# Biography as a Methodology for Studying the History of Marketing Ideas

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## ABSTRACT

**The process of biographical research, from selecting a subject to writing the finished biography, is described and illustrated with references to the biography of Theodore N. Beckman, a member of the marketing faculty for over 50 years at The Ohio State University. Other methodological issues and sources relevant to biographical research are also discussed. © 1998 John Wiley & Sons, Inc.**

We need only browse the shelves of any bookstore today to see that biography has become one of the most popular literary genres of the 20th century. Most of us are interested in sports heroes, politicians, and movie stars because of their notoriety or accomplishments. However, biography does more than just satisfy our curiosity about the lives of the rich and famous. It also teaches us about life and human behavior. Biography can tell us what people's motives were, the personality they brought to their life and work, and the people and conditions that influenced them along the way. In that way biography adds flesh to the bones of achievement; it adds human form to the spirit of ideas and emotions. With respect to the history of ideas, biography can explain the genesis of a scholar's work, how it came to include certain ideas, the ideological underpinnings of a subject's thought, and the social, economic, and political contexts that gave rise to certain ideas (Walker, 1983).

Ideas do not emerge in a vacuum. Marketing ideas, concepts, and theories are developed by people, distinctive individuals who are often

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scholars, but sometimes practicing businesspeople. Truly important and original ideas are the product of complex combinations of conditions and influences for those individuals. Studying lives can help us to better understand their contributions to marketing thought.

There is a long tradition of biographical research by marketing scholars. Beginning in 1956, the *Journal of Marketing* published a series of short biographical sketches that continued for many years, originally under the title "Pioneers in Marketing" and later as "Leaders in Marketing." Another series of biographies formed the basis of Paul Converse's important book on the history of marketing thought, *The Beginning of Marketing Thought in the United States with Reminiscences of Some Pioneer Marketing Scholars* (1959). Bartels's well-known book on *The Development of Marketing Thought* (1962) included 17 short biographical notes; however, that book was based on his doctoral thesis (1941), which included as an appendix some 40 biographical sketches, all of which were more detailed than the ones in his book. More recently, Nevett (1988) has used biography to look at advertising history, Jones (1994) has presented biographies of more early 20th century marketing professors, and the *Journal of Macromarketing* has begun to publish a series of autobiographies of eminent marketing scholars (Nason, 1995).

In the field of management history, which is roughly comparable to marketing history in its stage of development, researchers consider biography to be one of the major approaches to studying their field (Trent, 1972; Wren, 1987). Indeed, several full length biographies of management scholars have already been published (Wren, 1987).

Biography is often defined by biographers as life history. This is because biographical research involves the application of historiography, the theory and methods of historical research, to the life of an individual. Biography is also sometimes referred to as life portraiture, or poetry with a conscience, because it combines the quasiscientific methods of historical research and the creative inference associated with the writing of fiction. Although there are specialized subdisciplines of biography, such as psychobiology (e.g., Kets de Vries, 1990), we are concerned here with what Lomask (1986) calls commonsense biography, which utilizes the understanding of life that comes from living it.

Not being methodological zealots, biographers have created only a sparse literature examining their craft (e.g., Denzin, 1989; Lomask, 1986; Mandell, 1991; Nadel, 1984; Petrie, 1981), and there is almost nothing to date that examines biographical research from a marketing history perspective. One exception is Nevett (1983), who argues for a role for biography in marketing history and looks at some of the problems of handling biographical data, particularly for collective biography.

The purpose here is to outline some of the basic steps of doing biographical research and to discuss some of the methodological issues for potential marketing biographies. Wherever possible, this discussion is

illustrated with examples from a short biography of Theodore N. Beckman (1895–1973) who was a prolific contributor to the marketing literature and a member of the marketing faculty at Ohio State University for over 50 years (Jones, 1993).

## THE BIOGRAPHER'S CRAFT

Methodology is concerned with the philosophy or theory, and steps or principles, of doing research. There are different philosophies of historical research ranging from a more scientific or quantitative approach to a more traditional or qualitative one (Jones, 1991). The scientific approach to history relies on quantification, classification, and sampling of data, and on hypothesis testing and statistical analysis. On the other hand, the traditional approach to history is usually descriptive, more interpretive, and creative in the sense of telling a story.

