Hyper-power, the Marketing Concept and Consumer as 'Boss'

Abstract

This paper extends our knowledge of scientific marketing management and the reasons behind the emergence of the marketing concept. In our narrative, the banking community play an important role in promoting marketing in the early twentieth century. We illuminate this argument using the writings of Fred W. Shibley (1864-1944) and the theoretical resources of Michel Foucault. For Shibley, marketing advanced the interests of corporate financiers, shareholders and employees. Their profit focus was enabled via the marketing concept and accounting practices that mediated hyper- and disciplinary power. In this discourse, organisational relations reflected a pyramidal management of information through a 'principle of omnivisibility'. These processes individualised departments and affected all employees. Importantly, these control mechanisms were seeded through 'displacement'. This discursive move reveals a new dimension underwriting the promotion of the marketing concept and the pursuit of profit. These 'progressive' facets of marketing theory and practice were invoked to redirect employee attention away from their fractious relationships with management and the owners of capital. Redirecting employee focus was attempted by positioning the consumer as the 'boss', with increased production and consumption framed as 'unpolitical socialism'. While the marketing management literature depicts the marketing concept in quasi-humanistic terms, we unearth the roles of hyper- and disciplinary power, combined with a status-quo orientation, that underwrote its promotion in this formative period.

Keywords: Marketing theory; critical marketing studies; marketing concept; hyper-power; omnivisibility; displacement; consumer as boss.

> '…those whose jobs it is to satisfy human wants are under necessity…to cultivate a technique for keeping sensitive to changes in those wants…As a matter of fact, it seems likely that if they cannot do it, the people who have those wants will call on some other means to supply them. And that would be revolution.'
>
> (Cherington, 1935: 6, First President of the American Marketing Association)

Introduction

There has been much criticism of financial institutions and their role in the economic crisis that has reverberated around the world. They play a prominent role in driving the marketing system. However, comparatively little attention has been devoted to the connections between marketing and finance. Yet, this relationship has profoundly shaped marketing and the economic system as we know it. After Black Friday in 1929, for example, scholars critiqued this group for turning practitioners against core marketing values. The President of the American Marketing Society, Frank Coutant, blamed the Great Depression on the financial community:

> 'Perhaps we had better leave the moral lessons of the depression to the preachers and to Providence, but we are not likely to escape the indictment that it was caused by the most lopsided kind of thinking that business ever committed. Financiers filled the front offices. They inspired production experts to turn out goods faster and cheaper, but marketing has always been a mystery to the counting house. Men who understood marketing were herded outside with the other hired help.'
>
> (Coutant, 1936: 105)

Coutant provides a one dimensional perspective here. The relationship was far more complex. This paper will illuminate these dynamics, highlighting how the banking community promoted key marketing concepts and practices. They did this to ensure continuing returns on their investments. Central to this narrative is the idea of profit. Through their recommendations regarding the implementation of the marketing concept and their fostering of a profit focus via budgeting techniques, this community propelled the narrative that envisioned marketing practice as moving towards a customer focus with ever greater speed.

This said, claims of progressivism should be critically scrutinised. In this case, they elide the fact that the promotion of the marketing concept was encouraged to reorient capital-management-labour relations in directions amenable to capital reproduction. Consistent with the Foucauldian approach underwriting this paper, we use 'the most developed example' (Foucault, 2006: 144) of 'progressive' (Clark, 1929) banking practice that forwarded a marketing agenda to chart these discursive and disciplinary manoeuvers. The writings of Fred Shibley (1864-1944) – a Vice President at Bankers Trust, an institution that was rated as the thirteenth most powerful in the United States during the 1920s (Germain, 1996) – are significant here.

Shibley was a prominent practitioner whose insights were taken seriously and had an impact on a variety of industries. His views were 'typical' (Clark, 1929: 62). They did not violate the 'conditions of acceptability' (Foucault, 2015: 101) and were widely circulated ('Fred Shibley Dies', 1944). As such, echoes of his arguments about the marketing concept, the necessity of research, combined with customer focus, reverberate in the context of the Great Depression when questions of waste, efficiency, profit and labour unrest were salient. What is not frequently unpacked in the level of detail and clarity that Shibley provides is the importance of budgetary measures for marketing practice.

But, despite the importance of the scientific marketing management movement, historians have failed to examine Shibley's writings (e.g. Tadajewski and Jones, 2012). Inserting him into this genealogy thus provides one contribution of this paper. More important is the fact that Shibley's writings allow us to register power dynamics that have not received due attention. We extend the arguments put forward by Skålén et al (2006) on the centrality of disciplinary power to scientific marketing management. This body of scholarship makes the case that disciplinary power was restricted to the lower organisational rungs, namely sales workers (e.g. Skålén *et al*., 2006: 287-288). By contrast, we move up to the macro-level and engage with field defining practices: an approach rarely taken in the history of marketing theory. We document the role of macro institutions in encouraging the enactment of disciplinary power throughout all levels of the firm hierarchy, connecting this to a new interpretation of Foucault's reflections on power – hyper-power (Foucault, 2015) – that feature in his recently published lecture series.

Scientific Sales and Marketing Management: Discipline and Hyper-Power

Scientific management had a profound effect on management thought and was a major influence on marketing. It entailed studying worker behaviour within the factory setting with a view to making it more efficient. Workers were selected for their aptitude for certain tasks (e.g. shovelling), taught the most effective way of undertaking their activity (the 'one best way'), and anything other than their direct work-role was the responsibility of management (Taylor, 1911/1998).

