SBM in Transition ... The theme of this newsletter is transition. Dave Wilson, who, along with Irv Gross and Gary Lilien, founded the ISBM in 1983, passed away on February 1. Our newsletter feature is a memorial to Dave, who will be sorely missed, along with comments from a very few of his many friends and colleagues. Dave’s wisdom, good humor and general joy for life are irreplaceable and will be sorely missed.

Another transition for the ISBM took place on April 6, when Suzanne Lavin took over from Ralph Oliva as ISBM Executive Director (Ralph took over from Irv Gross in 1996). We introduce Suzanne here; she will be taking over Ralph’s “From the Membership Column” in the next issue of the newsletter.

Ralph’s From the Membership Column reprises some of the highlights of the ISBM March Conference, which focused on Customer Analytics. Ralph closes his column by passing it on to Suzanne.

Fred Wiersema’s from the B2B Leadership Board notes the activities the ISBM is engaged with to develop a research program in B2B Customer Analytics, an activity we hope many of you will embrace.

We also include news of the winners of the 2014 ISBM Dissertation Support Award Competition: Nicole L. Hanson, Texas A&M University, Kihyun (Hannah) Kim, Georgia State University, Sunil Singh, University of Missouri-Columbia. Congratulations to all!

Raj provides an update on IPSS and Raji Srinivasan reports on….well, you’ll just have to read her piece to find out.

All the best!

Gary and Raj
David T. Wilson, the founding Managing Director and Co-Founder of the ISBM passed away on February 1, 2015. In 1959, Dave received his B.Sc. in Mechanical Engineering from Queen’s University, Kingston, Ontario and he received his MBA (1964) and PhD (1970) from the University of Western Ontario in London, ON. In 1968, he began his career in Marketing at Penn State where he taught for 35 years, serving as Marketing Department chairman as well as the academic director of the MBA program. He was the Alvin J. Clemens Professor of Entrepreneurial Studies until his retirement in 2001. His service to the marketing profession included serving on the Advisory Board to the Vice-President of the Education Division and Vice-President of the Business Marketing Division of the American Marketing Association.

Dave was the founding editor of the Journal of Business-to-Business Marketing and served as editor until 1995 when he moved to Associate Editor. He served on numerous editorial boards and was Section Editor of the Journal of Marketing from 1981 to 1984. Dave was an author or co-author of over 200 books, articles and papers in business marketing. He consulted and presented executive programs for many B2B firms and was faculty director of the Penn State Executive program, Marketing Strategy in Business Markets. Dave was widely respected as a mentor to many students not only from the University Park campus but also from the global community.

Dave had a lifelong passion for sports as a player and coach, especially of ice hockey and was an accomplished watercolorist.

He was loved and respected by many and will be sorely missed. Brief comments from a few of his B2B colleagues follow:

- Dave Wilson was a great scholar and a fine man. We fondly recall our many wonderful interactions during his visits to the Australian Graduate School of Management in Sydney, and his hospitality and warmth in the cold of the Penn State winter, including taking some of us to outdoor ice hockey games. The world’s a poorer place with his passing, and we will miss him. ---- Grahame Dowling, Ujwal Kayande, David Midgley, and John Roberts

- Our meeting for the first time over breakfast at the first IMP Conference in Manchester in 1983 was the start of a wonderful 30 year friendship on both personal and professional levels. Dave’s subsequent invitation to undertake a sabbatical at Penn State had a significant influence on the career and life of a relative newcomer to academe. Dave was generous and caring, and always the very best of company – in the Australian vernacular “a great bloke”. His approach to life (including family, friends, colleagues, students, work and sport) was infectious - enthusiastic and passionate, always with good humour and a generous spirit. We shall miss Dave, but will forever treasure the wonderful memories and the part he played in our lives. ---- Nigel Barrett

- Dave Wilson and I met for the first time at Penn State in 1975 and we instantly bonded. Dave was always generous to others and, at the same time, he gained our respect and admiration by generating many innovative perspectives and ideas in BtoB Marketing. We have lost a great colleague. However, he will always be remembered for his great contributions to the Marketing discipline and to Penn State. ---- Jagdish Sheth

