



# Corporate heritage identity management and the multi-modal implementation of a corporate heritage identity<sup>☆</sup>



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## ABSTRACT

This article advances the theoretical and instrumental understanding of corporate heritage identities. This exploratory, empirical study focuses on both the nature and the relevance of corporate heritage identity as employed by managers for corporate identity management purposes. The research is undertaken within Britain's oldest brewery – one of the oldest corporate entities in Great Britain with a provenance spanning many centuries – and utilizes a qualitative and theory building case study. The research reveals two classes of management responsibilities vis-à-vis corporate heritage identity management, namely corporate heritage management activities and corporate heritage implementation strategies, which follow a particular corporate heritage identity implementation pattern identified. A normative framework synthesizes and marshals the findings. The empirical study provides insight into corporate heritage identity management and is potentially useful to both scholars and practitioners. This study advances the nascent area of corporate heritage identity management by providing empirical and theoretical insight into the salience and strategic relevance of corporate heritage identity as a resource for corporate marketing. The article provides a normative framework of actionable categories of activities related to the management and implementation of substantive corporate heritage identity dimensions.

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## 1. Introduction

The purpose of this empirical study, which has as its focus Great Britain's oldest brewery (Shepherd Neame, established in 1698), is to further elaborate the nascent area of corporate heritage identity management by making a theoretical and instrumental contribution to this emerging field of corporate marketing scholarship. In particular, this research examines the understanding of senior and middle managers in regard to the strategic utility of a corporate heritage identity and the various manifestations and representations of different corporate heritage attributes that constitute a corporate heritage identity.

After articulating the purpose, motivation and context of the study in the introduction, the article first discusses corporate heritage and

corporate heritage identities by drawing on the emergent literature. In addition, the section focusing on the literature positions the study within the broader corporate marketing domain and argues that the multi-faceted nature of a corporate heritage identity is consistent with an expanded notion of corporate identity implementation. Following on from this, the next section enumerates the efficacy and relevance of the research case. The subsequent section notes the absence of prior empirical insights relating to corporate heritage identities. The article then presents an overview of the Shepherd Neame brewery and the methodology employed along with the findings from the research. Finally, the paper details the theoretical and instrumental findings of the study; specifies its limitations; and outlines opportunities for further research.

Recently, marketing scholars have shown interest in the concepts of both corporate heritage brands (Balmer, 2011a; Balmer, Greyser & Urde, 2006; Blombäck & Brunninge, 2009, 2013; Hudson, 2011; Micelotta & Raynard, 2011; Urde, Greyser & Balmer, 2007; Wiedmann et al., 2011a, 2011b) and, more recently, corporate heritage identities (Balmer, 2011b, 2013) as organizational phenomena. This study is concerned with the notion of corporate heritage identity per se. For a discussion of the differences between corporate brands and corporate identity see Balmer and Gray (2003).

Specifically, the nascent concept of corporate heritage identity refers to a category of organization where particular identity traits of an organization have endured and meaningfully link its past, present, and

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prospective future (Balmer, 2011b). In contrast, the corporate heritage brand (covenant) has been defined as the perennial promise underpinning the organization's corporate brand (Balmer, 2013).

As conceptualized by Balmer (2013), stakeholders are likely to attach importance to those corporate heritage identity characteristics of corporate heritage institutions that refer to aspects of an organization's past which stakeholders deem to be relevant for them and for contemporary concerns and purposes. As such, both stakeholders and managers concurrently perceive a heritage organization's corporate heritage identity attributes to have a worth and, therefore, this explains why they should be maintained, nurtured, and passed on to future generations (Balmer, 2013).

The increased interest in corporate heritage in the context of corporate marketing is, in part, attributable to its potential utility as a strategic marketing resource: an organizational capability that can be leveraged in order to afford meaningful differentiation to corporate heritage identities vis-à-vis customers and other stakeholders.

Extant scholarship has identified the genus of corporate heritage institutions (Balmer et al., 2006); focused on the generic qualities and characteristics of corporate heritage brands (Balmer, 2011a; Blombäck & Scandellius, 2013; Hudson & Balmer 2013; Urde et al., 2007; Wiedmann et al., 2011a, 2011b); and, more recently, has conceptualized the existence and characteristics of corporate heritage identities (Balmer, 2011b, 2013). This study has corporate heritage identity as its specific focus and, arguably, is the first empirical study relating to corporate heritage identity.

The corporate heritage literature reveals a palpable concern within many heritage organizations in the appropriation of their corporate heritage as part of their firm's corporate marketing activities focused on their corporate brands (Balmer et al., 2006; Urde et al., 2007) and corporate identities (Balmer, 2011b). A growing number of organizations refer to their heritage in their formal corporate communications which represents also *prima facie* evidence for the increased relevance of the notion of corporate heritage identities: Patek Philippe SA is a prominent case in point.

Some business and non-business organizations appropriate and valorize selective aspects of their institutional (i.e., organizational) pasts as corporate heritage. Many of them can be characterized as heritage institutions such as Bentley, Jaguar, Rothschild, etc. (Balmer et al., 2006; Urde et al., 2007). Some can be classified as having a particular genus of corporate identity, namely, a corporate heritage identity (Balmer, 2013).