Taylor's ideas were translated into marketing in a variety of ways. At their most basic, it involved the scientific selection, training and supervision of salespeople (e.g. Hoyt, 1913). This was sometimes expanded to include reflections on the role of scientific research in enhancing marketing decision-making. More broadly, this stream of literature was the springboard for the development of a corporate reorientation of marketing around the customer (White, 1927). Across this domain, management oversight, discipline and appropriate reward structures (e.g. profit sharing) were crucial in rendering sales staff effective workers. Management were tasked with accumulating as much pertinent information about sales and selling practice as possible, using this to produce guidelines about the best approaches to the customer.

By being able to compare and contrast each worker, practitioners were using the tools and techniques that are associated with disciplinary power. Foucault defines the latter as a 'capillary form of power' (Foucault, 2006: 40). It permeates society right down to the individual body, shaping the way people think, behave and perform their role in the world. It has origins in the medieval period, rose to prominence in the eighteenth century, and disciplinary methods travelled across multiple contexts from religious orders, through the asylum, army and school to the factory system. It was firmly 'installed' by the twentieth century (Foucault, 2006: 41). In all of these contexts, disciplinary power was contingent upon 'a political anatomy of detail' (Foucault, 1977/1991: 139). It hinged on knowledge generated through methods of 'individualization' (i.e. confessions, record keeping, observation and examination) whereby people could be differentiated on the basis of desired and undesirable characteristics or performances. These power relations are ‘multiple’, ‘discreet’, and ‘distributed’ (Foucault, 2006: 22). All people subject to disciplinary ‘gazes’ were visible and accountable for their performance.

While the ability of bankers to exercise power operated on a continuum depending on the nature of the organisation, its financial status and whether help was requested or not, their economic support was in high demand. The knowledge of various industries that bankers possessed had considerable utility when access to consultancy organisations was limited (McKenna, 1995). Veblen’s view of the banking community as ‘those massive interests that move obscurely in the background of the market’ is not wide of the mark (1919/2005: 175).

In his reflections on power, Foucault moves away from the idea of concentrations of power, particularly those that emanate from a Marxist economically focused ‘centre’. Put simply, he pluralises the relations of power. Nonetheless, he does argue that we should explore those groups who are more central to a given society. We must be alert to the ‘consubstantial’ nature of power with certain groups (Foucault, 1980b). To add flesh to this point, he indicates that the rise of the industrial and distribution system is associated with the ability to marshal power which ‘reinforced’ positional status ‘in a mobile and circular manner’ (Foucault, 1980b: 160).

His recently published Collège de France lectures develop the point that ‘power is not the best distributed thing in the world’ (Foucault, 1980a: 99). This is the conceptual and methodological opening for ‘hyper-power’. It is a ‘multiplied, accumulated power’ (Foucault, 2015: 219) which threads throughout society. The ‘function’ of hyper-power, then, ‘is to connect up time, the body, the life of individuals, to the process of production and the mechanisms of hyper-profit’ (Foucault, 2015: 219). It reinforces existing relations of power, is mobilised to reaffirm ‘capitalist production’ (Foucault, 2015: 266) and the position of ‘privileged classes’ (Foucault, 2015: 268).

By their nature, the banking industry has considerable financial resources and political sway. It was closely connected to government and the legislature. It guided processes of corporate expansion and consolidation so that the late nineteenth, early twentieth century was literally the ‘era’ of banker control (Veblen, 1921/2006), even while it was subject to investigation as part of the trust busting activities of the period. Bankers, therefore, constitute part of the matrix of powerful actors called the ‘judges of normality’

(Foucault, 1977/1991: 304). By virtue of their credentials and social position they were able to perform 'an effect of supremacy' (Foucault, 1980b: 156). They determined when a business met conventionally sanctioned levels of profit and when it failed to meet the requisite profit flow. Their judgments then informed which businesses were provided with financial support and which were denied. They literally helped structure the marketplace.

Within organisational relations, power often 'takes a pyramidal form. Hence there is an apex' (Foucault, 1980b: 159). And internal control was exerted through the processes of individualisation mentioned above which were cost effective and reliant on minimal manpower (e.g. Foucault, 2015: 72). These operated through discursive mechanisms like file keeping or practices that moved between the discursive and non-discursive realms like the 'gaze' of the banker, owner, department head and sales manager. The 'gaze' was an element in the management of subjectivity. By assuming we are being monitored, we self-monitor. We render ourselves pliable (e.g. Foucault, 1980b: 155).

In equal measure, power was productive and pleasurable (Foucault, 1979), encouraging and enabling worker success and remuneration. It makes 'useful individuals' (Foucault, 1977/1991). But the banking community was not interested in financing industry, building an infrastructure and indirectly employing people for the sake of it. Their interest was the generation of profit, ensuring returns to shareholders and enabling the perpetuation of financial veins. This is what is connoted by 'hyper-power'. It *can* be centralised and is 'employed and exercised through a net-like organisation' (Foucault, 1980a: 98). Shibley's writings are relevant because they sketch out this 'net-like organisation' of power.

To substantiate our argument, we engage in a close reading of Shibley's writings. We underline the constructions of scientific legitimacy, Shibley's positioning within objectivist discourse and the structuring role of the abstraction of the sales dollar in embodying the external directive force of the marketplace and consumer desires. Attention is devoted to the processes of displacement being utilised, the function of the 'order of the situation' and the promotion of 'unpolitical socialism'. Our discussion and conclusion links these themes and indicates that the idea of the consumer occupying the apex of the organisational chart – not management or employees – remains a feature of contemporary marketing thought, as does the idea of the consumer as 'boss'.

Shibley's Biography and Career

Shibley grew up on a farm, a 'chunky, fat-cheeked boy' (Shibley, 1916a: 4). His parents were religious, financially constrained and he was exposed to business fairly early, 'tradin' horses' as a young man (Shibley, 1899: 44). While his business life made him a considerable fortune – he was cited as a high earner in New York, with his annual income roughly equivalent to half a million dollars in current figures (The New York Times, 1937) – he frequently tried to escape the city and 'the maelstrom of hurry and worry', for the slower pace of Canada (Shibley, 1917: 33). He was a nature lover, enjoyed socialising and supported needy causes.

