. Walle (1999) proposes that competitive intelligence becomes an independent discipline whose task among others would be to monitor competitor's activities.

At the conceptual level, some aspects of guerilla warfare also serve as an interesting comparison, since marketing also involves the important question of what constitutes effective strategies for the struggle against dominant rivals. The strength of guerilla warfare lies mainly in its ideological basis and flexible organization. Similarly, it is a fact that consumption itself often has an ideological, cultural, and even political background (see for example Crockett & Wallendorf, 2004 and Micheletti et al., 2004), which is very rarely taken into account during the process of marketing strategy development. This is where great potential lies hidden for the contemporary unconventional challengers of global corporations, as is attested by the success of Mecca Cola, a product whose competitive strategy was built on anti-American iconography (Johansson, 2004). The invisibility of operation is another key concept in guerilla activity that can be interestingly compared with the domain of marketing, and that simultaneously has contradictory and far-reaching significance. Given that attracting attention, recognition, and awareness constitute their main objectives, marketing strategies tend towards maximum visibility (Kotler, 2003). The idea of invisible marketing therefore seems paradoxical. However, as a result of being constantly bombarded with an abundance of information, consumers have started to create a kind of perceptual defense to protect them from aggressive mass advertising. The question of how to pierce or avoid their radar with invisible advertising is therefore highly relevant. It seems that in this domain marketing practice is considerably ahead of theory. Stealth/Undercover marketing and tribal marketing are already frequently used in marketing (Cova & Cova, 2002; Kaikati & Kaikati, 2004). Both approaches share the characteristics of operating locally from nearby, the use of unconventional communication tools (interpersonal communication, opinion leaders, product placement in everyday entertainment and cultural context), and the use of consumer social relations.

Presented comparison of the military and marketing domains confirms the existence of considerable creative potential hidden in the former. And we are far from having exhausted its dimensions and elements in their entirety (see table 1). A further comparison of various dimensions and concepts would go beyond the purpose and scope of this article, which, however, does not mean that these further elements cannot be relevantly compared. Hunt & Menon (1995) confirm this in their detailed comparison of military theories and theories of competition. Their analysis could therefore only be complement-



ed – for example, with a discussion of the theory of contemporary asymmetric-dissymmetric war, which is a theory that examines the relations of power between superior and inferior opponents and explains how a move toward *virtual war* allows us to pursue a strategy of combat without casualties and without collateral damage (Stahel, 2004).

The problems of value dimensions are, for example, considered in Katzenbach & Santamaria (1999). They demonstrate how it is possible to encourage loyalty and effectiveness among employees by following military examples in developing moral values. A comparison of military and marketing values is particularly provocative, since it questions some of the fundamental stereotypes of military command (e.g. that the military is immoral, that it makes the individual irrelevant and that it represses independent thinking) and in this way causes us to reflect on these questions in the domain of marketing.

The last phase of metaphor use demands that we unite all the important insights into a unified picture and develop an integral solution for the selected problem. In accordance with our own problem, the solution can neither lie in some conclusive set, or matrix, of strategic alternatives, nor in some linear and strictly formalized algorithm of the phases of marketing strategy implementation. In our case, an integral solution to the problem is represented by a summary of considerations on the possible directions, factors, and elements of marketing strategy offered by a view through the prism of the military metaphor. If we are to summarize these considerations, we may say that such a vision of marketing strategy includes the following features:

- it is based on more realistic presuppositions about the relations between marketing participants, including conflicts and unethical aspects,
- it includes more effective marketing intelligence about the current marketing situation, as well as about the sensory capacities of the competition,
- it takes into consideration the broader social context, the disappearance of borders between various social spheres, and deploys ideology as the strategic resource,
- it uses to a large extent the potential of contemporary information technology in order to achieve more effective access to, and persuasion of consumers, as well as to reduce collateral marketing damage, and
- is directed at local, immediate interaction with consumers, using the existing informal social networks of consumers.

The always divergent nature of the outcome of creative thinking is important to stress. That is why our main goal is above all to further a discussion of its elements, rather than to suggest a precise and uniquely “correct” approach to it. Adapting strategy to a variable environment is easier if the strategy is developed as a broad vision (Minzberg, 1994) or when strategy is conceived as a discovery (Prahalad & Ramaswamy, 2004). Accordingly, marketing strategy need to be considered as a broad(er) vision and an exploration, with respect to:

- further debates on the fundamental presuppositions of marketing doctrine, as well as on the meaning of relations between marketing participants,
- a discussion of additional key concepts which connect both domains, reveal marketing paradoxes, and point to the unexploited potential of marketing strategy development,

- a dialectical consideration of the dominant (technological-informational) and the inferior (guerilla) marketing position, and
- a concretization of strategic implications with the use of current trends and successful marketing strategies as practical examples.

