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# Modeling market to commercialize innovation: how the forgotten historical figure of salesman helps us learn on how firms design market models

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## Abstract

Innovation commercialization phase appears more and more as an issue for both marketing and innovation management literatures. This paper studies a particular aspect of innovation commercialization, namely the market-model design activities occurring during this phase. The paper builds on an underlying paradox of the literature. On a one hand consistent market models are useful for company to commercialize innovation and on the other hand marketization literature claims that the relevant variables depicting a market are countless and unknown. To sort out how market-modeling activities support innovation commercialization we conducted seven longitudinal historical case studies on commercial travellers. We looked for how 19<sup>th</sup> century companies employing commercial travellers structured their market models to foster commercialization excellence. Our results indicate that these companies used representations of the market that can be define as *ad hoc market* models. The representations are *models* as they are built only on few coherent variables but they are *ad hoc* as they differ from one case to another. Given these results we discuss the specificities of the design of ad hoc market models and define the innovation commercialization phase as the market-model design phase.

## Context:

Marketing facilitates innovation commercialization. First by aligning product specifications with customer needs. Second by orchestrating product launches in known markets. However, radical innovations address unknown markets. Therefore the challenge is commercializing while learning. Before marketing science, nineteenth-century-firms employing commercial travellers confronted such challenge. Their history unveils market-modeling activities relevant for innovation commercialization.

This paper is organized as follows. First we review the literature on innovation commercialization to depict the crucial role played by market models. The literature claiming also that market models are impossible to build due to the countless number of relevant variables, a research question is set to investigate this paradox. Then we detail a methodology based on the analysis of peer-reviewed business history papers that deal with commercial travellers. We then present our results that confirm the use of models, highlighting that firms hierarchized the variables to avoid the pitfalls described by the literature. We then conclude by a discussion toward a more strategic role played by salespeople.

## Literature review

### **The challenges of commercializing innovation: overcoming marketing discontinuity**

In the New Product Development literature, commercialization has for long been recognized as the last phase of the innovation process (Cooper, 1988). Historically, different labels have been used to name that phase such as, product introduction (Deszca, Munro, & Noori, 2002), product launch (Hultink, Griffin, Hart, & Robben, 1997) successful application (Cumming, 1998) or product delivery (Gobeli & Brown, 1993). All these studies, sharing a linear view on innovation, acknowledge that there is a phase following product design whose aim is to bring the product to the market. Following (Cooper, 1988; Song & Montoya-Weiss, 1998; Veryzer, 1998), we call this phase the innovation commercialization phase. Although last, this phase is not the least as the literature recognizes that it is an important driver to new product performance (Henard & Szymanski, 2001). Despite its widely acknowledged importance, recent specialized studies (Aarikka-Stenroos & Lehtimäki, 2014) and literature reviews alike (Dias & Ferreira, 2019) regret the lack of research dedicated to innovation commercialization phase while other phases of new product development, such as the front-end phase and the technical development phase, are receiving a more thorough attention. Historically, this disregard may be rooted in earlier conceptualizations that separate clearly innovation commercialization and design-related activities. Henceforth innovation commercialization was considered a simple implementation stage during which only tactical decisions are taken (Hultink et al., 1997) while the complex and non linear process of innovation is limited to phases during which the product is not yet designed.

However, actual conceptualizations depict innovation commercialization as a dynamic process that faces similar challenge as design-oriented phases. In a case of radical innovation,

firms operate in new marketing domain and face marketing discontinuity (McNally, Cavusgil, & Calantone, 2010). This leads firms to engage in market-learning approaches that are highly specific (Lynn et al., 1996) as the market is not yet created at the beginning of the innovation commercialization process (Storbacka & Nenonen, 2015). Therefore actual conceptualizations depict innovation commercialization as a dynamic process that includes continuous feedbacks and changes in marketing strategy (Aarikka-Stenroos & Lehtimäki, 2014; Mattila, 2017). This process aims at gaining support from the firm's external network (Aarikka-Stenroos & Sandberg, 2012; Chiesa & Frattini, 2011). Therefore, commercialization is more and more conceptualized as a market-shaping activity (Kjellberg, Azimont, & Reid, 2015) during which marketing and sales functions (Geiger & Finch, 2009) try to overcome the resistance of end-users and demonstrate the benefit of the commercialized innovation (Aarikka-Stenroos & Sandberg, 2012).