Shibley was an investment banker for most of his career. In 1920 he joined the Bankers Trust Company where he became Vice President. This New York institution 'held the deposits of business enterprises, paid interest to them at nominal rates, and advanced funds to them as needed, customarily for the short term' (Bankers Trust Company, 1978: 11). Eventually it offered fiduciary services and grew at a fast rate, extending its operations internationally, ultimately providing its services to the general public.

Courtesy of his extensive experience in investment banking (The New York Times, 1921), his role as an active investor (The New York Times, 1931b), advisor to trade associations (The New York Times, 1931c) and director of multiple large companies (The New York Times, 1922a, 1922b; Wall Street Journal, 1928), he came into 'contact with many industries' (Things Talked About in Wall Street, 1932: 103-104). Shibley was thus well positioned to express the concerns of the banking community about management and marketing practice, marshalling his ideas into books and articles. These resonated with corporate needs of the time, appearing at the juncture when sales and marketing trained executives assumed senior management positions (e.g. from the late 1920s onwards) (Fligstein, 1985). Connected to this, there was much greater attention being given to the financial calculations of efficiency needed to evaluate organisational performance in multidivisional firms (Clegg, 2014) with related valuation techniques articulated in Shibley's writings in the form of the 'sales dollar' (discussed below). In a citation from the time, we gain insight into his conduit-like status:

> 'Encouraged by his first test of market analysis, sales forecasting, budgeting-based-on-forecast and management control, Mr. Shibley had intensified his activities. He began to act as a clearing house, to gather facts about and personally study the new developments in many industries, in large companies and small ones…All the time he was busily engaged in analyzing the problems of the customers of the Bankers Trust Company, helping them to understand and meet the new conditions and new competitive problems that…had become a reality.'
>
> (Cowan, 1927: 459)

Beyond his banking activities, Shibley had an eclectic set of interests. He penned a number of books. His first is a collection of short-stories that appear to be based on his life (Shibley, 1899). *Aspinwall Island* (Shibley, 1916b) provides an account of his experiences on an island on Shabot Lake, Ontario, Canada. He visited this island during the summer months when he was not in New York City. In other places he wrote about the people he had known (Shibley, 1916a) and his enjoyment of nature (Shibley, 1917). He was, in other words, a multi-faceted individual who relished the financial freedom his success had provided and sought to enjoy nature's bounty.

Let us now turn to his managerial and marketing works, fleshing out his 'system' of 'scientific administration' (Shibley, 1928a).

Shibley's Writings

His major book, *The New Way to Net Profits* (Shibley, 1928a) was well received (The New York Times, 1947), 'had a large circulation' (Daily Princetonian, 1930a: 1) and came highly recommended (Feather, 1929). Shibley was described as a 'well known economist' (Daily Princetonian, 1930b: 1) and 'progressive' (Feather, 1929: 190). This label signified the application of science to reduce waste, improve financial control and increase the efficiency of the marketing system (The New York Times, 1931a). This was important in the context of the 1920s given that the costs of marketing were steadily rising.

Depending on who was consulted, business was viewed as inefficient, as restricting supply to maximise profits, or making the consumer carry the costs of marketing. To ensure its on-going legitimacy, industry had to demonstrate its commitment to efficiency. The invocation of engineering discourse, science and Taylorite measures were an influential means of responding to social criticism (Jacques, 1996). What makes Shibley's work novel is that he applied Taylorite principles, but greatly extended them with financial controls. In his publications, we see the first systematic and comprehensive outline for marketing analysis, planning, implementation and financial control.

Shibley's core arguments can be distilled as follows. He takes a Taylorite logic in terms of analysing the market, breaking it down into its component parts (i.e. sales territories) and determining which areas and customers were profitable to serve. Connected to this, he explicates the need to train staff and monitor the profitability of all company activities through what he called the 'sales dollar'. He adopts a relational perspective, stressing that the growth of enterprise is contingent upon the cultivation and 'retention of consumer markets' (Shibley, 1928a: 201). To achieve this, a firm has to undertake market and customer research, combined with tailoring products and services to the needs of the marketplace, all with an eye to profit requirements (Shibley, 1924).

Combined with this financial outlook, he averred that successful management of multi-layered business relationships was essential (Shibley, 1926). These include intra-organisational relations between departments and those between producer, wholesaler, retailer and consumer. Information must flow freely between them, enabling the producer to stay in contact with market needs. Key tropes are cooperation and coordination, enabled by the forecasting and planning of business activities (Shibley, 1928a, 1928b). Let us now discuss the main themes.

Scientific Administration

Shibley frames his project as a 'system' concerning the 'scientific administration' of a firm. Relatedly, he describes and recommends the need for 'scientific coordination' of 'production and consumer demand' (The New York Times, 1930: 23) based on 'sales research' and 'a new scientific system of budgetary control' (The New York Times, 1926: 37). The 'system' he envisages will generate 'confidence in the banker and in the investor' and 'makes for conservatism' (The New York Times, 1926: 37). These are important discursive moves that are repeated frequently (e.g. The New York Times, 1929a, 1929d). The description of his 'system' as scientific is intended to present his framework as progressive, objective and neutral (Jacques, 1996).