That traditional approach is more appropriate for biographical research, because it is based on developing a detailed historical account of unique events. For example, a biographer has no formal hypotheses but, rather, looks for patterns in the decisions and behaviors of a subject. Except in the case of collective biography (e.g., Bertaux, 1981), which is not the primary focus here, the biographer has a sample of one. The biographer must speculate about cause and effect in the form of ideas or events and the prior influences on the relevant decision making or behavior. This will necessarily be probabilistic in nature. In a sense, biography, or life history, is like a case study to which we cannot look for law-like generalizations, but rather can and do look to for usable knowledge. The process relies on interpretation, as all forms of research do, but because of the depth of interpretation it is often idiosyncratic. However, when guided by the principles described below, the results need not be any less truthful or usable.

## THE PROCESS OF DOING BIOGRAPHICAL RESEARCH

Practically speaking, the basic steps in biographical research are quite simple:

1. Choosing a subject
2. Gathering data
3. Analyzing and interpreting the data
4. Writing the results

(Lomask, 1986). However, as Goodman and Kruger (1988) point out,

> Historiography is difficult to define and explicate. Although it is easy to describe the steps that the historian follows, it is significantly harder to understand the *process* that he or she undertakes. (p. 315)

That process can be especially difficult to understand at Steps 3 (analysis and interpretation) and 4 (writing or presentation of results). But first the biographer must face the task of choosing a subject.

## 1. Choosing a Subject

Selection of a subject should be based on personal interest by the biographer and on the residue, or importance, of the subject (Lomask, 1986). The latter is more likely to be important in terms of the marketability of a literary biography, but it is also relevant to the availability of data for any subject.

Important people, people with residue, are more likely to have created readily available biographical data. For example, among the better-known marketing scholars historically associated with Ohio State University are James Hagerty, Harold Maynard, Theodore Beckman, and Robert Bartels. Arguably the most accomplished of these was Beckman, and his is by far the most complete biographical record held at the Ohio State University Archives. Thus, the choice of Theodore Beckman as a subject for biography was prompted, in part, by his considerable residue. During his career Beckman published over 200 articles and seven books, including seminal works in the areas of wholesaling, credit, and marketing productivity, as well as a *Principles* text that evolved through eight editions. He supervised over 50 doctoral students at Ohio State University, many of whom became well-known scholars in marketing. And Beckman consulted extensively to government and business. All of this created a substantial residue for his biography.

Personal interest is also necessary for the effective interpretation of biographical data and suggests that the selection of the biographer is also important. In some ways the most appropriate biographer of a marketing scholar may be another marketing scholar—perhaps even someone with ties to the subject in question. For example, Beckman was the thesis supervisor for the author's own doctoral thesis supervisor, David D. Monieson. Monieson's accounts of Beckman's work ethic and approach to teaching doctoral students gave the author a greater personal interest in Beckman, which motivated the biography and helped in the interpretation of his life and career. And, of course, in addition to motivating the choice of Beckman as a subject, this relationship provided the author with an important source of biographical data.

## 2. Gathering Data

The gathering of biographical data leads to consideration of two different issues. First, one can of course distinguish between primary and

secondary data. At a deeper level, however, it is useful to identify four different types of biography or biographical data: personal, professional, intellectual, and environmental.

***Primary and Secondary Biographical Data.*** The distinction between primary and secondary data is not as clear for historiography as for some other forms of research. Generally speaking, primary historical data is that which came into existence during the time period being studied (during the subject's life), and which has not been interpreted in some way for the purpose of writing a history or a biography. The *Principles of Marketing* text (Beckman, Maynard, & Weidler, 1927) for instance, is an important source of information about Beckman's thinking on the philosophy of marketing science. In the introduction to that text, he clearly describes his preference for, and belief in, a positivistic science of marketing and confirms what was his ultimate goal in scholarship—the development of marketing theory. When used to speculate about his philosophy of science, Beckman's *Principles* text is a source of primary data. On the other hand, Wright's (1965) biographical sketch published in the *Journal of Marketing* is an interpretation of Beckman's life and contributions, and thus should be considered as secondary data.