However, empirical insight into the management and implementation of corporate heritage identity as a strategic resource for corporate-level marketing purposes is still slight. This is surprising given the growing interest in historical references within marketing academia and practice in general (see Blombäck & Brunninge, 2009, 2013; Hudson, 2011; Hudson & Balmer, 2013).

As such, this empirical study specifically aims to meaningfully advance the instrumental and theoretical understanding of corporate heritage identity management. In particular, this research focuses on managerial comprehensions in regard to corporate heritage identity management. Scholars in the area have long recognized the custodial role of managers in terms of corporate identity (Balmer, 1995; Balmer & Greyser, 2002, 2003). More recently, empirical research has highlighted the importance of management cognitions and self-understanding for corporate identity management and implementation (He, 2012; He & Balmer, 2007, 2013).

In light of the above, a significant aspect of this study is the emphasis on the multi-modal (i.e., utilizing different implementation approaches at once) and multi-sensory (i.e., addressing different sense experiences at once) dimensions of corporate heritage identity manifestations and representations and their significance for corporate heritage identity management.

Mindful of the work of Balmer (1998, 2001) and Bartholmé & Melewar (2009, 2011) multi-modal and multi-sensory corporate

identity systems refer to (1) the importance accorded to the integration of diverse implementation manifestations such as design, communication, behavior (multi-modal) and (2) the importance given to and the amalgamation of the senses that is sight, sound, scent, taste, touch (multi-sensory) by which an organization's identity manifests vis-à-vis internal and external stakeholders.

An explicit corporate marketing perspective (Balmer, 1998) informs the research, which accords strategic marketing significance to organizational phenomena at the corporate level (see for example Abratt & Kleyn, 2012; Balmer 1998, 2001, 2011c; Balmer & Greyser, 2003, 2006; Hildebrand, Sen & Bhattacharya, 2011; Powell, 2011), situating the study within the broader discipline of marketing. An unabated interest in corporate identities has characterized the corporate marketing domain since the mid-1990s (see for example Abratt & Kleyn, 2012; Balmer, 1998, 2001, 2008, 2011c; Bick, Jacobson & Abratt, 2003; Melewar & Saunders, 2000; Melewar, 2003; Melewar, Karaosmanoglu & Paterson, 2005; Melewar, & Karaosmanoglu, 2006; Powell, 2011; Leitch & Davenport, 2011; Suvatjjs & de Chernatony, 2005).

The corporate heritage identity construct discussed in this article falls within the disciplinary realm of corporate marketing (Balmer 1998, 2001, 2009a, 2011c; Balmer & Greyser, 2003, 2006; He & Balmer, 2013; Hildebrand, Sen & Bhattacharya, 2011; Powell, 2011).

According to Balmer (2011c) corporate marketing:

"is a customer, stakeholder, societal and CSR/ethical focused philosophy enacted via an organization-wide orientation and culture. A corporate marketing rationale complements the goods and services logic. It is informed by identity-based views of the firm: this is a perspective which accords importance to corporate identities and corporate brands..." (Balmer, 2011c).

The corporate heritage identity concept falls within this field because, as with corporate marketing, corporate heritage identities have an institutional (i.e., organizational) focus, they can afford a strategic advantage and also inform the culture of the organization. The latter are particularly pertinent in the context of this study's scrutiny of senior manager's conceptualizations of the construct and the strategic implementation vis-à-vis the company's stakeholders. Further, corporate marketing advocates a trans-temporal orientation towards corporate marketing management, taking into account not only present but also past and future stakeholders (Balmer, 2001; Balmer & Greyser, 2003), which is relevant for corporate heritage identities (Balmer, 2011b, 2013) and corporate heritage brands (Balmer et al., 2006).

In addition, this study focusses on a family-owned corporate heritage identity. Marketing scholars have noted the lack of marketing research in relation to family-owned companies (see Berthon, Ewing & Napoli, 2008; also see Abimbola & Kocak, 2007; Abimbola & Vallaster, 2007; Blombäck & Brunninge, 2013; Craig, Dibrell, & Davis, 2008; Fetscherin & Usunier, 2012; Parmentier, 2011; Reuber & Fischer, 2011). Extant studies on the area tend to focus on large – often global – corporate entities (see Balmer et al., 2006; Hudson, 2011; Urde et al., 2007; Wiedmann et al., 2011a, 2011b) whereas this study has as its focus a medium-sized company operating in the south east of England.

This study is the first empirical study of its type owing to its focus on a prominent British and family-owned corporate heritage identity. As such, the article derives research insights from a theory-building exploratory qualitative-case study undertaken within a centuries-old organization – namely Shepherd Neame: Britain's oldest brewery. Also, this brewery has the distinction of being one of Great Britain's oldest surviving corporate entities.

Two classes of management responsibilities vis-à-vis corporate heritage identity management are revealed by the study. Corporate heritage identity management activities and corporate heritage implementation strategies are the two classes identified: both of these classes follow a particular corporate heritage implementation pattern. In addition, the article introduces an integrated normative framework of

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