As a system that encompasses everyone, it distances the activities that are undertaken away from managerial fiat, problematic power relations (i.e. between capital, management and labour) and places them within the domain of science. This is an 'objectivist' framing that runs throughout his writing (Jacques, 1996). It seeks to neutralise these interventions by presenting them as benefitting all equally and securing 'balance' in the industrial system (The New York Times, 1926, 1929c, 1929d), yet it had a fundamentally political intent, perhaps reflecting Shibley's social position. As Jacques (1996: 12) underlines, 'objectivist discourse was appealing to a society torn apart by vested interests'.

After all, this was a period of political upheaval. People had witnessed the rise of the robber barons; the political power of large corporations; movements against organised labour; and the growth of immigration from Europe. The latter was highly problematic for some. Immigrant populations tended to possess a more defined 'class consciousness' and were willing to mobilise for 'industrial conflict' (Jacques, 1996: 48). Socialism was gaining adherents and maintained a presence on the political scene until World War II. Reflecting these social and political trends, Taylor's scientific management was one salvo meant to defuse the appeal of radical social change. Working more efficiently courtesy of the objective insights of science would improve production output and reduce costs. Significantly, efficiency enabled owners and managers to pay higher wages. Through this prism, everyone benefitted. There was no need to rethink the existing system, nor pay attention to the distribution of the economic surplus (Taylor, 1911/1998). The only concern was to increase it for all.

Scientific administration and scientific marketing practice extended this logic into distribution (The New York Times, 1929a, 1929b, 1929d). This move was not unexpected. Costs were increasing and labour unrest was becoming pressing. Shibley registered this explicitly, calling forth the spirit of Taylor in doing so: 'It is my firm conviction that [the] socialization of industry will no longer be considered an attractive objective when cooperation is employed to coordinate supply and demand on an economic basis, fair to capital and fair to labor' (Shibley, 1931a: 29).

Modifying Taylor's ideas to fit with the needs of the distribution system and advancing a discourse of science and objectivity all promised – but only promised, this was a veil pierced by employees – to enable the management of firms in ways that were deemed 'fair', rather than completely 'self-interested' (Jacques, 1996: 92). In Shibley's hands, a scientific approach to the market emphasises analysis, planning, costing, implementation and control. By being attentive to the market, the firm could determine the most attractive offerings for consumers. Understanding customer desires and evaluating their financial viability would improve efficiency and speed to market. Motivating and incentivising all staff members 'from the president to the night watchman' (The New York Times, 1929c: 48) further enhanced distribution proficiency. All of this was undertaken in the pursuit of profit. Profit, in turn, enabled the provision of the 'highest possible wage consistent with efficiency and application' (Shibley, 1928a: 3). And, in conjunction, these were the royal road to success, socio-economic stability and returns to financial stakeholders. These methods were 'humanizing' business practice (Shibley, 1928a: 3).

Humanism had a specific meaning in this climate. It entailed the application of the insights of science to all elements of business practice to improve efficiency (Law, 2011). Efficiency would generate consumer buying power through high wages and thereby increase the sales of products (Ford, 1930; Young, 1930). These humanizing activities were supported by public relations campaigns conducted by business clubs and large corporations that underlined their 'service' to society, social responsibility and concern for workers (Tadajewski, forthcoming). This discourse is, as expected, underwritten by 'hyper-power' and discipline (Foucault, 2015).

To begin with, a firm must be run by well-trained staff. This reference includes the CEO through to the sales-worker operating in the field (Shibley, 1929b). They must all be 'high grade' employees. This point differentiates Shibley from Taylor (1911/1998). The latter saw people as motivated by their finances. Shibley, by contrast, opined that people thrive when given responsibility. He tempers this by noting that any delegation had to be accompanied by ‘a system of control by means of which information flows freely along charted lines to the chief executive’ (Shibley, 1929b: 122).

Consistent with the objectivist discourse that frames his writing, but somewhat unusually, Shibley repeatedly blurs hierarchical boundaries. From his perspective, effective ways of working and new product ideas were not the preserve of senior managers. He makes this openness to employees a central element of his system. The reasoning is not difficult to unravel. It underlines managerial interest in the workforce and enhances employee motivation. Not surprisingly, it destabilises the distinctions between management and labour. He repeatedly pressed the necessity of this strategy to ‘industrial leaders and bankers’ (‘Fred Shibley Dies’, 1944: 17).

Selecting staff members was important for an admixture of humanistic and instrumental motives. Determining who was best fitted for a given role was essential if profit objectives were to be met. In his reflections, Shibley’s humanistic orientation is notable as is his ongoing interest in highlighting how the ‘system’ treats everyone equally. As he stresses,

> ‘The student…in his contemplation of systems of business administration and control, will be wise if he considers first the human beings who comprise the working organization of an enterprise to the end that he may determine their fitness for their several tasks and their happiness in the performance of these tasks; for if success and profits are to ensue, each man and woman must labor skilfully and happily…whether he be president or a lone salesman out on the firing line where the competitive battle rages. Wherever a business enterprise is found operating on an uneconomic basis it may be accepted that incorrect thinking pervades the enterprise; that cooperation and coordination are lacking; that unhappiness and discontent are probably rife within it.’
>
> (Shibley, 1929b: 25)

Reflecting his interest in capable staff, Shibley emphasises the frequent upgrading of skills. In a citation that lays the groundwork for his approach, he writes:

> ‘The education and training of the organization comes first…When that is accomplished all those wonderful collaterals of scientific administration will ensue – market study made by educated and trained research men from within and not without the organization; planning of the merchandise line by men with trained merchandising minds, educated in quality, design and style values, sensitive to market needs and tastes, cautious men who feel their way into a line and never plunge on a reaction; planning the production schedule so that never shall there be any considerable mark-down in prices of excess products and that always production and sales shall be in balance; control of planning, control of the thinking, so that it shall be systematic thinking, needed thinking, thinking coordinated with the corporate policy and finally an executive management freed from details to think and foresee.’
>
> (Shibley, 1929b: 123-124; see also Shibley, 1928a: 131-132)

A firm must have an accurate understanding of the marketplace, with research disseminated throughout all divisions (e.g. Shibley, 1928b: 96). Using this knowledge, an organisation had to determine forecasts. These informed policy decisions such as production levels and sales quotas. Forecasting and budgeting were important. All activities had to be financially scrutinised on a regular basis – Shibley suggests every month (Shibley, 1928a) or every three months (Shibley, 1926) – with amendments made to budgets, quotas and production levels as required. In doing so, these gained objective credibility, and were less likely to be perceived as arbitrary constructions of management.

