

## **THE TREE METAPHOR: A CREATIVE APPROACH TO UNDERSTANDING MARKETING**



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### **Abstract**

Comparing major functions of marketing to a picture of a tree and its surroundings helps students learn about marketing concepts and how they relate to each other. This unique metaphor is in line with learning theory and could be used by other disciplines. Its teaching effectiveness can also be proved empirically by further studies.

**KEY WORDS:** Marketing metaphor, major marketing concepts, relationship of marketing concepts, learning theory

### **INTRODUCTION**

It is often not easy for marketing students and marketing practitioners to understand the relationships among marketing concepts. The development of a tree metaphor seemed to provide greater synthesis of knowledge for the integration, relationship, application, and overall understanding of the essence of Marketing in academic classes. This marketing tree (Figure 1) is a unique contribution to teaching marketing; a search of literature via the Internet did not reveal another originator.

This concept uses a constructivist model of learning. According to Johnstone [1997], learning is not the transfer of material from the head of the teacher to the head of the learner; it is the reconstruction of material in the mind of the learner. The marketing tree described in this paper allows for such reconstruction. The usefulness of the tree metaphor is backed up by general learning theory.

## THE USE OF METAPHORS IN LEARNING

### GENERAL METAPHOR THEORY

Lakoff and Johnson believe that people think in terms of metaphors. The less concrete an item is, the greater the tendency to describe it using a metaphor. Metaphors assist in gaining familiarity with the unfamiliar. Kirk [2005] adds to this theory: the shared properties create cognitive ties between the items and provide scaffolding upon which continued learning can take place.

Barbell [1997] says that language is a metaphor. He compares literal speaking and metaphorical speaking. Literal speaking is simple, direct, and uses less of our brain. In contrast, with metaphorical speaking we bring various areas of our brain into use. We paint a picture without words in a way that others can relate to. Using metaphors in speaking to aid learning is like "using barbells for our minds." Metaphors make learning more interesting and by default will enhance interest and retention. It encourages the student in a Socratic way to draw deep inside and bridge different regions of the brain.

Kauffman [1992] indicates that learning has to do with a hunger to make sense of something. The whole brain, including the emotions, has to be engaged. Metaphors engage the subconscious and emotions. Questioning drives thinking. Knight [1993] echoes this use. Because literature is the discipline that deals most directly with learning through metaphor, learning to read literature properly is the most direct way of learning to imagine properly what is read. This is a skill that is the key to reading technical manuals, if they are well written.

Gagne [2007] posits that there are nine events that activate processes needed for effective learning. One of them is providing learning guidance. For such purposes, analogies have proven to enhance student learning through metaphor and are considered an effective instruction technique. This method is said to aid retention and learning transfer.

### MARKETING CONCEPTS FIT THE METAPHOR MOLD

Marketing concepts are non-tangible and usually new to students. In addition, they can be complex and the inter-relations can be varied. Using a known natural object such as a tree to provide a brain-link to marketing concepts is well within the literature's suggestions for successful learning.

### THE MARKETING TREE METAPHOR

#### THE WHOLE TREE

The marketing tree is symbolic of an organization's marketing activities, set in the vast, green, natural "business" environment. The macro-environment is full of threats and opportunities. It is the literal space in which the organization will grow or die. To live and thrive requires the presence of marketing executives, capable of working with the business environment. Companies that create remarkable products, such as JetBlue Airways, Hasbro, and Starbucks, have to be run by marketers [Godin, 2003].

Marketing executives are like farmers. It is their responsibility to find fertile, firm nutrient rich land. For marketers the land is the marketplace. Marketers are responsible for the proper planning, creation, and execution of the strategic marketing process *where* to plant the seed, *how* to cultivate the growth, *when* to plant (the proper season), and *what* type of tree seed to plant, in order to provide desired value to the customer. Remarkable marketing plans to building things worth noticing right into the product or service [Godin 2003.]