Therefore recent conceptualizations of commercialization depict this phase as the moment when companies have to overcome marketing discontinuity. To cope with it the literature identifies that firms engage in market modeling activities.

#### **Overcoming marketing discontinuity: Restoring coherent market models**

When investigating the strategies that firms endorse to cope with marketing discontinuity, there is a growing interest in the literature towards market models. Two main key features of market models are discussed in the literature dealing with innovation commercialization.

First, market models are recognized as assets that help firms to take strategic decisions regarding commercialization (Aarikka-Stenroos & Lehtimäki, 2013, 2014; Dmitriev, Simmons, Truong, Palmer, & Schneckenberg, 2014; Flammini, Arcese, Lucchetti, & Mortara, 2017). Therefore market visioning capabilities are key for innovation commercialization (Colarelli & Robert, 2001) and market models should be developed and refined during the New Product Development process (O'Connor, 1998; Tsai, 2015).

Second, the literature highlights that market models are key assets in order to gain the support of the external network. Clear market models make firms take coherent actions regarding their network which is positively correlated with the commercialization success (Chiesa & Frattini, 2011). Thus market shaping literature considers modeling as an important phase of the market learning process (Storbacka & Nenonen, 2015) that could help a market actor to drive the market. This literature defines market scripting as the conscious activities conducted by a market actor in order to alter the current market configuration in its favor. To do so a market actor should first be able to change its mental model before sending a signal to other players by changing its business model (Storbacka & Nenonen, 2011b). Therefore, in this literature, a new market is created once all the market actors changed their related market models (Mason, Friesl, & Ford, 2017).

Therefore one of the key insights of the literature is that to cope with marketing discontinuity, firms should be able to develop new market models. Put differently, firms should be able to spot the critical variables that help build a viable commercial strategy.

The notion of model brings two important remarks. First, the number of variables in a model should remain low so that the model is still useful. Second the model is developed with a certain domain of validity. We conclude that having a coherent market model is a key asset to conduct innovation commercialization.

### **Difficulty of market modeling for innovation commercialization**

However interesting, market models may be difficult to develop during innovation commercialization. Three main reasons account for the difficulties of market modeling during a commercialization process in the literature.

First the variables useful to describe a market are numerous and heterogeneous. The development of marketization literature (Çalışkan & Callon, 2010) is an example of the multiplicity of the market descriptors that could be used. By considering markets as configurations (Storbacka & Nenonen, 2011a), marketization literature had multiplied the relevant variables that can be used to describe markets.

Second the relevant variables of a market model are unknown at the beginning of the process and may be of very different nature. This is well documented in early work on innovation where the problems may come from both the technical side and the social side (Akrich, 2006; Akrich, Callon, Latour, & Monaghan, 2002; Cochoy, Toulouse, Recherche, Toulouse, & Jaurès, 2016).

Third, relevant market variables are changing overtime. This is due to the efforts of other companies also trying to shape the market in directions that suit them more. As such, the multiplication of market shaping activities (Azimont & Araujo, 2007; Geiger & Finch, 2009; Humphreys & Carpenter, 2018; Kjellberg et al., 2015) contribute to make the variables even more changing.

Therefore we conclude with the literature that designing a market model is complex due to the fact that variables are countless, unknown and changing.

### **Literature gap and research question**

According to innovation commercialization literature, firms uncover through commercialization a set of critical variables that ensure radical innovation success. However, marketization literature claims that prospective variables are countless and that critical variables are unforeseeable. Hence on the one hand: one should have a *market model*. Often the literature has tended to underestimate what this notion of *model* means; that is to say not only critical variables but also non-critical one, ie validity domain of the model. On the other hand it is unclear how this model could be designed since the candidate variables are countless, unknown and changing. Hence question: is this notion of “*market model*” really present in practice and more specifically, if there is such thing as a “*market model*”, how can a firm organize to design this *market model*? In particular, guidance to separate useful learning from anecdotal evidence would be valuable for innovation commercialization

literature. To provide such guidance, we investigate the link between market modeling and commercialization through the following research question:

How do market-modeling activities conducted by a firm contribute to commercialization of radical innovation and the creation of the related market?

More specifically we propose several interrelated sub-research questions:

- 1) How to account theoretically to the apparent paradox in the literature between the use of market-models for commercialization and the fact that relevant variables are countless?
- 2) What are the specificities of the design process to build a market model used to support commercialization?
- 3) In the case of innovation commercialization, what is the link between innovation commercialization phase and the design process of market model ?