- When I first met Dave at Penn State some 25 years ago, the first thought to cross my mind was: “Wow! What a gentleman!” And each subsequent meeting was full of good cheer, uplifting and insightful. A true gentleman and a scholar. May his soul rest in peace. ---- Ajay Kohli

- I cherish my time with Dave. He was my only true academic mentor in my Ph.D. program at Penn State. When I realized how famous he was, I was shocked that he “took me under his wing”. The work we did is still the most cited of my articles…and not because of me! ---- Richard P. Vlosky

- I knew Dave for 40 years, ever since I was a doctoral student and interviewed at PSU in 1975. Although I did not accept the job offer, we remained close friends and colleagues. More than a friend he was a mentor. We hosted a number of AMA conferences together, edited several Proceedings, and he involved me in the very early days of ISBM. Dave also introduced me to the IMP group in Europe. Simply stated, he helped shape my career and I will always be grateful. The B2B field has lost one of its early leaders. However, his legacy will continue to shape the field. ---- Robert E. Spekman

- During his distinguished 33 year career at Penn State, Dave chaired or served on the dissertation committees for 38 students. As one of his students, I express my heartfelt gratitude to Dave for his generosity in sharing his talent and time to help me realize my goals. I’m confident that I speak for all of Dave’s doctoral students in expressing appreciation to our mentor and friend. ---- Paul Busch

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David T. Wilson 1934 - 2015 (cont)

- When I joined the faculty at Penn State as a newly minted Assistant Professor in 1976, Dave Wilson was one of the mainstays of the department of marketing. Over the course of my career, Dave taught me a great deal about becoming a successful faculty member. He was a great friend and mentor, and I will miss the sparkle in his eye and his wonderful sense of humor. I’ll always remember his joking that when I arrived at Penn State, I raised the average height of the department by three inches! RIP, Dave! ---- R. Dale Wilson

- I will remember Dave as a caring, compassionate colleague. He helped me immensely during my rookie faculty years at Penn State. I marveled at all the business ‘connections’ he seemed to have via ISBM. I will miss his sense of humor and the occasional loud guffaw in the hallways. His contributions to the field of B-to-B will be everlasting. ---- Srinath Gopalakrishna

- Dave Wilson was one of the bright lights in business marketing and he played a big role in my career and professional development. And he certainly didn’t have to. We worked at different schools; in hindsight, I probably didn’t cite him sufficiently in my papers; and I was “a channels guy.” But he went out of his way to invite me to participate in a Winter AMA conference in Arizona, dedicated to business marketing. There he introduced me to the global “B2B network” and he encouraged my research. He was personable, magnanimous, frank, and good humored. In a world sometimes too thick with egos and jealousy, Dave delighted in debate and discovery, he was always eager to learn more, and he boosted the zeal and confidence of budding scholars. He’ll be greatly missed. ---- Eunsang Yoon

- Dave Wilson was a scholar, gentleman and a friend, and was instrumental in breaking down barriers between himself and his students. Dave freely opened his heart and his house to students and faculty. He insisted on being called “Dave,” and loathed titles. Dave was a real fan of Penn State football. I remember seeing him in the student section of the bleachers trying not to stand out because he had generously given an out of town guest his season tickets. Dave’s love for skiing was unmatched. He loved chiding us when we would come in shivering after being out for a few minutes and he was wearing a T-shirt after he had already skied for several hours. Dave was a great guy and I will miss him. ---- Praveen Soni

- The chance to join ISBM in 1996 was the opportunity of a lifetime for me. But it was a very big jump from industry to the ISBM, a world that is somewhere between industry and academia. Dave was one of the folks who made this move possible for me. He was always there for me, providing gentle but firm guidance. The best part of mentorship. Dave showed me what the ”soul of the serious scholar” was all about, as well as, how to take rigorous research, and translate those results into practical action. He was an inspiration. He still is. His spirit carries on. ---- Ralph Oliva

- Dave Wilson, Gary Lilien and I co-founded the ISBM in 1983. I had just come to Penn State and Gary had been at the university only a relatively short time. Dave, on the other hand, was an old hand who knew the ins and outs of how the university really worked. His wisdom and calm council was invaluable when I wanted to buck the system or had an idea which would have ruffled feathers. He was invaluable in making what could have been a rough journey into smooth sailing. I am forever grateful. ---- Irv Gross

