

Inter-functional integration between Marketing and Logistics: insights from a case study

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Abstract:

Inter-functional integration dynamics between Marketing and Logistics are not well understood in terms of: contact points, integration factors, formality/formality, integration level and integration impacts. The purpose of this research is to characterize the Marketing-Logistics integration dynamics in two different companies, based on the results of in-depth case studies. The results demonstrate that integration between Marketing and Logistics can help companies to reach its main goals and also to bridge the great divide between forecasting demand and operational execution. At the same time it can make employees feel themselves as part of the whole process.

Keywords: Inter-functional integration, Marketing, Logistics.

Introduction

Individuals from different functions such as Marketing and Logistics are not natural allies (Ellinger, 2000; Piercy, 2007), but they are responsible for many activities that are inter-dependent. This interdependency means that the action or task done by one has impacts on the other (Piercy, 2007). Also these two function are recognized as they should initiate integration processes, because organizations might firms should initiate integration in the interface where it is easier and where integration benefits can be obtained early, because it will encourage further integration efforts.(Gimenez, 2006) and outcomes are interrelated (Shapiro, 1977; Gimenez and Ventura, 2005; Lynch and Whicker, 2008) even if performance measurement tools do not align with responsibilities (Piercy, 2007). Also as Fugate et al. (2009, p.248) highlighted “individuals from each side capture and share knowledge of the business environment that is specific to either the inbound supply side or the outbound demand side of the firm”. This could be useful to improve organization abilities to cope with the problem of integration between demand and supply.

The literature (Pagell, 2004; Ellinger, 2000; Kahn, Mentzer, 1998), predominantly discusses the correlation between integration and functional results, but does not describe the dynamics with which the integration processes generate such impacts. The following questions guide this research: how can Marketing and Logistics integration dynamics be characterized in terms of contact points, integration factors, formality/informality, integration level and impact of integration?

In this paper, the literature on inter-functional integration presents the main aspects of integration dynamics processes such as: contact points between areas, integration factors, integration level, integration impacts and formal/ informal aspect of integration. The overarching purpose is to compare what is occurring in the literature with what is occurring at organizations. This was accomplished by collecting primary data from two different companies. The findings are presented and, some insights and limitations are discussed to show the relationship between the practice and research.

Literature Review

Integration can be defined as: *“The quality of the state of collaboration that exists among departments that are required to achieve unity of effort by the demands of the environment”* (Lawrence, Lorsch, 1967 p.11). Characteristics of functional segmentation encourages individualistic behavior, "members of different departments look for different interests at different points of view, and often find it difficult to reach agreements on integrated programs of action" (Lawrence, Lorsch, 1967 p.11). The integration process has five primary aspects: contact points between areas, integration factors, integration level, integration impacts and formal/informal aspect of integration. Table 1, synthesizes these aspects of integration found in the literature.

Table 1: Synthesis of integration aspects

Elements	Description	Authors
Contact points	The contact points between areas correspond to the internal activities that must be performed by two or more areas related to compliance of business processes, a function helps another to perform tasks and accomplish goals	Rinehart et al, (1989)
Integration factors	Integration factors are management actions, individual or collective voluntary behaviors that stimulate the inter-functional integration	Chen, et al., (2007); Meunier-FitzHugh and Piercy, (2007); Chernatony and Cottam, (2009)
Integration level	Intensity of the involvement of a function with the other, based on the frequency and the ability to carry out the actions that need integration	Gimenez, (2006); Pagell, (2004); Flint et al., (2008); Daugherty et al., (2009); Esper et al., (2010); Flynn et al., (2010).
Formality/ Informality	Aspects related to how the factors of integration are implemented during integration processes. This is not only linked to the integrating factor, but also the dynamics of functional integration.	Kahn, (1996); Gimenez and Ventura, (2005); Daugherty et al., (2009).
Integration impacts	The integration of internal functions improves the organizational performance and also facilitates the achievement of external integration, based on relationships with the entities that make up its supply chain. The impact of functional integration with the efficiency and performance of tasks in each function integrated, involving factors of integration and functional performance metrics.	Flint et al., (2008); Daugherty et al., (2009); Ellinger et al., (2000); Schramm-Klein and Morschett, (2006).

According to Daugherty, Chen and Roath (2009), the biggest challenge is to discover how to achieve the integration levels desired and clearly define the integration factors. The integration factors are shown in detail in Table 1.