Therefore, the usually clear distinction between unpublished and published data (as primary and secondary, respectively) does not hold. Primary biographical data can be, and usually is, unpublished (for example, the personal papers found in an archival collection). Clearly, however, a book published by a marketing scholar can also be primary data for a biographical examination of that individual's contributions to theory.

As with all forms of research, it is desirable to use primary data—to get as close as possible to the subject. Although there are important marketing thinkers who were not university professors, the latter are in a unique professional situation that often lends itself to creating a rich collection of unpublished, primary biographical data. Most university archives collect, as a matter of policy, the papers of important faculty members and, at least in the past, many university professors seem to have been pack rats. As a consequence, there are often considerable collections of personal papers that have been donated to universities, providing important sources for biographical research. These sources range from a curriculum vitae (simple, but nonetheless an important primary source of biographical data) to large collections including unpublished autobiographies, diaries, lecture notes, unpublished papers, and correspondence. By way of example, Table 1 presents a partial listing of notable 20th-century marketing scholars for whom there are known archival collections, and briefly indicates the nature of each collection.

The *Papers of Theodore Beckman* (Beckman, undated) at the Ohio State University Archives, for instance, includes personal correspon-

**Table 1. Sample Descriptions of Archival Collections for Early 20th Century Marketing Scholars**

| Name | Institution | Size of Collection | Nature of Materials |
|---|---|---|---|
| Wroe Alderson | University of Pennsylvania Archives | Large, 7 boxes | Biographical notes, consulting reports (Alderson & Sessions), lecture notes and exams, student theses, Marketing Theory Seminar materials |
| T. N. Beckman | Ohio State University Archives | Large, several boxes | Curriculum vitae, biographical notes, personal correspondence, lecture notes and exams, consulting reports, unpublished manuscripts and speeches |
| Paul T. Cherington | Harvard Business School, Baker Library | Small, 6 folders | Autobiographical and biographical notes, newspaper clippings, course outlines, reading lists, publication lists |
| E. T. Grether | University of California Berkley Archives | 1,069 pages | Oral history transcript |
| Simon Litman | University of Illinois Archives | Very large, 18 boxes | Autobiography, correspondence, unpublished and published manuscripts, financial records |
| W. D. Scott | Northwestern University Archives | Very large, 43 boxes | Autobiographical and biographical notes, biography, personal correspondence, college records, consulting reports, presidential files |

dence covering the period from 1941 to 1970, biographical notes prepared for university records, course outlines, tests and lecture notes, extensive consulting reports and correspondence, and unpublished manuscripts and speeches. That substantial collection of primary data has provided considerable grist for the biographical mill. Others listed in the table could do likewise.

Some primary data may be difficult to find, depending on the subject (business practitioners, even successful ones, do not tend to deliberately create or leave behind collections of personal papers) or on the purpose of the biography. Often the biographer will have to rely on secondary data. Yet, these too can sometimes be surprisingly rich sources of biographical information, depending on the residue or importance of the subject. In any case, the biographer should begin data collection with secondary sources. The *Biographical and Genealogical Master Index* (annual), published by Gale Research Inc., is a cumulative index to biographical material published in books and magazines. This is an excellent reference for identifying secondary sources of biographical data on a wide range of subjects. Any subject with sufficient residue will generally be listed in one or more of the sources indexed therein. Most of these sources will include basic curriculum vitae for subjects, and thereby provide an excellent starting point for a biography.

In addition, if the subject was a university faculty member there is often a history of the institution and perhaps of the department, which can be a valuable secondary source in researching a biography. For example, some of the starting points for research into Beckman's intellectual biography were provided in Guy-Harold Smith's (1966) *The First Fifty Years of the College of Commerce and Administration.*

***Other Types of Biographical Data.*** Beyond the primary–secondary data issue, there is the consideration of data that reflect different aspects of a subject's life. All biographical research draws basically on four types of such data: personal, professional, intellectual, and environmental biography.

