Teaching is like engineering: my living educational theory

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Teaching Is Like Engineering:

My Living Educational Theory

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A context statement in fulfilment of the

requirements of Middlesex University

for the degree of

Doctor of Professional Studies by Public Works

Ann Arbor, United States

Monday 01 June 2020

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Acknowledgements

The public works which form the basis of this Doctor of Professional Studies degree were the result of a decade of scientific research and writing in and around the scholarship of teaching and learning. The colleagues, collaborators, and anonymous reviewers who contributed to these public works are too numerous to mention by name. But I am grateful for their counsel, cooperation, and constructive criticism.

With respect to this context statement, however, I thank my main advisor Dr David Adams at Middlesex University, whose suggestions have made it a better product. I also thank Professor Paul Gibbs and Dr Mariana Dodourova, also of Middlesex University, who provided valuable insights. And I thank my close friend and colleague, Marcus Collins, who, as a kindred marketing educator, pushes me to improve my professional practice.

Finally, I am lucky to have a wife, three children, and a miniature schnauzer, who continue to put up with my shenanigans. My love to you all!

1. Introduction

1.1. Historical Revisionism

The traditional view of scientific progress is that human understanding of the world is contiguous and cumulative, with both theories and concepts 'improving' incrementally through gradational change. Thomas Kuhn's (1962) *The Structure of Scientific Revolutions* challenged this traditional view by arguing, on the contrary, that scientific progress is made through leaps and bounds, when "the earlier results of science [are] rejected, replaced, and reinterpreted by new theories and conceptual frameworks" ("Scientific Progress.", 2020). Stated simply, scientific progress is revolutionary, not evolutionary.

History is seemingly no different. Indeed, although it is often said that history is written by the victors, human understanding of the past is always under threat, as new data are revealed, for example, ideologies and cultural hegemonies change, or scientific developments in other academic disciplines emerge. As suggested by Woodward (1989), these and other factors "will and should raise new questions about the past, and affect our reading of large areas of history, and my belief is that future revisions may be extensive enough to justify calling the coming age of historiography an 'Age of Reinterpretation' " (p. 76). This reinterpretation of history is known as historical revisionism among both historians and historiographers, and advocates for the challenge of orthodox views of the past. Historical revisionism can take on a negative tone, however, when reinterpretations are used to justify specific actions, or (as I write with a grimace on my face) in the everyday, when parents recount childhood events as if they occurred in some alternate universe.

Writing a doctoral dissertation— or a context statement, in this instance— often feels like historical revisionism. The 'writing up' stage of a doctorate is, in most cases, completed after the research has been concluded. Its course of events is rarely as logical or linear as it is remembered. Research is also inherently messy, and serendipity occurs frequently throughout the doctoral process. The conventions of scientific writing, however, tend to shun both chaos and chance. And research is usually conducted over many years with countless decisions along

the way, the rationalisations of which can be (temptingly) massaged into a neat and tidy storyline.

This context statement documents my historical journey through the Doctor of Professional Studies by Public Works process. The logic is largely chronological in nature, but doubtless some historical revisionism has crept into my narrative. Indeed, I registered as a doctoral student in January 2019. But the public works which form the basis of this context statement date to 2009. And the autobiography which I conducted in service of identifying the educational values which constitute my professional identity, includes descriptions of specific events in my life which stretch back to childhood.

Nevertheless, my historical journey through the Doctor of Professional Studies by Public Works process began with an exploration of professions. The first thing which I wrote for this context statement was the section on professions… although admittedly, pieces of it had been laying around for almost 20 years. To begin with professions simply made sense to me at the time, because the title of the degree itself intimated that a grounding in the professions was warranted.

I then embarked on a professional walkabout of sorts, the goal of which was to identify my own profession, whose articulation I deemed was necessary somewhere within a Doctor of Professional Studies context statement. On the walkabout, I meandered through the literature on professional identity, professional practice, professionalism, and professionality. This meandering also led to a detour into the literature on communities of practice.

Simultaneously, I also began to catalogue the public works which I had generated since starting my teaching career in 1993. These public works can be viewed as four broad streams. The first stream centres on issues in higher education, including teaching, learning, and educational administration. The second stream focuses on cultural/interpretive research methods. The third stream parallels my interests and experiences in international business, especially those experiences in emerging markets. And the fourth stream explores specific marketing practices.

It was a 2009 chapter on analogical learning in higher education, however— my first public work within the higher education stream— which led me to discover my community of

practice (professors whose goal is to improve teaching and learning in higher education), and to pinpoint my professional identity (marketing educator). It also instigated a decade of scientific research and writing in and around the scholarship of teaching and learning. The resultant public works form the basis of this context statement for the Doctor of Professional Studies degree.

With my community of practice discovered, and my professional identity pinpointed, I then felt compelled to enumerate the specific requirements of a Doctor of Professional Studies degree. To do so, I traced the emergence and evolution of doctoral degrees, highlighting in particular the differences between the traditional PhD degree and so-called professional (sometimes practice-based or practice-led) doctorates. This exercise also helped to distinguish a doctorate by dissertation from a doctorate 'by public works'. In turn, it led to the notion of a context statement as the means for positioning public works both contextually and theoretically.

The term positioning implies the utilisation of some framework, model, or structuring device. Consider the tale of the hermit who relocated his hermitage when the village moved inland after a flood. The status of a hermit, it follows, is defined by the location of the hermitage vis-à-vis the village. Serendipitously, while reading about action research, I happened upon the living educational theory paradigm, which offers a systematic approach to describing and explaining professional practice.

I adopted the spirit of the living educational theory paradigm for this context statement, as a means for positioning my public works both contextually and theoretically. Specifically, I theorised my professional identity, rather than my professional practice, as a marketing educator within my community of practice. I conducted an autoethnography, through which I identified the ten educational values which constitute my professional identity. I examined how these educational values are evidenced in my public works. And I theorised my professional identity as an analogy that 'teaching is like engineering'. But returning to the beginning with an exploration of professions…

1.2. Professions

Every year, at secret university locations throughout Canada, the *Ritual of the Calling of an Engineer*— known colloquially to its initiates as the 'iron ring ceremony'— is held amid the madness of spring balls and final examinations. The ritual was developed by author Rudyard

Kipling at the request of seven past-presidents of the Engineering Institute of Canada who believed that an ethical obligation "to which a young graduate in engineering could subscribe should be developed" ("The Calling… ", 2019). This ethical obligation is symbolised by an iron ring which is intended to be worn by the engineer on the pinky finger of the working hand. Legend holds that the first iron rings were fabricated from the remnants of an early twentieth century bridge disaster in Québec which was the direct result of shoddy engineering work… a sober reminder of the humility which any engineer ought to maintain.

Since its inception, the iron ring ceremony has been remarkably successful in binding engineers from all over Canada in a fraternity/sorority of sorts. I can recount numerous conversations with strangers following the query "So, which kind of engineer are you?", which was triggered by the sighting of my iron ring. Although its unifying power is a laudable result, it must be noted that the *Ritual of the Calling of an Engineer* was…

> … instituted with the simple end of directing the newly qualified engineer toward a consciousness of the profession and its social significance and indicating to the more experienced engineer their responsibilities in welcoming and supporting the newer engineers when they are ready to enter the profession ("The Calling… ", 2019).

Despite the importance of the iron ring ceremony to a young graduate in engineering, neither the Freemasonic-like chanting which occurs at the iron ring ceremony, nor the wearing of the iron ring on the pinky finger of the working hand, earns the engineering graduate the title of PE (professional engineer). On the contrary, the *Ritual of the Calling of an Engineer* is largely symbolic in nature, and does little to satisfy the requirements of the engineering profession. Put simply, engineering— like other professions— is more than pageantry and ornamentation.

Indeed, several themes seem to characterise a profession (Millerson, 1964). First, a profession revolves around a specialised body of knowledge, the mastery of which requires extensive training of an intellectual nature, and the advancement of which is a primary goal of its members. These members are often organised in professional associations (the Royal College of Surgeons, for example, or the Project Management Institute), they possess a high degree of autonomy and decision-making power in their professional activities, and they provide services which, in most spheres, are essential to society. To be able to undertake these services— that is

to say, to become a member of a profession— typically requires certification by an association, or a licence from the government, the benefit of which gives members of a profession some degree of exclusivity. Finally, because the services of a profession are directed towards society, a profession mandates that its members adhere to a code of ethics.

According to Freidson (1986), "the medieval universities of Europe spawned the three original learned professions of medicine, law, and the clergy" (p. 17). The technological advances and economic specialisation of modernity which were accelerated by the industrial revolution, however, expanded the breadth and variety of professions. Before assuming his military mantle, for example, the first United States president George Washington was a professional surveyor ("Surveying.", 2019). In 1896, accounting was recognised as a profession in the United States, with the passing of a law which stipulated that the title of Certified Public Accountant (CPA) would be awarded to only those people who had passed a licensing examination, and who had three years of accounting experience ("Financial History… ", 2019). And today, the so-called professions include everything from auto repair to zoo-keeping.

I only practised engineering for four months immediately after graduating with my Bachelor of Engineering Science (BEsc) degree in April 1990. I had spent my eight summer vacations of secondary school and university working in the engineering and maintenance department of a foundry in my hometown in Canada which is located one hundred kilometres north of Toronto. My formal 'apprenticeship' in the engineering profession, however, was relatively short-lived, and I was, as a matter of policy, years away from earning the title of PE. But, after a European back-packing trip which saw me traipsing through eleven countries in three months, I began a more metaphysical journey which revealed an entirely different 'calling' for this engineer.

1.3. Hot for Teaching

My sister was a teacher, first at a primary school in an isolated First Nations Webequie village near Hudson Bay, then later as a teacher-librarian in Arctic Canada. My mother was also a teacher; after completing two years of training at Hamilton Teacher's College, she was given her own one-room school house not far from my hometown. My maternal grandmother's teaching tenure lasted less than three years because only unmarried women were allowed to be

teachers during that period of Canadian history. I also have a vague recollection that her father had been a teacher, before education was deemed an acceptable job for women in Canada. It might seem, therefore, that I was destined to be a teacher.

My path to becoming a teacher, however, was not straightforward. As mentioned in Section 1.2, I completed my undergraduate degree in engineering, largely heeding to the 'wisdom of the crowd' which had concluded that engineering was the most appropriate subject for someone with good secondary-school grades in mathematics and the sciences. As I remember it, I had thoroughly squelched any inkling of being a teacher, having somehow convinced myself that the teaching profession was beneath me. In retrospect, however, some of my fondest memories of the four years of engineering grind involved impromptu study sessions with classmates, during which I attempted to teach the eight functions of microprocessors, the formula for calculating digital bandwidth, or some other engineering topic. I thought (arrogantly) that I was better than my classmates at explaining things.

It was after the four months of post-graduation engineering practice, and the requisite European back-packing trip, that I more or less fell into teaching. In late November 1990, I returned to my hometown from London, the last stop on the eleven-country backpacking trip. Prior to the trip, however, I had been offered (and I had accepted) a place in an MBA programme which was to begin nine months later. What to do until then? I was not especially eager to return to the foundry at which I had previously worked, and applying for engineering positions at other industrial companies in the area seemed unethical, knowing that I would be departing for the MBA programme in less than a year. So, again, what to do until then?

My mother still served as a substitute teacher from time to time in both the publicly-funded secular school and the Catholic school systems in my home town, and she suggested that I 'put my name on the list'. Within days I received my first call to stand in (actually more sitting than standing) for a kindergarten teacher who was out with laryngitis, strep throat, or some other not-the-best-for-a-teacher kind of illness. Although my engineering skills were doubtless under-utilised as I played in the sandbox, laced up boots, and doled out snacks, I was smitten. I was convinced that it was more than just an infatuation during the following week, when I spent two days teaching grade-twelve calculus. By the end of the school year, I had served as a substitute

teacher for more than one hundred days, and in almost every grade. And I knew that teaching was to become my profession.

At the end of the summer vacation following the school year, however, I packed up my car, and off I went— somewhat reluctantly— on a seventeen-hour drive to Fredericton, New Brunswick for a week of MBA orientation activities. It ought not to be surprising that I was reluctant to enter the MBA programme, and during that week I began exploring the possibility of switching to the University's one-year Bachelor of Education (BEd) programme (the Canadian equivalent of the United Kingdom's Postgraduate Certificate in Education). But another random occurrence changed my direction again.

In the first semester of the MBA programme I was fortunate to secure a teaching assistantship, the main activity of which was to conduct remedial marketing tutorials for three Indonesian classmates whose English-language skills were weak. I use the word fortunate because the teaching assistantship covered my university fees. Hooray! More importantly, the tutorial experience precipitated a decisive a-ha: that I would become a university professor (I use the term 'professor' throughout this context statement in the generic sense, not in terms of institutional rank.). The teaching assistantship also roused my interest in marketing.

An internship in Poland after my first year of the MBA programme, during which I spent the summer teaching marketing to the employees of a newly-instituted marketing department of a former centrally-planned tyre factory, confirmed my epiphany. And it reinforced my interest in marketing. Consequently, I returned to the second year of the MBA programme with more enthusiasm for its various subjects (especially marketing), with a new professional focus, and, accordingly, with a new item on my 'to do list': a PhD in marketing, the requisite degree for university-level teaching.

I began my doctoral programme in January 1997 at the University of Cambridge in the United Kingdom. My doctoral research was situated broadly within the field of marketing. More specifically, I developed a new conceptualisation of consumer values by conducting a phenomenology within the high-fidelity audio microculture. To fund my doctoral programme, I served as an adjunct professor at various universities in the United Kingdom and abroad, often leaving Cambridge for weeks at a time to deliver intensive modules in marketing. My higher

education teaching career was underway!

I submitted my doctoral dissertation for examination in October 2000, and in May 2001 I took up the position of Senior Lecturer at Washington University, a prestigious, private institution of higher education in Saint Louis, United States. My teaching load consisted of six full-term modules per year. My bread-and-butter module was international marketing, which I taught to both undergraduate and MBA students. I also taught services marketing and consumer behaviour at the post-graduate level from time to time.

To the outsider, therefore, it must have appeared that I had made it:

PhD degree ☑
Senior Lecturer position ☑

Indeed, paraphrasing 1970s chart-topper Helen Reddy, I was professor, hear me roar. I had entered the higher education profession. Eleven years after participating in the iron ring ceremony, I had finally become a professional.

1.4. Professional Identity

Ironically, despite the years of teaching experience which I had already accrued, despite the completion of my doctoral programme, and despite my appointment as full-time Senior Lecturer at Washington University, my professional identity— defined as a person's image of who she/he is as a professional (Slay and Smith, 2011), or, more elaborately, the constellation of attributes, beliefs, values, motives, and experiences which a person uses to define herself/ himself in a professional capacity (Schein, 1978)— had somehow become tied to marketing. Indeed, my scholarly activities, my memberships in professional associations, even my daily conversations with colleagues were all about marketing. Doctoral programmes have a way of brainwashing you, I suppose. And according to Cuthbert and Langley (2010), the academic profession has traditionally come second to the academic discipline in a professor's identity.

Soon, however, a disillusionment with marketing began creeping in— not with marketing *per se*, but with the academic discipline of marketing. First came the recognition that the scientific research on which I spent an excessive amount of time had marginal impact on the quotidian practice of marketing. In other words, the academic discipline of marketing appeared to overlap very little with 'real' marketing. The dirty little secret of the academy had been

revealed. The ivory tower had come into view.

Second, I observed that for many of my colleagues in the marketing department, the subject of marketing appeared to be almost entirely divorced from the students whose marketing mastery they professed to be nurturing. Student needs were seemingly of low importance, and their employability factored little in curriculum design. This observation would not surprise Stoller (2017), who suggested that professors…

> largely teach *what* they know (content) decoupled from *why* they know it (values), *how* they know (technological processes), and *who* knows it (identities and social contexts). The curriculum is not only decontextualised, but also dehumanised as its center of gravity prioritizes *subjects* over *students* (par. 10).

Third (and most jarring) was the revelation that to most of my colleagues in the marketing department and in other departments of the business school, teaching was considered secondary. Indeed, teaching was viewed by them as trivial and insignificant in contrast to scientific research, the gravity of which, for them, was undeniable. I remember the Dean stating offhandedly at a faculty meeting that three out of five on teaching evaluations was adequate. Adequate!

I decided then and there to enrol in the part-time Master of Arts in Education (MAEd) degree which was offered through the university's continuing education department (Employees of Washington University were allowed to take modules for free.). My cohort was a mixture of practising teachers from local school districts, and recent university graduates who were working full-time in another field, but who were hoping to make a switch to teaching. At the time, I was astonished by how much I enjoyed the MAEd coursework, which included such topics as the sociology of education, curriculum design, and educational psychology. Unfortunately, I had very little in common with members of my cohort, whose ambitions, interests, and concerns were rooted in K-12 education. In short, although I was inspired intellectually by the MAEd coursework, my professional identity remained ambiguous. Indeed, despite my claim to be a higher education professional, its meaning was vague.

This ambiguity of my professional identity as a professor— the vagueness of the meaning of 'higher education professional'— reveals the Janus-like nature which the word 'professional' now holds. In its noun form, to "refer to someone as 'a professional' may be to signify that he or

she belongs to one (or more) of a certain class or category of human occupations— commonly called ‘professions’ ” (Carr, 2014, p. 6). As an adjective, the meaning of professional is less well-defined. Professional can be used to indicate that a person receives payment for her/his activities, thereby distinguishing professionals from amateurs: professional wrestler or professional artist, for example. Professional can also be used, however, as a general appraisal of a person’s work. A mechanic might be deemed professional if the work which she/he did was judged to be done well. By contrast, a clerk in a bank whose service was judged to be unsatisfactory might be deemed unprofessional. But as noted by Carr (2014), we “might consider paid workers who give satisfactory service to be professional in these senses without regarding them as member[s] of *professions*” (p. 7).

More importantly, the ambiguity of my professional identity as a professor— the vagueness of the meaning of ‘higher education professional’— underlines the social and personal significance of professional identity. Indeed, professional identity allows people to enter a community whose members adhere to a common approach to a particular type of work (Van Maanen and Barley, 1984). Professional identity is used by people to assign meaning to their professional practices, and it shapes their attitudes, affects, and behaviours (Siebert and Siebert, 2005). And professional identity is the vehicle by which people claim purpose and meaning for themselves, and by which they explicate their contributions to society (Caza and Creary, 2019).

A constructivist view of professional identity suggests that professional identity is not dispensed like a membership card when a person joins a profession, or issued like some royal decree by the profession’s leaders. Instead, professional identity is an “interpretive activity involved in reproducing and transforming self-identity” (Alvesson and Wilmott, 2002, p. 627). It is a subjective construction which is influenced by the interpersonal relationships which a person has with other members of the profession, and by the profession itself, and which, in turn, influences the interpersonal relationships which the person has with other members of the profession, and which guides her/his professional practices (Caza and Creary, 2019). And it is always tentative, subject to a “continuous process of construction, deconstruction and reconstruction” (Henkel, 2010, p. 10).

According to Caza and Creary (2019), however, there are five different professional identity archetypes which people tend to display: 1. intersection, 2. dominance, 3. compartmentalisation, 4. holism, and 5. augmentation. Intersection occurs when a person situates herself/himself at the confluence of two professions. Consider a nurse-midwife, for example, whose professional identity combines aspects of both nursing and midwifery. In contrast to intersection, dominance occurs when a person's professional identity is defined by a primary profession to which all other professions are subordinated. In this case, a nurse-midwife would consider herself/himself first and foremost a nurse; being a midwife is not irrelevant, but it comes second to the primary profession. Compartmentalisation refers to a person's ability to identify with different professions in different contexts or situations. In other words, the activation of a professional identity is context-specific or situation-specific. When a nurse-midwife is taking blood, for example, the nursing professional identity comes to the fore. Holism, as the title suggests, applies to a person whose professional identity is superordinate, and encompasses all other professional identities— when a mid-wife defines herself/himself as a health care professional, for example. Finally, augmentation is a professional identity archetype in which a person holds multiple professional identities which are co-activated, and each of which complements, extends, or enhances other professional identities. Imagine the emphasis on mind-body-spirit for a nurse-midwife who also teaches yoga and sells nutritional supplements in her/his spare time.

1.5. Professional Practice

In recent years, the adjectival form of the term professional has also been applied to the notion of practice. Indeed, discussions of professional practice have coincided with the 'practice turn' which began in the early 1990s, and which gives primacy to practice as both the focus of inquiry and the unit of analysis. As summarised by Bueger and Gadinger (2014),

> [a] broad movement of scholars across the social sciences has started to think about practice and how the investigation of doing and sayings can provide us with a better understanding of the world. Together these scholars suggest that the attention to practice requires a turn, that is, a practice turn. (p. 3)

Green (2009) noted in the introductory chapter of his edited anthology on professional practice that, despite the widespread circulation of the term professional practice, its meaning

remains varied. Indeed, he offered up four possible senses of professional practice which are seemingly in play. The first sense is that professional practice refers to the notion of practising a profession, as in practising medicine or practising law. Accordingly, in the context of higher education, a person would be considered to be practising teaching. The second sense of professional practice alludes to the idea of practising professionalism. That is to say, when "one enacts professionalism, one practises what it is to be professional, or to be a professional" (Green, 2009, p. 6). The third sense intimates an ethical or moral quality which accompanies practice. Professional practice, therefore, occurs when a person acts ethically or morally in the context of her/his profession. And the fourth sense of professional practice reflects the paid/unpaid dichotomy which was mentioned previously— professionals, unlike amateurs, are paid for their practice.

Kemmis (2009), however, was less equivocal, adopting the first sense of the term professional practice, in concert with the practice turn which, not coincidentally, has informed many of his writings. Kemmis recognised, however, that the study of professional practice has been likewise varied. Indeed, he suggested that there are five distinct approaches to the study of social practices in general:

1. Individual/objective: practice as individual behaviour, seen in terms of performances, events and effects: behaviourist and most cognitivist approaches in psychology
2. Social/objective: practice as social interaction— for example, ritual, system-structured, structure-functionalist and social systems approaches
3. Individual/subjective: practice as intentional action, shaped by meaning and values: psychological *verstehen* (empathetic understanding) and most interpretivist approaches
4. Social/subjective: practice as socially-structured, shaped by discourses, tradition: interruptive, aesthetic-historical *verstehen* and post-structuralist approaches
5. Individual and social/objective and subjective: practice as socially- and historically-constituted, and as reconstituted by human agency and social action: critical theory, critical social science

Despite these different approaches to the study of practice, Kemmis concluded that social practices in general, and professional practices in particular, are defined by a set of fourteen key features. To understand professional practices, Kemmis continued, means to understand the discourses and language which people use to articulate their practices, the arrangements and 'activity systems' which constitute their practices, and the social connections and power

structures which order their practices. But to understand my own professional practice, I needed to figure out who I was? Indeed, I needed to pinpoint my professional identity? In the words of Bono, I still hadn't found what I was looking for.

1.6. Who am I? I am Jean Valjean!

In 2008, the ambiguity of my professional identity as a professor— the vagueness of the meaning of 'higher education professional'— was resolved when I reconnected with my former University of Cambridge carrel-mate Claus Nygaard, who had taken up a position at Copenhagen Business School in Denmark after completing his doctoral programme in the academic discipline of strategic management. In a similarly short period of time, Claus had likewise become frustrated with the emphasis on science over students at Copenhagen Business School. He thought that it was ludicrous, for example, for professors to attend expensive academic conferences at which they present their scientific research in a ten to twenty minute session, receive a few comments, then 'head to the bar for a drink'. These same professors, he noted, were often loth to spend any time refining a syllabus, reworking a lesson plan, or rendering a new classroom exercise.

Consequently, Claus launched a new association, *Learning in Higher Education* (LiHE), which, as intimated by its appellation, focused on learning at the post-secondary level. This focus reflected the shift in higher education which was underway at the time: from a professor-centred, transmission-based philosophy, to a student-centred, learning-based philosophy. Its scope was limited to vocational colleges, universities, and other higher education institutions.

The main activity of LiHE remains a symposium which, contrary to traditional academic conferences, returns to the ancient Greek format of the symposium at which co-creation is key. About six months prior to a symposium, a call for chapter proposals which has a relatively narrow theme is announced on the association's website and through various electronic mailing lists. Authors submit chapter proposals accordingly, which are then double-blind reviewed. If a chapter proposal is accepted, its author is given approximately four months to complete and submit a full chapter. The full chapter is then double-blind reviewed, and if it is accepted, the author is invited to attend the symposium, during which authors help polish each other's chapters, finalise their own chapters, and collaborate to assemble an anthology which is sent to

the publisher a few months later.

Claus contacted me in 2008 specifically to solicit a chapter proposal for an upcoming symposium whose theme was ‘Improving Student Learning Outcomes’. I submitted a chapter proposal on the use of analogies in teaching. The idea for the chapter arose one day in a conversation with a colleague who remarked that his go-to instructional tool was the 2×2 matrix (I have witnessed his teaching many times, and I certify that he can boil every management challenge down to two orthogonal dimensions.). With a smile, I added that my go-to instructional tool was the analogy (To this day, I frequently find myself explaining a concept using some variation of the phrase “You know, that is like_____.”.). But a number of important questions arose in my mind. Do analogies work? If so, how and why? Do they have limits? If so, what can be done to ensure their efficacy? This was the gist of the chapter proposal.

Thankfully, my chapter proposal was accepted. The subsequent full chapter was also accepted. And I headed off to the Greek island of Aegina, to a small one-star family-run resort, to the site of my first (first of many) LiHE symposium. Claus and I were the only business-school professors; the other participants came from a variety of faculties, including history, chemistry, and music. Like me, each professor had her/his own subject-specific expertise. But we coalesced around the common goal of improving teaching and learning in higher education. In that moment, I realised that this rag-tag, non-denominational group of professors was my community of practice. Indeed, I had met my tribe. I had found my intellectual home.

Consequently, I was also able to pinpoint my professional identity— that seemingly elusive ‘thing’ which I had been seeking, but which I had somehow been unsuccessful at defining. Indeed, I was finally able to identify— at least in name— who I was as a professional. I was not a marketer! I was not a marketing scholar! No, I was a marketing educator!

Reflecting on this new professional identity with respect to Caza and Creary’s (2019) typology of professional identity archetypes, it is clear to me now that I display the professional identity archetype of dominance. Although I pinpointed my new professional identity as a marketing educator very decisively (and I continue to consider myself as such), my primary profession is as an educator, to which marketing is subordinated. Marketing is the subject which

I teach most frequently, and which is my 'academic home'. When asked "What do you teach?" by immigration officers and other officials who have noted 'Professor' in the occupation field of my completed form, I always respond with marketing. But I consider myself first and foremost an educator; marketing is not irrelevant, but it comes second to my primary profession as an educator. And my community of practice is all educators, not marketing educators specifically.

So, I had discovered my community of practice (professors whose goal is to improve teaching and learning in higher education), and I had pinpointed my professional identity (marketing educator). But what exactly was this new professional identity? Indeed, what does marketing educator mean? Did I suddenly begin acting more professionally after pinpointing my professional identity? Was my level of professionalism, at that moment, somehow higher?

1.7. Professionalism and Professionality

Any discussion of professions, professional identity, and professional practice is incomplete without mention of the concept of professionalism. Originally, the suffix -ism was borrowed from the Greek ίσμός, which, when added to verb stems, created a category of abstract nouns which imply action: baptism, exorcism, or plagiarism, for example. Later, the suffix -ism became common as a means for denoting religious groups (Judaism, paganism, and Calvinism, for example), philosophical schools of thought (positivism, utilitarianism, and postmodernism, for example), and social or political ideologies (cosmopolitanism, militarism, and Thatcherism, for example). But as in the case of professionalism, the suffix -ism can also be used to "form names of a tendency of behaviour, action, state, condition or opinion belonging to a class or group of persons" ("-ism.", 2019). Professionalism, therefore, seemingly refers to the set of qualities which characterise professionals ("Professionalism.", 2019).

Englund (1996) and Hargreaves and Goodson (1996), however, noted a lack of consensus in the literature on the definition of professionalism. Crook (2008) agreed, arguing that "… the application of historical perspectives confirms professionalism to be an artificial construct, with ever-changing and always-contested definitions and traits" (p. 23). I suggest that much of this definitional debate stems from disagreement over the provenance of professionalism— from questions about who or what establishes the set of qualities which characterise professionals.

Burrage and Torstendahl (1990) identified four actors which are involved in

professionalism: states, universities, customers, and practitioners. Muzio *et al*. (2013) added a fifth actor: the employers. I also believe that professional associations play a role, thereby making six actors which are involved in professionalism. A review of the literature on professionalism suggests that the various definitions of professionalism correspond to these different actors.

Beginning with a top down perspective, professionalism can be viewed as originating with the state, a university, or a professional association… and often a combination of these three actors. Indeed, in many service occupations, professionalism is imposed from above (Evetts, 2011). It reflects "an externally imposed, articulated perception of what lies within the parameters of a profession's collective remit and responsibilities" (Evans, 2008, p. 24).

A profession-oriented conceptualisation of professionalism like this has been more common in Continental Europe, where the state and both guilds and unions have traditionally held a great deal of influence… in contrast to an Anglo-Saxon mode of professionalism in which employers or professionals themselves brandish the power. In either case, however, professionalism implies occupational value and a kind of ideology which is imposed on the profession (Evetts, 2009). It also tends to yield a more definitive set of qualities which characterise professionals:

- Control of the work systems, processes, procedures, priorities to be determined primarily by practitioners.
- Professional institutions/associations as the main providers to codes of ethics, contractors of the discourse of professionalism, providers of licensing and admission procedures, controllers of competencies and their acquisition and maintenance, overseeing discipline, the investigation of complaints and appropriate sanctions in case of professional incompetence.
- Collegial authority, legitimacy, mutual support, and cooperation.
- Common and lengthy (perhaps expensive) periods of shared education, training, apprenticeship.
- Development of strong occupational identities and work cultures.
- Strong sense of purpose and of the importance, function, contribution and significance of work.
- Discretionary judgement, assessment, evaluation and decision-making often in highly complex cases, and of confidential advice-giving, treatment and alternative ways of proceeding.
- Trust and confidence characterising the relations between practitioner/client, practitioner/employer and fellow practitioners (Evetts, 2011).

As intimated by this set of qualities, a profession-oriented conceptualisation of professionalism also produces a form of market closure, through credentialing, discursive

means, legal measures, or other tactics. Consider the way in which non-lawyers are 'kept out of the club' through a combination of formalised education, specialised terminology, and deterrents to criminal behaviour. Unsurprisingly, a profession-oriented conceptualisation of professionalism has been criticised for its market closure, which, in most instances, begets monopoly control of work (Evetts, 2011).

In a similarly Orwellian way, professionalism can be viewed as a product of employers. Accordingly, professionalism is "… defined by management and expressed in its expectation of workers and the stipulation of tasks they will perform" (Troman, 1996, p. 476). It is a means to "rationalize, reorganize, contain and control the work and the [workers]" (Evetts, 2011, p. 410). Employer-based conceptualisations of professionalism, therefore, are not so much about "the qualities inherent in an occupation but explore the value of the service offered by members of that occupation to those in power" (Ozga, 1995, p. 22).

According to Barnett (2008), however, "professionalism is witnessing a lurch from an ethic of service to an ethic of performance" (p. 197). It is the customer and not the employer, therefore, who becomes the principle actor of professionalism. And the term professionalism is used "to describe enhancement of the quality of service" (Hoyle, 2001, p. 146) which is delivered to customers. As a result, there is a corresponding shift from social trust to expertise (Brint, 1994). And likewise, professional autonomy gives way to professional accountability (Hoyle and Wallace, 2005).

It is striking that none of these profession-oriented, employer-based, or customer-centred conceptualisations of professionalism roots professionalism in the professionals themselves. Indeed, if professionalism refers to the set of qualities which characterise professionals, then where are thou, professionals? Freidson (2001) concurred, suggesting that professionalism ought to be conceptualised according to a third logic, in contrast to the logics of the market and the organisation. Professionals, it follows, are the provenance of professionalism. As emphasised by Evans (2008), "[w]hoever used to call the shots no longer does" (p. 20).

Recent conceptualisations of professionalism, therefore, have revolved around professionals… although to be fair, prominent sociologist Talcott Parsons suggested in the late 1930s that professionalism involves professional values which emphasise a shared identity

which is based on competencies. Specifically, professional-determined conceptualisations of professionalism define professionalism from a cultural standpoint. Consequently, professionalism is collective, "[s]omething which defines and articulates the quality and character of people's actions within that group" (Hargreaves and Goodson, 1996, p. 4). Professionalism is social— "a configuration of beliefs, practices, relationships, language and symbols distinctive to a particular social unit" (Hoyle and Wallace, 2005, p. 103). Professionalism is discursive. It "rests in the discourses of the practitioners as they define their occupational identity, promote its image" (Evetts, 2011). Professionalism is normative. It is the "[c]onsensus of the 'norms' which may apply to being and behaving as a professional with personal, organizational and broader political conditions" (Day, 1999, p. 13). And professionalism is self-interested, including "those strategies and rhetorics employed by members of an occupation in seeking to improve status, salary and condition" (Hoyle, 1975, p. 315).

Now, I have written elsewhere (Branch, 2018) that any group of people— society, organisation, or indeed profession— is not monolithic. On the contrary, there is always variation among group-members. People remain different, even when part of a larger collective. I suggest, therefore, that culture can be understood by viewing a heterogeneous group of people as a Gaussian (or normal) curve, with culture akin to the measure of its central tendency. In other words, culture is the mean, median, or mode of a group of people. Accordingly, culture is not the absolute of a group of people, but instead its inclination, its propensity, its leaning. And when group-members veer too far from the central tendency, there is pressure on them to be, err, normal. In summary, culture is normative.

When conceptualised from a cultural standpoint, therefore, professionalism is seemingly non-sensical at the level of the individual group-member. Voilà the rationale for Evans' (2002) proposal for the concept of professionality: the "ideologically-, attitudinally-, intellectually-, and epistemologically-based stance on the part of an individual, in relation to the practice of the profession to which she/he belongs, and which influence her/his professional practice" (pp. 6-7). For Boyt *et al*. (2001), professionality was more straightforward: "the attitudes and behavior one possesses toward one's profession" (p. 322). Professionalism, therefore, drawing on my

Gaussian curve analogy, is the 'average' of the professionalities of a profession's members.

It is difficult, however, not to see the similarities between professionality and professional identity. Indeed, both concepts are subjective. That is to say, professionality and professional identity arise within professionals themselves. They are cognitive constructions, linguistic in nature, and pregnant with meaning. And professionality and professional identity are products of social interactions. Although they arise within individual professionals themselves, professionality and professional identity come about in a social setting. Considering these similarities, plus the relative rarity of the concept of professionality in the literature, I use only the concept of professional identity in this context statement. And I use it to refer to the meaning which a person ascribes to herself/himself in a professional context.

So, after discovering my community of practice (professors whose goal is to improve teaching and learning in higher education) and pinpointing my professional identity (marketing educator), my scholarly activities, my memberships in professional associations, and my daily conversations with colleagues shifted immediately away from marketing, towards teaching and learning. I cancelled my subscription to the *Journal of Marketing*, for example, and I joined the *Higher Education Special Interest Group* of the *American Marketing Association*. A kind of psychological calm replaced the anxiety which had accompanied my 'I am marketer' professional identity. And I embarked on a decade of research and writing in and around the 'scholarship of teaching and learning', all in service of furthering my professional practice as a marketing educator within my community of practice. The resultant public works form the basis of this context statement for the Doctor of Professional Studies degree.

1.8. The Doctor of Professional Studies Degree

The history of the doctorate is, to a large degree (pun unintended), also the history of higher education. Indeed, the term 'doctor', which means 'teacher' or 'instructor' in Latin, emerged in early Medieval Europe as the licence which was required to teach Latin in a university (Verger, 2000a). Initially, the Catholic Church reserved the right to grant this teaching licence (the *licentia docendi*), but in 1213, as universities began to gain curricular independence, the Pope transferred the right to the University of Paris (Verger, 2000b), which had already conferred its first doctorate circa 1150 (Noble, 1994). Interestingly, the *license*

remains to this day a degree within the French higher education system, albeit now the first degree after secondary school, and, as such, the equivalent of the Anglo-Saxon bachelor degree ("Higher Education… ", 2019).

The doctor of philosophy (PhD or sometimes DPhil) degree as we now know it, is thought to have developed in seventeenth century Germany (Clark, 2006), although it is associated most often with the education system which was promulgated by Wilhelm von Humbolt in the nineteenth century. When the University of Berlin (now Humbolt University) was established in 1810, the PhD degree was promoted heavily, and other universities in the German-speaking world followed with their own PhD degrees shortly thereafter (Hall, 2019). In the United States, the first PhD degree was not conferred until a half-century later, in 1861 at Yale University ("Landmarks in… ", 2019).