## Methodology

In order to study our exploratory research question, we decided to conduct a case studies analysis from a highly qualitative sample. Our aim is to build a sample of cases from which we can extract market models contributing to commercialization and analyze their common structures and discrepancies. In order to be relevant to our research question, each case should therefore comply with three conditions. First it should display an access to the market models of commercialization at stake. Second it should account for successful cases of commercialization to ensure that the studied market models supported commercialization. Third the richness of each case should be high in order to allow some longitudinal analysis and comparisons. Those three reasons drove us to build a sample of peer-reviewed business history papers describing 19<sup>th</sup> century firms employing traveling salesmen. The choice to study specifically traveling salesmen is rooted in the fact that 19<sup>th</sup> century firm hired salesmen when they wanted specifically to stimulate and prime markets without modifying the product. Therefore our cases can be considered as pure commercialization cases. Furthermore, this sample complies with our three conditions. First salesmen and firms send numerous letters to each other, which spell out the market models prevailing during commercialization, enabling us to have access to the market model used by the firm. Second, the paper account for companies that succeeded on their market during a long period of time, therefore confirming that they were undertaking successful commercialization activities. Third, salesman activities are well documented over long time periods. Therefore this rich material is longitudinal in two senses: a) it cover time periods from product launch to product success; b) it covers, for a single company, several commercialization campaign, hence put light on the organizational process that is *repeatedly* used to design a market model.

To build our sample we follow the following approach. First we selected relevant business history peer-reviewed journal, we selected Business History, Business History Review, Enterprise and Society, Entreprise et Histoire, Management and Organizational History. Based on a review of the term used to designate traveling salesmen around the world

(Friedman, 2012), we looked for the terms “peddlers” ; “drummers” ; “commercial travellers” ; “manufacturers’ reps” ; “commis voyageurs” and “traveling salesmen” in the databases of these journals. The abstract of the papers – and when more work was needed the content of the papers - helped to discriminate relevant papers. The choice of incorporating the papers in the sample was conducted separately by the authors. The main reason of reject was the quality of the description of the content of the letters that where send by companies to commercial travellers. The Table 1 describes the content of our sample.

Reference	Journals	Type of product / Industry	Period of study
(Berghoff, 2001)	Enterprise and Society	Harmonicas / Manufacturer Industry	1857 - 1930
(Lyon-Jenness, 2004)	The Business History Review	Seeds / Horticulture	1800 - 1900
(Rossfeld, 2008)	The Business History Review	Chocolate / Food Industry	1860 - 1920
(Scott, 2008)	The Business History Review	Vacuum Cleaner / Manufacturing industry	1918 - 1945
(Vabre, 2012)	Entreprise et Histoire	Roquefort / Food Transformation	1851 - 1914
(Musset, 2012)	Entreprise et Histoire	Champagne / Food Industry	1790 - 1815
(Bayard, 2012)	Entreprise et Histoire	Silk fabrics / Cloths Industry	1700 - 1800

In the papers the market models are implicit in the papers, however, because of their richness our cases recount on the instructions the firms gave to salesman and the management tools used. For us, the dimensions on which the headquarters gave instructions and the management tools used spell out the market model mobilized by the firms. We selected all the instructions and management tools and the related quotes from our material. Then we agreed among the authors on a market model that encompasses all the orders. Then we compared the different models to see they common structures and discrepancies. Finally explain the discrepancies by the context of each specific case.

## Results

Our results confirm that commercialization is a market-learning activity. The massive and continuous exchange of letters between salesman and the firm testifies the eager for market information. Our original results are two-folded. First, we show that firms endorse a proactive attitude toward market learning by setting market models. In each case, we have been able to identify a small number of market dimensions on which the firm focuses its instructions. Second, critical market dimensions differ from one case to the other.

Table 2 for the detailed analysis of three cases (Lyon-Jenness, 2004; Rossfeld, 2008; Scott, 2008). Each case is analyzed as follow : the market model is displayed, along with relevant

quotes that illustrate it. Then to explain the discrepancies between market models, a “problem to be solved” is explained in each case, along with the relevant quotes.

To ease the understanding of our results we detailed them according to the three sub-research questions. Two French cases (Bayard, 2012; Musset, 2012) are used to illustrate the results.