- Dave was a main reason I came to Penn State in 1981. We shared a deep interest in industrial marketing (what the field was called then) and a desire to build an institution to foster the field. Were Dave not at Penn State, neither I nor Irv Gross would have connected there to found the ISBM. Dave was tough, fair, of unfailing good humor and had both wisdom and great common sense. I can still see him about to go to class, pounding his foot on the floor, saying “I am getting ready to stomp out some ignorance.” He stomped out a lot of ignorance in his time and stomped in a lot of warmth and good cheer. He will be sorely missed and fondly remembered by many. --Gary Lilien
Welcoming the ISBM’s New Executive Director, Suzanne Lavin

Exciting times here at the ISBM! Suzanne Lavin took over from Ralph Oliva as ISBM Executive Director on April 6, 2015.

For the last decade, Suzanne was the Vice President of Corporate Marketing at Underwriters Laboratories. During her tenure, she implemented many “firsts” for the company, including devising their first-ever digital strategy, initiating social media efforts and creating a content-driven, B2B campaign that generated tens of thousands of leads. Her work garnered many awards including the BMA B2’s, A Webby Award and MarCom awards. In addition to building and running the marketing function for the company, Suzanne regularly ran special projects to help the organization become more customer-centric and nimble.

Prior to UL, Suzanne was a Senior Consultant in the Strategy, Organization and People practice at Arthur Andersen Business Consulting, where she was a change management practitioner. At the time, many organizations were recovering from the events of 9/11 and needed to restructure or downsize their operations due to disappointing sales growth—all while retaining top talent, boosting productivity, and maintaining a strong culture. Her projects included: developing the communications to drive a billion dollar cost reduction effort for a major insurer, improving the internal reputation of the IT department at the world’s leading manufacturer of construction equipment, and helping a small telecommunications company improve their customer centricity through enhanced performance management systems.

Suzanne earned a Masters Degree in Integrated Marketing Communications from Northwestern University, and a Bachelor of Science degree in Journalism from Ohio University. She has received extensive leadership training from both Yale University and Northwestern University, and has significant professional experience working globally—especially in Asia. Suzanne sits on the Board of Playworks, an organization committed to reducing bullying through organized play. She lives in Chicago with her husband and two children, and will direct the ISBM from her office there.

Suzanne will be commenting in future newsletters in our From the Membership column.

Please help welcome Suzanne aboard at Suzanne.Lavin@psu.edu.

From the Membership:

Analysis, Analytics, and Answers - B2B: Highlights of the ISBM Winter Meeting, March 17-18, 2015

At our ISBM winter meeting we explored many facets of “customer analytics in business markets,” from the perspectives of thought leaders, in-practice cases, and ISBM Member consultancies. The meeting was designed to help member firms beginning to explore analytics get started on the journey, and to help those farther along benchmark with one-another.

Charles (“Charlie”) Peters, senior executive president of Emerson, kicked off the meeting. He highlighted the importance of combining high level insights derived from digital data and analytics with an understanding of the “business neighborhood” that firms are operating in locally.

Charlie noted the important role salespeople and others with “feet on the street” in business locales should play in interpreting and acting on insights from data analytics. He discussed generational and cultural differences in how B2B commerce is done in different geographies, raising interesting questions for researchers: what are the right “units of analysis” in interpreting B2B market data? How can different sorts of observational/anecdotal data be integrated with more purely digital data coming from centralized databases? How can we best create analytic insights for global firms that are genuinely actionable in local markets? How can we tune our traditional B2B buying models to different local geographies?

Steve Erickson, Ryan Reed and Chris Richards described the intelligence utility they have developed for Parker Hannifin, a utility that combines economic, business, market, and competitive intelligence. That combination allows Parker to more clearly see opportunities and pitfalls, and enables greater flexibility in serving its markets. The team emphasized that they see their role as creating more

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productive conversations on why things are changing in the marketplace, and how to take advantage of those changes.