The touchstone of the German PhD degree— which is effectively now the global norm, except in Canadian and American universities, and in a small number of universities elsewhere — is the notion of 'contribution to knowledge'. When I mentor potential doctoral students, I often channel my advisor from the University of Cambridge, who insisted that the PhD degree is awarded to a student who makes a contribution to knowledge. In slightly more grandiloquent language, the PhD degree validates the work of scientists whose motivating force is to increase humanity's understanding of the world. As suggested by Karl Popper (1959),

> [t]here is at least one philosophical problem in which all thinking men are interested. It is the problem of cosmology: the problem of understanding the world — including ourselves, and our knowledge, as part of the world (p. xix).

In practice, a PhD student conducts research independently, but under the guidance of a supervisor— a kind of Humboltian master/apprentice model (Gill and Hoppe, 2009). There is little or no required coursework. The PhD student documents the research in a dissertation which is defended before a panel of examiners who are, in essence, representatives of the academy of science, and who judge whether or not the PhD student's research has indeed made a contribution to knowledge, and thereby whether or not the 'apprentice' is admitted to the academy of science. And the contribution to knowledge is usually very narrowly discipline-specific, and is situated vis-à-vis the extant scientific literature on the topic. Like the doctorate of Medieval Europe, the PhD degree has become the *de facto* 'union card' for many university

teaching positions.

Perhaps unsurprisingly, many other types of doctorates have been introduced since the establishment of the PhD degree in the seventeenth century. In the United States, for example, the doctor of medicine (MD) and juris doctor (JD) degrees, both of which were products of the early twentieth century, have become the requisite qualifications for the medical and legal professions, respectively. Both degrees are post-bachelor degrees, and neither degree requires research, leading critics to claim that they are, consequently, not 'real' doctorates ("First Professional… ", 2019). Incidentally, in most other countries, medicine and law remain bachelor-level degrees.

In the past few decades, however, the increasingly diverse range of professions has been matched by a proliferation of so-called professional (sometimes practice-based or practice-led) doctorates (QAA, 2015). In 2002, for example, there were two Doctor of Nursing Practice programmes in the United States; the number of programmes had grown to 217 by 2012, and another one hundred programmes were in development (Zusman, 2013). Likewise, in the period from 1998 to 2009, professional doctorates in the United Kingdom grew in number from 109 to 308 (Brown and Cooke, 2010).

As the moniker suggests, these professional doctorates are in many instances linked to specific professions. Initially, professional doctorates were offered primarily in the fields of engineering, education, and clinical psychology; the fields of business and nursing dove in shortly thereafter (Green and Powell, 2005). Today, professional doctorates are offered in myriad professions, from architecture to x-ray radiography. In some professions, they have become the normative degree (Zusman, 2013), "required for entry to a profession, namely as a license to practice" (QAA, 2015, p. 8).

The proliferation of professional doctorates has likewise been matched by a proliferation of nomenclature, thereby underlining the link between a profession and its corresponding degree(s) (Scott *et al*., 2004). Indeed, professional doctorates are often designated with specific (but sometimes awkward) titles which usually follow the form Doctor of _____ or Doctorate in _____, one exception being the generic but more flexible Doctor of Professional Studies title. A selection of professional doctorates appears in Table 1, illustrating both the breadth of fields in

which professional doctorates are offered, and the corresponding breadth of nomenclature.

Table 1. A Selection of Professional Doctorates

Degree	Title
Doctor of Applied Social Research	DASR
Doctor of Health Science Education	DHealthSciEd
Doctor of Midwifery	DMidwif
Doctor of Applied Educational & Child Psychology	DAppEdChPsy
Doctorate in Counselling and Psychotherapy	DCouns & Psycho
Doctor of Real Estate	DRealEst
Doctor of Missiology	DMiss
Doctor of Juridical Science	JSD
Doctor of Hebrew Studies	DHS
Doctor of Design	DrDes
Doctor of Medical Ethics	DMedEth
Doctor of Criminal Justice	DCrimJ
Doctorate in the Built Environment	DBEnv
Doctor of Construction Management	DConsMgt
Doctor of Paedeutics	PaedDr
Doctor of Forensic Psychology	DForenPsy
Doctor of Professional Studies in Business	DProfBus
Doctor of Fine Art	DFA
Doctor of Practical Theology	DPT
Doctor of Information Security	InfoSecD
Doctor of Musical Arts	AMusD
Doctor of Science in Veterinary Medicine	DScVM
Doctorate in Computer Science	DCompSci

Source: Adapted from QAA (2015)

In most educational circles, professional doctorates are considered as alternatives to the 'traditional' PhD degree (See Table 2 which summarises the characteristics of professional doctorates and the PhD degree.). Whereas the PhD degree is fundamentally theoretical in nature, situated within the scientific literature of an academic discipline, and designed to

improve human understanding of a phenomenon, professional doctorates "provide an opportunity for individuals to situate professional knowledge developed overtime in a theoretical academic framework… [and] are designed to meet the needs of the various professions within which they are rooted" (QAA, 2015, p. 8). They are a response to the growing complexity of the professions, which is due, in part, to rapid technological developments, and which require professionals to have more sophisticated know-how (Zusman, 2013). That is to say, they attract students who aim to develop skills which will facilitate and further their professional practice (Brown and Cooke, 2010), and who are motivated to solve problems which plague their professions (Lockhart and Stablein, 2002). Consequently, their relevance to (Tennant, 2004), and their performativity in (Usher, 2002), the professions suggest that professional doctorates play an important role in the knowledge economy (Fink, 2006).

Table 2. Characteristics of Professional Doctorates and the PhD Degree

Characteristic	**Professional Doctorates**	**PhD Degree**
Career Focus	The profession	The academy
Entry Qualifications	Postgraduate degree	Bachelor degree with high grades
Experience Requirements	Expected	None
Pre-Service versus In-Service	In-service for professional development	Pre-service for academic career
Allegience	Links to the profession	Links to the academy
Student Type	Experienced practitioner	Fresh researcher
Taught Component	Often	Little or none
Modularity	Often structured	Unstructured
Mode of Study	Usually part-time	Full-time or part-time
Integration of Work and Study	Typical	None
Cohort	Yes	No
Duration	Fixed	Variable
Research Domain	Professional practice	Theoretical phenomenon
Research Type	Practical	Theoretical
Research Trigger	A practical issue	Gap in the extant scientific literature

Characteristic	Professional Doctorates	PhD Degree
Starting Point	A practical issue without a known solution	Literature review
Application	Broad	Reductionist focus
Research Breadth	Broad	Narrow
Research Approach	Outcome-driven	Process-driven
Research Context	Workplace	Academic discipline
Research Design	Action research	Traditional research methods
Work Mode	Collaborative	Individual
Research Goals	Improved practice	New knowledge
Research Aim	Application	Discovery
Dissemination of Results	Wide	Narrow
Research Boundaries	Context-driven	Tradition-driven
Research Outcome	Dissertation, project, portfolio	Dissertation
Research Impact	Significant and original contribution to (practical) knowledge	Significant and original contribution to (theoretical) knowledge
Assessment	Mixed	Oral examination (viva voce)

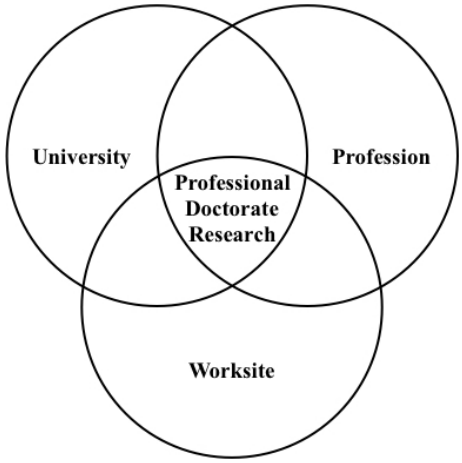
Source: Adapted from Bourner *et al.* (2001) and Fink (2006)

The practice focus of professional doctorates means that they often have different structures than the traditional PhD degree (QAA, 2015). Indeed, professional doctorates typically require coursework, which is delivered to cohorts of students (Brown and Cooke, 2010), and which emphasises the acquisition of professional skills (QAA, 2015). And they typically involve research which, as depicted in Figure 1, sits "at the intersection between the university, the candidate's profession and the particular work site of the search" (Malfoy and Yates, 2003, p. 120).

Professional doctorates, however, are certainly not without criticism. At a very pragmatic level is the call for the standardisation of nomenclature, in service of reducing the confusion which the multitude of degree titles causes (Brown and Cooke, 2010). Questions about the appropriate relationship between professional associations and the universities which award professional doctorates are raised (Zusman, 2013). Most serious, however, is the claim that

research on a practice is not equivalent to research on a scientific phenomenon (QAA, 2015)—that practical knowledge is inferior to theoretical knowledge.

Figure 1. Situating Professional Doctorate Research



Source: Adapted from Fink (2006)

In response to the last critique, I propose that the claim is premised on a false dichotomy between practice and theory, and perpetuates a kind of chauvinism which privileges 'theoretical knowledge' over 'practical knowledge'. Indeed, Western philosophy holds that there are three different forms of knowledge (Bakken and Dobbs, 2016): 1. declarative knowledge (knowing what), 2. procedural knowledge (knowing how), and 3. contextual knowledge (knowing where and when). Eastern philosophy adds a fourth form: somatic knowledge (embodied knowledge). The traditional PhD degree leans towards declarative knowledge (theoretical knowledge), whereas professional doctorates are often more about procedural and contextual knowledge (practical knowledge). But knowledge it is.

McWilliam *et al.* (2002) acknowledged that professional doctorates and the traditional PhD degree are different, but argued that they are 'differently rigourous'. The Quality Code for Higher Education (QAA, 2015) negates outright any differences (type, mode of delivery, title, and so on) which exist between doctorates, by maintaining a single set of criteria for doctoral degrees which are awarded in the United Kingdom. Perhaps the most compelling argument for the acceptance of, and support for, professional doctorates was offered by Tennant (2004): the relevance of doctoral research "no longer equates with the 'application' of knowledge 'to' the workplace, rather, the workplace itself is seen as the site of learning, knowledge and knowledge

product’’(p. 433). In summary, therefore, a contribution to knowledge, irrespective of its form or origin, ought to be considered a contribution to knowledge.

1.9. By Public Works

In recent years, another spanner in the, err, works is the notion of a doctorate by publication— also referred to as a doctorate by public works. In this case, the doctoral degree is…

> [a]warded on the basis of a [dissertation] containing a series of academic papers, books, cited works or other materials that have been placed in the public domain as articles that have been published, accepted for publication, exhibited or performed, accompanied by a substantial commentary linking the published work and outlining its coherence and significance, together with an oral examination at which the candidate defends his/her research (QAA, 2015, p. 7).

In short, in a doctorate by public works, the single tome-like dissertation of a traditional PhD is replaced with a collection of public works which are bound together with a commentary.

In a similar way, many universities now allow for the submission of a dissertation which is comprised of as-yet unpublished materials which are, likewise, explained with the aid of a commentary. The terms ‘prospective’ or ‘concurrent’ are often associated with this type of dissertation, referring to the publication status of the materials which make up the dissertation, and in contradistinction to the term ‘retrospective’, which describes the nature of the materials which are the basis of a doctorate by public works.

A professional doctorate by public works, therefore, which combines practice-oriented research and previously-published materials, might, at first glance, seem like an odd duck. And indeed, one reader of this context statement provided feedback which suggested that some unresolved issues remain, especially with respect to the criteria of professional doctorates, and of doctorates more broadly. One issue, for example, is a kind of conflation of public and practice: that ‘by public works’ means that the dissertation makes a contribution to practice. As mentioned previously, however, a doctorate by public works simply leverages previously-published materials in lieu of contemporaneous research, practice-based or otherwise. Many PhD degrees have been awarded for public works which make little or no contribution to practice.

This conflation of public and practice perhaps belies a second and graver issue which

mirrors the practice-theory debate to which I alluded in Section 1.8. Indeed, by juxtaposing professional doctorates and the traditional PhD in terms of practice versus theory, it propagates the notion that professional doctorates are atheoretical or, worse, anti-theoretical. But practice and theory are not orthogonal. On the contrary, as suggested by Kemmis (2009),

> practice is always "theoretical"— in the sense that practice always refers to a theory or theories that name, inform and justify it (even if these theories are not fully elaborated or if the practitioner is not aware of them, and even if the theories are contradictory or incoherent).

Consequently, a contribution to theory will also be a contribution to practice.

Now, truthfully, I did not set out to pursue a professional doctorate with that first chapter about analogical learning in higher education. But as noted in Section 1.7, through it I discovered my community of practice (professors whose goal is to improve teaching and learning in higher education), and I pinpointed my professional identity (marketing educator). More germane to this context statement, however, it instigated a decade of scientific research and writing in and around the scholarship of teaching and learning, all of which was undertaken in service of furthering my professional practice as a marketing educator within my community of practice. The resultant public works form the basis of this context statement for the Doctor of Professional Studies degree.

In concert with the characteristics of professional doctorates in general, my scientific research and writing was not motivated by academic advancement, but instead by professional concerns. The subjects of my scientific research and writing were almost always triggered by practical issues which I faced as a marketing educator within my community of practice, or which appeared to plague the higher education profession more broadly. And the goal of my scientific research and writing was less about contributing to the extant scientific literature, and more about 1. improving my practice as a marketing educator within my community of practice, and 2. increasing both the efficiency and effectiveness of higher education.

My scientific research and writing often involved collaboration. Typically, I followed an action research approach wherein my professional practice informed my research, and the results of the action research informed my professional practice in turn. My scientific research and writing was necessarily broad in scope, outcome-driven, and application-oriented. Finally, I

selected outlets for my scientific research and writing which were intended to have the broadest impact within my community of practice.

Likewise, in concert with the notion of a doctorate by public works, my contribution to knowledge is not borne from a single major research project, but instead from a collection of public works, which, in this instance, are the output of my decade of scientific research and writing in and around the scholarship of teaching and learning. In order to demonstrate that I have made a contribution to knowledge as a marketing educator within my community of practice, therefore, it is necessary that I 'position' these public works both contextually and theoretically. *Voilà*, the purpose of this context statement.

1.10. The Context Statement

There is more than one way to skin a cat. And when it comes to doctoral research (or any scientific research), a student can choose empiricism, phenomenology, or one of many other paradigms (Kuhn, 1970) which are on offer. But a student must choose. Indeed, according to Hirschman and Holbrook (1992), a student "must make an *a priori* ideological commitment to one philosophical project (e.g., humanism) before undertaking research" (p. 2). In doing so, the student subscribes to a set of ontological and epistemological assumptions, methodological constraints, data collection and analysis traditions, judging criteria, and so on, which steer the doctoral research.

This mandate to choose a paradigm when conducting scientific research of any kind is perfectly logical to me. Early in my academic career, for example, I was influenced heavily by semiotics— the science of signs and symbols— which I subsequently adopted for several marketing-related studies. In 2011, I published an article about *Lexicon Rhetoricae*, the narrative theory of Kenneth Burke from the academic discipline of literary criticism, which, I demonstrated, can serve as a comprehensive model to explain how symbolism and non-conscious processes influence the consumption experience (Hershey and Branch, 2011). And more recently in my EdD research, I adopted the philosophy and methods of praxiology which give primacy to practice as both the focus of inquiry and the unit of analysis.

Admittedly, the mandate to choose a paradigm when conducting scientific research bewildered me at the outset of this context statement process. What does a paradigm even mean

in the context of a doctorate by public works? If such a thing exists, is it possible to choose a paradigm *a posteriori*? And how can a collection of public works, which themselves might have followed different paradigms, be stitched together into a single narrative which demonstrates a contribution to knowledge?

By happenstance, when I began writing this context statement, I discovered a paradigm of sorts which seemingly addressed these concerns, and which, consequently, I pursued as a possible means for positioning my public works both contextually and theoretically. 'Living educational theory', as it is called, offers a systematic approach to describing and explaining professional practice. It is attributed to Jack Whitehead, who spent the majority of his career as a professor of education at the University of Bath. Living educational theory was born in the early 1980s from Whitehead's critique of traditional scientific research in the academic discipline of education. Its clarification, formalisation, and propagation as a paradigm (It was never presented as such, but it bears all the hallmarks of a paradigm.) solidified throughout his more than four-decade career.

In short, living educational theory is a paradigm for scientific research in the academic discipline of education in which a practitioner theorises her/his own professional practice. Using a kind of action research, she/he reflects on her/his educational values, and on the practice-solutions which were developed therefrom. The outcome is a 'living educational theory' which describes and explains her/his professional practice, with values as its elementary unit. The practitioner substantiates this living educational theory by demonstrating how the educational values are embodied in her/his professional practice.

I adopted the spirit of the living educational theory paradigm for this context statement, as a means for positioning my public works both contextually and theoretically. Specifically, I theorised my professional identity, rather than my professional practice, as a marketing educator within my community of practice. I conducted an autoethnography to identify the educational values which constitute my professional identity. And I examined how my educational values are evidenced in my public works.

This context statement consists of four chapters, including this introduction. Chapter 2 explores my professional identity according to the living educational theory paradigm. It begins

by reviewing the origins, characteristics, and criticisms of the living educational theory paradigm. It then introduces autoethnography as a research method, and details the specific autobiographical and hermeneutic procedures which I followed to identify my educational values. Finally, Chapter 2 defines these educational values as the constituent components of my professional identity as a marketing educator within my community of practice.

Chapter 3 presents my living educational theory. It begins by outlining the characteristics of a theory. It then elucidates my educational values, and demonstrates how they are evidenced in my public works. Finally, Chapter 3 theorises my professional identity as a marketing educator within my community of practice, as an analogy that 'teaching is like engineering'.

Chapter 4 concludes this context statement. It begins by illustrating my professional identity in practice. It then suggests directions for future scientific research and writing in and around the scholarship of teaching and learning. Chapter 4 continues by reflecting on my living educational theory. Finally, it offers some closing thoughts about professional identity.

1.11. Summary

Chapter 1 introduced this context statement. It began by considering the characteristics of professions. It then described how I discovered my community of practice, and pinpointed my professional identity. Chapter 1 continued by situating the Doctor of Professional Studies degree. Finally, it outlined the form and structure of this context statement. Chapter 2 now explores my professional identity according to the living educational theory paradigm.

2. Exploring My Professional Identity

2.1. Overview

Chapter 2 explores my professional identity according to the living educational theory paradigm. It begins by reviewing the origins, characteristics, and criticisms of the living educational theory paradigm. It then introduces autoethnography as a research method, and details the specific autobiographical and hermeneutic procedures which I followed to identify my educational values. Finally, Chapter 2 defines these educational values as the constituent components of my professional identity as a marketing educator within my community of practice.

2.2. Living Educational Theory

Self-help is among the world's best-selling 'literary' genres… projected to reach 13 billion USD by 2022 in the United States alone (LaRosa, 2018). *The 7 Habits of Highly Effective People* by Stephen R. Covey, for example, has sold more than twenty-five million copies in forty languages since is publication in 1989. Archeologists suggest, however, that the progenitor of self-help books might be the Sebayt, an ancient Egyptian instruction guide for living a verdant life ("A Short History… ", 2019). And some sociologists view the Bible as history's most successful self-help book (McGee, 2007), with its almost limitless number of lessons for humanity which are expressed in the form of parables. But in all three instances, the objective is seemingly the same: self-improvement.

According to Kemmis (2010), professors (and other practitioners) 'are people too', often engaging in self-improvement exercises of their own. They "make assessments, evaluations, interpretations and judgements of their work as *educators*— as do practitioners in every other field, in interpreting and judging the quality of their practice and the quality of their lives as practitioners of that practice" (p. 143). It is not uncommon, he explained, for professors to explore their professional practices in a kind of *autocritique*, by performing an exercise which he dubs a 'reading'— an exploration of…

> an act, an episode, or a life of professional practice… to make one's own judgement— which may disagree with the judgement of others— of the quality of the practice on this or that occasion or over that whole life. Such a reading is not a measure or an assessment, it is an elucidation of the way in which the act or

> episode or life holds up as a consistent, developing effort to realize the distinctive ends and goods of the practice (MacIntyre, 1982) in one's own life, in the lives of other with whom one works, and in a society. And it is *one's own* elucidation of the 'facts' of the act or episode or life with which one is presented— a judgement that is informed, to a greater or lesser degree, by relevant theory and traditions, and by a community of practice whose interest is in the maintenance and continuing development of that tradition (p. 143).

Kemmis' description of a reading of professional practice is uncannily similar to a living educational theory. Indeed, in the living educational theory paradigm, a practitioner likewise reflects on her/his educational values, and on the practice-solutions which were developed therefrom, using a kind of action research, and with the singular aim of self-improvement. The outcome of this exploratory *autocritique* is a living educational theory which, like Kemmis' notion of an elucidation of the facts, describes and explains her/his professional practice.

As mentioned in Section 1.9, that first chapter on analogical learning in higher education which was published in 2009 instigated a decade of scientific research and writing in and around the scholarship of teaching and learning, all of which was undertaken in service of furthering my professional practice as a marketing educator within my community of practice. In other words, I was engaged (consciously or non-consciously) in a journey of self-improvement— an autocritical exploration of my own professional practice— through my scientific research and writing. The living educational theory paradigm, therefore, with its systematic approach to describing and explaining professional practice, looked promising as a means for positioning my public works both contextually and theoretically. The following section reviews the living educational theory paradigm.

2.2.1. Origins

In the 1950s, both in-service and pre-service teachers in the United States were encouraged to reflect on their practices, and on the teaching profession more generally (Gore and Zeichner, 1991), as a way to "recognise problem areas, to imagine solutions, to try out solutions through a process of trial and error, to evaluate the outcomes and to modify the problems in light of the evaluation" (Whitehead, 1983, p. 175). This 'teachers-as-researchers' movement made its way into classrooms in the United Kingdom in the late 1960s (Elliott and Sarland, 1995), resulting in a new research-based professionalism among teachers which was

grounded in a "professional knowledge-base from our self-studies of our own professional practice" (Whitehead, 1998a, p. 2).

The teachers-as-researchers movement was inspired by the action research approach which had grown out of Kurt Lewin's social psychological experiments of the 1940s. Action research, as defined by Reason and Bradbury (2001), is…

> a participatory, democratic process concerned with developing practical knowledge in the pursuit of worthwhile human purposes… It seeks to bring together action and reflection, theory and and practice, in participation with others, in the pursuit of practical solutions to issues of pressing concerns to people, and more generally the flourishing of individual persons and their communities (p. 1).

With its focus on practical solutions, action research could be considered "the guiding method by which we organise our everyday inquiries and actions" (Chandler and Torbert, 2003, p. 134).

Action research is steeped in reflection— the "process of becoming aware of one's context, of the influence of societal and ideological constraints on previously taken-for-granted practices, and gaining control over the direction of these influences" (Carr and Kemmis, 1986, p. 37). It leverages the personal knowledge (Polyani, 1974) of the action researcher. And it recasts research as an activity of practitioners rather than scientists proper, because in action research, reflection and theory development occur *in situ* (Schön, 1983). Indeed, "[w]hen someone reflects-in-action, he becomes a researcher in the practice context. He is not dependent on the categories of established theory and technique, but constructs a new theory of the unique case" (Schön, 1983, p. 24). If teaching is "viewed as consisting of practical problems requiring deliberation and action for their solution" (Calderhead, 1989, p. 44), then action research is seemingly the ideal research approach for teachers.

The teachers-as-researchers movement had an immediate impact on the nature of the relationship between teachers and scientists. Indeed, it mollified Eggleston (1979) who had made a plea for scientists to stop treating teachers as professionals *on whom* scientific research is conducted, but instead as professionals *with whom* scientific research is conducted. Action research, in particular, helped to narrow the gap between educational research 'in the classroom' versus educational research 'in the laboratory' (Kemmis, 1990). As summarised by Whitehead (1983),

> [e]ffective teaching is more likely to be achieved when the teacher himself is operating in reflective and empirical modes, and that teachers operating in this way cease to be tiresome intervening variables and become self-conscious instruments of educational process (p. 175).

By the early 1980s, however, the teachers-as-researchers movement had more dramatically begun to challenge the orthodox view of scientific research in the academic discipline of education, with a move "away from the narrow purpose of contributing to a field of knowledge toward a living inquiry that is integrated in the lives of all those involved" (Reason, 1996, p. 15). Hamilton (1982) described this new academic discipline of education as a science which questions the imperialism and the supposed universality of propositional theories, and which instead embraces theory-building within bounded educational contexts. Specifically, this theory-building aimed for theories which "could be viewed as being constituted by the descriptions and explanations which professional educators created for their own learning as they answered practical questions of the kind, 'How do I improve this process of education here?' " (Whitehead, 1998c, p. 5). By building theories of this type, teacher-researchers would demonstrate the methods by which they held themselves accountable for their professional practices (McNiff, 2007).

The key proponent of this new academic discipline of education in the United Kingdom was Jack Whitehead. In a 1991 article, he recalled that his "early methodological questions progressed into epistemological enquiries related to the values, logic, unit of appraisal and standards of judgment which could be used to test claims to know the nature and processes of education" (Whitehead and Foster, 1984, p. 42). Consequently, he began to lay out a new paradigm for scientific research in the academic discipline of education which over time became known as 'living educational theory'. It specified the rationale for, and the process by which, contributions to knowledge could be made by practitioners through action research. Whitehead (1983) explained:

> This [action research] is then extended into theory in the form of an explanation for one's own practice. This process has ensured that the theory generated from such research is grounded in the important area of the classroom; it ensures that explanations and theoretical observations and analyses remain linked closely with what has actually proved to be of value in the school environment: it ensures that the theory evolving out of the personal research programmes is tailor-made for the individual who is putting it into practice. The personal explanation which

> constitutes an individual's personal educational theory grows out of his own practical experience. This means that his own values in education are included as well as the unique personality traits which make up an individual teacher (p. 175).

The action research which Whitehead advocated as the methodological foundation of the living education theory paradigm, is not unlike the 'dialogical inquiry' which Shotter (2006) proposed, and which, he argued, is the most appropriate method for research which is conducted in parallel with a researcher's participation in everyday practice:

> [S]uch a form of action research is not an experimental science in search of laws, nor is it an interpretative one in search of meaning (e.g. Geertz, 1975, 1983), but a practical one in search of the refinement or elaboration of, or a critical change in, our already existing practices. And such a research process involves— I think we also agree— inserting into the ongoing, routine flow of an everyday activity (often a specific production process), opportunities to take time-out of its taken-for-granted routines, to reflect on them in some way with the aim of refining, elaborating, changing, or otherwise developing them. Where the questions here are to do with the detailed conduct of the activities that might occur in such inserted moments of reflection (p. 3).

In summary, in this new paradigm for scientific research in the academic discipline of education, a practitioner reflects on her/his own practice using a kind of action research, through which her/his "philosophy of education is engaged as a first person participant" (Whitehead, 1992, p. 1). She/he documents these reflections in a 'living educational theory' which "includes the "I's" intention (a human goal) to produce something valued which is not yet in existence" (Whitehead, 1989b, p. 4), and which captures in detail her/his educational values and the solutions which were developed therefrom. By documenting these reflections, she/he claims to know her/his own professional practice, and subjects it to public scrutiny.

2.2.2. Characteristics

The living educational theory paradigm is distinct from traditional scientific research in the academic discipline of education first with respect to theoretical claims. A living educational theory is not defined by a set of interconnected propositions (Whitehead, 1998b) which sit idly in the stacks of university libraries (Whitehead, 1989a). On the contrary, a living educational theory is organic, "living in the public conversations of those constituting professional practice… growing in the living relationship between teachers, pupils and professional researchers and embedded with their forms of life." (Whitehead, 1989b, p. 4).

Consequently, a living educational theory is defined more in terms of the practitioner's values and understandings of her/his practice. Indeed, it is characterised…

> by the explanatory power of the values and understandings which a practitioner-researcher embodies in the explanation for their own learning as they work at living more fully their values and at extending their understandings. It is characterised by the use of the values and understandings as the standards of judgement they use to test the validity of their claims to educational knowledge. It is characterised by the dialectic between the explanations, the action researcher's present practice and the intention to chart a better future (Whitehead, 1998b, p. 9).

To be fair, the living educational theory paradigm does not reject outright traditional scientific research in the academic discipline of education. On the contrary, practitioners who adopt the living educational theory paradigm can (and ought to) draw on traditional scientific research. Whitehead himself acknowledged the contributions of scientific theories in the academic discipline of education (Whitehead, 1992), and suggested that a living educational theory, "while not being validly reduced to a proposition theory, *can integrate insights* from such theories" (Whitehead, 1996, p. 457). What he rejected, however, was that these scientific theories in the academic discipline of education,

> in any combination which omitted my explanation for my professional learning, contained the possibility of producing a valid educational explanation for my professional learning as an educator as I asked, answered and researched educational questions of the kind, 'How can I improve this process of education here?' " (Whitehead, 1998c, p. 2).

This focus on improvement also highlights that the living educational theory paradigm is patently practice-oriented. Just as necessity is the mother of invention, practical problems in the classroom trigger action research. In the words of Whitehead (1990), "I believe that you, like me, are experiencing a tension at work because you are not fully living your educational values in your practice" (Whitehead, 1990, p. 34).

The practice-orientation of the living educational theory paradigm also addresses the practice-theory debate head-on, ostensibly reversing the 'order of operations' in the (traditional) academic discipline of education. Whitehead (1983) suggested that the living educational theory paradigm "is a completely new approach to what is now recognised as a predominantly practical activity. The theory to be learned is now seen more and more as an extension of the practice

rather than as vice versa or as two separate disciplines of the one activity" (p. 174). His suggestion echoes Ryle (1949), who claimed that…

> [p]ractice precedes the theory of it; methodologies presuppose the application of the methods, of the critical investigations of which they are the products… The crucial objection to the intellectualist legend is this. The consideration of propositions is itself an operation the execution of which can be more or less intelligent, less or more stupid. But if, for any operation to be intelligently executed, a prior theoretical operation had first to be performed and performed intelligently, it would be a logical impossibility for anyone to ever break into the circle (p. 31).

A living educational theory is also distinct with respect to its rhetorical form. Whereas a theory which has been generated from traditional scientific research in the academic discipline of education is typically presented as abstract linguistic concepts, and as relationships between these concepts, a living educational theory is presented as a dialogical and dialectical explanation. Indeed, a practitioner who adopts the living educational theory paradigm uses a more informal, conversational rhetorical form, and weaves…

> a unique synthesis of values, understanding, context and practice into a comprehensible explanation of their own professional learning. The assertions in their explanations are supported by evidence. The explanation includes the explanation and justification of the meanings of the values which emerge through time and practice. They explain their own learning in the educational enquiry" (Whitehead, 1998c, p. 7).

Dialectical in the living educational theory paradigm refers to the inner discourse which occurs when the practitioner realises that she/he is not living her/his values. It means that the practitioner 'I' exists as a living contradiction, the reconciliation of which is the core of dialectics in general, and the impetus for action for the practitioner. Whitehead (1998c) explained:

> I imagine that you will understand what I mean by living contradiction in that you will have had experiences of holding together your values and their negation. In your teaching your may believe in enquiry learning whilst at the same time recognise that you have acted in a way which has stifled this expression in your pupils. You may believe in a curriculum which supports autonomy but find yourself 'teaching to the test' in a way which shirked in this value. It is the experience of recognition that you hold certain values whilst at the same time experiencing their denial which characterises my meaning of 'living contradiction' (p. 9).

Values, therefore, are not to be bracketed, as is common practice in more traditional scientific research in the academic discipline of education. On the contrary, a practitioner who

adopts the living educational theory paradigm recognises that action research (and social sciences of all shades) "is inherently value-laden because researcher values inevitably influence the choice of *phenomenon,* choice of *method*, choice of *data*, and choice of *findings*" (Hirschman, 1986, p. 238).

In the living educational theory paradigm, however, values play an even more central role, because a practitioner's professional practice cannot be divorced from her/his educational values. On the contrary, a practitioner's educational values are embodied in her/his professional practice. Practice is intentional action which is shaped by values (Kemmis, 2009). Intentional here refers to the philosophical notion of intentionality— that human action is "intentional activity, in the sense that intentions are always directed toward objects. In other words, consciousness is always consciousness *of something*. Objects are defined in terms of the practical intentions we have at hand when we encounter them" (Lindlof, 1995, p. 32). To practise, therefore, is to practise intentionally. Adler-Collins (2005) captured the sentiment:

> I view my every day living through the aspects of the active filters I am using— in that moment of knowing— through doing. By this I mean, as I teach I am using the aspect of me that is the teacher, grounded in my practice and supported and informed both by my practice and the theory, which I attribute to be necessary for my role as a teacher (p. 2).

Following Van Manen's argument (1990), therefore, a practitioner who adopts the living educational theory paradigm, uses her/his educational values as the explanatory principles in a living educational theory which explicates her/his professional practice. Indeed, as suggested by Whitehead (1998c),

> [e]ach action-researcher has represented their explanation for their own professional learning within their social context as a unique constellation of values, understandings and actions. They have communicated the meanings of their values and understandings as they emerge through time and action (p. 8).

In effect, therefore, values become the elementary unit of a living educational theory.

Accordingly, in living educational theory, values also become the standards of judgement. British philosopher Robin Collingwood provided the logic, suggesting that if the meaning of a proposition is relative to the question it answers, its truth must be relative to the same thing. In a 'valid' living educational theory, therefore, a practitioner has…

> shown how [her/his] values and understandings constitute the standards of judgement they use to test the validity of [her/his] claims to educational knowledge. These values and understandings have been legitimated as appropriate standards of judgement (Whitehead, 1998c, p. 8).

2.2.3. Criticisms

The living educational theory paradigm, like other paradigms, has unsurprisingly been met with criticisms. It would be easy to dismiss the critics, stating somewhat smugly that a paradigm is beyond reproach, because it is based on "a set of primary assumptions (axioms) that are accepted on faith; that is they are based on *beliefs about the nature of reality* whose truth or falsity is not subject to empirical test… [they] define what phenomena the scientist *believes* to be knowable, the way in which the phenomena may become known, and criteria for evaluating what becomes known" (Hirschman, 1986, p. 238). Some arguments and evidence in support of the living educational theory paradigm, however, seem to be warranted.

The first (and perhaps most serious) doubt which hovers over the living educational theory paradigm concerns the assertion that a living educational theory is indeed a theory, and, by extension, that it makes a contribution to knowledge. In Section 1.8, I proposed that the claim that research on a practice is not equivalent to research on a scientific phenomenon is premised on a false dichotomy between practice and theory, and that it perpetuates a kind of chauvinism which privileges so-called theoretical knowledge over practical knowledge. In a similar way, I propose here that doubts about the 'theoretical-ness' of a living educational theory is premised on a narrow view of what constitutes a theory, and likewise privileges so-called objective theories over subjective theories. Indeed, a theory "need not entail or require knowledge of how to predict or control a phenomenon" (Lindlof, 1995, p. 9), and Foucault (1977) presented a very convincing narrative about the relationship between truth and the hegemony of the people who make the truth-claims. A theory, therefore, irrespective of its origin, ought to be considered a theory. And doubts about its contribution to knowledge become a *non sequitur*.

A more pragmatic argument of the-proof-is-in-the-pudding type is simply that the living educational theory paradigm has become more widespread and accepted within the academic discipline of education. As early as the mid-1990s, for example, several university departments

in the United Kingdom had adopted the living educational theory paradigm (Elliott and Sarland, 1995). More obvious is the growing number of successful doctoral dissertations which document practitioners' living educational theories. Table 3 shows a selection of these doctoral dissertations, the most recent of which was submitted at the University of Malaya in 'far-flung' Kuala Lumpur, Malaysia.

Table 3. A Selection of Living Educational Theory Doctoral Dissertations

Author	Year	Theme
Laidlaw	1996	Educative Relationships
Cunningham	1999	Spirituality in Teaching
Austin	2000	Creating Community
Mead	2001	Scholarship of Living Inquiry
Delong	2002	Practice As a Principal
Hartog	2004	Ethics of Student Care
Naidoo	2005	Responsive Practice
Sullivan	2006	Social Justice
Cahill	2007	Inclusive Education
Spiro	2008	Creativity
Dent	2016	Continuous Improvement

Source: Author

Questions about the validity of a living educational theory have also been raised. Indeed, does the subjective explanation of the practitioner's professional practice reflect reality? Why would anyone trust that this explanation is true? In summary, what makes a living educational theory believable?

Gustavsen (2003), writing about pragmatists such as Charles Sanders Peirce and Richard Rorty, provided a somewhat radical view to the question of validity, suggesting that it is not a primary issue in action research:

> The point is not to what extent the theory resembles the world but to what extent it helps us perform rational action. And they can be anything, from a large text to a short formula; the point is that it identifies action to be performed and levers to be pulled if we want to do something about reality (p. 154).