- 1) To solve the apparent paradox in the literature between the use of market-models for commercialization and the fact that relevant variables are countless, the 19<sup>th</sup> century firm hierarchized the different variables. Thus the striking result of our study is that in each case, the number of dimensions on which indications are given to commercial salesmen is low. Headquarters concentrate on a restricted numbers of indications, leaving the other dimensions in the hands of the traveling salesmen. For example, logistics matters preoccupy silk manufacturers as they control carefully how, where and when their travelling salesmen are travelling. However, the traveling salesmen is in charge of setting the price (within a certain range), the time of the year the products will be delivered, the type of clients he meets... This results can be find in every case, see table two for more example. Thus headquarters deal with countless variables of the market by identifying critical ones on which they give instructions. The others dimensions are take care of by the traveling salesmen who adapt to sell more products. Therefore the notion of market-model is not usurped as headquarters identified not only critical variables but also identify non-critical one! Ie a market model (being a ‘model’) actually characterizes the variables that are not relevant to determine commercialization success.
  
- 2) Our research account also for the specificities of the design process to build a market model used to support commercialization. Even if we can only see the result of the design process (ie the market model) it is instructive. Even if it is a model, this is an ‘ad hoc’ model: the critical (and non critical) variables can be very different from one case to another. Therefore they have to be designed by taking into account contingent variables such as product to be sold, the commercialization company... The critical variables depend on the main problem to be solved by the headquarters. Fore example, for silk marchand, the main problem is to be the first to arrive in a city, therefore they concentrate their instructions on logistics matters. For champagne prodicers, the main issue is the quality of the wine once it reaches the client. Therefore instructions concentrated on carefully transport the delivery, of being always with a client when the first bottles are open and to manage caves in remote country so that the wine could be store more conveniently. For other matters such as publicity, logistics or type of clients, the instructions were much more flexible in coherence with results one. See table 2 for more example of specific problem to be solved and the specialized instructions given to solve it. Therefore our results is that, due to the specificities of the final model, the design of such market model have to be conducted during the commercialization phase.



Reference	Market-model	Quotes market models	Problem to be solved	Quote problem to be solved
(Lyon - Jenne ss, 2004)	<ol style="list-style-type: none"> <li>1) Advertising and Catalogs (promotion)</li> <li>2) Commercial traveller trainings</li> <li>3) Illustrations (marketing material)</li> </ol>	<ol style="list-style-type: none"> <li>1) "The enhancement of both advertising and catalogs served several functions for the horticultural industry" p398 "Customers could receive catalogs at no or minimal charge, often with the understanding that the cost of the catalog would be refunded with a purchase. Catalog producers also wanted to be sure that when a customer placed an order, he or she had appropriate cultural information in hand" p.399</li> <li>2) "Agents, themselves lacking horticultural experience, sometimes failed to properly tend the plants in their care" p402 "These "official" agents usually received some horticultural training" p403</li> <li>3) "Illustrations depicting fruit types or the ornamental potential of flowers and shrubs were critical to plant sales" p405 "Perhaps enchanted by the beauty of the illustrations, customers placed orders with virtual strangers and with little consideration for cultural details or regional hardiness.</li> </ol>	Establishing trust for a product the client could not properly see as the main sells were seeds	<p>"The trade was dependent on customers' buying goods "sight unseen," both mechanisms were important vehicles for establishing familiarity and trust" p.398</p> <p>"tree peddlers were everywhere and really did perpetrate fraud" p.407</p> <p>"an unethical agent might boost prices, fail to provide adequate horticultural information to inexperienced customers, or perhaps inadvertently jumble horticultural varieties, so that eagerly awaited fruit trees or flowering roots were not "true to name"" p.402</p>
(Ross feld, 2008)	<ol style="list-style-type: none"> <li>1) Territories (to ensure intimacy with customer)</li> <li>2) Coupled advertising and commercial traveller presence</li> <li>3) Commission system (To ensure loyalty)</li> <li>4) Commercial traveller manners (to ensure respectability)</li> </ol>	<ol style="list-style-type: none"> <li>1) "Initially, the traveling salesmen had no specifically defined territories and covered all of Switzerland [...]; after 1880, clearly delineated "rayons" were assigned" p.743 "At the beginning of the 1880s, [...] defined geographic regions, were assigned" p.741</li> <li>2) "[Statistics] enabled the [...] effectiveness of advertisements [...] While this was "a complex, time-consuming task" it [...] helped with the targeting of its advertising activities" p.747 "The traveling salesmen also participated in planning the use of advertising, distributing advertising materials, and improving their effectiveness" p.749</li> <li>3) "Their remuneration comprised a fixed salary, travelling expenses and a commission that depended on sales, a feature [...] introduced at the beginning of the 1890s" p.750 "Calculating the commissions was [...] influenced by multiple factors, including the size of the territory, the traveling salesman's age, or the volume of goods sold" p.751 "at that time, most traveling salesmen were employed on a commission basis (without a fixed salary and expenses), which had disadvantages over [the firm's] system" p.751</li> <li>4) "[The company] stated that politeness, patience, and "conversation suited" to the customer's character and education were important, as were a keen perception and carefully manicured hands for displaying the samples p.752</li> </ol>	Fighting the bad reputation of commercial travellers of the time	<p>"It was difficult to draw a line between bona fide traveling salesmen and the uncontrollable peddlers and hawkers" p753</p> <p>"The lack of differentiation between peddlers and hawkers, who sold their wares from door to door and were not employed by a company, and the profession of traveling salesman led to commercial travelers being considered as "exponents of intermediate trade." Against the backdrop of an overcrowded retail market, which became noticeable after 1880, the traveling salesman was anathema for many, viewed as the "embodiment of an imaginary parasitism." p752</p>
(Scott , 2008)	<ol style="list-style-type: none"> <li>1) Ensuring enough commercial travellers</li> <li>2) Preparing the speech no to be drove back</li> </ol>	<ol style="list-style-type: none"> <li>1) "Chronic labor turnover entailed a constant stream of new salesmen, who were mainly recruited through small ads in local newspapers" p775 "Firms tended to apply only the most basic selectio in the knowledge that reliance on commission would soon weep out the poorer salesmen"p.775</li> <li>2) "Recruits were typically sent to the firm's "schools" " p.776 "They were given a script to learn which they folloed almost to the letter" p777</li> </ol>	The work of direct selling was deceptive hence with high turn over	<p>"High labor turnover was common in direct selling" p.772</p> <p>"Hoover's British sales-force turnover was a staggering 500 percent"p.773</p> <p>"The practicalities of selling vacuums door-to-door acted progressively to undermine morale, as the job entailed making calls that most often produced a curt "no thank you," p.778</p>