The Parker presentation highlighted a recurring challenge raised at the meeting: mobilizing analytics involves finding, nurturing and deploying the right talent. That talent involves a combination of analytic skill and business knowledge: framing the right questions, using analytics appropriately, and creating good discussion around analytics do not happen without the right talent. A key challenge for us as educators is to produce B2B data scientists equipped to have a real impact on business.

WESCO CMO Mike Ludwig described the integrated marketing analytics journey WESCO is on with its partner, Teradata. Mike showed how mobilization of data analytics can lead to a more productive and powerful linkage between marketing and sales: the analytics approach creates better, automatically triggered leads, develops other tools that improve sales productivity and creates a stronger sales book that connects marketing and sales in new ways. But Mike raised a cautionary note: even with a powerful ROI argument, it has been difficult for him to generate the needed investment from top management. The funding issue aside, Mike’s experience raises an interesting research question: what sorts of analytic approaches create the most effective links between marketing and sales?

Laxman Srigiri, director of global marketing analytics at Dell, described how Dell tracks customers as they progress through a complex B2B buying process, delivering the right message to the right person at the right time. This approach requires moving away from silos where different communications media are managed separately, to an integrated approach that can act on insights gained from the deployment of analytics. Dell’s experience raises another research question: what organizational designs are required to best deploy the results of B2B analytics throughout the buying process?

Scott Gillum from “gyro” and Bill Rozier from gyro client Ciena Software showed how analytics can build a more profitable link between marketing and sales. Ciena’s marketing group surveyed its salesforce to assess marketing’s impact from the sales person’s perspective. Among other results, they showed how they used analytics to define and quantify the value of a lead and to determine the tactics that enabled sales to be most effective.

Mike Moorman from ZS and Associates discussed what marketers can learn from sales analytics. Mike shared cases illustrating important steps in deploying analytics: moving from understanding what happened, to why it happened, and determining what to do about it. Mike challenged marketers to connect with sales analytics to maximize joint performance.

Laura Patterson of VisionEdge Marketing kicked off the meeting’s second day, providing insights from companies that have invested in “Centers of Excellence” in marketing analytics. She described a maturity model on analytics, and the key ingredients in building analytic strength including enablers, facilitators, and implementers. She outlined how such centers can improve business performance, the workflows involved, and shared a step-by-step approach toward building such centers. She challenged us to inquire: are we asking the right questions, and are we focusing on the activities that have the potential to yield fast business success stories? Such stories can build the case for taking analytics further with the firm.

Shefali Patel of GE together with Matt Morris of RGL Forensics shared a B2B analytics case that addressed a common question: why is one region outperforming another very similar region in our business? Morris outlined their analytic approach, and GE was able to mobilize available data to answer that question, leading to both deep insights and improved business performance. Matt commented that data is like gold – to benefit from it, you need to find it, mine it, and refine it: each of those steps requires rare and different skills. Analogously, although new technology exists that makes it seem like anyone can do customer analytics, true talent is needed to do the work right and that talent will be increasingly difficult to find in the coming years.

Jim Guill and Andrew Clinton of Deloitte wrapped up the meeting, sharing an approach combining company, technology, and industry data to produce digital “market opportunity portraits.” Those portraits enable more productive discussions on marketing strategy. Jim and Andrew showed how integrating infographics, which mobilizes human intelligence, with data analytics helps make for better B2B decisions.
From the Membership:

Analysis, Analytics, and Answers - B2B: Highlights of the ISBM Winter Meeting, March 17-18, 2015 (cont)

- Successful firms start small, and focus on one or two projects that produce tangible results and "a-ha's" across multiple audiences, including the C-suite and sales.
- The new and powerful role of Infographics needs to be explored more fully as a catalyst for higher-level thinking and discussion on economies, markets, customers and competitors.
- Finding and nurturing the right talent will be key; good B2B analytics is not for amateurs.

B2B firms are struggling to frame the right analytics questions. Research that helps identify where B2B firms should start, and where the greatest economic impact of analytics can be found will be very important.

Note: This “From the Membership” column is my last as ISBM Executive Director: as noted elsewhere in this newsletter, Suzanne Lavin took over as ISBM Executive Director as of April 6, 2015. I have enjoyed my 18 years as ISBM Executive Director and will remain deeply engaged with the ISBM and its various activities in the years to come. And I look forward to reading Suzanne’s “From the Membership” columns in the coming months and years!