To my mind, however, validity is an issue in all scientific research, irrespective of a researcher's chosen paradigm. It is incumbent on the researcher, therefore, to adhere to best practices in scientific research, in order to increase the credibility of her/his theoretical claims. In the interpretivist tradition, for example, the disclosure of research setting, methods, data types, and procedures— often known as 'reflexive accounting'— helps to engender confidence in the theoretical claims which scientists make (Branch, 2009). Scientists might also exercise a variety of 'verification' strategies, including methodological and data triangulation, the *Eureka!* method, and auditing, to increase their credibility.

In the living educational theory paradigm, it is also customary for a practitioner to buttress the validity of her/his living educational theory with visual and/or lexical evidence from the practice which the living educational theory theorises (Whitehead, 1998a). That is to say, rather than simply making a theoretical claim, a practitioner substantiates it by demonstrating how her/his educational values are embodied in her/his professional practice. This visual and/or lexical 'evidence' can include photographs, videos, journals, lesson plans, and other ostensive artefacts from the practice. In her living educational theory doctoral research, for example, Glenn (2006) employed multi-media evidence, including screen shots, video clips, webpages, a digital portfolio, notes, and mind maps, to substantiate a living educational theory of her holistic educational practice, which theorises "the interconnectedness of people and their environments as a locus of learning which may be embraced through technology" (p. iv)

The living educational theory paradigm seemingly also suffers from a tautological issue when it comes to validity. Indeed, Whitehead has drawn heavily on Collingwood's logic which was presented in Section 2.2.2 in support of the validity of a living educational theory. This logic suggests that the educational values of the practitioner serve both as the basis of her/his living educational theory, and as the standards of judgement for the theory's validity. It reminds me a little of the 'duck test' in abductive reasoning: if it looks like a duck, swims like a duck, and quacks like a duck, then it probably is a duck. The underlying logic, however, is troublesome. Indeed, abductive reasoning relies on the use of a set of characteristics for identifying an object. But those same characteristics are defined by the object itself. *Un petit problème, non*?

In the living educational theory paradigm, however, a practitioner constructs her/his living educational theory using an interpretivist (not positivist) epistemology. Validity, therefore, is not a quantitative evaluation of the correspondence between a phenomenon and its empirical measure. Instead, validity ought to be viewed as the 'authenticity' (Lincoln and Guba, 1985) of the living educational theory. And as mentioned previously, the key is for the practitioner to 'maximise credibility' (Glaser and Strauss, 1965).

Along with questions of validity come questions of generalisability. A living educational theory is a theory of a singularity, and consequently, the extent to which this theory can apply in other contexts is an issue. Greenwood (2002), for example, suggested that action research of any stripe will have limited influence if it is conducted as a single case. Reason (2003) likewise noted this challenge of scale. Bassey (1995), however, was less worried:

> The conclusions of research should only be generalised, meaning that they are firmly extrapolated behind the population under study, if it is clearly established that the general population has the same characteristics as the population which has been researched. To assume that the findings from one study of a small group of primary school teachers, or fifteen-year-old children or left-handed astrologers with blonde hair, can be extrapolated to others who fit the same description is nonsense! It is nonsense because there are so many other contextual variables which may determine what happens— variables of personal history, of understanding and of intention of all the actors involved, as well as variable of setting (p. 111).

Finally, the mainstream acceptance of the living educational theory paradigm has been hindered by a broader mistrust and misunderstanding of action research. Since its inception, action research has often been "pitted against educational science, and as such is confined to a lowly status in the academic hierarchy of knowledge as a minor 'sub-discipline' in the field of educational research" (Elliott, 2004, p. 14). It has existed in a kind of nebulous philosophical position between practice and theory, thereby rendering it neither scientific fish nor fowl. And it has "been seen by many conventional academics as an esoteric kind of research, which generally has had difficulty gaining acceptance" (Gustavsen, 2003, p. 154).

According to Shotter (2006), however, it is not only possible but also natural to engage in "self-reflecting, self critical, self-researching, and self-developing practices. But to say this, is not to say anything very revolutionary, for such a form of 'research' is already part of our everyday practices. It is revolutionary to recognise that fact" (p. 25). Consequently, action

research ought to be embraced, not vilified, in educational research. Moreover, Shotter (2006) continued— in a kind of support for the living educational theory paradigm— "practice, teaching, and research can all be enfolded within each other, while one in-forms and creates the other in an ever evolving generative fashion. Both inquiry and learning in this process thus becomes a matter of 'practical authorship' " (p. 25), the output of which is what Whitehead calls a living educational theory.

2.3. Identifying My Professional Values

Criticisms notwithstanding, I maintain that the living educational theory paradigm indeed provides a means for positioning my public works both contextually and theoretically. Consequently, I adopted the living educational theory paradigm for this context statement, but with three caveats. First, whereas the living educational theory paradigm (as conceived by Whitehead) allows a practitioner to theorise her/his own professional practice, I theorised my professional identity instead. Like Kemmis (2009), I regard practice as intentional action which is shaped by values. Accordingly, I regard my professional practice as a marketing educator within my community of practice as intentional action which is shaped by my educational values. These educational values, however, constitute my professional identity. They form my image of who I am as a professional. They define me professionally.

To explore my professional identity, therefore, required me to identify my educational values. As recommended by Kemmis (2009), this required an approach which is characterised as individual/subjective— an approach which follows an interpretivist methodology to achieve *verstehen* (empathetic understanding) of the intentionality of my professional practice as a marketing educator within my community of practice.

Second, whereas the living educational theory paradigm uses a kind of action research in which a practitioner reflects on her/his educational values, and on the practice-solutions which were developed therefrom, I propose that a more appropriate method for identifying my educational values is autoethnography. As a method, autoethnography aligns better with the individual/subjective approach which was recommended by Kemmis (2009). Indeed, its focus on the agent rather than the action is more suitable for identifying my educational values, in comparison to action research, whose purpose is to improve social practices.

Perhaps less obviously, action research is typically performed *in situ* by a practitioner who is acting as a researcher and a change agent contemporaneously. Indeed, action research involves an interative cycle, not unlike double loop learning (Agyris, 1991), in which a practitioner reflects on an existing practice, takes action to improve the practice, reflects on the outcomes of the action, reflects on the improvements which led to the outcomes, and so on. But I have written this context statement *ex post*… as a retrospective on my professional identity and my public works. And it exists in complete isolation from the various contexts and timeframes of my public works themselves.

And third, whereas it is customary for a practitioner to buttress the validity of her/his living educational theory with visual and/or lexical evidence— photographs, videos, journals, meeting minutes, and other ostensive artefacts from the practice which the living educational theory theorises— I propose alternatively that my public works buttress the validity of my living educational theory. They are the evidence. They are the ostensive artefacts. Consequently, rather than substantiating my theoretical claim by demonstrating how my educational values are embodied in my professional practice, I examined how they are evidenced in my public works.

In summary, I adopted the spirit of the living educational theory paradigm for this context statement, as a means for positioning my public works both contextually and theoretically. Specifically, I theorised my professional identity, rather than my professional practice, as a marketing educator within my community of practice. I conducted an autoethnography in lieu of action research, to identify the educational values which constitute my professional identity. And instead of buttressing the validity of my living educational theory with visual and/or lexical evidence, I examined how my educational values are evidenced in my public works. The following section introduces autoethnography as a research method for identifying my educational values.

2.3.1. Autoethnography

Autoethnography appeared in the late twentieth century as part of the more general rise in the social sciences of interpretivist research approaches which rejected the binary opposites between object and subject, process and product, self and others, art and science, and the personal and political (Ellinson and Ellis, 2008). Indeed, during that time period, “scholars

across a wide spectrum of disciplines began to consider what social sciences would become if they were closer to literature than physics." (Ellis *et al*., 2011, p. 2). Ethnographers, in particular,

> could no longer hide behind or try to perpetuate an aura of objectivity and innocence; any attempt to do so signified at best a lack of awareness and at worst an abuse of research "subjects," as many of the ethnographers' observations came to suggest more about the ethnographer and the ethnographer's agenda than about the cultural "others" being studied (Adams *et al*., 2017, p. 2).

The first formal autoethnography has been attributed to Kenyatta, the first president of independent Kenya, who published *Facing Mount Kenya* in 1962 (Hayano, 1979). It was attacked for being too personal and uncritical, but it signalled the possibility of ethnography from an 'insider's perspective', a notion which continued through the 1970s (Denshire, 2013). Heider (1975), for example, defined autoethnography as the practice of cultural members giving an account of their own culture. Similarly, for Hayano (1979), autoethnographers "conduct and write ethnographies of their 'own people' " (p. 99). Goldschmidt (1977) considered all ethnography as 'self-ethnography', because it privileges the ethnographer's own beliefs, observations, and interpretations.

During the 1980s and 1990s, however, the emphasis of autoethnography seemingly shifted from ethnography to its prefix *auto*. First, the importance of the autoethnographer's role in both the autoethnography and her/his culture came to the fore. Indeed, an autoethnographer was no longer considered a bystander whose intervention had no impact on the cultural subject (Think *Star Trek*'s prime directive.). On the contrary, an autoethnographer was considered "a *participant observer* in that culture— that is, by taking *field notes* of cultural happenings as well as their part in and others' engagement with these happenings" (Ellis *et al*., 2011, p. 3).

Second (and perhaps more impactful in the evolution of autoethnography), the autobiography materialised as an integral component of autoethnography. As suggested by Ellis *et al.* (2011), an autoethnographer "uses tenets of *autobiography* and *ethnography* to *do* and *write* autoethnography" (p. 1). Understanding autoethnography, they continued,

> requires working at the intersection of *autobiography* and *ethnography*. When we do autobiography— or write about the self— we often call on memory and hindsight to reflect on past experiences; talk with others about the past; examine

> texts such as photographs, personal journals, and recordings; and may even consult with relevant news stories, blogs, and other archives related to live events (p. 2).

The consequence of this autobiographical addition to autoethnography is that storytelling, which includes personal, first-person narratives, was not only accepted but also encouraged as a part of ethnographic 'fieldwork'. Of course, an autoethnographer "does not live through experiences solely to make them part of a published document' rather, these experiences are assembled using hindsight." (Ellis *et al*., 2011, p. 2). But stories of these experiences, which are written after-the-fact, become the autoethnographer's data, with the autoethnographer herself/ himself serving as the datasource.

Storytelling also emerged as a suitable method for representing knowledge. Indeed, an autoethnographer uses "storytelling devices, such as narrative voice, character development, and dramatic tension, to create evocative and specific representations of the culture/cultural experience" (Adams *et al*., 2017, p. 2). She/he leverages "storytelling facets (e.g., character and plot development), showing and telling, and alterations of authorial voice… to produce aesthetic and evocative thick descriptions of personal and interpersonal experiences… to facilitate understanding of a culture for insiders and outsiders" (Ellis *et al*., 2011, p. 4).

Today, autoethnography is common in a range of academic disciplines, including education, religious studies, and physiotherapy, and in a variety of professions (Densire, 2013). But the purpose of autoethnography can vary from discipline to discipline, and from project to project:

1. to speak against, or provide alternatives to, dominant, take-for-granted, and harmful cultural scripts, stories, and stereotypes;
2. to articulate insider knowledge of cultural experience;
3. to show how researchers are implicated by their observations and their conclusions and to encourage autoethnographers to to write against harmful ethnographic accounts made by others;
4. to describe moments of everyday life which cannot be captured through more traditional research methods; or
5. to create texts which are accessible to larger audiences, primarily audiences outside of academic settings (Adams *et al*., 2017).

There are also different autoethnographic research types (See Table 4 for a selection of autoethnographic research types.) which vary in terms of goal; analytical emphasis; power relationships; context; and the emphasis which is placed on the study of the self, others, or the

interactions between self and others (Adams *et al*., 2017; Ellis *et al*., 2011). Similarly, autoethnography research types vary in how much weight is attributed to the self (auto), ethno (culture), and description (graphy) (Reed-Danahey, 1997).

Table 4. A Selection of Autoethnographic Research Types

Type	Purpose
Indigenous/Native Ethnography	Allow colonised or economically-subordinated people to to construct their own narrative
Narrative Ehnography	Incorporate the researcher's experiences into ethnography of others
Reflexive/Dyadic Interview	Incorporate the researcher's experiences into the story of the other
Reflexive Ethnography	Document the change which the researcher has experienced as a result of the ethnography
Layered Account	Share the experience of conducting research
Interactive Interview	Explore the interviewing process and the emerging relationships between interviewer and interviewee
Community Autoethnography	Facilitate cultural social intervention in the community
Co-Constructed Narrative	Illustrate the meaning of relationship experiences
Personal Narrative	Understand self

Source: Adapted from Ellis *et al*., 2011

It ought to be obvious that "the meanings and applications of autoethnography have evolved in a manner that makes precise definition difficult" (Ellinson and Ellis, 2008, p. 449). Indeed, this introduction to autoethnography suggests that it is 'all over the place'. A somewhat binary distinction, however, has sometimes been proffered as a means to categorise the multitude of autoethnographic research types: analytic versus evocative. Analytic autoethnography aims to "describe and systematically analyse (*graphy*) personal experience (*auto*) in order to understand plural experience (*ethno*)" (Ellis *et al*., 2011, p. 1). It focuses on developing theoretical explanations of broader social phenomena from personal experience (Adams *et al*., 2017)— social phenomena which are "broader than those provided by the data themselves" (Anderson, 2006, p. 387). In analytic autoethnography, therefore, autoethnographers…

> retrospectively and selectively write about epiphanies that stem from, or are made possible by, being part of a culture and/or by possessing a particular cultural identity. However, in addition to telling about experiences, autoethnographers often are required by social science publishing conventions to analyse these experiences… Autoethnographers must not only use their methodological tools and research literature to analyse experience, but also may consider ways others may experience similar epiphanies; they must use personal experience to illustrate facets of cultural experience, and, in so doing, make characteristics of a culture familiar for insiders and outsiders (Ellis *et al*., 2011, p. 3).

Evocative autoethnography, on the contrary, uses narrative to re-enact an experience by which an autoethnographer finds meaning (Bochner and Ellis, 2006). In doing so, it aims to open conversations among, and evoke emotional responses from, its readers. Evocative autoethnography foregrounds the autoethnographer's experience, and focuses "on life as 'lived through' in its complexities" (Adams *et al*., 2017, p. 8). In evocative autoethnography, therefore, autoethnographers immerse the reader into "the kinds of experience we might not ordinarily talk about publicly… [they] take the reader into the private cultural world of the author" (Turner, 2013, p. 213).

Reed-Danahey (1997) summarised the distinction between analytical and evocative autoethnography:

> [t]he concept of autoethnography… synthesizes both a postmodern ethnography, in which the realist conventions and objective observer position of standard ethnography have been called into question, and a postmodern autobiography, in which the notion of the coherent individual self has been similarly called into question. The term has a double sense— referring to the ethnography of one's own group or to autobiographical writing that has ethnographic interest. Thus, either a self- (auto-) ethnography or an autobiographical (auto-) ethnography can be signalled by autoethnography (Reed-Danahey, 1997, p. 2).

In either case, however, autoethnography differs from 'regular old' ethnography in that it embraces the ethnographer's lived experience, eschewing traditional fieldwork in favour of the autoethnographer's recollections of the experience. The autoethnographer serves as the researcher, the research 'instrument', and the research subject. And autoethnographies rely on a combination of autobiography and ethnography.

These defining characteristics of autoethnography have made many mainstream scientists sceptical of autoethnography. The embrace of lived experience, for example, has resulted in autoethnographers being labelled as journalists or 'soft' scientists (Denshire, 2013). The multifaceted role of the autoethnographer has led to cries that autoethnography is unscientific

and bias-laden. Evocative autoethnography in particular has been viewed as too personal, and lacking in theoretical relevance (Maréchal, 2010). And in one of those apparent 'cannot win' situations, the reliance on a combination of autobiography and ethnography means that "autoethnography is criticised for either being too artful and not scientific, or too scientific and not sufficiently artful" (Ellis *et al*., 2011, p. 8).

Burnier (2006) countered the sceptics, however, suggesting at the outset that the binary distinction between analytic and evocative is forced. Autoethnographies, he implored, can be both analytical and evocative, both personal and scholarly, and both descriptive and theoretical. Ellis *et al*. (2011) concurred, arguing that "[a]utoethnographers believe research can be rigorous, theoretical, and analytical *and* emotional, therapeutic, and inclusive of personal and social phenomena… Autoethnographers also value the need to write and represent research in evocative, aesthetic ways" (Ellis *et al*., 2011, p. 9). Writing in response to the critics of the autobiographical addition to autoethnography, Ellis *et al*. (2011) reasoned that an autoethnographer cannot remain dispassionate about her/his research subject, and likewise that "[a]n autobiography should be aesthetic and evocative, engage readers, and use conventions of storytelling such as character, scene, and plot development and/or chronological or fragmented story progression" (p. 3).

Proponents of autoethnography have also claimed that the traditional evaluation triad of reliability, validity, and generalisability ought not to be used as the criteria for evaluating an autoethnography. Bochner (2002), for example, created a triadic analogy for autoethnography, in which reliability refers to the autoethnographer's credibility as a researcher and writer (Is she/he believable?), validity is about verisimilitude (Does the experience or culture which is described feel life-like, true, and real?), and generalisability means resonance (Has the autoethnographer illuminated the culture for her/his readers?). Ellis *et al*. (2015) offered a more general and simultaneously autoethnographic-specific set of criteria for evaluating an autoethnography:

1. Does it make contributions to knowledge?
2. Does it value the personal and experiential?
3. Does it demonstrate the power, craft, and responsibilities of stories and storytelling?

4. Does it take a relationally responsible approach to research practice and representation?

Ellis *et al*. (2011) were even more specific: "an autobiography must also illustrate new perspectives on personal experience— on epiphanies— by finding and fulling a "gap" in existing, related storylines" (p. 4).

2.3.2. Autobiographical and Hermeneutic Procedures

As mentioned in Section 2.3, I conducted an autoethnography in lieu of action research, to identify the educational values which constitute my professional identity as a marketing educator within my community of practice. Arguably, I actually conducted an autophenomenography or perhaps an auto-hermeneutic study (The distinction is vague in the literature.), both of which aim to reveal the lived experience of a discrete phenomenon, rather than the amalgam of culture, a holistic picture of which autoethnography seeks to paint. Lived experience and culture, however, are often deemed inseparable (Gorichinaz, 2017). And my use of autobiography supports the notion that I conducted an autoethnography.

Whichever the case, I began by writing my autobiography of sorts. I qualify with 'of sorts' because I did not chronicle my entire life from first memories up to the present day. Instead, I described specific events in my life which have been instrumental in my development. Indeed, following Ellis *et al*. (2011), I keyed in on 'epiphanies':

> remembered moments perceived to have significantly impacted the trajectory of a person's life, times of existential crises that forced a person to attend to and analyse lived experience, and events after which life does not seem quite the same… When epiphanies are self-proclaimed phenomena in which one person may consider an experience transformative while another may not, these epiphanies reveal ways a person could negotiate "intense situations" and "effects that linger"— recollections, memories, images, feelings— long after a crucial incident is supposedly finished (Ellis *et al*., 2011, p. 3).

I also consider that an autobiography shows "people in the process of figuring out what to do, how to live, and the meaning of their struggles" (Bochner and Ellis, 2006, p. 111). Consequently, autobiography can be regarded as "a method of inquiry, a way of finding out about a topic… form and content are inseparable" (Richardson, 2000, p. 923). By writing my autobiography, therefore— by describing and reflecting on my lead up to, my entry into, and my time within, the higher education profession— I was able to begin to discern the educational

values which constitute my professional identity as a marketing educator within my community of practice.

I wrote the autobiography over a two-month period in summer 2019. I drew on some earlier autobiographical work which I completed as part of a Master of Arts in Education degree with which I graduated in 2003. My autobiography is presented in Appendix 1, and, as can be seen, includes both descriptions of specific events in my life which have been instrumental in my development (the epiphanies), and my reflections on these events. The rhetoric is informal and conversational in tone, consistent with both living educational theory and autoethnography. I isolated my reflections from the main text with ***emboldened italics***.

In the reflections, I attempted to re-frame the specific events in my life in a new context, which enabled me to view them from a different perspective— a methodological sleight of hand which Schön (1983) called a 'frame experiment'. The reflections were necessary because, as suggested by MacLure (1996), an interpretive researcher must move "backwards to the past and forward again in order to try to make sense of the present" (p. 273). In other words, the reflections precipitated movement from my autobiography being simply a description of the specific events which were instrumental in my development, to my autobiography also being an explanation of why these specific events were instrumental in my development. Indeed, the reflections, to some degree, helped me transform the specific events of the autobiography into specific *meaningful* events.

Now, in order to identify the educational values which constitute my professional identity as a marketing educator within my community of practice, I followed a hermeneutic procedure. Broadly speaking, hermeneutics is the science of interpretation (Allen and Jensen, 1990). It gained popularity in the seventeenth century as a term to describe Biblical studies (Thiselton, 1992), but as "a disciplined approach to interpretation can be traced back to the ancient Greeks studying literature and to biblical exegesis in the Judeo-Christian tradition" (Crotty, 1998, p. 88). Today it informs interpretive research throughout the social sciences.

As a 'mode of understanding', hermeneutics keys in on the 'meaning-full forms' (Betti, 1980) which are bound up in the "contextualized personal expressions of an individual" (Arnold and Fischer, 1994, p. 61)— known in hermeneutics as the text (Ricoeur, 1981). To re-

experience, re-cognise, and re-think these meaning-full forms through an interpretation of the text is to achieve hermeneutic understanding (Bleicher, 1980).

A hermeneutic procedure typically begins with an interpretive reading of the text, the aim of which is an initial understanding of its meaningful forms (Miles and Huberman, 1994). This is followed by a breaking-down of the text into elements, by transforming the text using clusters (Ellen, 1984), themes (Boyatzis, 1998), or categories (Spiggle, 1994). This transformation is most often executed by using codes (Strauss and Corbin, 1998)— conceptual labels which assign specific meanings to the text (Miles and Huberman, 1994). The elements are then re-constructed in a new way, thereby generating a new understanding of the text. This process of breaking-down and re-constructing continues, the goal of which is the resolution of contradictions among and between the elements and the text (Arnold and Fischer, 1994). That is to say, with continuous movement back and forth from the text to the elements (Strauss and Corbin, 1998), and an on-going seesaw between interpretation and understanding, we "transform the data into something it was not…We break down the data in order to classify it, and the concepts we create or employ in classifying the data, and the connections we make between these concepts, provide the basis of a fresh description [of the text]" (Dey, 1993, p. 30).

So, after completing my autobiography, I followed a hermeneutic procedure in which I treated the autobiography (specific events and reflections) as a 'Ricoeur-ian' text. I began with an interpretive reading of my autobiography to yield an initial understanding of the educational values which were embedded in it. I then started breaking down my autobiography into meaning-full elements, using a paper-based coding and indexing system (In previous interpretive research I have used NUD*IST and N-VIVO software to aid the hermeneutic procedure.). More specifically, I developed codes for different meanings, and indexed all instances of these meanings by tagging the textual units in my autobiography which demonstrated the codes. An example of a code was 'technology', which I tagged to ten textual units in my autobiography. I then reconstructed these codes in a new way, thereby yielding a new understanding of my autobiography as a whole. This process of coding, indexing, and theorising continued until I believed that I had resolved the contradictions among and between the elements of the autobiography and the autobiography as a whole. The final result of this

hermeneutic procedure was a 'fresh description' of my autobiography— specifically, the identification of the educational values which constitute my professional identity as a marketing educator within my community of practice.

Neither a description of hermeneutics nor the details of the hermeneutic procedure, however, capture fully the interpretive logic by which the educational values which constitute my professional identity as a marketing educator within my community of practice were abstracted from my autobiography. I offer the following brief example from the hermeneutic procedure, therefore, to provide a more concrete illustration of hermeneutics at work.

In the opening paragraph of my autobiography, I recounted my fascination with model-building, which, over time, evolved into automotive restoration, and, most recently, into house renovation:

> Like many children of the pre-video game era, I was enamoured with model-building. Indeed, I can recall many joy-filled hours painting, assembling, and finishing model cars, ships, and planes. Erector sets and Lego were also favourites, and I tried building a wooden schooner from a blueprint once, but plastic models were my preferred pastime. I can still picture Hambly's Hobby & Crafts in my mind's eye, sandwiched between Town Jewellers and CC Pant Shop on the main street of my hometown, its aisles brimming with Revell, Airfix, and Tamiya kits. By the age of ten or eleven, however, I had gravitated to model cars; my father was a 'gear-head', plus I had acquired a box of *Car and Driver* and *Road & Track* magazines at a garage sale for the princely sum of two CDN, each issue of which I read cover-to-cover. And 1:8 became my scale of choice— the bigger the better, was my opinion.

In my first iteration of coding and indexing, I indexed this and other instances in my autobiography which intimated a passion for building stuff, with the 'Construction' code. I played around with this theme, recalling my four years of undergraduate engineering studies, and the many summers which I spent working at the foundry. Consider the following excerpt from my autobiography which I had also tagged with the *Construction* code:

> Christy and I, however, convinced ourselves to go for it, cognitively-rationalising the benefits of Little Rock: the cost of living was low, the scenery was stunning, and there was an abundance of cheap 'renovation-worthy' housing. "The job is great and it will open other options," I told myself. Other arguments stretched even wider.

This *Construction* code felt forced, however, and after a few iterations which led to other coding attempts with different codes including *DIY* and *Engineer*, I remembered a concept from my marketing world which is called 'marketing myopia'. In short, marketing myopia refers to

the tendency of marketers to focus on the features of a product, rather than on the benefits which a consumer derives therefrom. The classic example is the electric drill: a consumer does not buy an electric drill because she/he wants an electric drill, but instead because she/he wants a hole. The essence of marketing myopia was captured succinctly by networking guru Ivan Misner, who suggested that 'features tell but benefits sell' (Misner, 2019).

It dawned on me that I had been focusing (myopically) on my passion for building stuff which I had derived from my early fascination with model-building, rather than on the benefits which were derived therefrom. In other words, I realised that I loved construction in all forms, not because of construction per se, but because of what construction provided to me, what it allowed me to do, and what it enabled me to achieve. Consequently, I re-worked the *Construction* code into three underlying values (benefits in the language of marketing): experiential, innovation, and technology.

Consider innovation, which, after many years of studying and teaching the subject, I define in terms of added-value:

INNOVATION = INVENTION + VALUE

In this sense, therefore, my passion for building stuff carried with it the more fundamental ideal of adding value— of upgrading, improving, making things better. Indeed, at the core of my automotive restoration projects was innovation. I am not a purist, and accordingly I always upgrade rather than simply restore— disc brakes to replace the drum brakes on my 1963 Porsche 356, for example. Yes, innovation is what really drove my passion for construction. Consequently, I developed the *Innovation* code, and indexed it to numerous excerpts throughout the autobiography, including the following:

> My international experiences, which gave me expertise in cross-cultural management, knowledge of the educational systems of many countries around the world, and a network of contacts in leading international business schools, made me a shoe-in for the administrative position in international study-abroad programmes. During my remaining four years at the Olin School of Business, I saw almost five hundred students participate in more than fifteen study-abroad courses.

2.4. My Educational Values

I offered the preceding brief example from the hermeneutic procedure to provide a more concrete illustration of hermeneutics at work. The result of this hermeneutic procedure are the

ten educational values which constitute my professional identity as a marketing educator within my community of practice (See Table 5 for a summary of my educational values.). This section defines these ten educational values.

Table 5. A Summary of My Educational Values

Educational Value	Meaning	Intentionality
1. Critical	• The form and function of higher education is equivocal	• I engage in higher education critically
2. Learner-Centred	• Higher education is about learning, not teaching	• I facilitate learning
3. Conceptual	• Knowledge is conceptually-mediated	• I establish conceptual foundations
4. Contextual	• Knowledge and learning are contextual	• I account for contextual differences
5. Experiential	• Learning occurs through experience	• I curate experiences
6. Scaffolding	• Students need guidance to learn effectively	• I scaffold learning
7. Assessment	• Students learn in different ways and at different rates	• I assess learning
8. Storytelling	• People 'storify' their worlds	• I tell stories
9. Innovation	• Higher education can be improved	• I innovate
10. Technology	• Educational technologies continue to evolve	• I experiment with educational technologies

Source: Author

To begin, I believe that students participate in higher education purposefully, but that the purpose of higher education is equivocal. That is to say, higher education is not happenstance for students. On the contrary, they elect to enter higher education institutions of their own free will… but they do so for different reasons. In parallel, higher education institutions operate under different philosophical assumptions, they hold different strategic postures, and they seek different organisational and societal outcomes. As a professor, therefore, I engage in higher education critically.

I believe that higher education ought to be student-centred. This belief is premised on the

philosophical notion that knowledge is constructed— that people are born into a meaningless world, and that this world only becomes meaningful when they ascribe meaning to it. Consequently, higher education is about learning, not teaching. Students are not passive receivers of information; they are active constructors of knowledge. As a professor, therefore, I do not transmit information; I facilitate learning.

I believe that knowledge is conceptually-mediated. Human understanding of the world consists of a Peircian triad of an object (a tangible or intangible thing), the sign (or *representamen*) which is used to symbolise the object, and the conceptualisation (or *interpretant*) of the object. Conceptual meaning consists of a linguistic structure which links concepts together in a cognitive schema. In simple(r) terms, concepts are mental abstractions of reality. And they are the building-blocks of knowledge. As a professor, therefore, I establish conceptual foundations.

I believe that all human knowledge is contextual. Indeed, the meanings which people ascribe to the world are not immune to their extant knowledge, to cultural backgrounds, or to their personal circumstances. Likewise, learning is contextual. People do not exist in a vacuum. On the contrary, learning occurs within specific learning environments, the characteristics of which impact the mechanisms of learning. As a professor, therefore, I account for contextual differences.

I believe that learning occurs through experience— that the natural learning process is enhanced if learning is grounded in life experiences. I follow Kolb (1984), who models learning as a cycle of concrete experience, reflective observation, abstract conceptualisation, and active experimentation, and who, accordingly, defines experiential learning as the mental process by which knowledge is constructed through the transformation of experience. As a professor, therefore, I curate experiences.

I believe that all people have the capacity to learn, but often need to be guided and supported in their learning. This guidance and support mirrors the idea of scaffolding which was introduced by Wood *et al*. (1976), and which analogises the activities which are provided by a teacher to students as they move through the ‘zone of proximal development’. As a professor, therefore, I scaffold learning.

I believe that students learn in different ways and at different rates. Learning is not linear, and the pace at which students learn varies. Consequently, the assessment of learning is a central activity of higher education, which ought to be implemented throughout (and not only at the conclusion of) a student's learning journey, and which ought to draw on different assessment methods. As a professor, therefore, I assess learning.

I believe that people are 'natural' story-tellers. Indeed, I buy into the fundamental proposition in Jonathan Gotschall's (2012) book that one of the abilities which distinguishes *homo sapiens* from other primates is story-telling. The corollary of this proposition— one which I have witnessed throughout my career— is that people 'storify' their worlds: they think in stories, they share their lives in stories, they learn from stories. As a professor, therefore, I tell stories.

I believe that higher education can be improved. Indeed, higher education is always tentative— in a permanent state of flux— and has no end point, thereby recalling the proverbial journey rather than the destination. This tentativeness is caused by endogenous innovation: teachers, students, and other people 'in the business of' higher education who work continually to make it better— a process which Schumpeter (1975) called 'creative destruction'. As a professor, therefore, I innovate.

Finally, I believe that educational technologies continue to evolve, as innovators adapt extant technologies, or create new technologies altogether, in service of improving higher education. Educational technologies need not be 'high tech', and not all new educational technologies improve teaching and learning. As a professor, therefore, I experiment with educational technologies.

2.5. Summary

Chapter 2 explored my professional identity according to the living educational theory paradigm. It began by reviewing the origins, characteristics, and criticisms of the living educational theory paradigm. It then introduced autoethnography as a research method, and detailed the specific autobiographical and hermeneutic procedures which I followed to identify my educational values. Finally, Chapter 2 defined these educational values as the constituent components of my professional identity as a marketing educator within my community of

practice. Chapter 3 now presents my living educational theory.

3. My Living Educational Theory

3.1. Overview

Chapter 3 presents my living educational theory. It begins by underlining the characteristics of a theory. It then elucidates my educational values, and demonstrates how they are evidenced in my public works. Finally, Chapter 3 theorises my professional identity as a marketing educator within my community of practice, as an analogy that 'teaching is like engineering'.

3.2. But Does It Work in Theory?

The joke goes something like this: The manager of a manufacturing company hires an economics professor for advice on improving its performance. After arriving at the company, the economics professor asks to tour the manufactory to see how it operates. The manager leads the economics professor through the manufactory, pointing to various machines, explaining different processes, and, at the conclusion of the tour, exhibiting the finished product. The economics professor thanks the manager for the tour, then comments with a scratching of the chin, "It is all very interesting, but does it work in theory?"

The joke is funny, of course, because it ridicules the 'dismal science' by playing on a stereotype of economists (Apologies to my economics colleagues!). It also hints at the on-going practice-theory debate to which I referred in Section 1.8. Perhaps most importantly, however, it raises the spectre of a philosophical question which has no incontrovertible answer: 'What is a theory?'.

In the positivist tradition, a theory is a set of "propositions [which] presents a systematic view of a phenomenon by specifying relationships among variables with the purpose of explaining and predicting the phenomenon" (Kerlinger, 1979, p. 9). These relationships "express regularities in which one concept is always related to another concept" (Berthold, 1964, p. 417), and are tested and modified through empirical research (King, 1988). Predictability and parsimony are the main evaluative criteria of a theory, and its generalisability is, to a large degree, the measure of its utility.

In the interpretivist tradition, by contrast, a theory consists of sets of "concepts and sets of

relational statements [which] can be used to explain, in a general sense, what is going on" (Strauss and Corbin, 1998, p. 145). 'Explain' does not mean prediction as in a positivist theory, but instead refers to a *verstehen* (empathetic understanding) of the structure and the logic — the *eidos*— of the phenomenon. In other words, a theory in the interpretivist tradition homes in on the meaning of a phenomenon, rather than its measurement. And because it embraces the nuances and complexity of a singular case, parsimony is somewhat antithetical, and generalisability, from a positivist standpoint, is largely moot.

The living educational theory paradigm, with its philosophical and methodological roots in action research, aligns with the interpretivist tradition. Typically, it relies on more introspective analytical methods, to ask and answer the primary question of 'How do I improve this process of education here?'. The output of these introspective analytical methods is not a set of propositions which aims to predict a phenomenon, but, more pointedly, a living educational theory which describes and explains, in a holistic, structured, and logical manner, the professional practice of a teacher-researcher.

As described in Section 2.3, I adopted the spirit of the living educational theory paradigm for this context statement, as a means for positioning my public works both contextually and theoretically. Specifically, I theorised my professional identity, rather than my professional practice, by identifying the educational values which constitute my professional identity. I conducted an autoethnography in lieu of action research, to identify the educational values which constitute my professional identity. And instead of buttressing the validity of my living educational theory with visual and/or lexical evidence, I examined how my educational values are evidenced in my public works.

3.3. My Public Works

In 2009 I published that first chapter on analogical learning in higher education, which instigated a decade of scientific research and writing in and around the scholarship of teaching and learning. The resultant public works consist of more than eighty articles, assessments, books, cases, chapters, interviews, notes, panels, podcasts, posters, presentations, and websites (See Appendix 2 for a list of my public works.). The following section elucidates my educational values, and demonstrates how they are evidenced in my public works. To be fair, it

could be argued that all ten educational values pervade, more or less, all my public works. But for concision, I foreground the public works which are the most salient ostensive artefacts of my professional identity as a marketing educator within my community of practice.

3.3.1. Everyone's A Critic

I often quip that I am a man in conflict— a kind of walking dichotomy. Indeed, as a Canadian who has also lived several years in Europe, I value policies, practices, and procedures which lean more towards socialism. As a marketing professor, however, I often extoll the virtues of free-market economics: the elegant efficiency of competition, for example, the dispassionate power of the 'invisible hand', and the fundamental fairness of meritocracies. I felt this tension most tangibly in the context of healthcare, after relocating from the United Kingdom to the United States in late 1999. But it also manifests itself each time a student approaches me for advice about a marketing career, thereby dredging up the philosophical dilemma between instrumentalism and edification which I noted in my autobiography. What is the purpose of higher education… getting a job, or seeking knowledge for its own sake?

This socialism versus capitalism tension alludes to the first of my educational values: *critical*. In short, I think of myself as a dialectician. I discuss, I debate, I dispute… anything and everything. More specifically, as a marketing educator within my community of practice, I scrutinise myself and my professional practice. Nothing is sacred; everything is subject to critique. In a recent discussion with a colleague, for example, I questioned the continued existence of the tenure system. Its purpose as an insurance policy for scholars in continental European higher education was perfectly logical in a historical time period during which knowledge was largely controlled by either the Church or the State. But today, which purpose does it serve, with so much knowledge seemingly fluid and un-filtered?