Implementing his version of ‘scientific administration’ is contrasted with older management practices called ‘bourbon management’. The latter consisted of senior staff hoarding knowledge about operational and strategic issues, rather than cooperating with relevant departments; a tactic Shibley believed failed to achieve corporate objectives (e.g. Shibley, 1928a: 160-162). Furthermore, it exaggerated differences between management and labour which he sought to deflate. Associated with this, management had to be informed about issues confronting their staff. Communication was consequently an essential part of business operations, with management encouraging employee buy-in to strategic decisions via explanation and the application of ‘gentle reason’ (Shibley, 1928a: 154).

Part and parcel of this 'reason' oriented approach was Shibley's call for a marketplace focus. Devoting attention to the consumer was an extension of Taylor's (1911/1998) logic that they had priority over and above management or labour. Shibley develops this idea in a direction that few other marketing writers had expressed, namely, that focusing on the marketplace was essential in generating the profit necessary to fund high wages for labour. In doing so, Shibley engages in a displacement move, shifting attention from the internal dynamics of the firm (i.e. boss-employee relations) by offering a new authority figure in the customer with the enabling technology to foster satisfactory profit levels being the abstracted metric of the 'sales dollar' (discussed below). In a concerted movement away from what prominent thinkers say we should witness in this period, that is, the pursuit of sales volume over profit (Webster, 1988), Shibley demands exactly the reverse. The pursuit of profit is the axis around which the 'hyper-power' of the banking industry is directed (Foucault, 2015) since it satisfies influential stakeholders (The New York Times, 1929):

> '…we must make profits rather than volume our goal. If labor is to be paid fair wages, a profit must be made on what is produced. If stockholders are to receive dividends on their investments, and if interest is to be earned on funded debts, a profit must claim its rightful and just position in the sales dollar of every business enterprise…Profitless business is a social enemy, a labor tyrant, a destroyer of trade and commerce.'
>
> (Shibley, 1933: vi)

Shibley was not alone in calling for a profit focus (Tadajewski, 2016). Even so, he is exceptionally rare in articulating its link to a marketing orientation, consumer focus and utility in undermining labour strife and political change.

The Marketing Concept

For Shibley, being customer-focused was a 'general law' that could not be violated. In a paraphrase of the eighteenth century arguments made by Adam Smith, which were echoed by writers in the 1920s (White, 1927), 1930s (Arnold, 1938) and cemented within the mainstream of marketing thought in the 1950s and 1960s, Shibley stresses the shifting power relations in industry. Producers, he wrote, 'can no longer dictate. They may only suggest. Consumer needs will determine market conditions' (Shibley, 1928a: 199-200).

Why, we might ask, was Shibley calling for this market focus? The answer lies in greater environmental uncertainty, higher levels of competition and the trend towards 'breakevenism' in industry (Shibley, 1933). He was well aware that his argument was nothing new and provided numerous historical examples – some taken from ancient times – to propose that focusing on customer needs is a time honoured practice pursued by successful entrepreneurs. It was not difficult, Shibley argued, to establish customer needs provided the merchant made an effort – an effort which required primary and secondary market research including monitoring stock levels, speaking informally to clients and ethnographic enquiry. This market sensitivity was the vehicle to achieve profit objectives and department stores were heralded as exemplars because they monitored changing tastes.

To summarise the discussion so far and orient the terrain for what follows: research furnishes the information about what will clear the market; sales estimation helps guide production, distribution and promotion decisions; with the profit potentials disclosed by the 'sales dollar' helping guarantee that firm objectives and labour demands are met. The costing measures and statistical indicators that we will explore below were helpful in multiple ways: they furthered the notion that a business is run on a scientific, objective and evidential basis. They illuminated what people were doing within the organisation and contributed to the emergence of a 'statistical reality' (Jacques, 1996). Quantification of sales potentials, 'objective' quota levels and related management practices provided what has been called 'the ultimate uniform and universal framework…Numbers could travel readily and reliably when hands-on management was giving way to management at a distance' (Jacques, 1996: 105). As we shall see, not all employees were happy with the generation of a 'statistical reality' that mapped their performance and provided an input into disciplinary mechanisms which were accompanied by sanctions, potential retraining and possible unemployment.

Nevertheless, these disciplinary measures were marketed in a positive way. The 'searchlight' of 'knowledge and [dissemination of] general information throughout the organization' provided the means to appropriately reward people (Shibley, 1929b: 124). Once again Shibley blurs organisational boundaries. These measures were not applicable solely to low ranking labour. All were appraised and measured against them. Furthermore, discipline was a condition of possibility for pleasure (Foucault, 1979) since these tools represent ‘the assurance to every man that merit shall be rewarded in the ratio of the efficient performance of the allotted task, no matter whether he be president or day laborer’ (Shibley, 1929b: 124).