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B2B Leadership Board Update:

B2B Data Analytics: Creating Research-Practice Synergies

What does it take to foster closer research-practice collaboration and spur knowledge creation and dissemination in the rapidly evolving domain of B2B customer analytics?

That’s an important question for ISBM’s CAP (Customer Analytics Program), which we launched last year with Hari Sridhar (Penn State) directing the initiative. Earlier exploratory interviews showed a convergence of researchers’ and practitioners’ needs: Researchers’ desire to explore fertile areas for inquiry aligns with B2B practitioners’ imperative to make sense of the growing stream of data in their firms. We decided to initiate a number of pilot projects with ISBM member firms to jointly explore the potential of B2B customer analytics. Then we held a formative ISBM-CAP meeting in Tampa, FL in March 2015 where a select number of B2B researchers and practitioners discussed successes, impediments and paths forward.

Both that formative CAP meeting and the larger ISBM member meeting that followed (covered elsewhere in this Newsletter by Ralph Oliva) underscore that conditions are ripe for researchers to work more closely with practitioners on B2B Customer Analytics:

- B2B companies now have more and richer customer and market data at their disposal than ever, and the availability of such data continues to grow rapidly. The notion that B2B firms are data-poor is becoming obsolete.
- There is no scarcity of burning business issues suited for advanced customer analytics applications. For instance, companies express the need for analytics to help manage customer churn and stimulate repeat buying; to calibrate sales strategy and execution; and to enhance innovation processes and new product commercialization.
- Managers realize the potentially transformative force of customer analytics, either because of successes experienced in their own firms, or because they see rivals make great strides. Yet, seasoned analytics talent is in short supply in most firms.

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Forward-looking managers are reaching outside their firms to acquire new insights, to help grow their internal talent and to draw on the expertise of advanced researchers in academia and elsewhere.

Through our ISBM-CAP pilot projects and practitioner interactions we are also learning to look at nuances. For instance:

- We found firms that are data-rich but remain insight-poor. We also found others who believe they are data-poor, yet do not realize that their existing data sources could be tapped for powerful analytical pursuits. In both cases, just doing an initial data and data usage audit provides great directional value.

- While managers can articulate their burning issues, they need the input of seasoned researchers to determine where and how the use of leading-edge analytics is most suited. Research-practice collaboration works when it focuses on real questions that lend themselves to scientific inquiry.

- Talent development is a pivotal concern. While informed executives may come to view customer analytics as a necessity rather than a luxury, expanding in-house expertise and tools/methodologies is not easy. Since their in-house analytics teams can easily feel marginalized by outside experts, we see the need to place a strong emphasis on shared learning, transfer of scientific methods and techniques, and proper coaching when undertaking collaborative projects.

Collaborative efforts that create synergy through focused, high-impact joint projects leveraging scientific expertise can be viewed as action learning projects, each with a deep educational component along with the high end analytical work. Such projects play to the strengths and expertise of practice-focused academics.

The upside potential to build synergies is there. With your encouragement and support ISBM-CAP will endeavor to play a meaningful role in realizing that potential.

Fred Wiersema
ISBM Fellow and
Chair, B2B Leadership Board
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On behalf of the many grateful students, I would like to thank Mike Ahearne and Hans Baumgartner for teaching the Selling and Sales Management and Structural Equations Modeling for B-to-B Research IPSS PhD seminars respectively in Spring 2015. Both the courses were very well received; thanks Mike and Hans!

For the coming Fall semester, we have two popular courses coming back: Abbie Griffin will teach Qualitative Research Methods and Kersi Antia will teach Channel Management. The details on the course are available from http://isbm.smeal.psu.edu/research/ipss.

Please bring these PhD seminars to the attention of your promising B2B PhD students. Students should register for the courses online at http://isbm.smeal.psu.edu/research/ipss/app_ipss.pdf.

Additionally if you have any other feedback or suggestions, please do not hesitate to contact me.