To the outsider, this dialectical fervour might smack of intellectualism, or even élitism. But it is definitely part of my professional identity as a marketing educator within my community of practice. And consequently, I approach my professional practice with a measure of incredulity, a sprinkle of cynicism, and a healthy dose of rationalism. I aim to be open and respectful of all perspectives of an issue, but I also aim to resolve discrepancies in order to arrive at some truth.

My *critical* educational value is evidenced foremost by my six public works (one article, one book, two chapters, and two presentations) which revolve around the topic of transnational higher education (See Table 6.). These public works parallel my Doctor of Education research in which I explored the transnationalisation of the Stockholm School of Economics, with an emphasis on its foreign branch campus in Riga, Latvia. Together, they trace the historical emergence of transnationalisation as a distinct form of internationalisation of higher education, enumerating the primary drivers of transnational higher education, and profiling the transnationalisation of the Stockholm School of Economics, specifically. More pertinently, they also examine the philosophical foundations on which transnational higher education is premised: marketisation, neo-liberalism, and globalisation. They critique transnational higher education, spotlighting its costs, and challenging the veracity of its supposed benefits. And they suggest possible directions for the future of transnational higher education.

Table 6. My Public Works and My *Critical* Educational Value

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Articles	**One Size Does Not Fit All: Localization in the Age Globalization**	✔			✔						
	Critical Perspectives on Transnational Higher Education	✔									
	Reflections on Authentic Leadership	✔		✔							
	Accountability in Graduate Management Education	✔									
	Leadership Beyond the Hype: A Conceptual Critique	✔		✔							
Assessments	**Major Field Test BBA**	✔						✔			
	Principles of Marketing	✔						✔			
	Major Field Test MBA	✔						✔			

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Books	The Marketisation of Higher Education: Policies, Practices, and Perspectives	✔									
	The Transnationalization of the Stockholm School of Economics	✔							✔		
	Globalisation of Higher Education: Political, Institutional, Cultural, and Personal Perspectives	✔									
Chapters	A Review of Transnational Higher Education	✔		✔							
	Accountability in the Management Education Industry	✔									
	Leadership in Management Education: Challenges and Prescriptions	✔									
	An Introduction to Globalisation of Higher Education	✔									
	Transnational Higher Education	✔		✔							
	The Internationalisation of the Stockholm School of Economics in Riga	✔							✔		
	Student Development at the Stockholm School of Economics in Riga	✔	✔					✔			
Interviews	A2 Insight	✔									
Presentations	More Than Words	✔									
	Homerton Changemakers: A Co-Curricular Programme at the University of Cambridge	✔	✔			✔	✔	✔	✔		
	Critical Perspectives on Transnational Higher Education	✔									

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Presentations	**Transnational Higher Education: Taking Stock and Looking Forward**	✔									

Source: Author

I have also been critical of two of the philosophical foundations on which transnational higher education is premised: marketisation and globalisation. An edited anthology which is entitled *The Marketisation of Higher Education: Policies, Practices, and Perspectives*, for example, will be published in 2020. As revealed in the title, the anthology probes the marketisation of higher education by: 1. investigating the various policies which have been (or which ought to be) implemented as checks on market forces in higher education, 2. illustrating the manner in which the marketisation of higher education has been implemented in practice, and 3. weighing up the marketisation of higher education from different perspectives.

With respect to globalisation, an edited anthology which is entitled *Globalisation of Higher Education: Political, Institutional, Cultural, and Personal Perspectives* was published in 2017. Its chapters, which include my own chapters on the internationalisation of the Stockholm School of Economics in Riga, and on transnational higher education (in addition to the introductory chapter) takes a stakeholder view of sorts, identifying the advantages and disadvantages of the globalisation of higher education from different perspectives. An article on the globalisation of higher education was published more recently, the main thesis of which is that despite globalisation— perhaps even because of globalisation— cultural differences remain, thereby suggesting that business schools ought to localise, rather than standardise, their curricula, instructional methods, and other pedagogical activities. All this critique of the globalisation of higher education was captured in a 2018 television interview on the *A2 Insight* programme.

Several additional public works mirror my ongoing musings about the purpose of higher education. In 2018, for example, I was engaged by Homerton College at the University of Cambridge to develop *Homerton Changemakers,* a three-year, integrated, co-curricular programme which was designed to help Homerton College undergraduate students become changemakers. The programme also supports the mental and physical health of Homerton College undergraduate students during their three years of studies, with its emphasis on self-clarification and self-fortification. Likewise, it prepares Homerton College undergraduate students to thrive in a world which is increasingly ambiguous, complex, interconnected, and dynamic (ACID). Finally, it increases the employability of Homerton College undergraduate students by encouraging both a mindset and a skillset which bolster their academic degrees.

Homerton Changemakers is particularly intriguing if viewed in the context of the purpose of higher education, because the colleges of the University of Cambridge have traditionally (and perhaps not surprisingly) held a singular focus on academic achievement. Other universities in the United Kingdom and elsewhere, however, have been pushing education of the 'whole student', student experience while attending university, and post-graduation employability. At the Stockholm School of Economics in Riga, for example, face-to-face conferences between students and the Pro-Rector were added to the second year of the Bachelor of Science programme in 2002. Additional activities and services were added thereafter, resulting in its so-called 'hybrid student development programme', the creation, implementation, and evaluation of which I documented in an anthology chapter.

Since 2016, I have been retained by Educational Testing Services (ETS) to design university-level assessments. Located in Princeton, United States, ETS is probably known best as the purveyor of *TOEFL*, the leading global test of English as a foreign language. Its *Principles of Marketing* assessment is used by institutions of higher education to award credit for self-study. More than five hundred colleges and universities in the United States allow students to sit this assessment in lieu of following a traditional classroom-based module. It reflects the more widespread growth of competence-based higher education, a phenomenon which is somewhat controversial among educators, and which calls into question the fundamental role of higher education institutions. The other two assessments are used by

universities as a kind of exit examination, to ensure that students who 'walk across the stage' are worthy of their diplomas. These *Major Field Tests* are especially popular among second and third tier universities which, presumably, use the assessment as a type of quality indicator.

This subject of quality has also been my focus in two additional public works. Indeed, I have applied my *critical* educational value by asking a simple but deceptively complex question: 'What is quality in higher education?'. More specifically, I examined various methods for judging the quality of management education, including accreditation agencies, the market, certifications, rankings and third-party evaluators, student assessment, and student evaluations. I concluded that each method has advantages and disadvantages, and that no single method dominates the management education industry.

Finally, my *critical* educational value is evidenced in four public works which concern leadership in higher education (or lack thereof). In *Leadership Beyond the Hype: A Conceptual Critique*, I argued that the concept of leadership, despite the importance which it has been accorded by society, has, to a large extent, failed to materialise. In *Reflections on Authentic Leadership*, I dug deeper into a particular type of leadership, and likewise argued that authentic leadership, as both a concept and practice, has been retarded because of a lack of definitional clarity. In *Leadership in Management Education: Challenges and Prescriptions*, I identified the challenges of leadership in management education, and, subsequently, provided prescriptions for some of these challenges. And in *More Than Words*, I proposed and illustrated the use of Simon Sinek's 'Golden Circle Model' as a tool for identifying, articulating, and communicating an institution's strategy.

3.3.2. Leggo My Ego

Ego is simply the Latin word for I. But Freud proposed famously in his model of the human psyche that the *ego* is the mediator between a person's reptilian instincts (the *id*) and her/ his humanistic morals (the *super-ego*). The ego is "like a man on horseback," he suggested, "who has to hold in check the superior strength of the horse" (Freud, 1923, p. 15). Accordingly, the ego is the key to a balanced psyche.

Most people, however, are not Freudian psychotherapists, and consequently they adopt an everyday meaning of the word ego: a person's self-worth or self-esteem, a person's ideas about

her/his importance vis-à-vis other people, or, in the more extreme, a person's conceit. It is obvious from this everyday meaning of the word that, in concert with Freud, ego is 'part of a healthy diet'— "[w]here there is no ego, there can be no mental health" ("The Function… ", 2019, p. 1).

It is the notion of an inflated ego, however, which has resulted in its bad reputation. Indeed, ego has been the lead character in countless self-help books and Internet articles, the majority of which pillory the ego for its potential injurious effects. Consider the 2016 title *Ego is the Enemy: The Fight to Master our Greatest Opponent* by Ryan Holiday, for example, which states vehemently that an "unhealthy belief in your own importance" prevents you from being sensible, impartial, and clear-headed.

Unsurprisingly, ego has also figured prominently in religious and philosophical teachings. Ego, in the guise of pride (also called vanity, hubris, futility, or vainglory) is one of the cardinal sins of Christianity, and is considered the sin from which all other sins arise ("Seven Deadly… ", 2019). According to the Bhagavadgita, "[a]ny suffering or any feeling or emotion that we experience, even a little disturbance or discomfort, is due to ego" ("The Concept… ", 2019). Renouncing the ego, therefore, is the path to universal consciousness. And likewise in Buddhism, Zen meditative practices are said to lead to egoless-ness, and, subsequently, spiritual enlightenment. This idea of egoless-ness was captured cleverly by Wei Wu Wei, who suggested that humans are "like a dog barking up a tree that isn't there. When we see there's no tree, we can finally stop barking" ("Re: When… ", 2019).

I am not a Zen Buddhist. I have never read the Bhagavadgita. And my days of Sunday school at Saint Athanasius Anglican Church in my hometown in Canada are long behind me. The idea of egoless-ness, however, resonates with me very strongly, as a marketing educator within my community of practice. The death of the Finnish graduate student which I chronicled in my autobiography, logically, had nothing to do with me. But it forced in me a spiritual reckoning of sorts, with respect to my vocation as a professor, to my relationship with students, and, ultimately, to my purpose in life.

The result of this spiritual reckoning has been my *learner-centred* educational value. Indeed, it led to a re-calibration of my role as a marketing educator within my community of

practice. My vocation as a professor is now driven by students. Curriculum design, for example, begins not with extant lessons, available textbooks, or previously-taught versions of the module syllabus, but with the needs of students. I no longer consider myself as the 'sage on the stage'; instead, I am the 'guide on the side'. I am not the walking wikipedia, whose function is to (generously) transmit the information to students. On the contrary, I am an architect of learning. In short, students are my *raison d'être*.

My *learner-centred* educational value reflects the shift which has occurred in higher education more broadly over the last few decades: from a professor-centred, transmission-based philosophy, to a student-centred, learning-based philosophy. It also happens to correspond to the notion of customer-centricity which has pervaded the practice of marketing since the 1990s, and which is manifest in everyday marketing mantras like 'The consumer is king (or queen)!', or 'The customer is always right!'. Perhaps Canadian rock legend Brian Adams captured the sentiment of consumer-centricity (and of my *learner-centred* educational value) best when he sang "Everything I do, I do it for you.".

My *learner-centred* educational value is evidenced first in the ten anthologies which I co-edited under the aegis of the *Learning in Higher Education* (LiHE) association (See Table 7.). As a reminder, my University of Cambridge carrel-mate Claus Nygaard launched LiHE in response to his frustration with the emphasis on science over students at Copenhagen Business School. Each anthology in the series focuses on a specific theme in higher education, while also reflecting the student-centred, learning-based philosophical shift which has occurred in higher education over the last few decades. Of these ten anthologies, four anthologies are particularly noteworthy with respect to my *learner-centred* educational value.

First, curriculum design is nothing new, but its treatment has often been mechanistic—almost formulaic— with an emphasis on the pieces and parts of a curriculum. The anthology *Learning-Centred Curriculum Design in Higher Education*, on the contrary, examines curriculum design from a learner-centred vantage point, emphasising the central role which learning ought to play in curriculum design. In the introductory chapter, for example, I proposed that moving learning to the forefront of higher education results in four different perceptions of curriculum:

1. Course curriculum: the micro-cosmos of student learning.
2. Subject-matter curriculum: the clustering of student learning.
3. Academic curriculum: the academic range of student learning.
4. University curriculum: the holistic understanding of student learning.

Table 7. My Public Works and My *Learner-Centred* Educational Value

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Books	Learning-Centred Curriculum Design in Higher Education		✔				✔				
	New Innovations in Teaching and Learning in Higher Education		✔							✔	
	Teaching and Learning Entrepreneurship		✔							✔	
	Globalisation of Higher Education: Political, Institutional, Cultural, and Personal Perspectives	✔	✔								
	Innovative Teaching and Learning in Higher Education		✔							✔	
	Assessing Learning in Higher Education		✔					✔			
	Technology-Enhanced Learning in Higher Education		✔								✔
	Learning Spaces in Higher Education		✔		✔						✔
	Case-Based Learning in Higher Education		✔			✔			✔		
	Learning in Higher Education—Contemporary Standpoints		✔								
Chapters	Four Perceptions of Curriculum: Moving Learning to the Forefront of Higher Education		✔	✔							
	Using the ECTS for Learning-Centred Curriculum Design		✔				✔	✔		✔	
	Academic Rigour: Harnessing High-Quality Connections and Classroom Conversations		✔	✔	✔						

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Chapters	A Possible Conceptualisation of Innovative Teaching and Learning in Higher Education		✔	✔							
	Introduction (Innovative Teaching and Learning In Higher Education)		✔							✔	
	Introduction (Assessing Learning in Higher Education)		✔					✔			
	Student Development at the Stockholm School of Economics in Riga	✔	✔					✔			
	Introducing Technology-Enhanced Learning		✔								✔
	An Introduction to Case-Based Learning		✔			✔			✔		
	A Call for Contemporary Practices of Learning in Higher Education		✔	✔							
	Universal Design for Learning in Higher Education		✔	✔	✔						
	The Use of RISK® for Introducing Marketing Strategy		✔			✔	✔			✔	✔
	Analogical Learning in Higher Education		✔	✔							
Panels	Teaching Consumer Behavior in Today's Changing University Environment		✔								
	International Marketing: Pedagogical Perspectives and Practices		✔			✔					
Podcasts	The 12-Minute Classroom Rule at The University of Michigan		✔								

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Presentations	**Think About This**		✔			✔	✔				
Proceedings	**The Case Method: Variations on a Theme**		✔			✔					
	Mini-Cases: Merging Declarative, Procedural, and Contextual Knowledge		✔			✔					
Websites	**The 12-Minute Classroom Rule at the University of Michigan**		✔								
	How to Engage Your Students With the 12-Minute Rule and Quizzes They're Meant to Fail		✔								

Source: Author

In another anthology chapter, I contended that the European Credit Transfer and Accumulation System (ECTS) serves as a very useful tool for learner-centred curriculum design in higher education, by providing both intrinsic and extrinsic guidance for designing lessons, modules, and even entire degree programmes. And in a third anthology chapter, I explored the concept of academic rigour, concluding that it ought to be learning-centred, and that it could be considered a defining feature of curriculum design. Indeed, I made the case that academic rigour requires professors to provide rich, deep, and relevant experiences for students which are 'suitably challenging', or, to paraphrase Goldilocks, which are not too difficult, not too easy, but just right.

Assessment has likewise been a topic of much discussion in recent years, especially because higher education accreditation agencies continue to push for 'assurance of learning'. Many volumes on the subject, however, take a very technical approach, covering such issues as question construction, the statistical properties of various types of tests, and, naturally in the

current environment, big data. The anthology *Assessing Learning in Higher Education*, however, puts learning at the centre of assessment. Indeed, in the introductory chapter I made the case for both summative and formative assessment from a learner-centred standpoint. But I also put forward a third type of assessment which I called 'generative assessment', whose goal is student growth. In another chapter, I examined generative assessment in depth at the Stockholm School of Economics in Riga, which has instituted its so-called 'hybrid model for student development'. It acts in concert with the more traditional summative and formative assessments within the bachelor's program at the Stockholm School of Economics in Riga, and employs various activities, including peer support, social counselling, and alumni-student mentoring, to: 1. smooth the transition from secondary school to higher education, 2. ensure progress throughout the three-year bachelor degree, 3. lay the foundation for career success, and 4. instil a passion for life-long learning.

The two other anthologies which are particularly noteworthy with respect to my *learner-centred* educational value are entitled *Case-Based Learning in Higher Education* and *Learning in Higher Education— Contemporary Standpoints*. The first anthology shifts the focus away from cases as a teaching tool. That is to say, this anthology serves not as a manual on how to teach with cases; instead, its chapters explore the use of cases as facilitators of student learning, within various higher education contexts. The second anthology, as intimated by its title, is a kind of state-of-the-art treatise on learning in higher education. It includes my chapter on universal design for learning, an idea which has recently begun to gain traction within higher education. Universal design for learning is not unlike the design thinking philosophy/ methodology which has made its way into architecture, industrial engineering, and new product development. Indeed, it champions the conception and use of a range of inclusive instructional methods which aim to serve the plurality of student learning needs.

My *learner-centred* educational value is also evidenced in thirteen chapters, including the introductory chapters of the co-edited anthologies, plus the other chapters, which I reviewed above. I call attention, however, to two additional chapters which appeared in LiHE anthologies before I became a co-editor. The first chapter documents my use of the board game RISK® for

introducing marketing strategy. I developed this learner-centred exercise in response to my predecessor's comments about his students' inability to grasp some fundamental concepts which he had attempted to 'teach' them. The second chapter explores analogical learning in higher education. Specifically, it elucidates the theory of analogical learning— how people learn (and do not learn) through analogies— and examines the use of analogy for improving student learning outcomes.

In a similar way, I have leveraged my *learner-centred* educational value in several speaking engagements during the past decade. Specifically, I served on two panels in which I ascertained the inherent learning challenges which students face in undergraduate and postgraduate consumer behaviour and international marketing modules. In a recent presentation, I outlined the role of reflection in the learning process. And in two proceedings, I weighed the advantages and disadvantages of the case method broadly, and mini-cases, in particular.

Finally, my *learner-centred* educational value is evidenced in one podcast and two websites. These public works revolve around a pedagogical 'trick' which I follow in both curriculum design and instructional design, and which I dub the 'twelve-minute rule'. The trick is based on a simple but powerful idea about the mental limits of the brain: that learning efficacy of any pedagogical activity drops off after about twelve minutes. Consequently, I consider a ninety-minute 'lecture' in one of my modules not as ninety minutes, but instead as an arrangement of seven or more short, interconnected activities, each of which has a duration of no more than twelve minutes.

3.3.3. A Rose by Any Other Name

In the famous Act II Scene II of the play *Romeo and Juliet* by William Shakespeare, Romeo is standing in the Capulet family garden when Juliet appears in a window above him. Romeo speaks:

> But, soft! what light through yonder window breaks?
> It is the east, and Juliet is the sun!

Aah, the romance!

Several stanzas later, without knowledge of Romeo's presence in the garden, Juliet begins to ponder the infallibility of her love for Romeo:

What's in a name? that which we call a rose
By any other name would smell as sweet

The meaning of her words is simple: that she loves Romeo, despite the dreaded Montague family name which he bears. Stated more generally, a name is just a name, and not the thing itself.

Shakespeare continues to amaze audiences around the world with his keen insight into the human condition, with his rapier wit, and with his poetic brilliance. But this scene in *Romeo and Juliet* also reveals a philosophical genius which I had not previously appreciated. Juliet's ponderings, in particular, demonstrate Shakespeare's profound understanding of the ontological link between language and reality, an understanding which was not articulated in the scientific literature until three centuries later by Swiss linguist Ferdinand de Saussure and American semiotician Charles Sanders Peirce. Indeed, in one single stanza he captured so eloquently the philosophical notion that humans ascribe meaning subjectively to the objective world.

It is this notion of subjective meaning which undergirds my *conceptual* educational value. As I summarised in Section 2.4, I believe that knowledge is conceptually-mediated. Indeed, I follow the philosophy of constructivism, which proposes that people construct their own individual conceptualisations of phenomena in the world, either abstract or concrete, as they experience them. Stated another way, people are born into a meaningless world, and only after people construct meaning about the world does it become meaningful.

An example ought to help. When a toddler who is not yet able to speak bumps her/his head against a table as she/he crawls, the table is nothing more than a physical thing which impedes progress, and which brings about pain. According to Peirce's semiotic theory, the table is the *object*. But the table only becomes a table to the toddler when she/he is able to 1. construct the meaning of 'table-ness', and 2. ascribe this meaning to the object which is the table. Peirce referred to this meaning which is constructed (this conceptualisation) as the *interpretant*. It is important to recognise that this meaning is linguistic in nature, thereby intimating that the toddler must have language capabilities to construct meaning. Also note that a toddler, when she/he is able, will use the word table as a short-hand for the conceptual meaning of a table. That is to say, the word— the *representamen* in Peirce's semiotic model— is

used as a label for the object, but also carries with it conceptual 'baggage'.

The first consequence of my *conceptual* educational value— of my belief that knowledge is conceptually-mediated— is that learning must begin by establishing conceptual foundations. Indeed, I consider it paramount to 'dredge up' students' extant knowledge of the world before trying to 'teach' them something new. It ought not to be surprising, therefore, that the research which I conducted for my PhD degree was conceptual in nature. In short, I developed a new conceptualisation of consumer values. Similarly, in the research for my EdD degree, I critiqued the conceptual immaturity of a relatively new phenomenon in higher education which is known as 'transnationalisation'. I subsequently developed a more essential and dynamic account of transnational higher education.

A second and equally important consequence of my *conceptual* educational value is that knowledge is not singular and immutable, documented in printed form. On the contrary, knowledge is plural and negotiated, 'documented' in the mind. Accordingly, knowledge is not 'taught' to students via some osmotic process which occurs during a lecture. Instead, knowledge is constructed by students when they engage consciously with the world.

My *conceptual* educational value is evidenced first in two articles which were published back-to-back in 2015 (See Table 8.). The first article, *Concepts: A Review*, begins by establishing the link between concepts and science. It then highlights the lack of emphasis on concepts in the academic discipline of management. The article continues by discussing the role of concepts and cognition. Finally, it defines and discusses the different philosophies of concepts. The second article, *Concept Development: A Primer*, likewise begins by establishing the link between concepts and science. It then outlines the main approaches to concept development. Finally, it provides an example of concept development from the academic discipline of marketing.

Two additional articles drew on the conceptual foundations which I laid in these first two articles. *Reflections on Authentic Leadership* begins by identifying how authentic leadership has been conceptualised. It then highlights some epistemological challenges of this conceptualisation. Finally, it discusses some implications of these challenges for the study of authentic leadership, and, more pragmatically, for authentic leaders. Similarly, *Leadership*

Beyond the Hype: A Conceptual Critique examines the literature on the leadership phenomenon. It concludes that the concept of leadership has suffered from definitional problems, and, in response, provides an alternative conceptual model of leadership which might help to address these problems.

Table 8. My Public Works and My *Conceptual* Educational Value

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Articles	Reflections on Authentic Leadership	✔		✔							
	Concepts: A Review			✔							
	Concept Development: A Primer			✔							
	Leadership Beyond the Hype: A Conceptual Critique	✔		✔							
Chapters	A Review of Transnational Higher Education	✔		✔							
	A Possible Conceptualisation of Innovative Teaching and Learning in Higher Education			✔						✔	
	Academic Rigour: Harnessing High-Quality Connections and Classroom Conversations		✔	✔							
	Four Perceptions of Curriculum: Moving Learning to the Forefront of Higher Education		✔	✔							
	Transnational Higher Education	✔		✔							
	Universal Design for Learning in Higher Education		✔	✔	✔						
	Analogical Learning in Higher Education		✔	✔							
Panels	A Pedagogical Primer for Professors		✔	✔							

Source: Author

Several chapters which appear in various anthologies are also conceptually-oriented. Two chapters review the emerging phenomenon which is known as transnational higher education, contrasting it with a more historic view of the internationalisation of higher education, describing its logic, enumerating both its rationales and incentives, and stressing its social significance. Two LiHE introductory chapters, *A Possible Conceptualisation of Innovative Teaching and Learning in Higher Education* and *Four Perceptions of Curriculum: Moving Learning to the Forefront of Higher Education*, propose conceptualisations of innovation and curriculum in higher education, respectively. And three other LiHE chapters which I described in Section 3.3.2, allocate significant space to defining the conceptual boundaries of academic rigour, universal design, and analogical learning.

Finally, my *conceptual* educational value is evidenced in the model of pedagogy which I presented in 2009 as a panelist. The model conceptualises pedagogy as five interrelated activities: needs analysis, curriculum design, instructional design, assessment, and evaluation. Each of these five activities I have conceptualised from a learning perspective. Needs analysis addresses *why* a student must learn. Curriculum design addresses *what* a student must learn. Instruction addresses *how* a student will learn. Assessment addresses *if* a student has learned. And evaluation addresses the *so what* of student learning.

3.3.4. There's No Place Like Home

According to IMDb, *The Wizard of Oz* ranks as the eighth best film of all time. It is certainly among my favourite films (although the flying monkeys continue to scare the wits out of me). The characters are adorable. Who does not love the lion, the scarecrow, and the tin man? The lyrics and melodies are memorable. Try reading the following words without breaking into song: "We're off to see the Wizard… " And at the end of the day, *The Wizard of Oz* is simply a wonderful story.

The film is also chock-a-block with numerous phrases which have entered the lexicon of contemporary culture. Consider "You're not in Kansas anymore, Dorothy.", for example, which is an adaptation of Dorothy's worrisome patter to her dog, Toto, and which connotes the notion of being in a foreign or uncomfortable setting. Think about the semantic power of the simple utterance "The witch is dead." And seeing 'behind the curtain' certainly took on new gravity

after people saw the wizard make a frenzied plea into his microphone to "[p]ay no attention to that man behind the curtain!".

The phrase from *The Wizard of Oz* which resonates with me most, however, is from the scene which leads up to the dénouement of the film. Dorothy is distraught after the hot air balloon which is intended to transport her home to Kansas, accidentally rises without her. Glinda the Good Witch appears, and then informs Dorothy that, having possessed the power all along, she need only close her eyes, click her heels together, and repeat the incantation "There's no place like home."

In my opinion, there is no place like home. Indeed, my experience suggests that people are most comfortable among like-minded people in their native environments. Why? In a word, culture! There are myriad definitions of the concept of culture, the enumeration of which is beyond the scope of this context statement. But a common notion among anthropologists, sociologists, and other scientists who study the subject, is that culture has a normalising effect. Culture defines what people believe is true, beautiful, appropriate, proper, correct, and so on. Consequently, when someone acts in a way which is deemed deviant, society puts pressure on her/him to be normal. Similarly, when someone is dropped into a foreign situation, which is characterised by cultural differences, she/he feels uncomfortable, becomes judgemental, and in some cases, dismisses the cultural differences outright.

It is this normalising effect of culture which is the root of my fourth educational value: *contextual*. In short, I believe that as a professor, I must embed learning in the culture of the students, because they are products of their culture. Indeed, I must consider culture in my curriculum and instructional design. I must ensure the cultural relevance of my teaching materials. And I must facilitate the construction of knowledge among my students in culturally-appropriate and culturally-sensitive ways.

A broadening of this idea of cultural embedded-ness is that learning does not occur in a vacuum. On the contrary, people cannot escape their surroundings, the stimuli of which influence their learning, consciously or non-consciously. In other words, learning is contextual. As a professor, therefore, I must consider the learning context in my pedagogy.

My *contextual* educational value is evidenced most prominently by the numerous cases

which I have written during my career, eighteen of which I published since 2009 (See Table 9.). The case method is a powerful tool within the broad pedagogical movement which is known as 'problem-based learning', 'action-learning', or 'experiential learning'. I describe it in more detail in Section 3.2.5. But for me, cases work best if they are situated in the cultural context of students. That is to say, learning occurs more naturally when a case mirrors students' reality.

Table 9. My Public Works and My *Contextual* Educational Value

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Articles	One Size Does Not Fit All: Localization in the Age Globalization	✔			✔						
Books	Learning Spaces in Higher Education				✔						✔
Cases	Transforming Culture in the Kingdom: How Saudi Telecom Focused on People to Compete in the Digital Age				✔	✔			✔		
	Nike, Colin Kaepernick, and the NFL: Stand and Deliver?				✔	✔			✔	✔	
	Amazon: Aqua Vitae or River of Tears?				✔	✔			✔	✔	
	Smartwatches: Is Time Running Out for the Swiss Watchmaking Industry?				✔	✔			✔	✔	
	Afrikan Tähti: Coming to America?				✔	✔			✔		
	Arm & Hammer: Extending a Trusted Brand				✔	✔			✔		
	Clearshield: Evaluating Market Attractiveness				✔	✔			✔		
	Ecolab: Is Green the New Black?				✔	✔			✔		
	Hong Kong Philharmonic: A New Hope?				✔	✔			✔		

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Cases	Medivice: An Exploration of Key Account Management				✔	✔			✔		
	Samitivej Hospital: Medical Tourism in Thailand				✔	✔			✔		
	Schaeffler: Opportunities in Peru?				✔	✔			✔		
	Spry Chewing Gum: Blowing Bubbles in a Competitive Market				✔	✔			✔		
	Sussex Industries: New Products or New Markets?				✔	✔			✔		
	Woodmaster: Developing a Distribution Channel				✔	✔			✔		
	Delta Corporate Accounts: Measuring Customer Value				✔	✔			✔		
	Gardasil: Growing a New Market				✔	✔			✔		
	The Clean Hands Company: Market Selection				✔	✔			✔		
Chapters	Practising Learning Space Design				✔	✔					✔
	Universal Design for Learning in Higher Education		✔	✔	✔						
Websites	WDI Publishing				✔	✔			✔	✔	

Source: Author

This link between cultural and learning became apparent to me during my time living and working in Uzbekistan. The cases to which I had access, and which I was using in my train-the-trainer sessions, were about large North American multi-national companies, which faced typically North American commercial challenges, whose customers were, well, North American. Not a single thing about these cases was familiar to my students. And not surprisingly, they had difficulty learning from the cases. Consequently, I now almost always write my own cases… about companies which are known to my students, which face

commercial challenges of their sort, and whose settings are culturally-proximate. My most recent case illustrates this approach.

Transforming Culture in the Kingdom: How Saudi Telecom Focused on People to Compete in the Digital Age explores the methods by which the former CEO of Saudi Telecom Corporation transformed this once staid, consumer-unfriendly, and inefficient public telecommunications operator, into a modern, dynamic, and globally-competitive corporation. Interestingly, despite the economic growth and importance of the Middle East, few cases exist about companies from the region, or about companies which operate in the region. My case fills this void (a little), and is particularly powerful because it documents a challenge which many public companies in the Kingdom of Saudi Arabia face as they transition to the private sector. The case also captures some of the cultural nuances of the Kingdom, including the power hierarchies of Saudi society, the male-female traditions which continue to exist there, and the central role of Islam in an Arab's daily life.

The case is published and sold by WDI Publishing, a division of the William Davidson Institute at the University of Michigan, the University's special institute which focuses on business in emerging and transitional economies. The case can also be purchased from Harvard Business School. In the late 2000s, I founded WDI Publishing (which was known at the time as Globalens). Over a two-year period, I hired, trained, and managed a team of case writers. I developed a catalog of nearly 200 different products, including cases, notes, and role play exercises. And I launched an e-commerce distribution 'business' to sell these products. The impetus for WDI publishing was the general lack of international cases at Harvard Business School, the European Case Clearing House, and the other main case publishers. Indeed, less than five per cent of the more than 2 000 cases which were on offer at Harvard Business School at that time were international in scope.

The central role of culture in learning can also be found in the article *One Size Does Not Fit All: Localization in the Age Globalization* which I introduced in Section 3.3.1. In the article, I noted that the homogenising forces of globalisation of the early 1980s had reinforced a kind of standardisation (probably more like the 'Americanisation') of business schools around the world: undifferentiated curricula, similar instructional methods, and even common u-shaped

style classrooms. I argued, however, that the cultural and contextual differences which persisted despite globalisation— perhaps even because of globalisation— has led business schools to localise themselves, by operating in concert with, not in opposition to, these cultural and contextual differences. The result is localised instructional materials, localised school branding, and even localised business models.

Switching to learning context, my *contextual* educational value is also evidenced in the LiHE anthology (and corresponding introductory chapter) which is entitled *Learning Spaces in Higher Education*. The anthology was published in 2014, and makes a particularly unique contribution to the scholarship of teaching and learning in higher education. The thesis of the anthology is simple: that because learning occurs *in situ*, professors ought to be proactive in the design of learning spaces. Chapters in the anthology explore this notion of learning space design in both the physical and virtual worlds, the latter being especially timely considering the rise of both Internet-based distance learning, and the so-called 'flipped classroom' approach which often leverages various modes of e-learning.

In a chapter from a different LiHE anthology, I likewise pursued this notion of learning space design, but with a view towards student inclusion. A more thoughtful approach to which audio and visual equipment is used in a classroom, for example, will help to ensure that students with different perceptual abilities are treated fairly. More importantly, it will increase the probability that all students will learn.

3.3.5. Dewey, Or Do We Not?

Noted American educationalist and philosopher John Dewey popularised the concept of experiential learning in his 1938 classic *Experience and Education*. Frustrated by American public education, which he regarded as a disservice to children because of its focus on rote learning, Dewey advocated for an alternative which situated experience at the centre of education. Dewey defined learning as a mental process by which knowledge is constructed through the transformation of experience. Consequently, he believed that there is "an intimate and necessary relation between the process of actual experience and education" (1938, p. 78).

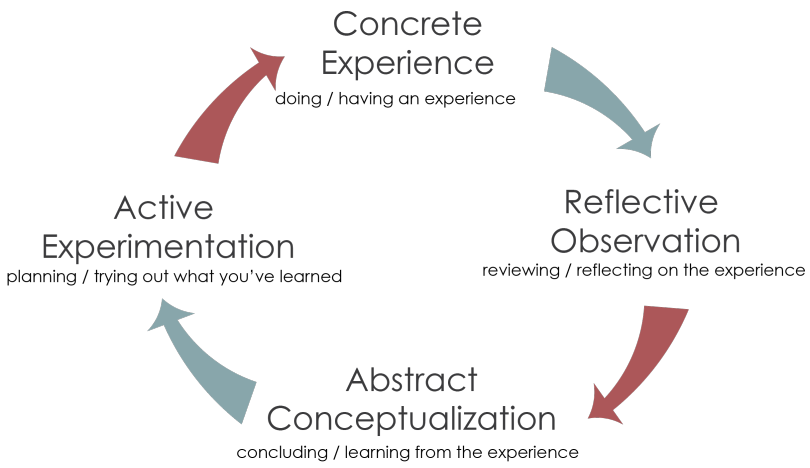
It is the Chinese philosopher Confucious, however, who is usually credited with the invention of experiential learning. Indeed, the saying 'I hear and I forget. I see and I remember.

I do and I understand.' is oft-quoted, and in most instances attributed to him. But according to the website *English Language & Usage*, it is his compatriot, the (Confucian) philosopher Xunzi who lived 340-245 BCE, who ought to be dubbed the inventor of experiential learning. He wrote, "不闻不若闻之，闻之不若见之，见之不若知之，知之不若行之；学至于行之而止矣.", which is translated loosely as:

> Not hearing is not as good as hearing, hearing is not as good as seeing, seeing is not as good as knowing, knowing is not as good as acting; true learning continues until it is put into action ("Origin of… ", 2019).

Xunzi's 20th century equivalent is David Kolb, who, as a professor of management at Case Western Reserve University in Cleveland, United States, 'operationalised' experiential learning in his 1984 cyclical model (See Figure 2.). According to Kolb, people learn by progressing through an iterative cycle of four stages: 1. concrete experience (you do something), 2. reflective observation (you think about what you did), 3. abstract conceptualisation (you make generalisations/hypotheses about what you did), and 4. active experimentation (you test out what you generalised/hypothesised with additional experiences).

Figure 2. The Kolb Experiential Learning Cycle



Source: https://csl.ku.edu/reflection-models#kolb

I do not characterise myself specifically as a Deweyian, Confucian, Xunzian, or Kolbian (if such things exist). But Kolb's *Experiential Learning Cycle* is the core of my fifth educational value: *experiential*. Indeed, like Kolb and others before him, I believe that learning occurs through experience. As a professor, therefore, I provide students with experiences. But more

than that, I facilitate learning by curating activities which 'force' students to engage in the entire Kolb experiential learning cycle. This is the core of my *experiential* educational value.

My *experiential* educational value is evidenced most obviously in my public works which revolve around the case method (See Table 10.). In a nutshell, the case method provides students with simulations of real-life experiences. It pivots on Dewey's belief that there is an intimate and necessary relation between experience and education. In the case method, students are presented with a 'story' of a critical point in the life of an organisation (the case). Students pretend that they are the protagonist in the story, and that they must manage the critical point, logically and objectively, and in a timely manner.