Market Research, Sales Estimation and the ‘Sales Dollar’

Resistance to market research was a concern for Shibley. Some business people viewed market and customer research as ‘highbrow’ and ‘impractical’ (Shibley, 1928b). Producers, wholesalers and retailers were all reluctant to commit to primary research (e.g. Shibley, 1928a: 184-185). While he agreed that intuition can make a company successful, it is not enough. Only research can provide ‘objective’ insights into the marketplace, existing demand and potential future environmental changes that require organisational reorientation. To advance his case, Shibley cited numerous successful companies including General Motors and General Electric who used research to forecast the future (e.g. Shibley, 1928a: 19). Being systematic in this way was imperative if firms sought to ‘regulate and control their affairs’ (Shibley, 1929a: 20), making production, quality and cost decisions on the basis of consumer requirements and ability to pay (e.g. Shibley, 1931b: 131).

Market analysis identified likely markets. To study consumers, producers had to utilise the insights of mass psychology and purchasing patterns (e.g. Shibley, 1928a: 31-32), translating this information into ‘probable sales in units and dollars’ (Shibley, 1928a: 109). These markets were subsequently assessed in terms of their desirability when juxtaposed against manufacturing and distribution costs. Costs – when interpreted through the prism of the ‘sales dollar’ – determined whether a market would be served or not. The ‘sales dollar’ was a listing of all production and distribution costs compared against profit. This calculation was applied by bankers to determine the viability and efficiency of a business (Shibley, 1924). And this hints at the concentrated nature of these hyper-power relations. As a disciplinary measure, it enabled each head of department to critically appraise their contribution to costs and indicated where savings could be made. Equally, it defined the statistical reality of corporate activities for shareholders who subjected firm activities to external analysis (e.g. Shibley, 1928a: 163).

The sales dollar is a hinge in his displacement of management-labour relations. No longer is the figure of the boss personified in an individual. It is impersonalised in the influence of the external environment (i.e. the consumer and their needs) and judgments are made about servicing the customer provided the sales dollar calculations suggest an appropriate financial return is achievable. Science, the abstraction of the consumer, and the constitution of statistical reality through financial metrics anchor firm activities. As Shibley underlined:

> 'The sales dollar is a hard taskmaster. It sets objectives, and the setting of objectives, as to both the time and costs of operations, demands attainment…The sales dollar provides an exact method of subdividing the atom of costs into its electrons and of putting these electrons under a powerful microscope for intimate examination'.
>
> (Shibley in The New York Times, 1928c: 48)

Working out levels of profit from forecasted sales was only a first step in mobilising the organisation. Budgetary control mechanisms were needed to make sure that all departments registered the financial strictures that bounded their activities. A budget helped control 'every department…so that each subdivision shall be healthy, and shall cooperate with its fellow-divisions, and shall respond quickly and obediently to the central control' (Shibley, 1924: 4). Shibley registers that any efforts at control will be resisted. Still, disagreements and obstructions needed to be minimised. Reflecting this, he requests that practitioners ensure that all relevant actors (e.g. heads of department) 'shall understand it, appreciate its helpful qualities, and believe in it' (Shibley, 1928a: 134).

Potential resistance came from all levels of a company ranging from heads of department who desire their autonomy through to the salesperson. Production and advertising departments alike 'will resist the system' (Shibley, 1928a: 137) as it makes them accountable for decisions made over the financial year. Shibley resorts to ocular metaphors, stressing the haunting nature of the control mechanisms utilised by management (Shibley, 1928a: 136-137). They are always present, operating continuously. All members of the organisation 'will be under the searchlight of the system, *and he knows it*' (Shibley, 1928a: 138; emphasis added). And, irrespective of the hierarchical position occupied, 'There is no escape' (Shibley, 1928a: 138).

Put otherwise, while he has a more positive view of worker behaviour than Frederick Taylor (1911/1998), Shibley was not naïve enough to believe that people could be trusted to expend their full energies in sanctioned directions.

Visibility, Control and Discipline

Disciplinary techniques were seemingly highlighted, serving to remind all employees that their activities were visible and monitored. Management and labour alike were subject to 'omnivisibility', hierarchical observation and normalisation (Foucault, 2006). Omnivisibility refers to the fact that employee traits, character and behaviour were examined and documented. As much as was feasible, beliefs and behaviours were recorded, filed and coded as normal or abnormal. In addition, Shibley used an obtrusive method of gathering the material that constituted part of the input into his disciplinary mechanisms. While not literally monitoring employees with a watch, he conducted a form of ethnographic research, observing management, workers and their activities, often speaking to nodal figures. This enabled him to distil 'the knowledge of salesmen, appraising their statements, and judging their personalities' (Cowan, 1927: 458).

The owners of an organisation, their management and employees were, therefore, 'besieged by a tissue of writing, by a sort of graphic plasma which records them, codifies them, and passes them up through the hierarchy through to a centralized point…the effect is what could be called schematic and centralized individualization' (Foucault, 2006: 49). Bankers, stockholders and owners were the upper points of this hierarchy. The financial and personnel records were effectively a mirror of the tunnel that Foucault described as permitting entry into the panopticon by those who were tasked with monitoring the prison warden. In this case, we are referring to banker power to monitor their investment portfolio.

Shibley details a variety of control mechanisms designed to maximise firm transparency and employee subjectification. Setting budgets and quotas were two means to visualise the activities of departments. For example, in reference to the 'X.Y.Z. company' he explains that this firm embodies a systematic strategy. First, it undertakes appropriate forecasting of marketplace potential. This enables it to 'visualize economic conditions in the various markets as compared to competing products, and to determine what the present requirements of those markets are so that it can adapt its products to such special market needs as have been ascertained' (Shibley, 1928a: 101). These practices structured organisational behaviour (Shibley, 1928a, p. 107): 'From the president down, every department head has before him a complete and graphic picture illustrating the corporate task' (Shibley, 1928a: 128).