Table 2: Integration factors and their main authors

Integration Factors	Authors
Planning jointly by the functions	Meunier-FitzHugh and Piercy (2007); Chernatony and Cottam (2009)
Inter-functional knowledge/same language/mindset	Meunier-FitzHugh and Piercy (2007); Dewsnap and Jobber (2009)
Inter-functional meetings	Chernatony and Cottam (2009); Flynn et al. (2010)
Sharing information, ideas and resources	Daugherty et al.(2009); Dewsnap and Jobber (2009); Flynn et al. (2010)
Congruent evaluation and rewards system	Van Hoek et al. (2008) ; Chernatony and Cottam (2009)
Top management support	Van Hoek et al. (2008) ; Chernatony and Cottam (2009)
Informal workgroups	Dawes and Massey (2006); Dewsnap and Jobber (2009)
Interpersonal trust between teams	Ellinger et al. (2006)
Hierarchical dependence level among functions	Dawes and Massey (2006); Jüttner et al. (2007)
Inter-functional education and training	Meunier-FitzHugh and Piercy (2007); Swink and Song (2007)
Adequate communication	Meunier-FitzHugh and Piercy (2007); Chernatony and Cottam (2009)
Cross functional teams	Chernatony and Cottam (2009); Kahn (2009); Flynn et al. (2010)
Willingness to solve conflicts	Swink and Song (2007); Chernatony and Cottam (2009)
Physical closeness of functional workgroups	Massey and Dawes (2001); Pagell (2004)
Job rotation/job switching	Massey and Dawes (2001); Pagell (2004)
Cooperation philosophy	Dewsnap and Jobber (2009); Chernatony and Cottam (2009)
Goal alignment	Swink and Song (2007); van Hoek et al. (2008)
Congruency between functional goals and organizational strategy	Shapiro (1977); Watson and Kraisenlbud (2007)
Interdependence Recognition	Lynch and Whicker (2008); Daugherty et al.(2009)

Method

The research was conducted in four phases. The first phase comprised an extensive literature review. The search and analyses process was done between August 2008 and March 2010. To locate the appropriate literature key word were identified such as internal integration, integration between Marketing and Logistics, inter-functional integration. These key words helped to identify the primary literature. There was a snowball effect where the identified literature helped locate other relevant literature. The literature review was comprehensive. The primary search engines were used: Google Scholar, Ebsco, Proquest. Ultimately a content analysis was performed on the applicable literature to identify the inter-functional factors.

The second phase comprised the sample selection and two companies were selected. As table 3 shows, these two companies are from different industrial sectors. Size of the organization and infrastructure were key elements involved in the selection. This is because larger companies demand large amounts of capital, participants and infrastructure toward integration (Massey and Dawes, 2001) and helps to better understand

integration in a complex environment. They also needed to be differentiated in functions and departments and have functions like Marketing and Logistics performed by two distinct departments, in order to identify and analyze integration actions. Companies from different business sectors were selected because they show management and structure heterogeneity.

Table 3 – Main characteristics of the companies in the sample

	Company A	Company B
Description	A division headquartered in São Paulo State, responsible for 55% of net sales revenue of a multinational group.	A company headquartered in, São Paulo State, with has 1 factory and 3 Distribution Centers.
Markets	Wheels and chassis for trucks, bus, tractors and pick-ups	Soft drink and Beverage products
2010 Net Sales Revenue	US\$ 701,08 million (Brazilian operation)	US\$ 348,14 million
Employees	6,000	2,500
Interviewed participants	5	8
Interviewed positions	HR Coordinator, Marketing Manager, Marketing and New Business Coordinator, Logistics Manager, Logistics Supervisor.	President, Marketing Manager, Logistics Manager, Trade-Marketing Coordinator, Logistics Coordinator, S&OP Leader/Supply Coordinator, Sales Coordinator, Strategic Planning Manager.
Time	December 2010	April/May 2011

During the third phase the interview protocol was developed and tested. The interview protocol was developed based on the literature and discussions with academics and practitioners knowledgeable in the area. A pilot-test was performed in a company that was not part of the research, but showed some similar characteristics with the sample target. The main questionnaire was also sent by email to ten colleagues (from Marketing, Logistics, Supply Chain Management and Production areas). Six returned returned the questionnaire, and all suggestions were incorporated.

During the fourth phase, in-depth interviews were conducted that lasted about one hour each. The interviews were recorded and transcribed. Content analysis was performed on the interview data with coding based on the primary factors of inter-functional integration found in the literature. The intention was catch each interviewed own perception about integration phenomena. For example, the integration level was defined by each interviewed and they were asked to explain the criteria they used to define their evaluation about the subject.

Results

The results of the interviews at the Company 1 are shown at Table 4.

Table 4 - Company 1 - Wheels and chassis

Elements	Perceptions from Marketing	Perceptions from Logistics
Contact points	New product development (NPD); management of company's image; delivery and transportation planning; customer service definition.	New product development (NPD); definition of product and packaging characteristics; customer service definition.