Table 10. My Public Works and My *Experiential* Educational Value

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Books	**Case-Based Learning in Higher Education**		✔			✔			✔		
Cases	**Transforming Culture in the Kingdom: How Saudi Telecom Focused on People to Compete in the Digital Age**				✔	✔			✔		
	Nike, Colin Kaepernick, and the NFL: Stand and Deliver?				✔	✔			✔	✔	
	Amazon: Aqua Vitae or River of Tears?				✔	✔			✔	✔	
	Smartwatches: Is Time Running Out for the Swiss Watchmaking Industry?				✔	✔			✔	✔	
	Afrikan Tähti: Coming to America?				✔	✔			✔		
	Arm & Hammer: Extending a Trusted Brand				✔	✔			✔		
	Clearshield: Evaluating Market Attractiveness				✔	✔			✔		
	Ecolab: Is Green the New Black?				✔	✔			✔		

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Cases	Hong Kong Philharmonic: A New Hope?				✔	✔			✔		
	Medivice: An Exploration of Key Account Management				✔	✔			✔		
	Samitivej Hospital: Medical Tourism in Thailand				✔	✔			✔		
	Schaeffler: Opportunities in Peru?				✔	✔			✔		
	Spry Chewing Gum: Blowing Bubbles in a Competitive Market				✔	✔			✔		
	Sussex Industries: New Products or New Markets?				✔	✔			✔		
	Woodmaster: Developing a Distribution Channel				✔	✔			✔		
	Delta Corporate Accounts: Measuring Customer Value				✔	✔			✔		
	Gardasil: Growing a New Market				✔	✔			✔		
	The Clean Hands Company: Market Selection				✔	✔			✔		
Chapters	An Introduction to Case-Based Learning		✔			✔			✔		
	The Use of RISK® for Introducing Marketing Strategy					✔	✔			✔	✔
Panels	Strategies to Develop and Recruit for Study Abroad Programs					✔					
Presentations	Think About This		✔			✔	✔				
	Homerton Changemakers: A Co-Curricular Programme at the University of Cambridge	✔	✔			✔	✔	✔	✔		
Websites	WDI Publishing				✔	✔			✔	✔	

Source: Author

I bought into the case method early in my career, initially as an author, writing my own cases, eighteen of which, as mentioned in Section 3.3.4, I published since 2009. I examined the case method more critically in the introductory chapter of the LiHE anthology *Case-Based Learning in Higher Education*. Other chapters in the anthology explore the use of cases as facilitators of student learning, within various higher education contexts. The case method became all-consuming for me, however, for the two years during which I launched and managed WDI Publishing. The result was a catalog of nearly 200 different products which were available on the e-commerce platform which I established.

It ought to be obvious that experiential learning need not be limited to cases. Indeed, there are seemingly infinite real-life and simulated experiences which can be provided to students. Two of my public works offer examples of alternatives to the case-method. The first public work, *The Use of RISK® for Introducing Marketing Strategy*, is a chapter from an early LiHE anthology, which documents a classroom activity which I developed, in which students play a round of the board game RISK®. In the panel *Strategies to Develop and Recruit for Study Abroad Programs*, I discussed study abroad programmes in general, and the study abroad modules which I run at the Ross School of Business more specifically, from the perspective of experiential learning opportunities, especially for the development of cultural intelligence.

It also ought to be noted that in both the RISK® activity and the study abroad modules which I run at the Ross School of Business, I also employ assessment components which introduce opportunities for students to engage in additional stages of the Kolb experiential learning cycle. In the RISK® activity, students are required to journal their play, and then reflect on both the board game and their play from the perspective of marketing strategy. A reflection might be something like:

> Australia has one entry point: Indonesia. Controlling Indonesia, therefore, makes defending Australia easier. This is analogous to a company which controls a distribution channel to a specific market, thereby making it easier to maintain market dominance.

Students who enrol in the study abroad modules which I run at the Ross School of Business are required to complete a ‘critical incidents report’, which, likewise, involves both journalling and reflection. First, students chronicle their personal experiences and corresponding

thoughts, feelings, and actions in a journal— a daily diary of sorts— prior to, during, and following the international fieldtrip. Second, students reflect on these experiences, thoughts, feelings, and actions, using the concept of 'critical incident'. A critical incident is any situation beyond the realm of a person's usual experience which overwhelms her/his sense of vulnerability or lack of control over the situation. A simpler definition of a critical incident is a normal reaction to an abnormal event. Critical incidents are sudden and unexpected. They disrupt our sense of control, and confound our beliefs, values, and basic assumptions about the world in which we live, the people in it, and the work which we do. I discussed this critical incidents assessment, the RISK® activity, and other ways in which I provide opportunities for student reflection, in the presentation *Think About This*.

The public work which evidences my *experiential* educational value most completely is *Homerton Changemakers: A Co-Curricular Programme at the University of Cambridge*. Indeed, this three-year, integrated, co-curricular programme is designed to provide Homerton College undergraduate students with numerous opportunities to iterate through the Kolb experiential learning cycle. The programme begins, for example, with a real-life, community-embedded challenge. But throughout the three years of the programme, students will have other experiences, including inspirational TED-style talks from real changemakers, movie nights, workshops, international field trips, a Dragon's Den-like entrepreneurship challenge, and internships. Time for, opportunities for, and support for the reflection, abstraction, and experimentation stages are built into the programme, thereby helping to fulfil Dewey's idea that learning is a mental process by which knowledge is constructed through the transformation of experience.

3.3.6. Matrixman versus Analogue

I was never into comic books. Nope! I never understood the attraction. My best friend in primary school, Tommy Crosby, collected Spiderman comic books. But I had no use for them. I was shocked, therefore, by the worldwide success of the *X-Men* franchise, which began back in 2000 with the opening film of its namesake, and which to date has grossed some six billion USD. Even more shocking to me is the *Avengers* franchise (my son Charles' favourite), which got its start in the mid-2000s with *Ironman,* and which has raked in more than twenty-two

billion USD since then.

John Pavlovitz (2019), however, has an interesting take on comic books… and a conclusion which I can certainly get behind. Indeed, his website, *Teachers are Superheroes*, is a little cheeky, but it aligns closely with my own view of the 'Marvel'-ous universe. This excerpt will give you a flavour of the website:

> Comic books have lied to all of us.
>
> Heroism isn't capes and costumes.
>
> It doesn't come from radioactive spider bites or metal suits or gamma rays or distant planets.
>
> It isn't found in cavernous caves, palatial compounds, or hi-tech floating cities.
>
> It isn't wielding tricked out all-terrain vehicles, gadget-laden utility belts, hammers from the heavens, or indestructible shields.
>
> The real heroic stuff here on this planet is firmly seated in the chests of the ordinary people who embrace an extraordinary calling; those whose superhuman hearts beat quite differently than the rest of us mere mortals.
>
> They rise before the sun does, and in the most counterintuitive fashion, they run directly, passionately, and purposefully into the thick of the flourescent-lit fray—*and they simply save children.*

I suppose that I could see myself as a superhero. Who would not like that? And if I were forced to adopt an alter ego, I would be *Analogue*. The name sounds kind of cool, and it alludes to my go-to instructional tool (the analogy) which I mentioned in Section 1.6, and which might be considered my 'superpower'. My nemesis, naturally— or perhaps my sidekick (I have not worked out the entire plot yet)— would be Matrixman, referring to that colleague of mine who uses 2×2 matrices to 'save the world'.

All joking aside, I consider my use of analogy as representative of a broader set of approaches to teaching and learning in higher education which I have adopted. Indeed, analogies are just one tool in my Batman utility belt (to continue the comic book theme). More to the point, the use of analogy reflects my *scaffolding* educational value. Scaffolding refers to "a variety of instructional techniques used to move students progressively toward stronger understanding and, ultimately, greater independence in the learning process" ("Scaffolding.",

2019). An analogy itself, scaffolding supports students as they progress ‘upwards’ to increasingly difficult (cognitively demanding) subject material or skills.

Scaffolding emerged from a study of young children and their tutors, which was conducted in 1976 by scientists David Wood, Jerome Bruner, and Gail Ross, at the Center for Cognitive Studies at Harvard University. The 1980s saw a tightening of the theory of scaffolding, while the 1990s resulted in a more application-oriented perspective. Hogan and Pressley (1997), for example, identified five specific scaffolding methods:

- modelling of desired behaviours
- offering explanations
- inviting students to participate
- verifying and clarifying student understandings
- inviting students to contribute clues

As a professor, I am a consummate scaffolder. Indeed, I tend to use all five Hogan and Pressley scaffolding methods frequently. When lecturing, for example, I summarise subject material systematically, in a kind of back-and-forth recital, which allows students to ‘fill-in-the-blanks’, and thereby clarify their own understandings. Similarly, during a case analysis discussion, I explain the logic for ‘solving’ the case, sometimes using analogy. And I demonstrate the appropriate format for articulating a case solution, by drafting a case analysis write-up on the overhead projector.

In terms of public works, however, my *scaffolding* educational value is evidenced most prominently in the presentation *Homerton Changemakers: A Co-Curricular Programme at the University of Cambridge* (See Table 11.). Indeed, the three-year, integrated, co-curricular programme which was designed to help Homerton College undergraduate students become changemakers, is especially difficult from a learning perspective, because it requires students to ask and answer questions which are cognitively-demanding, not only in terms of new theory and vernacular which is outside their academic specialities, but also in terms of self-awareness.

In year 1 of the programme, for example, students will acknowledge their responsibility (as students, professionals, alumni, citizens, etc.) to become changemakers in the world, with a view to answering such questions as: ‘What is the nature of the world in which I operate?’, ‘Which changes are required to make the world better?’, and ‘What is a changemaker?’. Similarly, they will explore their own interests and identities, plus other concepts which drive

their engagement as changemakers. This exploration will help to answer such questions as: 'Who am I?', 'What is the change which I want to make?', and 'And how might I go about making the change?'.

Table 11. My Public Works and My *Scaffolding* Educational Value

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Chapters	The Use of RISK® for Introducing Marketing Strategy					✔	✔			✔	✔
Notes	Note on Countertrade						✔				
	Note on Culture						✔				
	Note on Remittances						✔				
	International Trade Theories						✔				
Presentations	Think About This		✔				✔				
	Homerton Changemakers: A Co-Curricular Programme at the University of Cambridge	✔	✔			✔	✔	✔	✔		

Source: Author

Consequently, I designed a curriculum for the programme which scaffolds student learning, beginning the first day of programme, and continuing through to graduation. In session 2 of year 1 of the programme, for example, students will begin exploring their personal responsibility and its many manifestations in society, utilising the eight dimensions of well-being as defined by (Ardell, 1985): intellectual, physical, social, occupational, emotional, financial, environmental, and spiritual. They will use these eight dimensions later in the term, when they will begin to articulate their responsibility for their own well-being, and for the well-being of their colleagues and communities. Later in the programme, students will revisit the eight dimensions, as they transform responsibility into action in the form of specific change initiatives. And toward the end of the programme, they will use these same eight dimensions

once again as criteria for judging whether or not the change initiatives have indeed helped fulfil the responsibilities which they articulated earlier in the programme.

As described in Section 3.3.5, the case method revolves around the idea of students pretending to be the protagonist in the story of an organisation which is suffering from some dilemma. Many students, however, find the case method especially challenging, because analysis of the dilemma often stretches them beyond their current knowledge (or skill) level. A solution to this challenge is scaffolding, by way of a pedagogical tool which is called a 'note'. Harvard Business School introduced notes back in the mid-1900s, when it realised (and admitted) the limitation of the case method which it had pioneered, and for which it remains known.

A note is a concise summary of a specific topic. It is not unlike a Wikipedia entry. I think of a note as a textbook chapter, stripped of the opening vignette, the 'action boxes', the glossary, the end of chapter review, the summary questions, and all those other 'fillers'. Many professors use notes as companions to the case method, because they help to scaffold the student toward the solution to the case dilemma. But they are also useful as alternatives to textbook chapters, to scaffold student learning in other instructional methods.

I have written four notes since 2009, all of which are published by WDI Publishing, and which, not coincidentally, cover topics which are in the domain of international business. International business is usually beyond the realm of most students. Indeed, the topics can feel very alien, and the vernacular is specialised and not always intuitive. The note on culture, however, is exactly the opposite. Although the term culture is bandied about loosely in everyday society, students actually have little grasp of the concept. Understanding cultural differences can also be a heavy lift for many students, especially those who have little or no international experience.

The note is not the only 'formal' scaffolding device which I use. Indeed, I developed the RISK® activity specifically to introduce students to some new concepts: strategic postures, resource allocation, and sustainable competitive advantage, for example. Additionally, I hoped that the activity would expose students to the dynamics of competitive markets, which can remain extremely ethereal until they are experienced first-hand. And I wanted to move students

from foundational modules which treat marketing as something which 'is' to marketing as something which is 'done'— that is to say, from marketing as a collection of definitions, to marketing as a practice.

Finally, my *scaffolding* education value is evidenced in my presentation *Think About This*, in which I discussed the role of reflection in higher education. As mentioned in Section 3.3.5, I have used reflection in assessment (as part of the RISK® activity, for example). But increasingly I use reflection as an opportunity to scaffold. More specifically, I provide students time to reflect on their understandings of a specific topic, which, subsequently, provides me, *à la* Hogan and Pressley, an opportunity to verify and clarify these understandings. And that, you might say, is superhero powerful.

3.3.7. You Know When You Know!

Love. Is there any stronger emotion? Any more potent feeling? I think not. Love is the primary theme of much poetry, prose, and other human artistic endeavours. Love inspires incredible acts of devotion. Consider the Taj Mahal, for example, which was commissioned by the Mughal Emperor Shah Jahan to house the tomb of his beloved wife. And, of course, love is the source of many irrational, crazy, and even criminal behaviours.

Love has baffled philosophers through the millennia. In his famous *Symposium*, Plato recounts the conversation of a dinner party at which Socrates was a guest. During the conversation, Socrates refutes the commonly-held Greek notion of his time that love is a god (*eros*) whose beauty they praise, and suggests instead that love is "a means to the attainment of things that are good in themselves" (Levy, 1979, p. 285). Nietzsche, always the critic, thought that love is similar to greed and lust for possession ("Nietzsche on… ", 2019). And according to Jean-Paul Sartre, for whom freedom was the central tenet of his moral and political philosophy, love is hazardous, a painful struggle between masochism, in which a person denies her/his freedom in return for the love of another person, and sadism, in which a person treats another person as an object ("Sartre: Love… ", 2019).

For the majority of us non-philosopher types, however, perhaps the most philosophical question about love is simply, 'How do you know when you are in love?'. This question is (ironically) pragmatic, a stark contrast to the mystery of love to which the question alludes. But

we want to know, nevertheless. Consequently, we pose the question to our friends who are already in love. We seek counsel from our grandparents who, after decades, continue to hold hands. Or we solicit the wisdom of the crowds. So, how do you know when you are in love? The answer is usually similarly simple: 'You know when you know!'. Cue the romantic string music.

When it comes to student learning, however, 'You know when you know!' is glaringly inadequate. Indeed, assessment— defined as the "systematic collection, review, and use of information about educational programs undertaken for the purpose of improving student learning" (Plomba and Banta, 1999, p. 12)— evokes an exactitude which befits its purpose. Assessment demands measurement. Assessment requires more than some 'feeling' which is implied by 'You know when you know!'.

My seventh educational value is *assessment*. When I began my teaching career, I was unaware of the term assessment, and instead referred to any and all activities of the sort as grading. At first blush, assessment and grading seem to be interchangeable. Semantically, however, I suggest that they differ greatly. Grading is about judging the work of students; its focus in on the deliverable. Assessment, by contrast, is student-centred; its focus is on learning. To be fair, just the mention of grading often sends shivers down the spine of most educators. And using the word assessment cannot reduce the tedium which it sometimes involves. But by adopting assessment instead of grading, I have re-oriented away from the deliverable to the student, thereby nudging me into alignment with my *learner-centred* educational value. Assessment has pushed me to re-think the purpose of each and every exercise, examination, or project which I assign. And assessment has expanded the range of activities in which I engage, because assessment is about improving student learning, not just assigning a grade to a particular assignment.

This re-orientation towards the student, and the subsequent re-purposing of assignments and expanded range of activities in which I engage, are reflected in my *assessment* educational value, which, in turn, is evidenced in my public works (See Table 12.). Consider the assessment design consulting which I conducted for *Educational Testing Services*, for example. All three assessments (the *Principles of Marketing* assessment and the two *Major Field Tests*) are focused

squarely on students. Indeed, they are designed to assess whether or not students understand the subject material. I spent days working with my fellow committee-members writing, re-writing, and testing the questions to ensure that they assess student understanding fairly and accurately. The sophisticated statistics which lay behind each assessment are likewise designed to ensure their veracity.

Table 12. My Public Works and My *Assessment* Educational Value

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Assessments	**Major Field Test BBA**	✔						✔			
	Principles of Marketing	✔						✔			
	Major Field Test MBA	✔						✔			
Books	**Assessing Learning in Higher Education**		✔					✔			
Chapters	**Introduction (Assessing Learning in Higher Education)**							✔			
	Student Development at the Stockholm School of Economics in Riga	✔	✔					✔			
Presentations	**Homerton Changemakers: A Co-Curricular Programme at the University of Cambridge**	✔	✔			✔	✔	✔	✔		

Source: Author

An entire LiHE anthology, *Assessing Learning in Higher Education*, is dedicated to the topic of assessment, from a learner-centred perspective. As mentioned in Section 3.3.2, the introductory chapter made the case for summative, formative, and generative assessments, and reinforced the notion of student development, not simply the grading of assignments. My specific chapter documents the creation, implementation, and evaluation of the so-called ‘hybrid

model for student development' at Stockholm School of Economics in Riga, which employs a range of activities to develop the 'whole student'. Other chapters in the anthology explore the use of e-portfolios to support student self-assessment, the co-creation of assessments between students and professors, and the effect of assessment on student empowerment and autonomy.

Finally, my *assessment* educational value is evidenced in the presentation *Homerton Changemakers: A Co-Curricular Programme at the University of Cambridge*. Assessment forms the backbone of the three-year, integrated, co-curricular programme, which was designed to enable Homerton College students to become changemakers; to support their mental and physical health; to prepare them to thrive in a world which is increasingly ambiguous, complex, interconnected, and dynamic (ACID); and to increase their employability. Indeed, multiple and different types of assessments are built into the programme. In year 3, for example, students will participate in a leadership workshop, after completing an assessment which identifies leadership style and leadership traits. Another workshop in year 3 draws on the results of an assessment which aims to uncover students' strengths and weaknesses in emotional intelligence.

3.3.8. Once Upon a Time…

The four most powerful words in the English language might possibly be, 'Once upon a time… '. Indeed, people of all stripes— young and old, rich and poor— lean in at the sound of this phrase. Their eyes light up, their hearts start racing, and an 'I'm-all-ears' tension fills their bodies. Why? In a nutshell, people love stories. Human beings, it seems, are culturally-programmed for stories. According to anthropologist Daniel Smith and his colleagues (2017), storytelling is ubiquitous, found in all societies around the world, and in all languages. It is a human universal. Stated simply, people are natural storytellers.

Storytelling, therefore, can be a powerful technique in a variety of domains. In marketing, for example, story-telling has usurped the traditional communication-heavy view of promotion. Many advertisers, therefore, have re-cast themselves as story-tellers. Similarly, storytelling contributes to the power of social media. A colleague of mine who is an expert in social media marketing (He was Beyoncé's digital strategist before becoming a professor.) contends that the power of social media is not the 0s and 1s of digital technology, but instead the 'network effect'. Social media platforms such as Facebook or Twitter, he explains, help spawn, strengthen, and

sustain networks of people, often through stories. Accordingly, social media marketers ought to give people reasons to share their stories, in service of helping to fortify the relationships in the network… and perhaps even create opportunities for strangers to become members of the network.

As a professor, I believe that storytelling is also a powerful technique in teaching and learning, because it sits at the core of reflective practice and professional development (McDrury and Altero, 2002; Moon, 2010; Harrison, 2009). Storytelling can enhance self-knowledge (Taylor, 2006) and collaboration (Gold and Holman, 2001). It can capture students' attention, and introduce them to new experiences without requiring them to be present (Bruner, 1986). And it can facilitate learning by making subject material more memorable, by rendering abstract concepts easier to understand, and by stimulating introspection (Flanagan, 2015).

Consequently, storytelling is also one of my ten educational values. Indeed, I fancy myself a storyteller, and infuse my lectures with 'war stories' from my marketing practice, from readings, and from life in general. As I write this paragraph, for example, I am also preparing to deliver a lecture on customer satisfaction, dissatisfaction, and delight to retailers in the Baltic states, on behalf of the Samsung Corporation. I plan to illustrate each of these fundamental marketing concepts, using stories which draw on my personal experiences staying in hotels around the world.

Storytelling, however, also figures prominently in my public works (See Table 13.). My *storytelling* educational value is evidenced first in my case-related public works. A case, at its core, is a story of an organisation. Indeed, like any story, a case typically has characters, a setting, a plot, and some conflict— a crisis, an emergency, an opportunity. Unlike a story, however, there is no resolution to the conflict in a case. The crisis is not averted at the last minute. There is no 'happily ever after'. A case is written, on the contrary, to force students to undertake the actions which are required to resolve the conflict. The pedagogy of the case method, therefore, is about conflict resolution. Students learn by averting the crisis, responding to the emergency, exploiting the opportunity. Using a medical analogy, the case method is a pedagogy of diagnosis and (prescribed) treatment.

This notion of a case as a story without conflict resolution is reflected in the LiHE

anthology *Case-Based Learning in Higher Education*, its introductory chapter, and the WDI Publishing website which I launched and managed in the late 2000s. It is most obvious, however, in the eighteen cases which I have published since 2009. *Samitivej Hospital: Medical Tourism in* Thailand, for example, documents the challenges which a Bangkok-based hospital must manage, as it attempts to operate in the lucrative but competitive medical tourism industry. *Sussex Industries: New Products or New Markets?* describes the crisis which a military contractor faces, after its product is rendered obsolete with a switch of technology by the United States Government. And *Gardasil: Growing a New Market* chronicles the opportunity for a pharmaceutical giant after its discovery of a new human papilloma virus vaccine which helps to prevent cervical cancer.

Table 13. My Public Works and My *Storytelling* Educational Value

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Books	**The Transnationalization of the Stockholm School of Economics**	✔							✔		
	Case-Based Learning in Higher Education		✔			✔			✔		
Cases	**Transforming Culture in the Kingdom: How Saudi Telecom Focused on People to Compete in the Digital Age**				✔	✔			✔		
	Nike, Colin Kaepernick, and the NFL: Stand and Deliver?				✔	✔			✔	✔	
	Amazon: Aqua Vitae or River of Tears?				✔	✔			✔	✔	
	Smartwatches: Is Time Running Out for the Swiss Watchmaking Industry?				✔	✔			✔	✔	
	Afrikan Tähti: Coming to America?				✔	✔			✔		
	Arm & Hammer: Extending a Trusted Brand				✔	✔			✔		

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Cases	Clearshield: Evaluating Market Attractiveness				✔	✔			✔		
	Ecolab: Is Green the New Black?				✔	✔			✔		
	Hong Kong Philharmonic: A New Hope?				✔	✔			✔		
	Medivice: An Exploration of Key Account Management				✔	✔			✔		
	Samitivej Hospital: Medical Tourism in Thailand				✔	✔			✔		
	Schaeffler: Opportunities in Peru?				✔	✔			✔		
	Spry Chewing Gum: Blowing Bubbles in a Competitive Market				✔	✔			✔		
	Sussex Industries: New Products or New Markets?				✔	✔			✔		
	Woodmaster: Developing a Distribution Channel				✔	✔			✔		
	Delta Corporate Accounts: Measuring Customer Value				✔	✔			✔		
	Gardasil: Growing a New Market				✔	✔			✔		
	The Clean Hands Company: Market Selection				✔	✔			✔		
Chapters	A History of the Stockholm School of Economics in Riga								✔		
	The Internationalisation of the Stockholm School of Economics in Riga	✔							✔		
	An Introduction to Case-Based Learning		✔			✔			✔		
Presentations	Homerton Changemakers: A Co-Curricular Programme at the University of Cambridge	✔	✔			✔	✔	✔	✔		

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Presentations	**WDI Publishing**				✔	✔			✔	✔	

Source: Author

I have also used storytelling as the primary rhetorical form in my research and writing on the Stockholm School of Economics. The book *The Transnationalization of the Stockholm School of Economics* presents a sketch of the School's transnational activities: its foreign branch campuses in Riga, Latvia and Saint Petersburg, Russia, and its joint ventures in Finland and Japan. The chapter *A History of the Stockholm School of Economics in Riga* chronicles the creation of the School's foreign branch campus in Riga, Latvia. And the chapter *The Internationalisation of the Stockholm School of Economics in Riga* documents the development of the international activities at this foreign branch campus.

Finally, storytelling is also a cornerstone of the Homerton Changemakers programme. In year 1 of the programme, for example, Homerton College students will participate in a storytelling workshop to explore the role of stories in leadership, and also to develop their skills as storytellers. Throughout the three-year programme, students will participate in a variety of action-learning experiences, including a Dragon's Den-like entrepreneurship challenge, which will rely on storytelling. And students will be encouraged to document their personal and professional journeys over the three-year programme using an e-portfolio which, of course, will benefit from stories.

3.3.9. Citius, Altius, Fortius

In 1894 at the founding of the International Olympic Committee, Baron Pierre de Coubertin proposed the motto *Citius, Altius, Fortius*, which in English means faster, higher, stronger ("The Olympic… ", 2019). De Coubertin, who would become the second president of

the Committee, borrowed the motto from a Dominican Priest friend who was an athletics enthusiast. The motto was introduced to the world at the Paris Olympic Games in 1924, and captured the spirit which de Coubertin envisioned for the Olympic Games:

> Why did I re-establish the Olympic Games? To ennoble and strengthen sports, to assure them independence and duration and to enable them better to fill the educational role which falls to them in the modern world. For the exaltation of the individual athlete, whose existence is necessary for the muscular activity of the community, and the prowess displayed, to encourage the general emulation (IOC, 2002, p. 1).

Citius, Altius, Fortius, however, could also serve as a motto for science, commerce, and seemingly every other human enterprise, whose advancement is tied inextricably to making things 'faster, higher, and stronger'. Indeed, at the core of any activity which people might undertake is an intrinsic motivation to make it better. According to Eagleman and Brandt (2017), homo sapiens are unique within the animal kingdom, because their brains are hardwired to solve old problems, to re-fashion existing technologies, to create alternatives to the status quo. In other words, people are natural innovators.

Higher education is certainly not impervious to change. On the contrary, despite the resistance to its change by some of my colleagues, higher education continues to advance, as people (both inside and outside the system) innovate, by introducing and implementing new solutions, re-fashioned technologies, and creative alternatives. Consider electronic learning management systems, for example, which have proliferated since the advent of the Internet, and which themselves have evolved over the years with a variety of new features, feeds, and functions. Stated simply, higher education can, and ought to, change. Consequently, my ninth educational value is *innovation*.

My *innovation* educational value is evidenced first in two LiHE anthologies (See Table 14.), both of which adopt the theme of innovation in the context of higher education, with an emphasis on teaching and learning: *New Innovations in Teaching and Learning in Higher Education* and *Innovative Teaching and Learning In Higher Education*. The introductory chapters to these anthologies make the case for innovation in teaching and learning in higher

education. They also conceptualise innovation in terms of invention, using the following algebraic formula:

INNOVATION = INVENTION + VALUE

Accordingly, an invention is only an innovation if it is judged by students, professors, administrators, policy-makers, and so on to be value-adding. In other words, the arbiter of innovation is the higher education 'market' itself. The remaining chapters in these analogies introduce specific innovations in teaching and learning, underlining the 'problems' which triggered their development, describing their use *in situ*, and discussing their extension to other higher education applications.

Table 14. My Public Works and My *Innovation* Educational Value

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Books	**New Innovations in Teaching and Learning in Higher Education**									✔	
	Teaching and Learning Entrepreneurship									✔	
	Innovative Teaching and Learning in Higher Education									✔	
Cases	**Nike, Colin Kaepernick, and the NFL: Stand and Deliver?**				✔	✔			✔	✔	
	Amazon: Aqua Vitae or River of Tears?				✔	✔			✔	✔	
	Smartwatches: Is Time Running Out for the Swiss Watchmaking Industry?				✔	✔			✔	✔	
Chapters	**A Possible Conceptualisation of Innovative Teaching and Learning in Higher Education**			✔						✔	
	Using the ECTS for Learning-Centred Curriculum Design		✔				✔			✔	
	An Introduction to Teaching and Learning Entrepreneurship									✔	

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Chapters	**Introduction (Innovative Teaching and Learning In Higher Education)**		✔							✔	
	The Use of RISK® for Introducing Marketing Strategy					✔	✔			✔	✔
Websites	**WDI Publishing**				✔	✔			✔	✔	

Source: Author

Another LiHE anthology, *Teaching and Learning Entrepreneurship*, likewise shares the theme of innovation in teaching and learning, but with a specific focus on entrepreneurship. The introductory chapter discredits the claim that entrepreneurship is innate, and, consequently, that it cannot be learned. The remaining chapters: 1. discuss the role of political initiatives for encouraging and enhancing entrepreneurship education at the university level, 2. showcase university initiatives which bring entrepreneurship into the classroom, and 3. underline the impact which these initiatives have on the entrepreneurial mindset of students.

Two innovation-oriented chapters appeared in other LiHE anthologies. *The Use of RISK® for Introducing Marketing Strategy* documents the innovative instructional and assessment activity which I developed for introducing marketing strategy in an undergraduate elective. *Using the ECTS for Learning-Centred Curriculum Design* outlines the European Credit Transfer and Accumulation System (ECTS), the innovative system which the European Union introduced as a means to interject transparency and flexibility into European higher education, and describes its fitness for designing lessons, modules, and even entire degree programmes.

My *innovation* educational value is also evidenced in my case-related public works. As outlined in Section 3.3.4, I founded WDI Publishing in the late 2000s to fill the gap in the market for international business cases. In addition to the catalogue of more than 200 different

products, which included cases, notes, and role play exercises, I developed an innovative syllabus-maker tool. It allowed professors to construct entire modules by assembling these products. They could also draw on modules from other professors which were stored in an electronic syllabus repository.

More recently, however, I have written three cases which are particularly innovative, not so much in terms of their content, but in terms of both their form and function. Traditional Harvard Business School cases are distributed to students either electronically in a flat pdf, or on paper in black and white. Consequently, they are somewhat 'lifeless'. The three cases which I have written were designed from the outset to be accessed on a new Internet-based platform which is called TopHat. As such, the cases are highly-engaging, with dozens of hyper-links, embedded videos, and interactive features. In the case *Smartwatches: Is Time Running Out for the Swiss Watchmaking Industry?*, for example, the case boasts a three-dimensional rendering of a mechanical watch which can be rotated 360 degrees by students, allowing them to explore the technology which sits at the core of the case.

In terms of function, these three cases also deviate from traditional Harvard Business School cases. Indeed, as highlighted in 3.3.6, the case method revolves around the idea of students pretending to be the protagonist in the story of an organisation which is suffering from some dilemma. Typically, the solutions to this dilemma are limitless. In each of these three cases, however, I have presented the dilemma as an either-or type of debate, which requires students to take an affirmative or negative stance. By forcing students to argue 'yay' or 'nay', these cases help them to not only learn the theory which underpins the dilemma, but also to develop their skills at creating and communicating a compelling argument.

3.3.10. All the Bells and Whistles

Henry Ford was a shrewd businessman. His five dollar per day programme, for example, which he introduced in 1914, and which doubled the wages of other automobile manufacturers of the day, caused profits to soar for the Ford Motor Company. Indeed, this at-first-glance generosity was enormously successful in attracting the best workers to the Company, thereby eliminating turnover almost entirely, and, in turn, increasing productivity and reducing training costs. The higher wages also meant that these employees were able to afford the Company's

product, and sales of its famous Model T soared. The higher wages were also a boon to the local economy; by the early 1920s, Detroit had become the fourth largest city in the United States after New York, Chicago, and Philadelphia ("Henry Ford.", 2019).

Henry Ford was also an arrogant and stubborn man, however. Convinced of his tacit understanding of the market, he compelled the Company to continue producing the utilitarian Model T— even as competitors began to add new features to their models— until 1927, at which time financial troubles forced him to shut down production for re-tooling. In December of that year, the Company launched the successor to the Model T which was dubbed incongruously the Model A. It enjoyed modest success, but, outsold by more technologically-advanced vehicles from both General Motors and Chrysler, it was replaced by the Model B in 1932. Only after Henry Ford ceded control of the Company in 1945 did its vehicles begin to include all the 'bells and whistles'. Throughout the next two decades, the Company was lauded for its adoption of new technologies, including vinyl fabric, metallic paint, and the automatic transmission.

New technologies are not limited to automobile manufacturing or other technical industries. On the contrary, even the service-heavy and seemingly engineering-light higher education 'industry' leverages technological advances. Scantron readers, for example, have had a massive impact on assessment in universities and other higher education institutions. The Open University, which was established in in 1969, was an early adopter of television, well before the widespread penetration of cable and its hundreds of channels. And who can deny the role which the Internet has played in higher education teaching and learning?

It ought not to be surprising, therefore, that technology, like its kissing cousin, innovation, is one of my educational values. Indeed, throughout my entire career I have experimented with educational technologies. I was a pioneer in the use of so-called clickers, for example. I dabbled in SecondLife, adopting the avatar Dr Johnny and exploring its virtual world as an alternative to the traditional face-to-face classroom. And recently I have put e-portfolios to the test. Two experiments, however, are evidenced in my pubic works (See Table 15.).

In the first experiment which was captured in a chapter of an LiHE anthology, I used a decades-old popular board game for introducing marketing strategy. Incidentally, modern

management simulations have their roots in military simulations, which were most often conducted on a table which resembles the playing surface of the board game RISK®. In the second experiment, I leveraged the Internet to create a virtual exchange programme for students of four different countries, the goal of which was to help them develop their cultural competence. This experiment I shared as both a poster and a presentation.

Table 15. My Public Works and My *Technology* Educational Value

		1. Critical	2. Learner-Centred	3. Conceptual	4. Contextual	5. Experiential	6. Scaffolding	7. Assessment	8. Storytelling	9. Innovation	10. Technology
Books	Technology-Enhanced Learning in Higher Education										✔
	Learning Spaces in Higher Education				✔						✔
Chapters	Introducing Technology-Enhanced Learning		✔								✔
	Practising Learning Space Design				✔	✔					✔
	The Use of RISK® for Introducing Marketing Strategy					✔	✔			✔	✔
Panels	Best Practices, Trends and Technologies in Online International Business Education										✔
	Teaching Cross-Cultural Competence in Traditional, Online, and Hybrid Formats		✔								✔
	International Business Online Education in a Transforming World										✔
Posters	Teaching Cultural Competence Using a Virtual Exchange										✔
Presentations	Teaching Cultural Competence Using a Virtual Exchange										✔

Source: Author

Technology has also manifest itself in my everyday teaching practice, especially in two international business modules in which I have leveraged the Internet for online teaching and learning. Consequently, I have been called on to serve as a panelist. In two of the panels, I shared lessons from, warnings for, and best practices of, online international business education. In the third panel which was narrower in focus, I compared and contrasted the teaching of cross-cultural competence in traditional, online, and hybrid formats.

3.4. You Can Take the Kid Outta Engineering, But…

Fitness freaks, vegetarians, and people who simply wish to remain healthy, often live by the old proverb 'You are what you eat!', the gist of which is that corporal condition is linked to alimentary activity. According to research, however, you are also what you listen to… or more accurately, you listen to what you are. Indeed, studies have concluded that musical preferences are psychologically-determined (Bonneville-Roussy, 2013). Preferences for intense music such as punk rock and heavy metal, for example, are related positively to openness, sensation-seeking, and impulsivity.

A recent study which was published in the New York Times also found that a person's musical preferences are, by and large, fixed by the age of 13 for girls and 14 for boys. The author of the study, Seth Stephens-Davidowitz (2018), arrived at this finding after cross-referencing chart-topping songs from 1960 to 2000, with the age data of listeners who subscribe to the *Spotify* streaming music service. The song 'Creep' by *Radiohead*, for example, was found to be the 168th most popular song among thirty-eight year old men. They were fourteen years of age in 1993 when the song was released. 'Creep' did not even make the chart, however, for people who were born one decade earlier or one decade later. Stephens-Davidowitz's cheeky conclusion was that "[t]he study adds one more piece of evidence to the growing scientific consensus that we never really leave middle school and high school" (p. 9).