Personal biographical data, or personal biography, includes the demographic, family, and personality characteristics of a subject. Sources of such data include curriculum vitae, autobiographies, diaries, and even interviews with the subject, as well as with friends and relatives. For example, Beckman's personal biography relied mostly on his curriculum vitae as well as interviews with former students and colleagues. One interview of Beckman himself had been filmed over 30 years ago, approximately 10 years before his death, allowing the biographer to see and hear the subject speaking about his contributions to a particular area of marketing thought. Taken together, these sources inspired a vision of a man with an intense work ethic, one who, like many early 20th-century Americans, was a poor immigrant who worked hard to

acquire wealth and material possessions. On the other hand, they also suggested that Beckman was somewhat intellectually arrogant and therefore slow to recognize the work of others.

Professional biography examines the jobs, positions, and careers held during a subject's life. Of course, the subject's curriculum vitae is again an excellent source of this type of data. Beckman's vitae confirmed that all of his university education and his entire working life were spent at the Ohio State University. This may help to explain why he placed such a high value on outside consulting jobs; they gave him nonacademic contacts and a fresh way of looking at marketing problems. For Beckman's professional biography, specifically with relevance to his consulting work, university records were also an important source of information. During that time period, faculty members at Ohio State University wanting to do outside consulting had to provide a detailed request. It would include a description of the type of work to be carried out as well as a rationale for how the consulting would contribute to the faculty member's academic career. In the *Papers of Theodore Beckman* there are numerous such requests, which provide much insight into the consulting jobs done throughout his career. His motivation for such work was undoubtedly financial, in part, but his official requests to the university also suggested that Beckman saw consulting as an essential part of the training for any university teacher of marketing.

Intellectual biography describes the education and training of a subject. For this, the biographer of a marketing scholar might first turn to the university calendars of institutions attended by the subject. Calendars published in the early 20th century often included a good deal of information that is no longer provided today. For example, course descriptions sometimes specified which readings were assigned and gave detailed descriptions of course content. Often, such calendars included a list of the names of outside speakers invited to lecture in business schools, and they almost always indicated faculty teaching assignments. This can be used to develop an intellectual genealogy for the subject and, in turn, can lead to archival collections of the subject's teachers for information about the intellectual biography of the subject. For Beckman's biography, this included a study of the *James Hagerty Papers* (Hagerty, undated), because Hagerty was Beckman's undergraduate and graduate teacher, his doctoral thesis supervisor, and indeed, for a period of time, was Dean of the College of Commerce at Ohio State University.

In addition, archival collections for a subject sometimes include lecture notes and theses written when the subject was a student. These materials can offer valuable insights, not only into what was studied and under whom, but also into the early development of ideas that later became important concepts or theories for the marketing discipline. Such was the case for Beckman's masters thesis on wholesaling, which grew out of a course on "Wholesaling and Retailing" taught by Walter

Weidler at Ohio State University. Weidler went on to supervise Beckman's thesis and provided him with many of the industry contacts who were influential in that particular piece of work and in much of the consulting work later pursued by Beckman.

Environmental biography includes the social, political, and economic conditions during a subject's life. Generally these are available from published histories of the period during which a subject lived. Even a general knowledge of the unusual economic and social conditions during the Depression and World Wars will provide some context for the biography of an individual such as Beckman, who lived during those times. Records of such conditions that existed at a personal level for the subject can also often be found in diaries or in unpublished autobiographies.

As data are being collected, secondary and primary, in all of its various biographical forms, the process of analysis is already beginning. The very activity of filing the data forces the biographer to begin imposing some order on the collections of facts being assembled.