Department heads were 'the eyes and ears of executive management on the firing line [and]…he occupies a position of great trust and responsibility, as the success of the entire…program depends upon the accuracy of his estimate of sales by styles and kind of product for the coming year' (Shibley, 1928a: 101). Planning production and sales forecasting made performance levels amenable to evaluation and staff knew it:

> 'The average sales manager does not like to make an exhaustive market study and sales analysis. He is forced to put down in black ink on white paper a sales estimate for a particular period…[and] *he knows he will be expected to perform on the basis of the forecast. Each branch manager feels that the sales analysis is a high-powered searchlight directed on his division*.'
>
> (Shibley, 1928a: 135; emphases added)

As a further example, Shibley quotes a cigar producer being outpaced by cigarette manufacturers. What market research disclosed was that their salespeople were not efficient. This knowledge was a medium for discipline:

> '…their salesmen were not properly developing the purchasing power of the territories in which they operated. Steps were taken to educate these salesmen and to insist that a given territory be developed to the limit of its purchasing capacity. Definite sales quotas were allotted to each territory…When he discovered that the sales manager at the home office knew more about his territory and its sales potentialities than he did, *he came to the realization that he must become a more efficient salesman if he was to keep his job*.'

(Shibley, 1928b: 19; emphases added)

These quotas were input into tabular form against employee names 'so that the local sales manager and even the general sales manager, through direction, *can get after poor salesmen and compliment good ones on the basis of their performance*' (Shibley, 1928a: 96; emphases added). They could be reprimanded, (re)trained, relocated or fired. These punitive measures were repressive, productive or a combination of the two and made extremely salient in a period of high unemployment.

Shibley, to recapitulate, provides us with arguments that reflect those later aligned with the marketing concept. His work invoked humanism and this axiology undergirds all his written output. He sought to humanise business practices and centre attention on the role of the consumer whose needs, desires and willingness to pay for the products of the industrial system made them the 'boss' of the company (Ivey, 1925/1937). This is a concept that has a lineage through to the present day. It is a culmination of a process of 'displacement' (McGreggor Cawley and Chaloupka, 1997) which we will unravel.

Displacement, the 'Order of the Situation' and 'Unpolitical Socialism'

What we mean by 'displacement' is that the owners and managers of firms are deemphasised in Shibley's work. He introduces the language of science, objectivity and evidence-based decision-making as part of a wider effort to mute labour tensions. This speaks to general trends in the business community which leveraged scientific neutrality to undermine concerns about the power of big business and 'vested interests' (Jacques, 1996). The literal bosses – bankers, owners or managers – were discursively side-lined in favour of upgrading the status of the marketplace, consumer and the abstraction of the sales dollar (The New York Times, 1928c). This tactic was initiated by Adam Smith; it was used by Taylor to undercut the potential for socialist political change; and referenced as a useful means to discipline workers (Derksen, 2014).

Displacement was promoted by Mary Parker Follett (1925/2013) just prior to the conceptualisation of the consumer as 'boss' in our literature (Ivey, 1925/1937). Follett argued that getting people to follow orders is contingent upon appropriate training and displacement. Orders have to be 'depersonalized' – this deflates animosity – and people have to adhere to the 'law of the situation' (1925/2013: 58) which redirects attention away from internal politics. This was useful when people shared a similar hierarchical position, but it applied to all members of the company and their relationships. As she elucidated:

> 'The head of the sales department does not give orders to the head of the production department, or vice versa. Each studies the market and the final decision is made as the market demands. This is, ideally, what should take place between foremen and rank and file, between any head and his subordinates. One *person* should not give orders to another *person*, but both should agree to take their orders from the situation. If orders are simply part of the situation, the question of someone giving and someone receiving does not come up. Both accept the orders of the situation. Employers accept the orders given by the situation; employees accept the orders given by the situation.'
>
> (Follett, 1925/2013: 59; emphasis in original)

These ideas were extended by Shibley when he posited that the market and consumer directed company activities through the prism of the sales dollar. A new authority relation – however tenuous – was fostered (Knoeppel, 1933). Management were the 'servants' of their customer base and 'guardians of the workers' (Knoeppel, 1933: 293), with 'external conditions' impacting upon the firm and its pursuit of profit more 'than internal factors' (Knoeppel, 1933: 304). This was the new 'philosophy'. It '*definitely shifts the emphasis from the factory to the consumer and the market-place as the originating authorities and controls*' (Frederick, 1930a: 223; emphasis in original) – an axiological redirection that was sympathetically supported by the 'American Federation of Labor' (Frederick, 1930c: 237).

It was not class manipulation which sought to make employees adhere to corporate dictates. By doing what the 'external' environment, that is, what the market and consumer wanted, employees could achieve their desires for high income levels. High income would provide high levels of consumption. It promoted what J.G. Frederick, the one-time editor of *Printers' Ink* called 'unpolitical socialism' (1930b: 208). This was a 'socialism' underwritten by 'democratic' access to the outputs of industry (Frederick, 1930d). These products were secured via hard work and through employees investing in share ownership which promised additional discretionary income (Young, 1930), thereby further tying employees to the capitalist system, driving industry to new heights; heights which were revitalised by advertising, ‘progressive obsolescence’ and reference group pressures (Abbott, 1930).

In this way, the industrial community was able to earn enough profit to permit its longevity. This, in turn, supported the workers and their consumption-driven quality-of-life in perpetuity. Enabling these interrelated desires was Taylor’s recognition that high wages were consistent with efficiency and Shibley’s rethinking of the relationship between the firm, consumer and the employee. While Shibley did anticipate that workers would resist his system, his conceptualisation of scientific administration and scientific marketing was cited as delimiting the potential for radical social change: ‘the very developments which Mr. Shibley advocates…tend to render more drastic remedies such as communism, to say the least, unnecessary’ (Clark, 1929: 62).