Integration factors	Interpersonal trust between teams; physical closeness of functional workgroups; non-conflicting objectives; attention to informal working group; cooperation philosophy; willingness to solve conflicts.	Interpersonal trust between teams; sharing of information; joint planning; adequate communication; top management support; attention to informal working group; physical closeness of functional workgroups; congruency between functional goals and organizational strategy; recognition of function interdependence; cooperation philosophy; willingness to solve conflicts; a function broad knowledge from another one.
Integration level	Medium.	Medium.
Formality/ Informality	More informal than formal: there is trust among participants because they have long term working relationship, cooperative atmosphere, and willingness to deal with issues from another area. Informality facilitates conflict solving.	More informal than formal: there are formal meetings to define goals and verify results. Although, deals related the execution of the plan are made informally through often personal communication. Participants have trust and mutual knowledge about each other, therefore, there are no surprises at the end of term.
Integration Impacts	Generates customer acknowledgement (awards), helps keep a positive image in face of the market, reduces time between project and launch of new products, avoid late on deliveries, as well as damages on products.	Helps keep a positive image in face of the market, company does not sell what it cannot deliver, avoid stress among employees, speeds up logistics operations by quick solving of inter-functional problems, improves customer service, reduces inventory and final costs.

NPD is an important contact point because it requires integration between Marketing and Logistics since they need to make the best decision about packaging, type of vehicle, load optimization. Also, they have to share information related to amount, time, prizes and costs. This sharing process should be quickly done in order to take the better decision in terms of market requirements and firms resources and constrains. Participants from Marketing suggest that integration is required to perform image management, though adequate deliveries, to keep customer satisfaction, and promotion made by trucks painted with advertising is also a desirable action. In order to answer customer needs efficiently, Logistics considers that Marketing has to give timely feedback to Logistics in case of problems and complaints about transportation and unloading. Participants from the both functions agreed that customer service level definition requires information from customer's specifications and transportation possibilities. Moreover, Logistics participants consider that forecasting demand should be precise, as well as, the definition of the physical characteristics of products. The joint follow-up of these two activities may help Logistics improve the performance of inventory management.

The integration level between Marketing and Logistics was evaluated as medium because of the answers received about this element, the respondents argued that integration is enough to perform activities that involve the two areas, but there are some problems. According to Marketing, the main problem to be solved is a waste of time with complain and look for guilty between areas. Moreover, Logistics participants noticed the existence of conflicting objectives as in forecasts or definition of sale amounts that are over the Logistics capacity.

The way the practice of integration arises in Company 1 seems to be more informal than formal. Marketing participants explain that in the normal routines, integration appears to be formal. However, in the operational level, where the formal plans are accomplished, there is more informality than formality in the relationship. This is because of the existence of a cooperation philosophy in which employees engage themselves seriously in issues related to the proper functioning of the firm. Participants are working together for a long time and it facilitates conflict solving and informal deals in inter-functional problems. Longevity of inter-personal relationship shows up as an

important integrator factor. Logistics participants agree that the environment of the dyad is very informal; participants from Marketing have willingness to answer directly. Logistics participants indicated that there is a keen understanding of problems and responsibilities from each other; however it is not a result of formal trainings, but a result of personal communication.

Finally, marketers and logisticians have many opinions about possible impacts generated by the existence of integration between their areas. Table 5 introduces the second company involved in this research.

Table 5 - Company 2 – Beverages and soft drinks

Elements	Perceptions from Marketing	Perceptions from Logistics
Contact points	New product launch; management of image; customer service; inventory; warehousing and storage; promotion activities	New product launch; packaging characteristics; customer service; inventory; promotion activities; forecasting demand to new products and sales activities.
Integration factors	Organizational structure that facilitates interactions among functions; a function broad knowledge from another one; top management support; adequate communication; interpersonal trust between teams; cooperation philosophy; recognition of functional interdependence; goal alignment; willingness to solve conflicts and informal workgroups.	Willingness to solve conflicts; share information, ideas and resources; interpersonal trust between teams; adequate communication; goal alignment; congruency between functional goals and organizational strategy; a function broad knowledge from another one; cooperation philosophy; organizational structure that facilitates/ support interactions among functions; cross functional teams; top management support; informal workgroups.
Integration level	Medium.	Medium.
Formality/ Informality	More formal, even if informality plays an important role. Trust is present; participants know each other and work together for a long time and there's a cooperation atmosphere. These factors facilitate conflicts solving and informally dealing. Besides all this, Integrated Planning Group (IP), a seed for S&OP initiative has been present and it is considered the main tool to integration	Both formal and informal plays important role. Joint planning to define goals and verify results. Formal: weekly IP meetings and monthly meeting with main directors, managers and president. Participants have high level of trust and mutual knowledge about each other functions, and it arises from a maturing process lived by employees and the company. In spite of this, it is hard to put in others place during daily/routinely activities. Cooperation and Longevity of inter-personal relationship has facilitated the integration process.
Integration Impacts	Bridging the great divide between forecasting demand and execution to protect the company image, avoid out-of-stock and improve customer service. Internal Marketing actions help all operational staff to feel part of strategic plan.	Integrate Sales and Deliver requirements (impacts customer service and Logistics costs) to improve consistency. Implantation of CRM, with Marketing helps to define an integrated evaluation of clients (to Company, to Sales/Marketing, and to Logistics) to define what will be the right service level in different dimensions. Internal Marketing actions are essential to make Logistics employees feel part of the whole process.