## 3. Data Analysis and Interpretation

One popular description of historiographic data analysis draws an analogy with detective work (Barzun & Graff, 1985; Lomask, 1986; Winks, 1968). This is appropriate because the analysis and verification of historical evidence must be guided by accuracy, love of order, logic, honesty, self-awareness, and imagination (Barzun & Graff, 1985). The underlying logic is analogous to regression analysis; one examines the correlation of different sets of events and attempts to explain the relationships among them. Unfortunately, history, particularly biography, cannot be expressed in the same neat, quantitative form as are regression results. The ordering of events chronologically can imply, but cannot prove, causality. Such analysis of historical data involves creative interpretation and has been described as a synthesis or web of imaginative construction based on critical evaluation of source materials (Fullerton, 1988).

## 4. Writing Biography

One of the reasons that the process of doing biographical research is difficult to understand has to do with the lack of a clear distinction between *the analysis and interpretation of data* and *the writing of results.* Clearly, there is overlap between these two activities.

Witkowski (1993) offers sound advice on a number of issues regarding the writing and presentation of historical research, specifically as they relate to getting published in the more traditional marketing journals. Particularly relevant here is his discussion of narrative structure and style. He lists the four basic elements of narrative structure as character, setting, actions, and happenings. The manner in which these ele-

ments are connected determines the narrative structure—most commonly a chronological or topical organization. As applied to biography, different approaches to analysis (or structure) are possible: chronological (through time), topical (examining logical patterns or groupings such as careers, positions, or industries), or some combination of these two approaches. The latter combination approach is the most common and undoubtedly the most useful for a study of the history of ideas.

Usually, and this was the case for Beckman's biography, the biographer starts by organizing the events of a subject's life chronologically, allowing the topical patterns to emerge as the research progresses. Thus, Beckman's biography is presented overall in a chronological theme, but with topical sections based mostly on his intellectual background and professional career, his education, teaching, research, and consulting.

Because of this form of analysis, writing a biography takes on a unique form of expression, one that is somewhat different from the conventional style of writing found in most social science. History is generally written in a narrative style that can range from the dramatic and literary to the use of heavy documentation and elaborate presentation of empirical findings. Another common characteristic of narrative style is the use of general statements followed (or preceded) by a number of illustrative examples. This writing style does more than just make the biography entertaining and interesting. It also helps in communicating the logic and pattern of results discovered by the researcher.

How to shape one's material, to give it form, is a skill that must be cultivated. The writing of history, and therefore of biography, depends on giving meaning to a collection of facts. That meaning will flow from the manner in which the facts are clustered. Lomask describes it in this way.

> The facts you gather take on a life of their own. They make faces at you. They thumb their noses. Most of them come drenched in overtones that must be sifted to determine first what they mean and then what to do with them. You first push them this way and they squirm elsewhere . . . When you start the actual writing you discover, as all nonfiction writers do, that willy-nilly you must work in clusters of facts and ideas. Striving to organize the material, you try to put every fact and idea into a cluster consisting of other facts and ideas with which the one you're inserting fits better than it does with any other group. (1986, pp. 39–40)

Indeed, clusters of information about a subject's life are the building blocks of the biography. They are what gives the biographical data their meaning, what creates the story.

## SUMMARY AND CONCLUSIONS

Stated simply, biography is story telling, but it is story telling that is truthful, analytical, and informative. It is story telling that can add to our understanding of the history of marketing ideas—in a poetic way.

Biography is also life history and, as such, is a type of research with which many marketing historians are familiar. However, in addition to the specific types and sources of biographical data, perhaps what most distinguishes biography from other forms of historical research is the selection of a subject. Lomask (1986) considers this the most crucial step in biographical research.

There is no shortage of important subjects for potential marketing biographies. Wright (1989) has compiled a lengthy list of candidates, both scholars and practitioners, all of whom have contributed important ideas to marketing during the 20th century. For many such individuals, there are interesting, primary biographical data just waiting to be analyzed (again, see Table 1).

There is a long, but not a strong, tradition of biographical research in marketing. We might write more and better biographies without thinking about how to do so, but it is hoped that this introduction to the principles of biographical research will ideally make the task a little easier. And, in addition to what it can teach us about the history of marketing ideas, perhaps more biography would revitalize and personalize scholarly research and writing in marketing.

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