When combined with Cowan’s (1927) argument that Shibley provides us with the first explicitly articulated ‘philosophy’ of ‘marketing management’, it is possible to conjoin the two projects. Marketing management as a business philosophy was promoted – in part – as a vehicle to protect the economic status quo against socialist and communist threats. On the managerial side, research continued to develop Shibley’s ideas regarding profit, budgetary practices and the need for organisational control routines. His work was praised as a ‘constant inspiration’, the consumer continued to be prioritised over capital and labour interests and positioned as the ‘*keystone in the business arch*’ (Knoeppel, 1933: 7; emphasis in original), with bankers continuing to function as judges of normality (Knoeppel, 1933: 55, 60).

Discussion and Conclusion

In this paper, we have focused attention on a superordinate group able to texture the practices of business organisations through their ability to provide or deny access to financial resources: the banking system. They used marketing to forward their agendas and engaged in discursive ‘displacement’ to defuse capital-management-labour tensions and the appeal of socialism (McGreggor Cawley and Chaloupka, 1997). This has not previously been documented.

Tracing this narrative has deepened our understanding of marketing's role in political-economic contestation. It complements other Foucauldian research by illuminating the ideological and quantitative dynamics that accelerated in the Cold War context (Tadajewski, 2006), but ties them to earlier social fractures. Where Tadajewski (2006) highlighted the impact of the geopolitical climate on marketing theory, we made a case for scholars to direct their attention beyond the bounds of the marketing community – whether understood as practitioners or academics – to elucidate the complex macro-structural power relations that shape the nature of business practice and subsequent enrolment of the consumer within organisational control mechanisms. The reasons behind the promotion of a customer orientation were more complex than accounts have acknowledged to date and this 'subjugated knowledge' has allowed us to disrupt the 'functionalist coherence' that marks textbook accounts of the development of our discipline and its contribution to society (Foucault, 1980a: 81).

The relationship between the banking industry and the wider community was positive in that Shibley's writings were meant to foster efficiency and profitability. His 1928 text was admired for communicating best practice. Concomitantly, the application of his ideas would help defuse the threat from socialism and communism. Related ideas were not unknown within our discipline. Early marketing thinkers like Paul Ivey rallied against the United States taking a Bolshevik turn. Success in a capitalist country, he proposed, was contingent upon improving and controlling oneself, training, hard work and through cooperation with 'capital' interests (e.g. Ivey, 1925/1937: 110, 115).

Both Taylor (1911/1998) and Ivey (1925/1937) were claiming that radical political, social and economic change was not necessary to improve living standards. Working more efficiently within the system was crucial. Shibley made related connections, linking the consumer, the use of 'objective' market research and budgeting to the pursuit of profit. This focus and these practices would enhance the ability of firms to remunerate their employees. Marketing-oriented, profit-generating business was not the enemy of labour in this axiology. It was its friend (Shibley, 1933). But only if all parties appreciated how power in the marketplace 'actually' functioned. It was not the owners of capital at the apex. Nor the worker. Ivey (1925/1937: 117) expresses this point lucidly:

> 'The customer, you know, is the boss of your company. I do not care who owns it or who runs it. The patrons of your company are the bosses; they can preserve or destroy your organization. How do I know? Because the men who manage it do everything they can to satisfy the customer. That is the secret of progress and success in any business. Are you doing all that you can to satisfy the customer, to satisfy the people who are working with you, and to satisfy the person you are working under in your organization.'

This idea of the customer as boss resurfaces periodically in the history of marketing theory. It appears when social tensions reach a breaking point. As such, prominent advertising agencies like J.W Thompson make a similar association in 1937 in their literature intended to buttress the capitalist system (e.g. Schwarzkopf, 2012: 255, 259). In far less visible terms, the concept of the consumer as boss was used by General Electric during their labour disputes in the mid-century to undermine union officials and render their workers more amenable to management. The concept of the consumer as 'boss' was once again used to legitimate disciplinary power.

The promotion of the marketing concept, consumer orientation and the pursuit of profit has, therefore, been underwritten by the expansion of hyper- and disciplinary power. Marketing and its association with rising standards of living have all historically been a means to stabilise (where necessary) and expand (where desirable) the capitalist system. These values cohere in the early twentieth century and are taken-for-granted in the period after World War II (Mazur, 1953), becoming central to the discussions about the contribution of marketing to society in the Cold War era (Monieson, 1988). Interestingly, the key figure pushing this agenda forward was Paul Mazur, an investment banker who emphasised the role of marketing in fighting 'international Communism' or 'disguised totalitarianism' (Mazur, 1953: xi).

Not long after Mazur was writing, Kotler (1967) published the first volume of his *Marketing Management: Analysis, Planning, and Control* (APC). Shibley's work is comparable to this text in terms of its coverage of APC (Cowan, 1927) and the idea that marketing management is a business philosophy. What we can now appreciate is that Kotler engages with Shibley's spectre in ways he did not register. He positions the consumer as the apex of the organisation: 'Under the marketing concept, the customer is at the top of the organizational chart' (Kotler, 1967: 6). More recently, Kotler reinvigorates the idea of the consumer as boss, although the disciplinary, labour-management narrative is submerged: 'We now live in a customer economy where the customer is king…Companies must wake up to the fact that they have a new boss – the customer' (Kotler, 2008: 36). This 'boss' has long haunted organisational routines and was part and parcel of an attempt to control workers and ensure the perpetuation of capitalist exchange relations. This project has been largely successful. For some writers, it defused class conflict (McGreggor Cawley and Chaloupka, 1997) and is a project that continues today in a variety of areas including sales management (Skålén, 2009) and retailing practice (Korczynski and Ott, 2004).

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