The study also confirms a claim which I have been making for years: that I am a (musical) child of the eighties. I began secondary school in 1981, and graduated with my Bachelor of Engineering Science degree in April 1990. The entire decade, therefore, provided the soundtrack to my formative years. Indeed, it defined my musical preferences, and the criteria by which all other music is measured. Consequently, to my ears there is nothing like the

gated and compressed ‘thwap’ of an eighties snare drum. Today’s electronic dance music (EDM) cannot compare to the arpeggiated synthesisers of Depeche Mode, Human League, or New Order. And no-one can argue the genius (sic) of lyrics such as:

> I walk along the avenue
> I never thought I’d meet a girl like you
> Meet a girl like you
>
> With auburn hair and tawny eyes
> The kind of eyes that hypnotise me through
> You hypnotise me through
>
> And I ran
> I ran so far away
> I just ran
> I ran all night and day
> I couldn't get away (‘I Ran’ by Flock of Seagulls from 1982)

Just as my musical preferences were fixed in my youth, my teaching approach also established itself early on… even before that year of substitute teaching in my hometown in Canada, and long before I became a professor. I have definitely outgrown model-making, and I have not done any serious automotive restoration in more than thirty years. But I am certain that my teaching approach, like my musical preferences, is psychologically-determined. Indeed, it is influenced, if not moulded entirely, by specific events in my life— epiphanies, in the language of Ellis *et al*. (2011)— which have been instrumental in my development. In essence, although I discovered my community of practice (professors whose goal is to improve teaching and learning in higher education), and pinpointed my professional identity (marketing educator), I remain an engineer at my core.

Accordingly, my teaching approach is the teaching approach of an engineer. When tasked with a new module, for example, I plan and execute it like an engineer. I treat a ninety-minute classroom session as if it were an engineering problem. And each case study or exercise which I intend to use is engineered with precision, down to the board blueprint and the pedagogical ‘pastures’. Consequently, I theorise my professional identity as a marketing educator within my community of practice, as an analogy that ‘teaching is like engineering’.

It is no coincidence that I use an analogy to theorise my professional identity, because my go-to instructional tool is indeed the analogy. That first chapter on analogical learning in higher

education also led me to discover my community of practice and to pinpoint my professional identity. And it instigated a decade of scientific research and writing in and around the scholarship of teaching and learning, the resultant public works of which form the basis of this context statement for the Doctor of Professional Studies degree.

Additionally, I have written elsewhere (Nygaard *et al*., 2015) that analogies are used often to theorise educational practice. Consider the conductor analogy, for example, which has the teacher conducting an orchestra of students within the classroom concert hall. Sir Ken Robinson, who is considered a hero by cheerleaders of a more creative school curriculum, presses the popular 'teacher as gardener' analogy in his TED-talk. In this analogy, students are seeds which must be nurtured by the teacher-gardener, the classroom is the soil, and so on. Other analogies for educational practice include teacher as lighthouse, coach, performer, water, muse, even bowl of soup.

To begin the analogy that 'teaching is like engineering', engineering is defined as the use of "scientific principles to design and build machines, structures, and other things, including bridges, roads, vehicles, and buildings" ("Engineering.", 2020). It is derived from the Medieval French word *ingenium* which meant machine or engine, and which itself stems from the Latin combination of *in* and *gignere* (to beget), a rough translation of which is the 'product of ingenuity' ("Engine.", 2020). In plain English, engineering is about making new technologies… with the aid of science.

According to the New World Encyclopedia, 'technology', in its broadest sense, refers to "the entities, both material and immaterial, created by the application of mental and physical effort in order to achieve some value" ("Technology.", 2020). Technology, therefore, can be viewed as the output of engineering. Indeed, to engineer means to engineer something. Technology is the tangible or intangible manifestation of engineering. It is the stuff of engineers.

Julie Andrews and Christopher Plummer cautioned us, however, that nothing comes from nothing. Consequently, technology must also be considered as an input to engineering. That is to say, a new technology always owes its existence to previous technologies, a notion which is sometimes captured by the cleverly-worded concept of 'combinatorial creativity' (Popova, 2012). Even so-called 'disruptive innovations' have antecedents in some shape or form.

Similarly, technology serves as an instrument of engineering. Engineers employ technology in the act of engineering; it supports their application of 'mental and physical effort in order to achieve some value'. Engineering and technology, therefore, are inextricably linked, and technology functions as the input, the instrument, and the output of engineering. Engineers, for example, might use a hammer to design and build an improved version of a hammer.

One aviso is that engineering creativity is not unbounded. On the contrary, engineers must operate within prescribed or self-imposed constraints: temporal or financial limits, for example, government regulations, or user demands. Consider the challenge which engineers face when developing solutions for the base of the pyramid— the approximately 1 billion people who live on less than 1 USD per day. Or what about the 'Nano', the diminutive and spartan result of TATA's goal to build the world's least expensive automobile? Both of these examples allude to the very real constraints with which engineers must grapple.

Returning to the definition of engineering, when designing and building machines, structures, and other things— when making new technologies— engineers use (or apply) scientific principles, thereby giving rise to the idea that engineering is an applied science, as distinguished from the pure or basic sciences. These scientific principles include first principles — the elementary ideas from which a concept, theory, or system is derived. Indeed,

> [i]n every systematic inquiry (methods) where there are first principles, or causes, or elements, knowledge and science result from acquiring knowledge of these; for we think we know something just in case we acquire knowledge of the primary causes, the primary first principles, all the way to the elements (Aristotle, Physics 184a10–21).

Not to be confused with first principles, however, are what might be termed 'engineering principles': the rules, standards, or guidelines which shape engineering practice. A generally-agreed list of characteristics of engineers is relatively easy to assemble. Engineers are detail-oriented, for example. Engineers are good problem-solvers. And engineers are strong in logical reasoning. But a similar list of engineering principles is difficult to find. As mentioned in Section 1.2, the iron ring ceremony was instituted to position ethical behaviour as an engineering principle for Canadian engineers. And 'keep it simple stupid' (KISS) and 'keep the user in mind' which were suggested by EngineerGirl.org, both seem reasonable engineering principles to follow ("Engineering Principles.", 2020). But at the end of the day, it appears that

engineering principles rest with the individual engineer.

As an example, ReadtheDocs.org is an open source software which aims to simplify "software documentation by automating building, versioning, and hosting of your docs" ("Technical Documentation… ", 2020). Its website ("Engineering Principles… ", 2020) provides six engineering principles and their rationale, as a way to align the software coders, which is especially important considering that they are non-employee contributors to the software:

> This document is an attempt to capture a shared set of values for the project. Many companies rely on Mesos as a foundational layer of their software infrastructure and it is imperative that we ship robust, high quality code. We aim to foster a culture where we can trust and rely upon the work of the community.
>
> The following are some of the aspirational principles and practices that guide us:
>
> 1. We value craftsmanship: code should be easy to read and understand, should be written with high attention to detail, and should be consistent in its style. Code is written for humans to read and maintain!
> 2. We value resiliency: our system must be highly-available, stable, and backwards-compatible. We must consider the implications of failures.
> 3. We value accountability: we own and support our software, and are accountable for improving it, fixing issues, and learning from our mistakes.
> 4. We value design and code review: review helps us maintain a high quality system architecture and high quality code, it also helps us mentor new contributors, learn to collaborate more effectively, and reduce the amount of mistakes.
> 5. We value automated testing: automated testing allows us to iterate and refactor in our large codebase, while verifying correctness and preventing regression.
> 6. We value benchmarking: benchmarking allows us to identify the right locations to target performance improvements. It also allows us to iterate and refactor in our large codebase, while observing the performance implications.

Now, to flesh out the analogy that 'teaching is like engineering', I regard teaching (paraphrasing the Cambridge English Dictionary definition of engineering) as the use of scientific principles to design and build knowledge, wherein knowledge includes the three different types of knowledge which were enumerated in Section 1.8: 1. declarative knowledge, 2. procedural knowledge, and 3. contextual knowledge. Technology and knowledge, therefore, are analogous; just as technology is the output of engineering, so knowledge is the output of teaching. Indeed, to teach means to teach something. Knowledge is the intangible manifestation of teaching. Knowledge is the stuff of teachers.

Truthfully, my instinct as a constructivist was that, in my role as a professor, I actually

design and build learning opportunities, because knowledge is beyond my direct control. After some reflection, however, I concluded that learning opportunities are the means to the ends, and not the ends in themselves. Indeed, learning opportunities are the mechanisms by which knowledge construction is facilitated. Knowledge, not learning opportunities, is the objective of teaching… hence the term learning objectives.

In parallel with the definition of technology, new knowledge always relies on extant knowledge. Indeed, knowledge is cumulative, with new understandings of the world not so much replacing, but subsuming, their predecessors. To learn means to revise and reform the cognitive schema which represent the concepts and theories of reality. This is the crux of the constructivist philosophy.

Similarly, knowledge serves as an instrument of teaching, like technology serves as an instrument in engineering. To design and build knowledge, I use my own knowledge of educational psychology, curriculum design, and classroom management, for example, in support of my 'mental and physical effort in order to achieve some value'. Teaching and knowledge, therefore, are inextricably linked, and knowledge functions as the input, the instrument, and the output of teaching. Accordingly, teaching, like engineering, is an applied science.

As an applied science, teaching has its own first principles. Indeed, in the words of Aristotle, teaching has its own elements or causes which form the basis from which it is known. In other words, these first principles are the 'laws of physics' to which teachers ought to appeal, when they design and build knowledge. We know, for example, that students continue to work diligently if praise for their academic success is tied to effort rather than intelligence (See Gable *et al*., 2009, for example.). Any teaching activity, therefore, would do well to strengthen this tie.

It ought to be obvious that any teaching activity is also subject to constraints. The university year, for example,

> has (somewhat arbitrarily) been divided into trimesters or semesters or other circumscribed periods of time. A committee somewhere, sometime might have decided that, irrespective of their focus and content, all courses in a degree programme will be standardised to 3 credits. Or maybe the department chairperson has restricted enrolment in a course to students who have met certain pre-requisites, has already written the course's learning outcomes, and has even mandated a specific course textbook (Nygaard *et al*., 2015, p. 2).

Constraints are unavoidable. And teachers, like engineers, must incorporate them when they design and build knowledge.

Finally, teachers, like engineers, do not have a definitive and universal list of teaching principles (rules, standards, or guidelines) which shape teaching practice. On the contrary, teaching principles rest with the individual teacher. Precisely! As mentioned in Section 3.2, I regard my professional practice as a marketing educator within my community of practice as intentional action which is shaped by my educational values… which is another way of saying my teaching principles (my rules, standards, or guidelines) or, collectively, my professional identity.

3.5. Summary

Chapter 3 presented my living educational theory. It began by outlining the characteristics of a theory. It then elucidated my educational values, and demonstrated how they are evidenced in my public works. Finally, Chapter 3 theorised my professional identity as a marketing educator within my community of practice, as an analogy that 'teaching is like engineering'. Chapter 4 now concludes this context statement.

4. Conclusion

4.1. Overview

Chapter 4 concludes this context statement. It begins by illustrating my professional identity in practice. It then suggests directions for future scientific research and writing in and around the scholarship of teaching and learning. Chapter 4 continues by reflecting on my living educational theory. Finally, it offers some closing thoughts about professional identity.

4.2. My Professional Identity in Practice

In his 2009 bestseller *Start With Why: How Great Leaders Inspire Everyone to Take Action*, Simon Simek offered a simple but elegant idea "upon which organizations can be built, movements can be led, and people can be inspired" ("Start With… ", 2019, Description). The idea is captured in his Golden Circle Model which suggests very simply (although not easily, as it happens), that leaders ought to begin by asking the question 'Why?'. All leaders know their *what*, Sinek claimed, but few know their *why*. Too often, he continued, leaders focus on their specific activities as leaders (the *what*), without a clear rationale for these activities (the *why*). From a management perspective, the Golden Circle Model provides a useful tool for developing the logic of a company, with the *why* serving as a kind of 'North Star' for organisational, strategic, and commercial decisions. In the context of marketing, the Golden Circle Model intimates that consumers not only buy *what* you do, they also buy into *why* you do it.

I propose that my professional identity as a marketing educator within my community of practice is my *why*. Following Sinek's advice, I started with *why*, by conducting an autoethnography to identify the educational values which constitute my professional identity. This professional identity serves as my North Star, guiding my *what* in the context of higher education. That is to say, my professional identity shapes my professional practice as a marketing educator within my community of practice. Indeed, in accordance with the living educational theory paradigm, my educational values are embodied in my professional practice.

In Section 3.3, I elucidated my educational values, and demonstrated how they are evidenced in my public works. This section illustrates my professional identity in my teaching practice (as opposed to my scientific research and writing in and around the scholarship of

teaching and learning), by describing two recent educational activities: 1. a new marketing textbook on which I have been labouring since January 2018, and 2. a new cross-cultural business module which I launched in January 2020. In both of these descriptions, I highlight specific instances in which my educational values are exhibited using ***(emboldened italics)***.

Why a new marketing textbook? My interest in writing a new marketing textbook was triggered— calling on the consumer decision-making process which is a tenet in marketing— by a 'need recognition'. Perhaps I can say more colloquially that necessity was the mother of invention. I was running several sections of an introduction to marketing module for MBA students at Washington University in Saint Louis (the institution at which I served five years as a senior lecturer before landing at the University of Michigan). I could not find a textbook which met my needs ***(critical)***. None had a narrative which matched the marketing story which I wanted to communicate ***(storytelling)***. I also thought that it would be disruptive for students to read chapters out of order ***(scaffolding)***. Many of the marketing textbooks were voluminous (in a few instances, close to 1 000 pages), and had price tags which were staggering, even for MBA students at a swanky private university ***(learner-centred)***. And in general, most of these textbooks read like dictionaries, treating marketing more like something which *is*, rather than something which *is done* ***(conceptual)***. Over time, I perceived several other weaknesses of the existing marketing textbooks ***(critical)***, thereby prompting me to explore the idea of writing a new marketing textbook.

For background, there is indeed no shortage of marketing textbooks in the market. I tend to think of these existing marketing textbooks in two broad categories: 1. the dead sea scrolls, and 2. the new kids on the block ***(critical and storytelling)***. The dead sea scrolls refer to the existing marketing textbooks which were written by the pioneers in marketing education (although in most cases the baton is now being passed to someone more junior), and which have been re-issued numerous times over the years. The new kids on the block refer to the existing marketing textbooks which are relatively young in comparison to the dead sea scrolls, and which, to some degree, are attempting to challenge their supremacy with new pedagogical models, different narratives, more modern delivery methods, localised examples, and/or flashier printing.

First among the dead sea scrolls is *Basic Marketing* by Bill Perreault, Joe Cannon, and Jerome McCarthy (the father of the infamous 4 Ps). Often considered the first true marketing textbook, it started publication in 1960, and is now in its 19th edition. More ubiquitous, however, is *Principles of Marketing* (17th ed.) by Philip Kotler, in all its geographic guises: Asian edition, global edition, European edition, and so on. There are also other Kotler variants, including *Marketing: An Introduction*, *Marketing Management*, and *Foundations of Marketing*, each of which also has its own geographic editions, and its junior co-authors. Rounding out the dead sea scrolls are:

- *Marketing*. 7th ed.. Grewal and Levy. 2020.
- *Principles and Practice of Marketing* (9th ed.). Jobber and Ellis-Chadwick. 2019.
- *Marketing*. 9th ed. Solomon, Marshall, and Stuart. 2017.
- *Marketing*. 12th ed. Evans and Berman. 2020.
- *Marketing*. 12th ed. Lamb, Hair, and McDaniel. 2019.
- *Marketing*. 14th ed. Kerin and Hartley. 2019.
- *Contemporary Marketing*. 18th ed. Boone and Kurtz. 2019.
- *Marketing*. 20th ed. Pride and Ferrell. 2020.

It is obvious that, in contrast to these dead sea scrolls which date back to the early 1960s, the new kids on the block are mere toddlers… or newborn, in the case of *Fundamentals of Marketing* by Baines, Fill, Rosengren, and Antonetti (2019), which is in its first edition. Other new kids on the block include:

- *Marketing* (2nd ed.). Hunt, Mello, and Deitz. 2018.
- *Marketing* (2nd ed.). Levens. 2011.
- *Marketing* (2nd ed.). Sharp. 2018.
- *Principles & Practice of Marketing* (3rd ed.). Blythe. 2013.
- *Marketing* (4th ed.). Elliott, Rundle-Thiele, and Waller. 2020.
- *Marketing* (4th ed.). Burrow and Fowler. 2016.
- *Marketing* (4th ed.). Masterson, Phillips, and Pickton. 2017.
- *Marketing* (5th ed.). Baines, Fill, Rosengren, and Antonetti. 2019.

Finally, it is important to mention that the writing of marketing textbooks has largely been an American enterprise, although to be fair, a few of the new kids on the block have been written by British and Australian authors ***(critical)***. Indeed, US-based authors have dominated the global market since the publication of McCarthy's textbook in 1960, with their American versions, geographic adaptations, or translations being adopted by marketing professors at foreign institutions. One notable exception is *Principles and Practice of Marketing* by Jobber

and Ellis-Chadwick, which is now in its 9th edition, and which has been published in the United Kingdom since the mid-1990s.

So again, why a new marketing textbook? Certainly, one of these existing marketing textbooks must have met my need? I cannot lie. In some instances, my objection to a specific existing marketing textbook was simply a matter of taste; I did not like the author's choice of anecdotes, for example, or the textbook's aesthetic was unappealing. But overall, I believe that I was more objective, using specific criteria (my educational values, I now realise) to identify weaknesses of the existing marketing textbooks. Please note that I also subscribe to the trite but useful 'keep it short and simple' (KISS) principle— a modern-day Ockham's razor— as a touchstone for many of the solutions which I proposed in response to these weaknesses ***(scaffolding)***.

First, most of the existing marketing textbooks adopt rather all-encompassing definitions of marketing which attempt to cover all feasibilities, which extend marketing to every possible domain (political marketing, for example, or tourism marketing), and which jump on the latest marketing fads and fashions ***(conceptual)***. The two most recent American Marketing Association (AMA) definitions make nods to different organisational stakeholders, consumer value, customer relationships, marketing institutions, organisational departments, corporate social responsibility, and so on. Kotler's definition is possibly worse, referencing segmentation, market sizing, consumer research, and targeting. Consequently, these all-encompassing definitions of marketing become almost meaningless ***(critical)***, and, from a pedagogical perspective, serve as poor narrative devices ***(storytelling)***.

In response, I suggest a reversion to the first definition of the word market (as in the verb 'to market') in the English language which appeared in the Oxford English Dictionary in the year 1455 ***(conceptual)***. To market is "to sell, or bring to market" ("Market.", 2020). It is simple, pithy, and in this verb form, encapsulates perfectly what marketing is— going to market. It is also timeless. Indeed, definitions ought not to change when new technologies, approaches, or delimiters arise ***(critical)***. Basketball, for example, was not re-defined when the weave offence supplanted the seemingly unfailing pick-and-roll system. Likewise, marketing is

still marketing, even if companies now consider long-term custom relationships more profitable than one-off transactions.

I proposed, therefore, to adopt the following definition for my new marketing textbook: marketing is going to market ***(innovation)***. In this sense, marketing has its roots in commerce; it is grounded in the market. It ought not to be surprising that I always begin my introduction to marketing modules with a discussion of commerce, by asking simple and foundational questions such as 'How does a company make money?' and 'What is a market?' ***(scaffolding)***. To me, it is a more appropriate and accurate entrée to marketing than the often-used 'Marketing and Its Role in Society' premise.

This definition of marketing also distinguishes marketing very clearly from advertising and from other widespread mis-uses and misunderstandings of marketing ***(conceptual)***. More importantly, it renders marketing synonymous with commerce ***(critical)***. Indeed, someone who grows carrots but does not take them to market is only a gardener. A furniture builder is just a hobbyist without the act of going to market. Simply stated, if a company does not go to market, it does not make money ***(contextual)***.

Pedagogically, marketing as going to market also provides a powerful narrative device for my new marketing textbook ***(storytelling)***. Indeed, many of the existing textbooks do a poor job of linking together the various marketing concepts and activities into a single endeavour ***(critical)***. This new textbook instead unites these concepts and activities around the common enterprise of going to market ***(innovation)***. Market sizing and market scoping, for example, are positioned as the two activities of market attractiveness which address the question 'Ought the company go to market?'. Segmentation and targeting are framed explicitly in terms of the trade-off between efficiency and effectiveness when going to market, which is caused by the heterogeneity of the consumers in the market, and which address the question 'For whom does a company go to market?'. And the infamous 4 Ps are explained easily in terms of the question 'With what does a company go to market?' ***(storytelling)***.

This definition of marketing as going to market is so central to my new marketing textbook that I incorporated it into the title: *Going to Market: The Principles and Practice of Marketing*. Note that this title also implies a dynamism to marketing. Many of the existing

textbooks— especially those which are aimed at introduction to marketing modules— emphasise marketing as a noun, which has resulted in a kind of entification of marketing— as if marketing exists as a thing in and of itself, independently of the practice of marketing ***(critical)***. Likewise, many of the introduction to marketing textbooks are often dictionary-like, with little action orientation. That is to say, they are more about definitions and lists of things, rather than manuals for how to do marketing ***(critical)***. Marketing as going to market implies, on the contrary, that marketing is a practice. Indeed, marketing is something which is done ***(conceptual)***.

My new marketing textbook, therefore, emphasises marketing as a practice. Of course, it delivers the principles of marketing, but they are presented in service of making marketing more operational in nature ***(conceptual)***. Accordingly, I adopted three additional narrative devices for my new marketing textbook: 1. a set of questions which marketers must address when going to market, 2. a story line which links these questions together, and 3. action-oriented book section titles (Ready, Aim, Fire, Reload) which correspond to the main steps of the strategic marketing process ***(storytelling)***.

Continuing with a laundry-list of other perceived weaknesses of the existing marketing textbooks, marketing is not an American phenomenon ***(critical)***. Indeed, companies in poor regions (bottom of the pyramid) and wealthy regions alike go to market. My new marketing textbook, therefore, bridges the gap which is left open by the existing marketing textbooks, by presenting marketing in a global context and with cultural sensitivity ***(contextual)***. Similarly, many of the existing marketing textbooks are written from an American point of view, with an almost imperialist go-forth-and-conquer feel to them ***(critical)***. My new marketing textbook is polycentric, with no set home, illustrating how marketing is enacted in different countries, companies, and cultures from around the world ***(conceptual)***.

Most of the existing marketing textbooks focus primarily on goods, despite the fact that services make up the majority of economic activity in most countries ***(critical)***. Even China's GDP is more than 50% services! My new marketing textbook, therefore, uses services examples, and introduces the 7 Ps as an alternative/complement to the 4 Ps ***(conceptual)***. In a similar way, many introduction to marketing textbooks also privilege consumer packaged goods

(CPG)— also know as fast-moving consumer goods (FMCG)— relegating the marketing of industrial products, services, travel and tourism products, social ventures, and so on, to textbooks of their own ***(critical)***. My new marketing textbook is non-denominational, providing examples from across the product spectrum ***(conceptual and scaffolding)***.

Many of the existing marketing textbooks pitch a single model/view of marketing, rather than reveal the myriad competing models/terminology which exist among marketing practitioners and theoreticians ***(critical)***. Consider the terms 'promotion', marketing communications', and 'IMC', for example, or the confusing use of 'consumer' and 'customer' in the CPG/FMCG world. My new marketing textbook, therefore, exposes and explains the debate and disagreements which are part and parcel of marketing ***(learner-centred, conceptual, and scaffolding)***.

Most principles of marketing textbooks tend to treat contemporary marketing challenges such as social media, globalisation, ethics, social responsibility, sustainability, the Internet of things, and so on, in isolated chapters, almost as appendages or afterthoughts ***(critical)***. My new marketing textbook takes a more holistic approach, integrating these and other marketing challenges throughout the textbook ***(contextual and scaffolding)***.

Finally, many textbooks privilege the consumer with an entire chapter (or more) on consumer behaviour… and rightly so, because the consumer is the lifeblood— the *raison d'être* — of any company. Indeed, a company makes money by exchanging its product for money with a consumer. These consumer behaviour chapters, however, are frequently neither fish nor fowl. They are too slim to do full justice to the depth and breadth of the scholarly understanding of consumers and consumption. But simultaneously, they usually attempt to cover too many concepts to provide a clear and concise rationale for understanding the nature of consumers and consumption ***(critical)***.

I proposed, therefore, that my new marketing textbook ought to be more particular and purposeful in its writing about consumers, focusing on consumer value as the primary consumer-oriented concept ***(conceptual)***. First, consumer value buttresses the marketing as 'going to market' definition, by underlining that an exchange only occurs if the consumer values the exchange, a notion which is captured eloquently in the classic Milton Friedman quotation

“People value what they pay for, and pay for what they value!”. As the primary consumer-oriented concept, consumer value also serves as the foundation for concepts and activities which appear later in the textbook, including benefit segmentation, positioning, and both satisfaction and loyalty ***(scaffolding and storytelling)***.

Switching to the new cross-cultural business model which I launched in January 2020, the William Davidson Institute, at which I hold a Research Fellow position, was awarded a grant recently from the US State Department under the aegis of the Stevens Initiative. Named after Ambassador Christopher Stevens who was killed by extremists in 2012 at the American Special Mission in Benghazi, Libya, the Stevens Initiative “is an international effort to build career and global competence skills for young people in the United States and the Middle East and North Africa by growing and enhancing the field of virtual exchange: online, international, and collaborative learning” (“Vision.”, 2020).

Working with my colleagues at the William Davidson Institute, therefore, I designed a new cross-cultural business module, the purpose of which was to prepare students for positions in today’s organisations, by:

- sensitising students to the scope and nature of cross-cultural business,
- elevating students’ knowledge of cross-cultural business, and
- cultivating students’ proficiency in cross-cultural business ***(critical and learner-centred)***.

More concretely, the module provides students with a collection of cross-cultural business ‘tools’— models, theories, frameworks, perspectives, ideas, an so on ***(conceptual)***— which are required for success in the global economy. The module also provides students with opportunities to practise these tools through hands-on activities ***(experiential)*** in which they will work in a multi-cultural team of students from three partner institutions: the American University in Cairo, the American University of Beirut, and the Benghazi Youth for Technology and Entrepreneurship in Libya ***(innovation)***.

The module will increase students’ knowledge of the global business environment in general, and of the Egyptian, Lebanese, and Libyan business environments more specifically ***(conceptual)***. It will improve students’ ability to work in a cross-cultural, geographically-dispersed team ***(contextual)***. And, in concert with the vision of the Stevens Initiative, it will

strengthen students' ties to other like-minded young business people in Egypt, Lebanon, and Libya ***(scaffolding)***.

The fourteen-week module will operate like a kind of 'virtual exchange', bringing together professors and students from the United States, Egypt, Lebanon, and Libya ***(innovation)***. It will leverage the Internet to facilitate the geographically-dispersed teams, and to provide a forum for examining specific aspects of cross-cultural business ***(technological)***. The module will combine traditional classroom sessions with hands-on activities. The classroom sessions will focus on culture and cultural competence, plus specific cultural practices of each of the participant countries ***(conceptual and contextual)***; the activities will provide opportunities to develop cross-cultural business skills ***(experiential)***.

The module will begin by establishing the rationale for the module— in essence, that cultural competency is a key success factor in the global economy ***(critical)***. It then reviews various conceptualisations of culture, primarily from anthropology, sociology, and management studies ***(conceptual)***. The module continues by examining the notion of cultural competence, and underlining the human limitations which prevent cultural competence ***(contextual)***. It concludes with a survey of different tools for improving cultural competence ***(scaffolding and storytelling)***.

Students will be assessed on their performance in the following activities ***(learner-centred and assessment)***:

1. The *Cross-Cultural Journal* provides students with an opportunity to develop their cultural competence, through reflection on their own experiences. Throughout the semester, they will maintain a journal, the entries of which will serve as the material for the reflection ***(critical)***.
2. The *Cross-Cultural Business Forum* provides students with an opportunity to 'engage' with cross-cultural business in an online discussion forum. They can share their own views and real-life examples, pose questions, offer opinions, make arguments, critique ideas, and so on ***(critical and contextual)***.
3. The *Armchair Anthropologist Exercise* provides students with an opportunity to explore cross-cultural business within another society, in order to understand and appreciate the impact of cultural differences. They will explore a business activity in another society, using their foreign classmates as information sources, and explain the differences in the business activity from a cultural perspective ***(critical, contextual, and experiential)***.
4. The *My Culture Presentation* provides students with an opportunity to share their culture with their international classmates. More than just a list of trivia about their country, it requires them to use cultural models in a critical manner

to unpack their own culture—in essence, to explain why they do what they do ***(critical, contextual, and storytelling)***.

5. The *Internationalisation Consulting Project* provides students with an opportunity to practise their cross-cultural business skills in a simulated consulting project in which they will research and compare two different countries as possible internationalisation markets for a company. Indeed, they will practise their cross-cultural business skills in the research and planning of the internationalisation of the company, and also as a member of a cross-cultural, geographically-dispersed team ***(contextual, experiential, and technology)***.

More than thirty students, from across the University of Michigan have enrolled in the module. Another eighty students from the three partner institutions have likewise decided to participate in the pedagogical experiment. Two more iterations of the module have already been planned for the 2020/2021 academical year, and we are exploring the possibility of adding a fifth institution, most likely from Tunisia.

4.3. Reflections on My Living Educational Theory

The purpose of this context statement was to position my public works both contextually and theoretically. To do so, I theorised my professional identity as a marketing educator within my community of practice. I conducted an autoethnography to identify the educational values which constitute my professional identity. And I examined how my educational values are evidenced in my public works.

The descriptions of my two recent teaching activities complement my public works, and lend additional support to Kemmis' (2009) claim that practice is an intentional action which is shaped by values. Admittedly, I have made a somewhat misleading distinction between my teaching practice and my scientific research and writing in an around the scholarship of teaching and learning. As mentioned in Section 2.3, however, I regard my professional practice as a marketing educator within my community of practice, as intentional action which is shaped by my educational values. And both of these teaching activities, along with my public works, illustrate how my educational values are embodied in my professional practice.

This context statement, therefore, demonstrates, in a general sense, that the living educational theory paradigm provides a means for positioning a practitioner's public works both contextually and theoretically. More specifically, it captures the dynamic nature of my professional practice as a marketing educator within my community of practice. Indeed, it

reveals the constitutive relationship between my professional identity and my professional practice, thereby affording a richer understanding of the way in which my professional identity shapes my professional practice, and, in turn, of the way in which my professional practice re-shapes my professional identity.

The context statement also demonstrates the value of autoethnography as a research method within the living educational theory paradigm. It enabled me to identify my educational values which constitute my professional identity, and subsequently to clarify and build on my existing sense of who I am as a marketing educator within my community of practice. By elucidating my educational values, and examining how they are evidenced in my public works and in two recent teaching activities, I have also become a more conscious practitioner, aware of how my professional identity shapes my professional practice. Consequently, I am now vested in my public works beyond the public works themselves, because I recognise that they are not only the output of my scientific research and writing in and around the scholarship of teaching, but also an embodiment of my professional identity. And I am more cognisant of the agency which I possess as a practitioner to influence the perception of my professional identity within my community of practice.

The analogy that 'teaching is like engineering' which I explicated in Section 3.4 also provides a novel perspective on, and interesting insights into, teaching practice. Its focus on knowledge as the output of teaching, for example, emphasises the centrality of the learner, and reinforces the constructivist nature of learning. It acknowledges that teaching is an applied science with its own set of first principles on which teachers (as engineers) ought to draw. It not only accepts that teaching is subject to constraints, but also that teachers account for them in their practices. And it underlines the notion that teachers bring their own teaching principles to bear on these practices.

With respect to the validity of my living educational theory, I summon first the argument — albeit a weak and self-serving argument— that most of my public works have been published after passing a peer review process. A second and more philosophical argument is that the validity of my living educational theory is derived from its authenticity which, in effect, rests on my credibility both as a researcher, and, in this context statement, as an autobiographer.

I suggest, however, that the validity of my living educational theory is granted, to some extent, by a variety of stakeholders who, by their 'consumption' of my professional practice, have indirectly validated it. To begin, since 1993 when I began my professional career as a marketing educator within my community of practice, I have received numerous awards and accolades from students and professional associations alike. In 2011, for example, I was named champion of the 'Sherwin Williams Distinguished Teaching Award' at the *Society for Marketing Advances* annual conference, which recognises contributions to the practice of marketing education. In 2017, I was nominated for the University of Michigan's 'Service in International Education Award', for my dedication to, and my innovation in, international education. And in April 2019, I received the 'Neary Professor of the Year Award' for my teaching in both the Master of Management and Weekend Master of Business Administration programmes.

As a marketing trainer, I am in high demand from companies around the world, thereby intimating a kind of tacit approval of my professional practice. In the past two years alone, I conducted nearly fifty individual executive education training programmes for companies from Johnson & Johnson to the Saudi Telecom Company, and in countries as far-reaching as Latvia and India. See Table 16 for my executive education activity for the period January 2018 to December 2019. The formal and informal teaching evaluations from these training programs likewise confirm my efficacy as a marketing educator. Figure 3 contains feedback from a recent two-day training programme for global product marketers at Dell Computer Corporation in Round Rock, Texas.

Table 16. My Executive Education Activity (January 2018 to February 2020)

Company	Programme	Date
Gore	Strategic Marketing	January 2018
TATA	TGELS	February 2018
BTN	Innovation	March 2018
Johnson & Johnson	Strategic Marketing	March 2018
Dell Computer Corporation	Marketing Excellence	April 2018
Precision Castparts	Marketing and Sales	April 2018
Dell Computer Corporation	Marketing Excellence	May 2018

Company	Programme	Date
Precision Castparts	Commercial Development	May 2018
ICBC	Marketing Excellence	June 2018
Dell Computer Corporation	Marketing Excellence	June 2018
Saudi Telecom Company	Cohort 2 Module 4: Competition	June 2018
Saudi Telecom Company	Cohort 1 Module 8: Innovation	June 2018
TATA	TGELS	July 2018
UFV	Brand Reputation and Management	July 2018
Brightview	Customer Centricity	August 2018
Dell Computer Corporation	Marketing Excellence	August 2018
Saudi Telecom Company	Cohort 1 Module 9: Wrap-Up	September 2018
Gore	Strategic Marketing	September 2018
BTN	Innovation	October 2018
Johnson & Johnson	Strategic Marketing	October 2018
Saudi Telecom Company	Cohort 2 Module 4: Marketing Essentials	November 2018
Medtronic	Strategic Marketing	November 2018
Saudi Telecom Company	Cohort 2 Module 5: Business Acumen	December 2018
Gore	Strategic Marketing	December 2018
Gore	Strategic Marketing	December 2018
Saudi Telecom Company	Cohort 2 Module 5: Business Acumen	January 2019
TATA	TGELS	February 2019
Johnson & Johnson	Strategic Marketing	March 2019
Dell Computer Corporation	Marketing Excellence	April 2019
Saudi Telecom Company	Cohort 2 Module 6: Digitalization	April 2019
Gore	Strategic Marketing	May 2019
Japan Chamber of Commerce	Global Mindset	June 2019
Dell Computer Corporation	Marketing Excellence	June 2019
Cristo Network	Strategic Marketing and Branding	June 2019
Gore	Strategic Marketing	July 2019
TATA	TGELS	July 2019
Gore	Strategic Marketing	July 2019
Precision Castparts	Marketing and Sales	August 2019
Johnson & Johnson	Strategic Marketing	August 2019
TATA	TGELS	September 2019

Company	Programme	Date
Saudi Telecom Company	Cohort 3 Module 1: Kickoff	October 2019
William Davidson Institute	Strategic Management Program	October 2019
Gore	Strategic Marketing	November 2019
Dell Computer Corporation	Marketing Excellence	November 2019
KAUST	Emerging Leaders Program	November 2019
Fulbright University	Internationalisation	December 2019
Saudi Telecom Company	Cohort 3 Module 2: Customer-Centricity	December 2019
Saudi Telecom Company	Cohort 2 Module 8: Leading the Organisation	January 2020
Saudi Telecom Company	Cohort 3 Module 3: Action Learning Project	February 2020
TATA	TGELS	February 2020

Source: Author

Finally, media coverage of me and my various teaching activities alludes to the utlity, if not the validity, of my living educational theory. In June 2018, for example, I was invited to share my thoughts on the globalisation of higher education in a television interview on the *A2 Insight* programme. My approach to instructional design which leverages the twelve-minute rule was picked up by two online education blogs: Helix Education and Edsurge. And I was featured as a 'Master Educator' on the CoureHero website; a nine-minute video vignette which is entitled 'Business Professor Builds Classes Like He Builds Cars' captures the analogy that 'teaching is like engineering'.

4.4. And Up Next Is…

I sometimes quip that my life is one big customer complaint. It is impossible for me to remove my marketer's uniform, and consequently, everywhere I go as a consumer, I see marketing problems… or, phrased more positively, opportunities for improvements to customer experience. Do not get me started about air travel!

And so it is in my professional life. Indeed, I cannot refrain from being a marketing educator. And consequently, I see opportunities everywhere for scientific research and writing in and around the scholarship of teaching and learning. Upon completion of my new marketing textbook, I shall begin to tackle a number of projects which are on my publishing agenda.