In Company 2, Marketing and Logistics participants agree in general about the contact points and it should be in part, result of the Integration Planning meetings (IP), efforts that will be discussed later. Logistics claims more communication and discussion about packaging characteristics that different types of products require. For them, this knowledge is included in Marketing expertise and Logistics participants have difficulties in dealing with so many differences. Another activity that demands close communication (not well developed) is aggregating new products forecasting demand and sales work. For Logistics participants, decisions like improving sales volume out from the plan should be discussed before the pre-sale happens and may include Logistics and Production participants.

In company 2, integration factors considered by both Marketing and Logistics participants were: willingness to solve conflicts, interpersonal trust between teams, a function broad knowledge from another one, adequate communication, top management support, cooperation philosophy and informal workgroups. On the other hand, (IP) are one of the formal mechanisms cited. IP meets at least weekly including participants from all functions of the company. This group has the autonomy to align conflicts and problems that affect company's macro results and objectives. The group leader is a manager or coordinator from one of this functions (Supply Coordinator) and changes each year. The IP group played a key role during the last 11 years in slowly changing mindsets and behaviors in all areas involved. IP helped a lot to change the way participants think about integration and interdependence. Many interviewed participants highlighted that is hard to change Sales culture about pushing volumes in the end of the each month, for example.

Internal Marketing and Longevity of inter-personal relationships among participants of different areas are cited as two important components of integration phenomena. Besides cited in the literature, this two constructs were not previously mentioned.

Integration level was considered medium not just by Logistics and Marketing participants, but also by the other interviewed participants. Even recognizing that company 2 made great improvements in inter-functional integration, they feel that much work is demanded to really integrate, comparing situations that they lived before IP meeting started in the past. They do not have integrated metrics even recognizing that it should be important, they cannot imagine how they should be organized. The entire company has an evaluation metric called Participation in the Results which includes 60% of individual results and 40% of company general result. They do not indicate that this metric is inter-functional but mention it as a formalized effort to make participants look in a systemic versus functionally siloed perspective. Besides IP efforts to make participants look to the other's function side, many problems of miscommunication and misunderstanding occur, but at this company, participants also show willingness or goodwill to solve conflicts.

Conclusions

This paper proposed the characterization of inter-functional integration elements involved in Marketing and Logistics relationships. Five elements were identified and characterized, from the theoretical review: contact points, integration factors, integration level, integration formality and/or informality and integration impacts. In a field study, two companies were investigated in order to analyze empirical data to compare and contrast these different elements in research and in practice.

Marketing and Logistics participants identified many contact points which should be considered early integration targets. They are the points that require more incentives to improve integration efforts and their outcomes should used to measure performance from integrated actions.

Due to the way the integration factors, and contact points are applied, it is possible to note a predominance of informal ways of integration in Company 1. On the other hand, Company 2 presented a higher level of formalization on integration aspects. It can be clearly noted that the cross functional team (IP) and top management support are essential efforts for the integration management in Company 2. Marketing and Logistics participants, from both companies, perceived the integration level between these areas as medium. Generally it is justified by the existence of some integration factors in such relationships, however, in both companies there were some complaints about lack of

inter-functional cooperation, mainly, about operational issues. Culture and different mindsets were also pointed as some constraints to improve inter-functional integration.

The participants demonstrated a perception that integration between Marketing and Logistics can help companies to reach desirable results, such as: customer acknowledgement, keep a positive image in the market, reduce time between project and new product launch, avoid late deliveries as well as damage on products. The most important complaint is that the company cannot sell what it cannot deliver. Situations like that cause stress among employees because in general the expectation is that the speed of the logistics operations is increased, there is a reduction in customer service and unnecessary costs that will avoid increase in revenue for the whole company. Discussing the right level of inventory to maintain the appropriate levels of customer service and debating the costs of this decision is a first way to bridge the great divide between forecasting demand and execution and make employees feel engaged in the process.

As a limitation, the paper only provides characterization and possible impacts of internal integration, about a few practical situations. Further studies may provide a deeper analysis of the implications generated by determined combinations of the proposed elements, as well as, to explore the integration elements through different methods and industries.

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