Raj Grewal
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The Institute for the Study of Business Markets (ISBM) is pleased to announce the winning entries in its 2014 Dissertation Support Award Competition, selected from a total of twenty-three entries. Each are named ISBM Business Marketing Doctoral Fellows:

Nicole L. Hanson of Texas A&M University

*Essays on B2B New Product Development in Emerging Markets*

Ph.D. Advisor: Professor Venkatesh Shankar

Kihyun (Hannah) Kim of Georgia State University

*The Impact of Transaction and Relationship Focused Marketing Actions on Buying Behavior in B2B Markets*

Ph.D. Advisor: Professor V. Kumar

Sunil Singh of the University of Missouri-Columbia

*Email B2B Sales Negotiation: Influence Strategies as Textual Cues*

Ph.D. Advisor: Professor Detelina Marinova

Dissertation competition entries are judged on the rigor of the proposed work and the relevance of that work to B-to-B marketing practice. Each winner will receive a grant of $7500 to support their research.

This ISBM award has supported outstanding B-to-B dissertation work since its inception in 1991. For information about the competition or to see a list of past winners see [http://isbm.smeal.psu.edu/research/doctoral-awards](http://isbm.smeal.psu.edu/research/doctoral-awards).

Congratulations to all!
The ISBM is pleased to announce the following honor for its founding Research Director, Professor Gary Lilien. This annual award is designed to be the highest honor that a marketing educator who has had extensive connections with EMAC (The European Marketing Academy) can receive. What follows is from the Award Committee citation.

The two main criteria for the award are: (1) Outstanding marketing scholarship as reflected in extensive, impactful research contributions and (2) Outstanding contributions to the European Marketing Academy.

Professor Lilien has an outstanding record in terms of publications, with 50 articles in the leading marketing and management science journals, including nine in International Journal of Research in Marketing. He has received multiple awards for his publications, including twice the award for best paper in IJRM.

Professor Lilien has been for three decades a leading researcher on business-to-business marketing and marketing analytics. His work has influenced generations of researchers, having been cited more than 12,000 times. He has also contributed to marketing education through fourteen books, many re-issued. This includes his two landmark textbooks on Marketing Models, co-written with Philip Kotler. Another outstanding contribution was his series of books and software on “Marketing Engineering,” written with Arvind Rangaswamy, which made it possible for large populations of students to enter into the logic and mechanisms of marketing models.

Professor Lilien has made unique contributions to EMAC. He has remained constantly since 1987 in the editorial board of EMAC’s flagship publication, International Journal of Research in Marketing. He served many times in the faculty of the EMAC Doctoral Colloquium, and played an important role in positioning this colloquium as a place where seasoned faculty listen to still unknown students in order to give them help and advice to start their career with publications. Many attendees who are now leading colleagues fondly remember his support which sometimes included invitations to Penn State. Professor Lilien has played an important role in attracting to EMAC a large number of overseas colleagues, especially from North America but also from ANZMAC. This has played a role in the increased visibility of European research in the world’s academic community in marketing.

He also created major innovations during his more than 20 year tenure in EMAC’s Executive Committee, as Vice-president or as Representative for the US. He played a key role in creating and organizing the EMAC-McKinsey dissertation award, which has become such an important element of EMAC’s portfolio. He also played an important role in designing, on behalf of the Executive Committee, several formalized procedures, e.g. for the appointment of IJRM’s editor-in-chief or for the EMAC Distinguished Marketing Scholar Award. As part of his career-long work in favor of increased links between academia and practice and for managerially relevant research, he has organized presentations, at each EMAC conference, by the three finalists of the practice prize that now bears his name.

He has made numerous contributions in other academic journals, associations, and institutions and received several lifetime awards and honorary degrees. Let us simply mention his unchallenged reputation as the fastest reviewer in the profession.

Overall, Professor Lilien fully deserves the EMAC Distinguished Marketing Scholar Award, given his high quality rigorous research, exceptional contribution to EMAC, and service to the marketing community.

He will officially be presented with the Award at the forthcoming EMAC conference in Leuven (May 26-29, 2015), during which he will give an invited presentation in a special session.

The Award Committee consisted of Gilles Laurent (Chair), Sönke Albers, and Hubert Gatignon.

Congratulations, Gary!

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