To begin, I have three projects which reflect my *critical* educational value. The first project explores the nature of competition in higher education by: 1. outlining Shelby Hunt's (2000) 'Resource-Advantage Theory of Competition', and 2. mapping the theory to higher education in the United States. The second project enumerates different business models (the platform model, for example), and then explores their application to higher education. The third project is an anthology on branding in higher education.

Figure 3. Feedback From Dell Training Programme

Course Name & Instructor	Date	Location	# of Attendees	Survey Response Count	NPS Score (Target ≥55%)
Marketing Excellence: Success through Decision Making / Dr. John Branch	Nov 13 & Nov 14	Round Rock	24	14	86%

Questions	Rating Average (Target>=4.5)
1. My knowledge skills increased as a result of today's learning event	4.9
2. I can apply the concepts and skills I learned today in my job	4.5
3. Today's session was structured logically to provide a good foundation for learning the concepts	5
4. The course provided a good balance between instruction and small group individual exercises	4.9
5. The instructor had the ability to maintain class interest and facilitate group discussion	5
6. The instructor effectively linked concepts to real-world scenarios	5

Question	Strongly Disagree 0	1	2	3	4	5	6	7	8	9	Strongly Agree 10	Rating Average	Response Count	Answered Questions	Skipped Questions
I would recommend this class to my peers*	0	0	0	0	0	0	0	0	2	0	12	9.7	14	14	0

8. Additional suggestions or comments:	Highly recommend Overall good course Great class, kept things simple yet strategic, learned new methods for breaking down and building up marketing strategies Fantastic Loved it. good class Excellent class Great professor, concise insights. would recommend 10/10 recommend Dr. John Branch's training to all Dell employees. Best Training I've taken at Dell John Branch did an amazing job as an instructor. This has been the most valuable training I have had in years. - Best training class I've experienced thus far via the P&O Academy. This is a valuable two-day experience that takes you outside of your day-to-day complexities and delivers practical, easy-to-implement methods that result in a more strategic and easy-to-communicate marketing plan. Well organized and interactively taught. Refreshing methodical approaches to marketing decision-making, including the powerful mechanism of assigning quantitative scores to qualitative attributes. Lots of good models we can take back to our daily PM lives - thank you! BUT - it's not actionable at all. We talked about what the Dell brand should be - but we were 20 people in a company of hundreds of thousands. There's nothing we can do. Much of this direction needs to come from the top--> down. Can our CMO take this class? Instead of us figuring out what Dell's "brand flag" should be - we need someone at the top to make that decision so we can all march to it. Still, wonderful class and wonderful instructor. great class John is a great teacher! Really enjoyed this course - possibly my favorite thus far. Taught basic principles of Marketing and worked hard not to overcomplicate them. Focused on how we might actively apply models and tools into our workday. Wish I had taken the course sooner. kij This was the most interesting/engaging training I have ever been a part of. Dr. John Branch was an incredible teacher and everything I learned was very applicable to my job. I am excited to use the knowledge and skills he taught us to make Dell an even better place. Would recommend all Dell employees take his class! This training felt like an MBA class. Instruction seamlessly moved between academic explanations and real application. The instructor level set all students understandings at the beginning of the class and ensured we were all speaking from a common understanding. He then provided us a road map for all the topics that were to be covered and how they were related to one another. Instructor was entertaining which made it easy to stay engaged. Would highly recommend this training.

Source: Author

Another project stems from my use of music in the classroom. About ten years ago, I began to play music at the beginning of a session (my *contextual* educational value). At first, I curated a setlist which matched the theme of the session's subject matter (my *scaffolding* educational value). In recent years, I have also begun exiting the classroom about thirty seconds before the official start time of the session. I collect any stragglers in the hallway outside the classroom. And then I enter the classroom, closing the door behind me, and stopping the music at the official start time of the session. I have noticed that after two or three times of this pre-classroom ritual, students become conditioned (almost Pavlovian-style) to cease their chatter at the stopping of the music. I intend to explore this practice further, perhaps using qualitative research, or (Dare I say it?), some kind of experiment.

I am also intrigued by the use of both humour and movies in the classroom (my *contextual* and *scaffolding* educational values). Students often comment on how much they enjoy my sessions, partly because of the humour which I bring to the classroom. But does humour actually work? How does it affect learning? And are there any guidelines for its use? Similarly, as mentioned in Section 1.6, my go-to instructional tool is the analogy. A colleague has recommended the use of movies, however, which, he contends, are themselves a kind of visual analogy. But do they work? If so, how, and under which circumstances? And likewise, are there any guidelines for their use?

Paralleling my *conceptual* educational value are two projects which aim to illuminate the concept of analysis. The first project which I have titled 'Reviewing the Logic of Scientific Discovery: Abduction, Deduction, and Induction' in a nod to Popper's famous treatise on science, aims to raise the profile of abduction as a third analytical logic. The second project seeks to clarify the distinction between the concepts of interpretation and analysis, confusion of which is problematic in market research, and in strategic management more broadly.

I am eager to pursue my *assessment* educational value by expanding on the idea of generative assessment which I mentioned in Section 3.3.2, and which I put forward initially in my anthology *Assessing Learning in Higher Education*. Indeed, much has been written about formative and summative assessments. But generative assessment appears to be a relatively new idea. In a somewhat related project, I plan to investigate the role of non-verbal cues in the

classroom. The motivation for this project came from an especially frustrating teaching experience at the Helsinki School of Economics. Finnish students— risking stereotype here— were seemingly void of all facial expressions during my sessions, making it nearly impossible for me to discern their mood, or to judge whether or not they were 'getting it'.

Finally, I have two projects which exhibit my *scaffolding* educational value. The first project draws on my penchant for the use of analogy. There are several instances in marketing which require the selection of a 'winner' from among a list of candidates. In targeting, for example, marketers must select which segments to serve. It dawned on me one sleepless night that this selection routine is not unlike various game shows and reality shows in which a person must select a date, or even a mate, from among a list of candidates. Think *The Bachelor*, or its 1960s predecessor, *The Dating Game*.

The second project emerged in a recent training programme, in which my colleague noted my tendency to use acronyms and other mnemonic devices to describe models, frameworks, and procedures. The attractiveness of a segment, for example, can be gauged by evaluating its SPECS: size, profitability, expected growth, competitive intensity, and special characteristics. My first-hand experience with mnemonics dates back to 1978, the year I created LANOPA as a way to remember the six factors which influence weather. I can still name them to this day, more than forty years later! But how exactly do mnemonics they work? And similarly, what are the keys to their success?

4.5. Closing Thoughts

In his 1998 bestselling book 'How to Think Like Leonardo da Vinci: Seven Steps to Genius Every Day', author and consultant Michael Gelb posed a simple question: "Can the fundamentals of Leonardo's approach to learning and the cultivation of intelligence be abstracted and applied to inspire and guide us toward the realization of our own full potential?" To answer the question, Gelb scoured da Vinci's notebooks, inventions, and works of art. His conclusion was a set of seven 'da Vincian' principles which, Gelb suggested, defined the master's approach to creativity:

1. Curiosità: an insatiable quest for knowledge and continuous improvement
2. Dimostrazione: a commitment to test knowledge through experience, persistence, and willingness to learn from mistakes

3. Sfumato: an openness to the unknown, embracing and managing ambiguity, paradox, and uncertainty
4. Arte/Scienza: whole-brain thinking, developing a balance between science and art, logic and imagination
5. Connessione: an appreciation for the interconnectedness of all things and phenomena
6. Corporalità: body-mind fitness, cultivating grace, ambidexterity, fitness, and poise
7. Sensazione: the sharpening and continual refinement of the senses, especially sight, as the means to enliven experience

According to Gelb— and mirroring the sub-title of his book— he had unlocked the genius of Leonardo da Vinci, the essence of which readers of the book could emulate in their everyday lives. In the spirit of the living educational theory paradigm, what Gelb had identified were the values which shaped da Vinci's professional practice. In other words, he had exposed da Vinci's professional identity.

To be clear, I make no claim to be a genius like Leonardo da Vinci. My arrogance knows some bounds. But Gelb's exercise in 'professional archeology' reinforces the fundamental purpose of the living educational theory paradigm: to theorise a practitioner's professional practice. Indeed, by reflecting on da Vinci's values, and da Vinci's works which were developed therefrom, he was able to describe and explain the professional practice of the man who was Leonardo da Vinci.

I wonder if Gelb would have identified the same educational values as I had identified for myself, if he had studied me *à la* his da Vinci method? Indeed, would he have exposed a different professional identity altogether? More generally, would other epistemological and methodological approaches reveal different things about me?

Whatever the case, this exploration of my professional identity according to the spirit of the living educational theory paradigm has been a worthwhile and rewarding exercise. Through it, I have come to know my professional identity as a marketing educator within my community of practice. Likewise, I have observed the role which my professional identity has in shaping my professional practice: both my teaching activities and my scientific research and writing in and around the scholarship of teaching and learning. Consequently, I encourage other practitioners to explore their professional identities and professional practices in this kind of *autocritique*, subjecting their own living educational theories to public scrutiny. In doing so, I

am confident that they will also become more conscious practitioners, aware of how their professional identities shape their professional practices, and, in turn, how their professional practices re-shape their professional identities.

Epilogue

Perhaps the dream of every doctoral student is to hear "Pass with no corrections." at the conclusion of her/his viva voce. And on Tuesday 26 May 2020, I was thrilled when the chair of my viva voce voiced those very words. She followed them up, however, by stating that my examiners (one internal examiner from Middlesex University, and two external examiners) recommended some additions to this context statement which, they were convinced, would strengthen it. The chair emphasised that these additions were optional, and that the awarding of my Doctor of Professional Studies degree was not contingent on me making them. But in the spirit of living educational theory, I have heeded my examiners by writing this epilogue, thereby bringing this context statement to a conclusion.

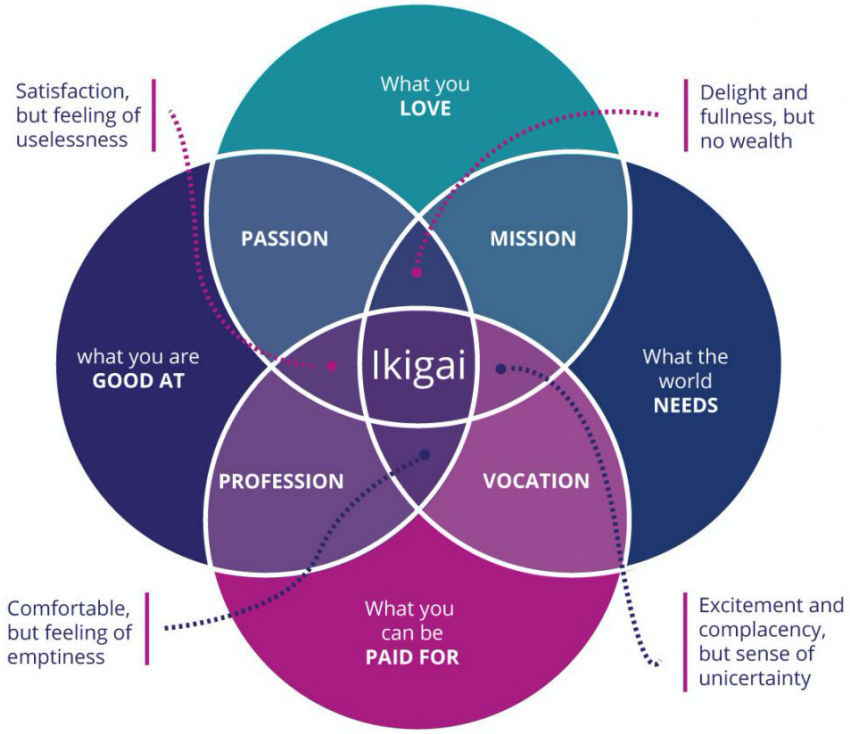
To begin, one external examiner recalled my use of the concept of love to introduce one of my ten educational values. But he proceeded by noting that my living educational theory itself is relatively devoid of love, and a short conversation about the concept of love in the context of professions ensued. Consequently, since my viva voce (and channelling my inner Tina Turner), I have been pondering the question 'What's love got to do with it?'. Is love the motivating force behind my professional identity? What does it mean when I proclaim that I love my profession? And how, if at all, does love play into the way in which I serve my students?

Admittedly, my living educational theory is relatively devoid of love. I certainly hope that this context statement does not read as a dispassionate treatise on my teaching— that my professional identity which I have theorised as an analogy that 'teaching is like engineering' does not paint me as some robotic, heartless, and mechanistic marketing educator…. because the exact opposite is true. I am passionate about my profession. The stay-at-home measures which have been implemented as a result of the Covid-19 pandemic, and which have kept me out of the classroom, have left me feeling empty. And although it sounds somewhat sentimental, I consider students to be my *raison d'être*.

Love, it seems, has got a lot to do with it. The notion of love as the source of my professional identity, and perhaps as the main ingredient of my living educational theory,

conjures up the Japanese concept of 'Ikigai'. Translated as 'a reason for being', Ikigai sits at the confluence of four dimensions: 1. what you love, 2. what the world needs, 3. what you can be paid for, and 4. what you are good at (See Figure 4.). According to Garcia (2017), Ikigai defines the meaningfulness in your life. It is akin to Maslow's idea of self-actualisation. It is what makes you "jump out of bed each morning" (Oppong, 2018).

Figure 4. Ikigai



Adapted from "How to…" (2020)

I use Ikigai frequently, usually when counselling students (both young and old) about their post-business school careers. And I almost always refer to myself as a 'poster child' for Ikigai, boasting that I have found that sweet spot at the confluence of the four dimensions. I wonder, therefore, if a valuable complement/supplement to living educational theory might be (as I have begun to sketch out here) an exploration of the motivating force at the root of professional identity. Indeed, it might be worth including love, passion, compulsion, conviction, or other conative force which drives professional practice, as a key component of a living educational theory.

This concept of love in the context of professions also brings to mind the philosophy of servant leadership which has gained popularity in both the management and popular literature as of late. Servant leadership inverts the traditional hierarchical view of organisations in which a leader 'commands' employees from on high, emphasising instead that servant leaders situate employees above them, and aim to empower and uplift them ("The Art… 2020). An interesting twist on servant leadership, therefore, might revolve around the concept of love in the context of professions, and more specifically, around the 'obligation' to serve students which many professors appear to have.

The philosophy of servant leadership alludes to the topic of responsibility which was also raised during my viva voce. Although I doubtless feel that I have an obligation to serve my students, as a professional— as a marketing educator— I also have a responsibility to serve other stakeholders within my community of practice. Truthfully, I had not given this much thought prior to the viva voce. To be fair, I have conducted teaching workshops for doctoral students as part of the doctoral consortium which the *Society for Marketing Advances* runs each year at its annual conference. But beyond that, my engagement with a wider array of stakeholders has been limited. What can I do now to fulfil this responsibility?

Love, servant leadership, and responsibility all provoke some consideration of the role of relationships in education. In Section 3.3.2, I wrote about my learner-centred educational value, and how it is evidenced in my public works. It is noteworthy, however, that I wrote nothing about the relationships which invariably develop with my students. Indeed, I am adamant that social interaction is not a 'necessary evil' of being a professor (I phrased it thusly because I am convinced that some of my colleagues genuinely dislike students.). But I also recognise that different types of relationships can develop between my students and me.

This consideration of the role of relationships in education reminds me of different stages in the evolution of marketing, each of which is characterised by a different philosophical/ operational approach to the interaction between a company and its customers. In the early years of marketing, for example, the relationship between a company and its customers was primarily transactional in nature, focused as it was on the exchange which occurs between them. In the latter part of the twentieth century, 'customer relationship management' emerged as the

dominant logic of marketing. It specified that a company ought to develop more intimate relationships with its customers. And more recently, there has been much talk about 'key account management', which advocates very intense relationships… but with a limited and select group of customers. I often describe these three different stages in the evolution of marketing according to three different types of relationships: acquaintances, friendships, and marriages. A deeper examination of the types of relationships which develop between my students and me would doubtless be beneficial.

Switching gears… another topic which emerged during my viva voce was the topic of knowledge representation. I was responding to a question about my use of autoethnography as a research method, and I noted that the different types of doctorates which have been introduced since the establishment of the PhD degree in the seventeenth century, have not been met with the same lattitude with respect to how contributions to knowledge are demonstrated. Indeed, the traditional dissertation which is written in a very formal, de-centred, and supposedly objective manner remains, to a large degree, the norm in doctoral work. I did remark, however, that in the academic discipline of marketing, whose scientific journals have likewise followed the same scholarly tradition, there is movement to accept alternative forms of knowledge representation. At a recent *Consumer Cultural Theory* conference, for example, attendees presented their research with multi-media, as visual art, and in poetry. It seems that there is some hope for doctoral students who wish to buck the system.

Finally, it is essential that I expound on the realisation that my context statement was largely uni-directional, by which I mean that I have examined how my educational values are evidenced in my public works, but not how my public works are evidenced in my educational values. This uni-directionality might be due to the historical tendency in living educational theory to focus on how a teacher/researcher uses her/his educational values as the explanatory principles in a living educational theory which explicates her/his professional practice. This is not meant to be a criticism of living educational theory, but instead an admission of my own guilt, and perhaps a call to action for researchers (including me) to be more circular or holistic in their use of living educational theory.

An epilogue is meant to be a commentary on, or conclusion to, a book or a play. It ties everything together. It brings a finality to the work. So, to put a bow on this context statement, I shall conclude by underlining the personal and professional growth which has occurred as a result of pursuing this Doctor of Professional Studies degree. Indeed, writing this context statement allowed me to crystallise my community of practice and my professional identity, which, although seemingly trivial, was revelatory. Perhaps more importantly, it afforded me the (once in a lifetime?) opportunity to engage in my profession at a depth and breadth which would be inconceivable under normal circumstances. I hope that other educators can carve out time to engage in their professions in a similar way. I guarantee that it will be both personally cathartic and professionally confirming.

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Appendix 1. An Autobiography (of Sorts)

This autobiography includes both descriptions of specific events in my life which have been instrumental in my development, and my reflections on these events. The rhetoric is informal and conversational in tone, and reflections are isolated from the main text with ***emboldened italics***.

Engineering? Of Course!

Like many children of the pre-video game era, I was enamoured with model-building. Indeed, I can recall many joy-filled hours painting, assembling, and finishing model cars, ships, and planes. Erector sets and Lego were also favourites, and I tried building a wooden schooner from a blueprint once, but plastic models were my preferred pastime. I can still picture Hambly's Hobby & Crafts in my mind's eye, sandwiched between Town Jewellers and CC Pant Shop on the main street of my hometown, its aisles brimming with Revell, Airfix, and Tamiya kits. By the age of ten or eleven, however, I had gravitated to model cars; my father was a 'gear-head', plus I had acquired a box of *Car and Driver* and *Road & Track* magazines at a garage sale for the princely sum of two CDN, each issue of which I read cover-to-cover. And 1:8 became my scale of choice— the bigger the better, was my opinion.

I often think of myself a 'details man', which I attribute to model-building. How many other people have gruelling internal dialogues about the controversy over 'that' and 'which' as conjunctions, for example? And I know that I drive my children mad when I correct their use of 'jealousy' versus 'envy'. This attention to details is, quite possibly, the key to my accomplishments in both mathematics and music, my facility with foreign languages, and my success in curriculum design.

I also believe that my love of model-building when I was a boy triggered my life-long DIY spirit. Indeed, to this day I continue to get my hands dirty on a regular basis. My current house is the second 'down-to-the-frame' renovation which I have completed. And I completed everything myself, from plumbing repairs, to a whole-house re-wiring, to all the trim-work.

Model-building, along with erector sets and Lego, might also be responsible for my interest in technology and innovation. I recall several short-lived— but important

nevertheless— forays into other hobbies along the way, including remote-controlled cars, electronics, and HO-scale trains. More recently, I taught myself the art and craft of stained glass, in order to rebuild the dining room windows in the first house renovation.

It is also remarkable that the skills of model-building can also be extended to other domains. That is to say, all that painting, assembling, and finishing model cars, ships, and planes established a kind of foundational DIY muscle which I have exercised throughout my life across different contexts and technologies. I found the same thing in sport: after mastering ice hockey, for example, the strategies, positional play, and 'field' awareness in lacrosse were almost a given.

It was no surprise, therefore, that in 1980, shortly after my thirteenth birthday, I purchased my first real car: a 1962 sky-blue Volkswagen Beetle. My grandmother had given me five hundred CDN, as recompense after she chaperoned my older sister to Europe for a two-week tour. I mastered the Beetle's manual transmission quickly, and then subjected the car to much abuse in our family's 'back forty'. Mr. Tiffin, the farmer next door, caught me tearing up his alfalfa field which I had mistaken for fallow, and I spent three successive Saturdays collecting stones to make amends.

One day while racing the Beetle on the narrow cross-country ski trail through our pine forest, a protruding stump sheared off its muffler, the engine suddenly shifting from the characteristic Beetle puttering to a demonic growl. I decided then and there to disassemble the Beetle— down to its last nut and bolt— the primary aim of which was to see its inner workings. The auto-mechanics textbook which I had found in that box of magazines had given me the theoretical basics, but I soon learned that there was no substitute for grease under the fingernails. Truly everything which I know about cars today, I learned from that Beetle.

I remain a classic Volkswagen fan. Indeed, I have had my monthly subscription to 'Dune Buggies and Hot VWs' magazine for years. There is a small shrine in my office which is dedicated to Volkswagen: belt buckles, wheel covers, and even a set of official master mechanic manuals from 1966. And my heart always jumps at the site of an original Beetle vrooming toward me.

That 1962 Volkswagen Beetle, however, is more than just my childhood romance. It

introduced me to complex machinery, and heightened my awareness of the need to understand not only the individual pieces and parts, but also the manner in which they work together as a whole. More than model-building, it also taught me the value of experience—that theory is good (and necessary), but that experiential learning, especially in practice-oriented activities such as auto mechanics, is paramount.

At the age of seventeen, however, I was fortunate to 'move up the food chain' when I inherited a 1962 Austin-Healey 3000 from my Uncle Dave. Mmm, I can see it now: bright red with black leather interior, spoked wheels, and that three-litre, in-line, six-cylinder engine. Uncle Dave had received it in a trade I think (He was a bit of a wheeler-dealer.), but after an accident in 1969 which crushed the right front wing, he put it in his garage, with the intention of getting around to it one day. But there it sat until 1983. For the next three years, my singular focus outside school was that Healey. I sometimes joke that the neighbours only knew me by my feet which stuck out from underneath the car. And girls? Nah, I had something more interesting.

As for school, my energy during my secondary school years was spent on music, sport, and academics (principally mathematics and science). When the time came to begin thinking about university, those three activities dominated my decision calculus. "What can I do with a bachelor's degree in music?" I asked myself. The likelihood of making it to the professional ranks was slim. Besides, who had ever heard of a professional tuba player? The only other conceivable option seemed to be an elementary or secondary school music teacher, and that just did not seem 'successful' enough (Yes, I had an ego!). A bachelor of physical education pointed to a similar teaching path, or worse yet, to the doors of a YMCA or a recreation/leisure centre.

Engineering was for me. After all, I understood technology. I loved building things. And I excelled in mathematics and science. Additionally, it was iterated incessantly by my father, "Get your engineering ticket, rookie. You'll be set for life. And you can always do music and sport on the side." Who can argue with the utilitarian logic of a father?

I know now that I ought to have argued with him. Indeed, those four years of engineering certainly taught me many things… not so much engineering in the long-term, I suppose, because I cannot remember much of anything when it comes to electric circuits,

solid state electronics, or digital signal processing. But my engineering degree taught me (or maybe reinforced) my engineering mentality. Indeed, it demanded discipline, time management skills, and a very serious work ethic, which I might not have have 'received' from another undergraduate degree. Maybe I ought not to complain about those four years of engineering.

If I had been more self aware at the time, however— more reflective, more astute— I think that I might have chosen a different undergraduate degree. And it probably would have been a subject with less exactitude… something with a more philosophical bent, which recognises the irrationality of humans, and possibly something which appreciates cultural differences among groups of people.

Isn't It Ironic?

Year 1 of my bachelor of engineering programme, in all honesty, was an academic disaster. It was quite possibly the most important year of life in terms of personal growth— nights in a crammed dormitory room speaking about religion, sex, and every other possible topic, with kids from all over the world. But failure of my first university examination (and my first examination ever, in fact) foreshadowed less than stellar results at the year-end.

I can remember walking with my mother to the mailbox each day early in the summer, worrying about what I would do if I failed out of the programme. "Mom," I said, "I don't even know what else I could do." Six-o-and-go was my mantra, referring to the sixty per cent average cut-off which, the Dean of Engineering had warned us, would eliminate half of all engineering students after year 1.

Fortunately (perhaps unfortunately, in retrospect), my average calculated out to sixty-three percent. I breathed easily for the remainder of the summer, convinced that, in year 2, I would begin to enjoy engineering. Year 2 came and went, however, and except for the creative and technical writing modules which I took as electives, I was still unhappy with the degree subjects. Do not misunderstand me. University was great— I was sharing a townhouse with three other hometown guys, high-jumping for the varsity athletics team, and dating a girl who had been a model for a couple of years. But something about engineering was not clicking.

In year 3, my electrical engineering cohort dwindled to about forty students, half of

whom were Chinese. I took pride in being the only 'white guy' who knew all their names, and that I actually talked to them. As a cohort of electrical engineers, we rarely moved classrooms; the professors mostly came to us. We grew very close and I started to enjoy university… maybe.

I have always thought of myself as being particularly culturally-sensitive. As I write this paragraph, I am in Egypt which counts as the eighty-fifth country which I have visited. But what prompted me to be the only white guy to know all the Chinese students' names? My small town in Canada was populated by mostly European descendants. There were a few South Asian families. There were three Chinese restaurants which were owned and operated by the three Chinese families in town. There was one Jewish family, although I had no clue about Judaism.

Interestingly, this reflection has triggered numerous memories, many of which had receded to the back of my mind. I can see the face of Manjeet Kaur, the Indian boy who lived a few blocks away, who had a terrible bicycle accident in front of our house when his back wheel slid out from him because of the sandy shoulder. He was in excruciating pain, but I sensed his uneasiness after entering our house so that my mother could tend to his injuries. Incidentally, I just Googled his sister Pardip who was with me for several years, with the thought that I ought to reach out to her to apologise if I had ever offended her (forty years ago). I also think about the cool boys in my elementary school whom I so desperately wanted to emulate, but who caused me great personal shame when I laughed at their racist jokes.

Ironically, despite a great start to year 3, I began thinking about studying at another university in another country. I spent hours poring over volumes of the *Association of Commonwealth Universities Guide* and *World Universities Yearbook* (pre-internet). Late in the autumn semester, I decided to explore the possibility of spending my year 4 at McGill University in Montréal. Indeed, I thought that a year in French-Speaking Canada would be a wonderful experience.

Everything was in order for the exchange, but at the last minute I balked at the opportunity. The forty-odd electrical cohort which had begun year 3 had dwindled further to a twenty-five— strong electronics group. We became even tighter socially, due in part to the ice hockey team which we assembled for the two-nights-per-week recreational league. How could I

leave when year 4 promised to be so good?

Well, it was and it was not. Digital communications tweaked my interest, but overall, the subjects continued to be unexciting. Okay, they were interesting. I appreciated them for the science, and for the beauty of the mathematics. But I was not jazzed about anything in particular. From a social perspective, however, year 4 was a blast. Our small group grew even closer— we ate together, studied together, and even vacationed together. I developed the strongest friendships which I had ever experienced.

A frightening thing, however, was looming in the future: graduation. But even more ominous for me was post-graduation. Most of my classmates spent countless hours writing job applications at the career centre, preparing for interviews, and comparing the benefits packages of Ontario Hydro with ABB or of Northern Telecom with IBM. I had no desire to find a job. Despite having spent four years studying engineering, the last thing which I wanted to do was be an engineer. In the words of Alanis Morisette, "Isn't it ironic?".

I can also detect another struggle which I was facing at the time, and which surfaces regularly, especially in the world of management education. It is the struggle between instrumentalism and edification. Indeed, what is the purpose of education? Up to that moment in time, I had looked on education— from kindergarten through to year 4 of my bachelor of engineering programme— as the pathway to a job. Learning was learning toward something tangible. But I was beginning to understand that knowledge for its own sake might be a valid alternative.

On a Whim

I started to explore year-off options with non-governmental agencies such as *Canada World Youth*. I actually reached the final round interview for a Rotary exchange programme, but as fate would have it, I was pitted against a Catholic priest who wanted to spend the year in Ethopia, helping starving children and erecting school-houses. I suppose that not responding correctly to the question about the current Prime Minister of Canada could also have had some bearing on the outcome.

A very odd thing then crossed my mind: "Why not do a master's degree in engineering?". I think that my rationale was that if I could focus on a single area of electronics, then I might

finally enjoy engineering. Plus, it was a seemingly easy way to defer the inevitable. I also have a very faint recollection of considering being a professor of electronics.

I pored over the annual graduate school brochures of the various Canadian universities which had master's-level electronics programmes, and settled on two: the University of Waterloo, which had a special emphasis on the electronics of musical instruments, and the University of Calgary, which was a centre of excellence in digital signal processing. My grades had improved to an overall average of about seventy-five percent, but I know now that I was not a particularly good candidate.

In parallel, I started speaking with the head of the electronics group at my university to see if there might be the option of staying on for a master's programme. He was very supportive and encouraged me to look for a project and funding. I started first with the Faculty of Music, hoping that someone might be working with synthesisers or with 'new' digital recording equipment. I also checked the department of Communications Sciences and Disorders in the Faculty of Health Sciences, thinking that digital signal processing would have applications in hearing aids and speech generators.

In the end, I was able to convince an electronics professor to take me on as a research assistant. He was the professor whom I liked the least, but he was willing to pay my monthly stipend through a combination of teaching assistantship and research assistantship. The teaching assistantship required me to run the laboratory for the year 2 solid state electronics module. I was excited about the laboratory. My research assistantship required me to build a frequency engine which would blast a powerful 1 Hz signal into the sky, and then, after receiving the signal as it bounced off different atmospheric layers, convert the signal into digital form so that it could be monitored real-time on a computer. Interesting? Well, interesting from a scientific perspective. Again, I appreciated the idea of engineering, so to speak. But, as before, I was not fired up about the subject.

Looking back, this logic to continue on to a master of engineering degree was madness. Again, I lacked the ability to be introspective. Consequently, my decisions were more of a default than a proper evaluation of a well-defined consideration set. Incidentally, this notion has also become part of my parole when teaching marketing strategy, especially to younger

students who have little experience with strategic management: "Strategy defines what a company is, but it also defines what it is not.".

Meanwhile, I had also applied to a few schools of business for a Master of Business (MBA) degree. I knew nothing about it, but had taken the General Management Aptitude Test on a whim, following the advice of one of my housemates who had started an MBA programme at another university, following his three-year degree in chemistry. He loved the programme, and spoke incessantly of the value of combining technical and commercial skills. On the GMAT test there was a section in which one could apply to three universities. I remember, very deliberately, selecting three universities which were furthest from my hometown, and which were located in cities which I thought might offer new cultural experiences.

It is interesting that I selected these three universities, mostly based on city. Indeed, I did not consider rankings, admissions requirements, or curricular themes. I was driven by the notion of experiencing something new from a cultural perspective. I knew that I wanted to grow as a person, and I reckoned that moving far away from the comfort of my home province would provide that potential.

Graduation came and went without much fanfare. My parents were extremely happy for my accomplishment, and, with my iron ring now encircling my pinky finger, I felt a strange alliance to the engineering profession. The January start for my master of engineering programme was all set. I secured a summer position at the ole' factory, but with a position in engineering rather than grass-cutting and hedge-trimming. And a three-month European back-packing adventure with one of my engineering-mates was in the works for the autumn.

The Best Laid Schemes o' Mice an' Men

Then it happened. About mid-August, only three weeks before the school year was about to begin, I received an acceptance letter to the MBA programme at the University of New Brunswick, one of the three universities which I had selected on the General Management Aptitude Test. I thought that maybe the University was late in conducting its business. Looking back, I realise that it needed students to fill its relatively new programme, and that I was undoubtedly a last minute add-in, because I was not a strong enough candidate to warrant early or even regularly-scheduled acceptance.

There was no hesitation. I was like a Google search: 1 result (0.23 seconds). I knew in my heart that I did not want to do the master of engineering programme. I was not certain if I wanted an MBA degree, but I knew that I was not returning to engineering. I telephoned the admissions department at the University of New Brunswick, and secured a one-year deferral. I then apologised profusely to the electronics professor whom I did not like, but who had offered me the teaching and research assistantships. A huge weight had been lifted off my shoulders.

This seemingly random event in my life calls into question once again the purpose of higher education, and my complete lack of critical thinking. I was rudderless, relying on 'fate', and hopeful that I would land somewhere good. I wonder how many other students find themselves in similar situations. And what can be done to guide them so that the outcomes are more positive?

I spent the autumn traipsing around Europe (another autobiography of sorts altogether) then returned to my hometown. My father had retired from the factory, and I was not especially eager to return; eight summers were more than enough. There were other factories in my hometown, but I hesitated applying, knowing that I was off to business school in less than a year.

My mother was still a regular substitute teacher, and she suggested that I apply. By the end of the first semester, I was being called three days per week. I even got a two-week position at my old secondary school, filling in for a mathematics teacher who was chaperoning students on a band trip. My competitive advantage was my engineering degree. There were few, if any, substitute teachers in my hometown who could step into a classroom, look at the lesson plan, and start teaching higher grade mathematics or physics. Headmasters loved me— a sick teacher did not equate to a day of lost teaching.

The teaching was thrilling. I was disappointed each morning when the telephone did not ring. I started coaching the track and field team at one secondary school so that I could spend more time with students. I got asked to do special things, like chaperoning school dances and functions. I started playing ice hockey in the Friday afternoon teacher's pick-up game. I honestly could not get enough of it.

What was it that drew me to teaching? I had not set out to become a substitute teacher.

On the contrary, it was intended to be a placeholder for the remainder of the year until I departed for business school. Two things in particular stand out. First were the students. I can say very genuinely that I found great pleasure in 'serving' students. Truthfully, my ego had not diminished much, if at all, and I doubtless aimed to build my brand as a 'cool' teacher. But witnessing a student in the 'I got it' moment was indescribably gratifying.

Second was the teaching, by which I mean the challenge of unpacking a topic into bite-sized morsels which would help a student learn. It reminds me of a former colleague who was studying algebra so that she could apply to the local community college. She was having difficulty with simplification. "Why is it necessary to change it?" she moaned. "16/64 is already the correct answer." My split-second answer was that simplification is, err, simply the way in which it is done in mathematics. But then I realised that she needed an explanation, some tangible reason, which caused me to develop a simple analogy about directing someone who is lost. She got it.

The money in substitute teaching was not great, however, and consequently I also secured a job as a bagger at a local grocery store. My ego took a small hit. There I was, a graduate of a top engineering programme, bagging groceries in small-town Canada. I did about twenty hours per week, and enjoyed seeing friends and acquaintances… perhaps too much. I was a good bagger, planning out with engineering precision which products would fit best together in which bag. But I spent far too much time socialising with the customers. Indeed, I was reprimanded on more than one occasion by the manager.

I remember loving that bagging job, primarily because of the customers. I would chitty-chat with them as I placed their fruits and vegetables carefully in bags. I would swoop down like an eagle if I perceived that customers were in need of help, not just pointing them to an aisle but walking them over personally. There was also some joy in rounding up grocery carts which were strewn throughout the parking lot. I drew out a mental map of the most efficient route to collect the carts, and challenged myself to calculate the maximum number of carts which I could manage for each different type of snow in the parking lot.

When the school year ended, my substitute teaching gigs also (sadly) ended. Consequently, I found myself a day-job cleaning service cars at the local Volkswagen

dealership. Oh yes, heaven is a place on earth. I could ferret myself away in the back bay, turn on the music, and just 'philosophise' all day while vacuuming up the detritus of someone's life.

Anne Murray, Lord Beaverbrook, and McCain… and Erwin

August arrived, and I packed up the car which my sister had lent me for the year while she was teaching in Arctic Canada. Off I went for a seventeen-hour drive to New Brunswick, home of Canadian singing legend Anne Murray, newspaper magnate Max Aitken (aka Lord Beaverbrook), and McCain Foods, the world's largest manufacturer of frozen French fries. Incidentally, New Brunswick is about the size of Ireland, but has a population of only 750 000.

I remember being fascinated by the cultural differences between New Brunswick and Ontario. "How different could it really be?" I asked myself, thinking that everything would be similar, because they were both Canadian provinces. Canada is Canada, is it not? Well, seventeen hours is not a long time by Canadian standards, but the distance which can be covered in seventeen hours results in some stark cultural differences. For Europeans, I suppose, this is a truism. Consider the linguistic differences from village to village in England, for example, or the dietary differences between neighbours Croatia and Serbia.