Table 2 : Detailed cases of market models, problem to be solved and related quotes

3) More generally, it means that ‘innovation commercialization’ hence consists in identifying critical and non-critical variables; and consists in organizing the process to design the ad hoc market model. Therefore we propose to conceptualize the innovation commercialization phase as the phase during which the market model is designed.

Our results therefore show that each firm developed a specific market model for each commercialization process.

## **Discussion and contributions**

Our results are aligned with precedent result on innovation commercialization. By focusing our analysis on market model, we highlight and concur with their crucial role in innovation commercialization (Aarikka-Stenroos & Lehtimäki, 2013, 2014; Dmitriev et al., 2014; Flammini et al., 2017). Second we set ground to explain more thoroughly why innovation commercialization is problematic: the market model is not establish yet (Aarikka-Stenroos & Lehtimäki, 2014; Connor & Rice, 2013; Lynn et al., 1996).

Our contribution extends current knowledge by building bridges between three literatures stream, namely marketization, innovation commercialization and sales roles. By showing that the headquarters rely on specific market models we solve a paradox that separated marketization literature and innovation commercialization literature. To deal with the countless variables described in marketization literature (Azimont & Araujo, 2007; Kjellberg et al., 2015; Storbacka & Nenonen, 2011a) firms hierarchize them with a model enabling their action (Mason et al., 2017; Storbacka & Nenonen, 2011a, 2015). Our second contribution is aligned with recent literature of sales agent that call for a more strategic-oriented role of sales (Borg & Young, 2014; Fraenkel, Haftor, & Pashkevich, 2016; Geiger & Finch, 2009; Goetz, Hoelter, & Krafft, 2013; Ulaga & Kohli, 2018). Our results state that when commercializing an innovation, there is still a design activity to be conducted: to design a relevant market model. Therefore this call for a different perspective on sales, to move from an implementation role towards a more strategic role

Of course, our research displays important limitations. First the research focuses only on commercial traveller due to our methodological choice. It could be interesting to see if others form of commercialization can also give access to market models and validate our results. Second we induce market models from our comprehension of the papers, an exchange among a wider community to validate that the model we choose are correct could be valuable.

We hope that this research could help further development in the three fields mentioned in particular to investigate the design activities related to salespeople.

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