## 7. CONCLUSIONS

The theoretical and practical discussion of metaphors in this paper confirms their applicability as a tool for creative strategic thinking. On the practical example of military metaphor they confirmed expected function and proved to be inspiring, insightful and constructive. For this reason, we can conclude that metaphors can serve as an effective tool for in process of marketing strategy development. This however demands their thoughtful and systematic use. It is impossible to expect a realization of their creative potential, if metaphors are not used in an appropriate, deliberate way. In the case of the military metaphor, it has turned out to be quite a demanding task to use it; nevertheless, it corroborates the meaningfulness of the expected function and potential of the invigorated military metaphor.

Based on the experience and insights gained through the examination of a given metaphor, an extended and more universal framework for metaphorical transfer is proposed (Table 1). Proposed framework enables use of other relevant metaphors discussed in the paper (e.g. Jazz, Blue Ocean, Discovery, Marriage, etc.). Also, it is open for construction of other, future oriented metaphors like “marketing is reality show” or “marketing is video game”. As a second extension proposed framework upgrades original dimensions suggested by Hunt & Menon (1995) with additional dimensions. Possible additional dimensions are more practice and process oriented and include, yet they are not limited to, variety of elements that are relevant for development of creative marketing strategies (assumptions, methods, resources, tools, stakeholders, challenges, costs, processes, measures, benefits, experiences, etc.)

Table 1: *Expanded framework for strategic metaphorical transfer*

»Market(ing) (or Market, Business, Strategy, etc.)	is	«Warfare» (or: Jazz, Ocean, Discovery, Marriage, etc.)
Dimensions of metaphorical transfer:		
• <u>Concepts, Ideas, Theories, Values</u>		
• <u>Models, assumptions, methods</u>		
• <u>Resources, tools, actors, stakeholders</u>		
• <u>Problems, challenges, costs</u>		
• <u>Processes, activities, measures</u>		
• <u>Motives, benefits, experiences</u>		

(source: own)

When choosing (or constructing) alternative metaphors it is important that strategists have sufficient knowledge of the relevant context and content of a particular domain, which is a necessary prerequisite for a rich and productive metaphoric transfer. Contrary to some doubts about the usefulness of the military metaphor, presented example shows that it is very much alive and relevant; if only we can direct its transfer in an appropriate way. Doubts about the basic presuppositions and concepts of classic military strategy turned out to be especially productive, since this also enabled a different view of strategy in the domain of marketing.

Also, an interpretative, epistemological perspective is important for the recognition of new meanings, since in the objectivist-positivist perspective, concepts such as subjective interpretation and sense, simply do not exist (Hatch, 1997). Without doubt an analytical use of metaphors is required when metaphors are used as a research technique (see. Cornelissen, 2003). However, when creative and sense-making aspects of strategy are to be managed by marketing managers that operate in complex and unclear reality, an interpretative approach toward use of metaphors seems warranted.

Finally, consider some limits of metaphor use. Given that their use introduces subjective meaning, there is always a danger of “seeing what we want to see” with the aid of metaphors, or the danger of merely confirming our presuppositions. This is why metaphors gain their true validity only through inter-subjective communication (Rindfleisch, 1996). Moreover, metaphors are appropriate as triggers for creative thinking and the articulation of intuitive knowledge (Hill & Levenhagen, 1995; Nonaka, 1991), which is why they do not suffice for the development of integral conceptual models nor complete strategy. In order to serve as such triggers, the ideas and meanings revealed by metaphors have to be systematically interpreted. Since a metaphor always presents a partial truth, many authors advise the simultaneous use of several metaphors (Hunt & Menon, 1995; Rindfleisch, 1996). Following this strategy, the present study avoids the greatest danger of metaphor use: its literal understanding, which is nonsensical and potentially misleading. Marketing, of course, is not war, which is why trying to establish the truthfulness of this metaphor is unproductive. Key aspect of the military metaphor that is constructive, liberating, and creative is precisely the nonliteral, symbolic, thus the false one.

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