My first month at the University of New Brunswick that autumn was remarkable. I had secured myself a position as resident advisor in a small off-campus dormitory for international and graduate students, which suited me perfectly. Long chats with my dormitory-mates opened the world to me, and I dreamed of taxiing on the Thai klongs, strolling the streets of Saint Petersburg, and feasting on falafel in Haifa. I also did a walk-on tryout for the varsity basketball team and secured myself a position— a bench position, but a position nevertheless.

Scholastically, university, for the first time, was more than interesting. I actually enjoyed the subjects. Accounting and finance were a useful application of mathematics, not just some theoretical exercise. Human resources and organisational behaviour probed the inner workings of people and their companies, notions which I had never studied due to the rigid nature of the engineering curriculum. But it was marketing which really set me going. I cannot put my finger on it. Perhaps it was the teacher. Or it could have been the irrationality of humans, which is the core of consumer research. Maybe I just had a knack for it. But it was me.

Despite my enjoyment with the MBA curriculum, a niggling in the back of my mind

caused to me submit an application for teacher's college (The months of substitute teaching had planted a seed.). In order to teach at a government school in Canada, a bachelor of education degree is required, which most students complete in a one year, post-graduate format. Teaching is a very sought-after profession in Canada, however, and teacher's college is consequently very competitive… almost as a competitive as medical school. But even with my very high grades which I was earning in my MBA programme, I was not accepted.

In year 1 of the MBA programme, I was also offered a teaching assistantship. The Faculty of Administration had a pot of money from the Indonesian government which was sponsoring several of its employees to get an MBA degree. The money was intended primarily to support these students through tutorials. They were far from fluent in English, so after the first round in class, they were given a second opportunity in a smaller tutorial setting. I was assigned three students who were classmates in my cohort: Erwin, Tri, and one other student whose name I cannot remember. I shall call him Mr X. It was a joy to work with them. And they told me later that without the tutorials with me, they would never have passed the MBA programme.

Teaching Erwin, Tri, and Mr X required me to simplify everything, a theme which would recur throughout my early teaching career. Indeed, I believe that one factor which has contributed to my success as a professor, is that the students in my first years of teaching were non-native English language learners. It reminds me of an old teaching trope which suggests that you do not understand something if you cannot explain it to a six-year old.

I remember how culturally insensitive the university was to its growing international population. All the documents which Erwin received (That was his name: Erwin.) were always addressed to Erwin Erwin. Even his diploma had Erwin Erwin as the holder of a Master of Business Administration degree. The university information system did not allow for people with only one name.

I also realise that it is difficult, if not impossible, to identify the one single thing which was responsible for my enjoyment of year 1 of the MBA programme. On the contrary, it seems that it was the Gestalt of the year: my international dormitory-mates, the new subjects of the MBA curriculum, the basketball team, the tutorials for my Indonesian classmates, and so on, all wrapped up in 'the perfect storm'.

What I Did On My Summer Vacation

After the successful completion of year 1, I secured a spot with fourteen classmates in the new international internship programme. It was 1992, and our Polish-*émigré* Assistant Dean organised a twelve-week combination of study and consulting in Poland. For the first two weeks, we studied economic re-organisation and re-structuring at the Warsaw University of Economics, and enjoyed cultural activities in the evenings and on the weekends. For the remainder of the internship, we scattered to various cities through Poland to help state-owned Polish companies which were floundering in the new market-driven economy. It was the most transformational twelve weeks of my life.

It is also difficult to pinpoint the exact thing or combination of things during the international internship programme which had me transfixed… but transfixed I was. Poland was not beautiful at the time, polluted as it was from years of industrial activity and environmental neglect. The economy was in a horrible state, with monthly inflation often reaching four thousand percent or more. And the living conditions were not particularly easy; food was relatively plentiful, but everyday products such as toilet paper and clothing were scarce. Restaurants were non-existent. But I knew then and there that an international life was for me.

For the consulting gig, I was paired with another engineer who hailed from Newfoundland, Canada. We were stationed in a medium-sized city in north-central Poland. Our company manufactured truck and tractor tyres, and was part of the state rubber products behemoth which, during the social period of Polish history, provided the country with not only tyres but also hot water bottles, kitchen spatulas, and even condoms. Garry had worked for two years in a Michelin manufactory in Nova Scotia, Canada, so he was well-versed in tyres. My eight years of evenings, weekends, and summers at the foundry in my hometown likewise made me a good match for the company.

Our posting was in the marketing department. Two days into the job, however, revealed that it was not much of a marketing department at all. Remember that this was 1992, less than two years after the democratisation of Poland. The managing director of the company knew nothing about marketing, because the manufactory had operated for many decades under a

centrally-planned economic system. But he did know that foreign companies had marketing departments. So two weeks before our arrival, he created a marketing department.

There were five employees in the marketing department. Jerze, the chief of the marketing department, was an engineer by training, but had most recently spent some time in the commercial (sales) division. Another man, whose name I cannot remember, spent the summer essentially trying to figure out how Microsoft EXCEL worked. Two Polish interns just sat around and read the newspaper all day. The only employee who did anything remotely marketing-like was Alicja, a recent graduate of the Faculty of Foreign Languages of Toruń University. Her job was to purchase company knick-knacks, such as pens, cigarette lighters, and little sewing kits, all of which were emblazoned with the company logo and address, for the purposes of trade fairs and other sales events. Alicja was our host, and she spoke English beautifully.

This lack of marketing meant that our summer was spent teaching marketing to Jerze and Alicja, with Alicja translating for Jerze. Garry realised early on that he was not a teacher. He understood the material, but just could not teach. He could not find examples in the Polish streets around him, or take the new (and I do mean new) concepts of marketing and make them understandable to these 'students'. I, on the other hand, excelled. Garry looked at me one day when we were laying on our single beds in the tiny room of the Hotel Robotnichje (Worker's Hostel) and said, "You ought to be a teacher. You are really good at it."

Teaching Jerze and Alicja was a similar challenge to teaching Erwin, Tri, and Mr X, but with the added obstacle of cultural-relativity. Indeed, the examples from my life in Canada which popped immediately to my mind, and which were absolutely second nature to me, were very foreign concepts to Jerze and Alicja, who had grown up with different economic and political assumptions. It forced to me find alternative methods to buttress their learning, which were grounded in their own cultural context. Although, to be fair, at the end of the summer it was unclear to me if Jerze or Alicja understood anything. At times, they would say things to me which suggested that their marketing knowledge was crystal clear, then turn around and say something else which was one hundred percent incorrect. It was the first time in my life that I actually thought about assessment as an educator, not as a

student who was worried about an impending examination.

I also learned that I could not only survive in a foreign country, but that I thrived on it. Alicja took us everywhere. The first weekend we drove to the lake district where the company had a lakeside resort for its employees, complete with fishing and boating equipment, sports facilities, and hiking and leisure trails. We took one of the small sailboats out for the weekend. There we were, under the stars on some tiny island in the middle of Lake Mikołaiki around a fire cooking Polish kiełbasas, drinking vodka, and singing some camp songs, they in Polish and we in English. This was just the first weekend. I knew then that I needed international in my life.

Further Afield

I returned to year 2 of the MBA programme, now fully vested in the idea of becoming a professor. I began searching for doctoral programmes in the United States. New Brunswick was a seventeen-hour drive from my home town, but I realised that I was ready to explore further afield: the United States. Plus, American business schools had a reputation as being the gold-standard for doctoral programmes. My General Management Aptitude Test score was not exceptional, and, of course, my undergraduate average was mediocre at best. Despite my high grades in the MBA programme, therefore, I doubted my ability to be accepted at a top-tier university. Consequently, I looked to medium-sized state universities with decent marketing departments, which were located in cities which seemed like interesting places for four or five years. The resulting list included the University of Nebraska, the University of Memphis, the University of Oregon, Louisiana Technical University, and the University of Arkansas.

Meanwhile, the University of New Brunswick had a visit from the Dean of École Supérieure de Commerce de Rennes in France, who was eager to set up an exchange programme with the Faculty of Administration. Garry and I, as two leaders in the MBA student council, offered to give the visitor a tour of the campus. After showing him the various buildings and historic sites, he asked us what we planned to do after graduation. Garry mumbled something about combining his engineering and management skills. I told him of my applications to doctoral programmes. His eyes lit up.

His school was looking for a young marketing professor who would consider being the

guinea pig for a new doctoral programme. He said that he could offer a salary of about $25 000 per year for teaching a half-load of courses, and support research toward a doctoral dissertation for the remaining time. The school was located two hours from Paris. About one month, and several faxes and letters later, I had accepted the position, and was auditing a French-language module at the university.

I am attracted to new things, not so much because they are 'shiny' when new, but because they offer opportunities for experimentation. Indeed, it was more than a little gamble to accept a position at a business school which had been in operation for only two years, about which I knew very little (pre-internet), and in a foreign country whose education system was dramatically different from the education system in North America. But the four years which I spent in Rennes were foundational to my professional development, especially in terms of 'industry' knowledge. In those four years, the school launched several new programmes, undertook an external validation by the Open University, and applied for (and received) national and international quality accreditations.

Uganda, Cool, Where Is That?

What to do for the summer before moving to France was the next big decision. I approached my Polish professor who had organised the previous summer's international internship programme, asking about other similar opportunities. Coincidentally, he had just been speaking with a colleague at York University in Toronto, Canada about a new project in Kyrghyzstan which was to be funded by the Ontario provincial government. The money was to support the development of a new MBA programme in the capital, Bishkek. It would be the first of its type in Kyrghyzstan, and would follow a North American approach to business education. I offered my services without hesitation, signing then and there on the dotted line. Immediately following the meet, I ran to the university library to consult the *Encyclopædia Brittanica*, because I had never heard of Kyrghyzstan.

Here was the deal: I would teach the introduction to marketing module in the new MBA programme. The Ontario provincial government would pay all my travel expenses, and the new business school in Bishkek would support me on the ground. My excitement escalated as my departure date came grew closer, and I searched for any information which I could find on this

exotic land.

I think about the sheer madness of this. The Soviet Union had fully dissolved by December of 1991, less than two years before, and most of Central Asia was engaged in some level of civil war or ethnic cleansing. The attraction was clear: spend the summer teaching in a very different cultural context. Plus, I knew that I wanted to become an expert in international marketing, and it seemed to me that it would be a sham if I had not experienced international marketing first-hand— that is to say, if all my war stories were taken from books.

I decided that I would spend a week in France before the two month Kyrghyz adventure. I took my then girlfriend Julie along with me, and we visited Rennes in order to learn more about the school at which I would begin work in early September. Unfortunately, my VISA for Kyghyzstan did not arrive in time for my scheduled departure for Alma Ata, the capital of neighbouring Kazahkstan— the only country in Central Asia which had an international airport in operation. So Julie's friend with whom we were staying in Paris, hooked me up with a British construction company in which she was serving as a general office assistant and translator. I did the next three night shifts staining the fort and painting fake rocks in Frontier Land at EuroDisney. It was a great job, paying more than £10 per hour, but somehow seeing behind the façades at Disney shattered all the fairytale conceptions which I had about it being 'a small world after all'.

The nine weeks in Kyrghyzstan were among the best of my life, not least because I had a whirlwind romance with the daughter of the Kyrghyz prime minister. Living and breathing the economic and political transition of Kyrghyzstan was even more rewarding than my weeks in Poland. It was like starring in a movie, the plot of which was unfolding before my eyes. The teaching was also rewarding, although difficult. It was my first experience doing sequential translation, which is particularly tasking mentally. It also forces you to be economical with your rhetoric.

I learned very quickly in Bishkek that to teach effectively requires grounding lessons in local culture. Things like brand choice which I took for granted back home, and which were scarcely discussed during my MBA programme, required lengthy explanations. In Kyrghyzstan at that time, for example, there were only two types of bread: Russian-style loaf

bread or хлев and Kyrghyz flatbread or нон. In fact, in essence there was only one type of bread, хлев, because нон is not considered bread, just нон. I realised very quickly that one of my first lessons fell as flat as нон, because I was asking my students to consider the brand choice which they faced when shopping for bread in the supermarket. "You know? When you are in the bread aisle at the supermarket, and you have all those different types and brands of bread," I said with aplomb. I was greeted with blank stares all around.

Teaching in Kyrgyzstan also gave me a valuable lesson with respect to technology. In North America at the time, the word technology conjured up high technology: electronics, digital displays, and advanced materials, for example. Although the Soviet Union was very advanced in certain technologies, especially technologies which supported competition with the West (in military and sport, for example), everyday products lagged by decades: dodgy rotary dial telephones which did not always connect properly, refrigerators which resembled old-fashioned ice boxes, and televisions which had long ago been relegated to the basement.

When it comes to technology in the classroom, however, I realised that (high) technology is not always the answer. On the contrary, I had to teach in that classroom in Bishkek which was 'technologically-challenged'. I am not certain that my teaching would have been better, had smart boards, clickers, and other pedagogical devices been available to me. Just as right-sizing became the terminology of choice during the management restructuring fad of the 1990s, perhaps 'right technology' instead of 'high technology' is the appropriate terminology in higher education. Tell that to my former Dean, who invested heavily in the latest and greatest classroom technology, most of which remains unused.

I returned to Canada for the remainder of the summer, spending my time mostly working on the 1967 Porsche 911 which I had purchased two years prior. With Kyrghyzstan still vivid in my memory, I then set off to France to begin the next chapter of my career. I arrived in Rennes during the last week of August, one week before the start of the academic year and the arrival of three hundred new undergraduate students, plus another one hundred or so international exchange students.

O Captain! my Captain

My teaching began strongly, and students appreciated my youthfulness and energy, which

I believe enabled me to connect quickly. Admittedly, I was very ego-centric, my aim being to earn me the reputation as the 'coolest teacher in school'. Doubtless I had been influenced by Robin Williams in the film *Dead Poets Society*. My pedagogy was lecture heavy— very me-focused— and I spent hours scripting my speeches, which, self-centredly, would underscore my knowledge, and highlight my lecturing prowess.

This ego-centricity, however, prevented me from seeing the needs of students. Indeed, after a few months of supervising the master's project of one Finnish student, she confronted me, suggesting that I had misunderstood her entire research plan. She went on to inform me that she no longer wanted me as a supervisor. I was insulted, attributing the misunderstanding to her instead of me. A week later she returned to Finland, feeling ill. A few days later we received word that she had died of a rare blood disease.

As illogical as it seems, I linked the two concomitantly. Indeed, I blamed myself for her death— that her illness was somehow the result of my negligence. I vowed that students would become the centre of my attention. It was this event, in that very first semester in Rennes, which also set me on a new path of teaching. Or shall I say learning design? Indeed, I began to develop experiential, problem-based activities to replace the scripted speeches. I embraced the philosophies of constructivism and, subsequently, action-based learning (although I am not sure that this terminology had entered the pedagogical vernacular at that time).

With respect to my doctoral research, my broad interests at that time centred, not surprisingly, on international marketing, with an inclination towards issues of a cross-cultural nature. These interests led to the development of my initial research proposal which was situated at the confluence of cross-cultural perceptions of beauty and international advertising. The idea for this research proposal stemmed from the contemporary practice among large, often multi-national, cosmetics and other fashion-oriented companies, of employing one sole model or spokesperson for product promotion, in all international markets.

The subtext of this research proposal was one of criticism. Indeed, my time in both Poland and Kyrghyzstan had pushed me toward the localisation end of the globalisation versus localisation continuum. I was sceptical, therefore, of the notion of cultural universals,

and accordingly I questioned the wisdom of using a sole model or spokesperson in all international markets.

Criticism has continued to be a constant theme in my career. By criticism here I do not mean disapproval, but instead the notion of appraisal which leads to a critique. I am reminded of a recent discussion which I had with my wife, as we walked the dog through our neighbourhood. The discussion began with her criticism of the Ann Arbor Art Fair (one of the largest art fairs in the United States, but a sore spot for many locals who are frustrated by the traffic which it brings), claiming that most of the works on display were craft, not art. "But what is art?" I asked with a smile, mirroring the question which has plagued philosophers for ages, but hoping to delve deeper into the question. Shortly thereafter, the discussion also led to a similar question about the nature of sport. "Can pistol shooting be consider a sport?", I asked, noting that the American Olympic gold-medal winner was morbidly obese. "And is it a sport if involves music, if winning is based on judgement, or if creative interpretation is part of it?", I added.

In the autumn of 1994, while pursuing this research proposal, I discovered an interesting series of anthropological books which were published by Queen Elizabeth House, a research centre at the University of Oxford in England which is dedicated to gender, agriculture, economics, education, and other international development issues. I contacted the editor of the series who, at that time, was also the director of the centre, with a query about purchasing a few of the books of the series which related to the body and femininity. In my letter, I also outlined my research proposal, and summarised my career to date.

With the director's reply came an invitation to study at Queen Elizabeth House as a visiting fellow. The purpose of the fellowship was to develop my research proposal further, under the guidance of one of the faculty members. The director also believed that my business school and masculine perspectives— both of which were uncommon at Queen Elizabeth House — would enable me to make valuable contributions to its programmes.

I applied for a leave from my duties at École Supérieure de Commerce de Rennes and spent two terms of the 1995 calendar year at Queen Elizabeth House. I attended seminars and workshops, took part in lectures, and met with faculty members and other visiting scholars

regularly. The majority of my time, however, was spent in the many libraries of the University of Oxford, where I conducted two broad literature reviews for my research proposal: one literature review on beauty and another literature review on advertising research.

Those two terms at the University of Oxford left an indelible impression on me, especially with respect to the purpose of higher education. I remember writing a letter to my then girlfriend who was living in Canada, in which I described a reading group to which I had been invited. The theme of the reading group was about economic geography, a subject about which I knew nothing. Nobody else in the reading group knew anything about economic geography either. And that was astounding. The idea that people would gather to discuss academic journal articles about a topic which was outside their scholarly interests, awakened in me a new kind of thirst for knowledge, and not just in marketing.

It ought not to be surprising, therefore, that I often feel conflicted as a professor in a business school, whose Dean has been quoted, on more than one occasion, saying that employers, not students, are the true customers of higher education. Doubtless this reasoning has led to the outsized role which the School's Career Development Office plays in the daily lives of our students. I cannot help but think about Alice A., one of my favourite full-time MBA students from about five years ago, who came to my office, panic-stricken. "Professor Branch, I have problem," she sobbed. Worried that she was unable to pay her university fees, or that a relative had passed away tragically, I straightened up and waved her compassionately to my extra office chair. "I have five job offers and I cannot decide which to accept," she blurted. "Can you help?"

The results of my burgeoning literature review suggested to me that beauty, like other aesthetic appraisals, fell into the realm of axiology, the science of value judgements. That is to say, beauty was a question of value. People undoubtedly know this tacitly, and from the saying 'Beauty is in the eye of the beholder.'. The literature review on advertising research led me to the academic discipline of semiotics. The science of signs and symbols, semiotics is a common method for studying advertising and other visual cultural manifestations. When I returned to France, I continued with the two literature reviews, but I shifted the focus of the literature review on beauty to the more general topic of axiology. Similarly, I broadened the literature

review on semiotics to include other alternatives to positivism such as grounded theory, naturalistic inquiry, and hermeneutics.

There is nothing quite like an academic literature review to 'get to the bottom' of a concept. Indeed, it forces you to question all assumptions which you might have had about the word which is used colloquially to denote a phenomenon. It also forces you to unpack the various conceptual meanings which have emerged in the literature over time, and which in some cases have confused, rather than clarified, our understanding of the phenomenon. And it often forces you to go further than you first intended, back to the 'first principles' which undergird the phenomenon and your philosophical approach to understanding it.

Crossing the Channel

In the spring of 1996, however, some dramatic and worrisome changes were starting to occur at the school. Its strategy— originally very international in focus, with an international curriculum for French and foreign students, taught in English by mostly foreign professors— had been altered considerably by the new director, and by the local chamber of commerce which funded the school. École Supérieure de Commerce de Rennes was beginning to resemble all other traditional French *grande écoles*: 1. a proposed curriculum design was conspicuously Francophone in emphasis, 2. several foreign professors were resigning and being replaced with French professors, and 3. fewer foreign students were being recruited.

Admittedly, I was also having difficulties juggling both my professional and personal schedules in order to allow for the periods of time which I needed for conducting research. As a teacher, I had an open door policy for students— something which naturally hindered the dedicated research-time which is a prerequisite for concentrated work. Outside school, I was playing French National II ice hockey in the winter and French National I baseball in the summer, leading a small rock band, and carrying on a typical French social life.

Consequently, I began to search for full-time doctoral programmes at other business schools and universities in Europe. Initially, I was most interested in INSEAD in France, not only because it would have facilitated an easy relocation, but also because a marketing professor who was well known for his expertise in semiotics was based there. I soon discovered, however, that he had no openings for new doctoral students at that time.

I turned my attention to London Business School in England. Its programme was (and still is) essentially North American in design, with two to three years of courses followed by both comprehensive examinations and a dissertation. A move to London Business School, therefore, would have meant starting anew. As a result, I applied to and was accepted by several institutions in England, including the University of Oxford and the University of Cambridge. I narrowed my options to these two universities, but I accepted the offer from the University of Cambridge, because I had already spent time at the University of Oxford, and because I had established good rapport with a potential supervisor.

I started the doctoral programme at the Judge Institute of Management Studies in January 1997. It began with a series of seminars which included topics on both research methods and statistics. Concurrently, I worked on my 'first year report' which was based on my two literature reviews, and which was a requirement of the doctoral programme.

This entire process of crossing the channel to start the doctoral programme at the University of Cambridge highlights the differences in higher education from place to place. It is very evident to me now that different countries have taken very different approaches to higher education: to its structure, its length, its purpose, its assessment, and so on. I must admit that I am often frustrated by the non-sensical approach to doctoral education in the United States. I asked a colleague recently to define the PhD. "It's about five years," she responded, saying nothing of specific research objectives.

The two literature reviews which I had started at the University of Oxford had evolved during the remainder of my tenure in France. My first year report, therefore, focused specifically on the lack of understanding of the concept of consumer values in marketing, and additionally, recommended a new programme of research on the concept of consumer values which was based on interpretivism. Much of the summer and autumn of 1997 was spent structuring and authoring the first year report, which I submitted in December of the same year.

Initially, my first year report was not accepted, and I intermitted the Lent term (January to April) of 1998 in order to wait for the results of an appeal which I had made. The appeal addressed issues of conflict between the examiners and me, with respect to the assessment of the first year report, and sought to resolve some problems of supervision. The appeal was

successful, and at the end of April the first year report was accepted and the problems of supervision were resolved.

The drama which surrounded my first year report admittedly left in me a very bad impression about the University of Cambridge, and it took me several years for my selective memory to erase it. I was particularly annoyed at the subjectiveness of the assessment of my first report, especially considering that we had not been given any specific criteria. My first report was almost one hundred pages in length (Many of my classmates had written fewer than ten pages.), and there was definitely a dissertation 'in there'. The drama also demonstrated a lack of student centred-ness, an issue for which, I learned later, the Universities of Cambridge and Oxford, plus a few of the other old universities, had a reputation. The director of the doctoral programme even said to me off-handedly one day, "Maybe Cambridge is not for you, and you ought look somewhere else."

During my doctoral programme, I also took advantage of an opportunity to spend one academic quarter as a visiting fellow at the Kellogg Graduate School of Management at Northwestern University in Chicago, USA. I was invited and hosted by John F. Sherry, who was (and still is) regarded as one of the leading marketing scientists of the interpretivist tradition. While there, I participated in two doctoral level courses (not for credit)— a marketing theory course and a cultural linguistics course— and attended a weekly doctoral research seminar and several open seminars.

Additionally, because I was unable to secure any grants or scholarships from the University of Cambridge, from the government of Canada, or from private foundations, I was compelled to take on short-term teaching contracts at several business schools in Europe and Asia, intermittently throughout the duration of my doctoral programme. These contracts were anywhere from two days to three weeks, and provided me with the income to not only pay for university fees, but also to cover my living expenses. One gig, for example, had me flying to Brussels once every two weeks for an entire term.

I now know that these short-term gigs were more than just a pay cheque. Indeed, they were also key to building the John Branch brand (marketing professor from Canada, who has lived in France and England, and who has taught in business schools around the world),

which, significantly, was instrumental in landing me my first full-time, post-PhD position, and also my current position at the University of Michigan.

American Television Night

One evening in 1999, after I had returned from Chicago, I decided to stay in town for supper at my College (I shared a house with a Canadian couple and their son, in a village just outside Cambridge.). I had forgotten that it was formal hall night, for which students are required to wear academic regalia, so I popped 'round to the Mediterranean take-away next door and picked up a smelly chicken kebab. I entered the television room at the College only to discover a very attractive young (American) woman who was very much in control of the 'clicker'. It seems that it was American television night in England (Channel 4 broadcast *Frasier*, *Friends*, and *ER* back to back on Thursday evenings.), and she had been there since about 17:00 in order to secure the 'seat of power'. I asked her if she minded me sitting there, to which she replied in a snarky voice, "You're not from this College, are you?" "Yes, I am," I replied, assuringly. "No you're not. I know everyone in the College." "I don't live in College, so maybe you haven't seen me." That was the first encounter with my future wife, Christy.

Shortly thereafter, I invited Christy to join me for a two-week teaching gig at the University of Southern Denmark. It was not regarded particularly highly in Denmark, not to mention the global league tables of universities, but it 'paid the bills'. My students were mostly foreign students on an exchange programme, their home universities being of equal status to the University of Southern Denmark. After finishing my first day of lectures, I returned to the apartment which the University provided me, to find Christy at the kitchen table working on her dissertation. She looked up, and, apparently noticing some glow around me, uttered, "You really love what you do, don't you?"

I shall never forget that moment. I often joke that the happiest place on earth is the front of a classroom (not Disney, whose television advertisements so sweetly and convincingly entreat us to believe). Indeed, the joy which teaching brings to me is sometimes indescribable, but it is derived largely from the gratification of witnessing the a-ha moments among students (whoever they are), and, oddly, the satisfaction which I get from designing, developing, and delivering lessons which work as intended.

About a year later, Christy finished up her dissertation and we moved to Houston, USA, to Rice University which had offered her a research position at the Center for Technology in Teaching and Learning. Fortunately, her employment there allowed me to stay at home in order to focus on finishing my dissertation. I also had a faculty spouse card which gave me access to all the libraries and, possibly more importantly for my sanity, the gymnasium. Every Tuesday and Thursday for one and one half years I spent almost two hours at lunchtime playing pickup basketball with a bunch of graduate students, alumni, and Rice professors.

It was not the first time (nor would it be the last time) for me to realise it, but the one and one half years during which we lived in Houston reinforced my love for the academic lifestyle. There is something about the non-stop learning, the social interactions, the intellectual challenge. I cannot picture myself doing anything else.

Every so often during our one and one half years in Houston, I would also jet off for anywhere from three days to five weeks of contracted teaching. This kept my feet in the teaching arena, and provided some additional funds for living. It also rejuvenated me with respect to my dissertation; each time I returned from a gig, I felt more compelled to finish it. With each contracted teaching assignment also came the re-assurance that teaching was my calling. Feedback from my students, though often ego-stroking, pushed me further into auto-critical mode, and prompted me to develop additional student-centred activities.

As completion of my dissertation grew closer, I began searching for full-time teaching placements. I was not keen on research, which came across in my academic curriculum vitae, so most of the interest in me came from teaching-oriented business schools at what would be considered second and third tier universities. After more than a dozen conference interviews and several campus visits, I received relatively solid offers from four universities: the University of Alaska, Bishop's University, the University of Southern New Hampshire, and the University of Arkansas at Little Rock.

The University of Alaska job was fantastic. With its location, which is actually closer to Vladivostok than Vancouver, it had secured a reputation as the leading voice on all things far-eastern Russia. The business school at the University of Alaska was following suit, winning grants from the federal government to conduct small business training for entrepreneurs from

Kamchatka to Irkutsk. And the business school needed someone with the experience and energy to continue this. Apparently, professors had queued up the first time to go, but after that they were reluctant to return— for most people, Russia is not an easy place to live.

The positions at Bishop's University and the University of Southern New Hampshire were good, and the locations were fantastic. Lennoxville, the site of Bishop's University is only one hour from Montréal. And, as a Canadian, I have always thought of New England as a good cultural fit.

The University of Arkansas position was also intriguing. As the cultural, political, and economic centre of Arkansas, Little Rock was set to increase its international involvement. Consequently, the University was pushing hard to play a role in this internationalisation. And my position would have been the centre of this push. With a smaller teaching load and almost unlimited travel budget, the job would have been to increase the international footprint of the business school at the University of Arkansas through exchange programmes, links to the business community, international student recruitment, and so on. It was actually a dream job… just not in my dream place.

This entire recruitment process revealed a growth mindset which I had developed over the years. I had also become much more critical. Indeed, I evaluated the positions not only in terms of salary or teaching load, but also for their potential to offer new and enriching experiences. My definition of a professorship had expanded beyond straight-up teaching, to also include participation in a broader array of teaching-related activities, including programme design, institutional internationalisation, and administration.

Christy and I, however, convinced ourselves to go for it, cognitively-rationalising the benefits of Little Rock: the cost of living was low, the scenery was stunning, and there was an abundance of cheap 'renovation-worthy' housing. "The job is great and it will open other options," I told myself. Other arguments stretched even wider.

Before accepting the position, however, I decided to make a few last inquiries. My Harvard connection had dried up. The Yale friend was not responding. Around 09:00 on 23 March 2001, I e-mailed the Associate Dean for Faculty at the Olin School of Business at Washington Univeristy in Saint Louis, USA, asking if there might be a position open. It was a

'hail Mary' as they say in American football. I had been considered for a position the year prior, but in the end the professor whom I would have replaced did not resign. About an hour later, I received a reply:

> John Branch
>
> ---
>
> From: Kerry Back[back@olin.wustl.edu]
> Sent: Thursday, March 23, 2001 10:14
> To: John Branch
> Subject: Re: Vacancies
>
> John, We might just have something open for you this time. What are you looking for? Can you send your updated CV? Kerry

Less than one week later I had my contract from Washington University, and a letter was in the post to the folks in Little Rock, Arkansas. On 18 April 2001 we were married. On 24 April the moving van arrived to pack the contents of our apartment. And on 25 April we were on the road to Saint Louis!

Please, Sir, I Want Some More

Approximately one year into my new role at the Olin School of Business, I started to become a little antsy. I had distinguished myself as an award-winning teacher, and I knew that I was a valued colleague. But I was looking for a new challenge. After that first year, therefore, I relocated my office to the ground level in the Center for Experiential Learning, and assumed responsibility for managing and leading MBA-level international study-abroad courses.

The Olin School of Business had never had an international outlook. In the 1980s and 1990s, when other business schools were 'jumping on the international bandwagon' and developing their international networks, programmes, and reputations, the Olin School of Business remained very much a mid-western provincial school in mentality. Pressure from both its students and its other stakeholders forced the Dean to re-evaluate its strategy (or lack thereof) with respect to internationalisation. Hanging flags in the main hallway of Simon Hall, the home of the Olin School of Business, could no longer serve as the sole international dimension of the school.

My international experiences, which gave me expertise in cross-cultural management, knowledge of the educational systems of many countries around the world, and a network of

contacts in leading international business schools, made me a shoe-in for the administrative position in international study-abroad programmes. During my remaining four years at the Olin School of Business , I saw almost five hundred students participate in more than fifteen study-abroad courses.

I often take it for granted that people are international… maybe not as international as me, but international nevertheless. And so I am always surprised when people boast about a family trip to Paris, or their child's spring-break mission in Costa Rica. In the four months from September to December 2018, I did nineteen international flights. For the past decade, I have needed to renew my passport every two and one half years because its pages become filled with stamps and visas. Being international is now part of my DNA, and it is likewise part of all my teaching.

The administrative position in international study-abroad programmes actually triggered me to consider a full-time move to academic administration. Consequently, I began exploring the path to becoming a university president. I was (and still am to a certain degree) intrigued by the strategic challenge of leading a university. Like professional turn-around managers, a university president is often the key figure in revamping an institution's vision or performance. And this seemed interesting. Very pragmatically, I was also concerned at the time that fifteen or twenty years hence I might be tired of the classroom. And admittedly, a very honest look-in-the-mirror suggested that I might thrive in the role, with all its political handshaking, chicken dinner-eating, and baby-kissing.

I was naïve. Academia, I have discovered, is far more rigid than I had envisioned. The path to becoming a university president is relatively straightforward, but also quite closed. Indeed, a university president has almost always risen up through the research-oriented tenure track system which rewards high-calibre scientific research and publications, and which, to some degree, treats teaching as a necessary evil and, worse still, good teaching, as a commodity.

I approached the Dean, therefore, asking for a new challenge which would expand both my responsibility and my experience. "Keep doing what you're doing," was his response. It seemed to me that he had pigeon-holed me as a 'hired gun', suitable for teaching international

marketing to undergraduate and graduate students. My administrative position in international study-abroad programmes, therefore, was simply part and parcel of his vision of me as a teacher of international marketing. It was time to pack my bags again.

Pure Michigan

And so, at the start of the next academic year I found myself at the Stephen M. Ross School of Business at the University of Michigan in Ann Arbor, USA. I had applied to fifty or so business schools around the world; three business schools had shown interest, but Ross offered me more money, for less work, and at an institution with a higher ranking. It was a no-brainer, as they say.

By Christmas of that first year, I had been offered the position of Director of Educational Outreach at the William Davidson Institute, the University's special centre which focuses on emerging economies. I was responsible for developing, publishing, and distributing teaching materials in the broad field of international business. The President of the William Davidson Institute had invited me to lunch shortly after I arrived in Ann Arbor, and our conversation eventually led to his plan to enter the case publishing world, à la Harvard Business School. He asked me if I might know anyone who 1. could straddle academia and the corporate world, 2. who understood education and pedagogy, and 3. who had an international background. It was his subtle way of offering me the position.

The main benefit of starting anew, as I see it, is the opportunity to redefine and reframe your professional identity. Whereas colleagues at the Olin School of Business had seen me as primarily a teaching-oriented professor who was capable of managing teaching-related activities, I was a blank slate at Ross. My new colleagues made no assumptions about my capabilities, and I was free to pursue almost anything. And I did. I was unabashedly entrepreneurial in an academic way, reaching out to colleagues in different departments to co-teach and co-publish; earning myself a joint appointment at the University's Centre for Russian, East European, & Eurasian Studies; and creating opportunities for partnerships and collaborations worldwide.

After a few years, I was also tapped by the Associate Dean for executive education department. He had heard of my classroom success, and wondered if I might like to try my hand

at training managers. He spent a few hours coaching me for my first foray into the executive education classroom, cautious about my ability to survive the 'challenging clients'. My evaluations in that executive education programme were the highest on the team, and he has rarely given me any advice since then.

Fast-forward a few years, I was asked by the then Dean to serve as the Academic Director of the School's part-time MBA programmes. It was a serious administrative bone to chew, and I savoured it for four years until a new Dean eliminated my position in an organisational re-shuffle. During those four years, however, I oversaw redesigns of both programme curricula, managed a P&L in excess of five million dollars, and grew the weekend programme enrolment from some forty-five students to two cohorts of sixty-plus students.

If I am completely honest with myself, I no longer harbour any desire to be a university president. I enjoy administration… well, let me qualify that. I enjoy some parts of administration. I enjoy strategising, for example— developing a vision for something, setting the plans, designing the tactics. I relish the role of mentor, working with employees so that they can improve their performance, and, ultimately, take on new and more challenging responsibilities. I even like meetings. But the everyday operations— the keeping-the-trains-running-on-time stuff— I can do without. In that sense, I am more of a CEO than a COO, and fortunately, I had a great COO when I was directing the part-time MBA programmes. I also am not so fond of conflict, and it is apparent to me that the higher up the academic administrative ladder you go, the more conflict there is.

I have just entered my fourteenth year at the Stephen M. Ross School of Business at the University of Michigan. I continue to enjoy (immensely) my classroom teaching. In fact, I do more teaching now than ever before. I have visiting professorships at four different universities around the world. Each academic year I seem to be asked to teach more overload, and that does not include non-credit executive education programmes which are more than double my annual teaching load. And I am contracted by outside vendors and global corporations to conduct management training programmes.

Perhaps equally important is that I continue to be challenged with new activities and responsibilities. Indeed, my academic life is never dull. Just last year, for example, I was asked

to serve as the Co-Director of a new digital media initiative which was initiated on receipt of a large endowment from a wealthy media donor. Other than the small ‘blip’ which had me pursuing the Deanship at Skolkovo Moscow School of Management, my academic life remains wedded to Michigan. At fifty-two, I consider myself middle-aged in academic years, but this would not be the first time to admit that I could see myself ‘retiring from this place’.

Appendix 2. A List of My Public Works

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