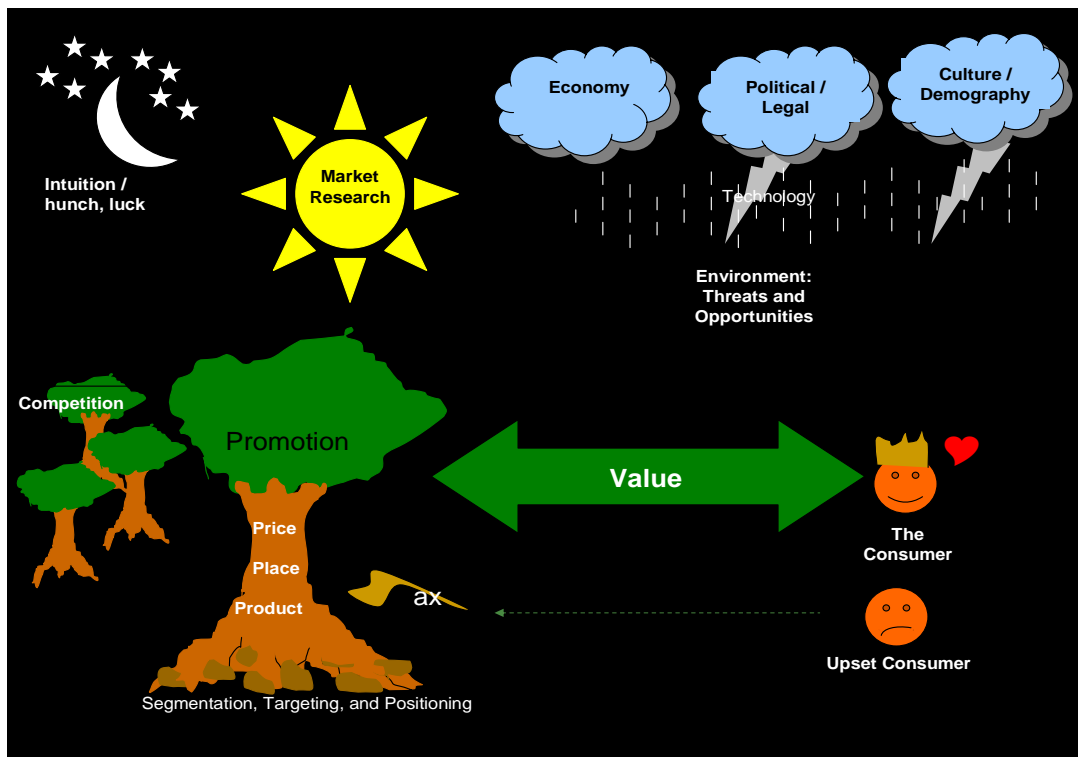
The life of the tree begins with the planting of the seed into fertile soil. The marketer's idea (seed) must be targeted to the right market segment. The tree needs space to develop. The marketer's product/service needs competition-free space. For example, Applebee extended into rural counties with populations under 50,000, where there was no casual-dining competition from Chili, Bennigan or Houlihan.

## COMPETITION: OTHER TREES

These competitor trees, looking to survive on their own, represent a tremendous threat. Competitor trees may suck valuable resource minerals from the soil, block needed sun, or strangle the tree itself in the same way that competing products soak up market demand and reduce or eliminate the success of a product.

Executives need to monitor the marketplace for growth and competitors, to be sure that their sapling product is first, grows taller and stronger than the competition. Therefore, the location (segment) where the marketer places the seed for the marketing tree is vital.

**FIGURE I  
THE TREE METAPHOR**



If the new product grows faster and stronger than the competition it may eventually kill off the competition. The government and consumer advocates, uncontrollable factors, may try to change the monopolistic market by dividing its resources. For example, this is what occurred with AT&T and some cable companies.

## AN UNCONTROLLABLE FACTOR: THE WEATHER

Before selecting the market segment, marketing executives focus on the uncontrollable environmental factors that will affect the life of their product. This is similar to the farmer's concern with the weather. Climate in nature would be equivalent to technological, economic, political, legal, cultural (consumers changing tastes and preferences), and other macro/micro-environmental events. For both the botanical tree and the marketing tree clouds may be either positive or negative. In nature, clouds can block important light; other times they protect the tree from intense heat. For the marketing tree, clouds can converge together to form a formidable and detrimental legal storm; this was evident in the United

States Government monopoly case against Microsoft Corporation. Clouds can become an economical storm, as was the US Stock Market crash of 1987.

Thus, rain and storms from the clouds represent both opportunities and threats. Water is necessary for the life of the natural tree (an opportunity), but storms can also bring powerful downpours, high winds, or lightening that break branches or blow a tree over (a threat). For the marketing tree, lightning represents the fast pace of technology, a sudden destructive rumor (P&G logo) or a proven fact (Vioxx), or sudden death: film giant Polaroid was almost destroyed overnight by digital camera technology.

In summary, the climate can be beneficial or destructive. To understand marketing, and to develop effective marketing strategies, you must first understand the context in which marketing operates [Armstrong and Kotler, 2007]. Marketing executives must constantly monitor weather forecasts (sudden macro/micro-environmental changes of climate) and the strength of their product's roots – its positioning in the marketplace.

### **SEGMENTATION, TARGETING AND POSITIONING: THE ROOTS OF THE TREE**

The roots of the tree represent three key factors that are the essence of strategic marketing: *Segmentation of the Market*, selection of the *Target Market* and *Product Differentiation and Positioning (STP)*, [Kotler and Keller 2006]. If the seed (product idea) is planted too deep, the product never sprouts to life because it is too far from the market. If the product seed is planted too close to the surface, macro-environmental factors (such as a heavy storm) may wash the seed away. If planted just above a section of bedrock, the roots are impeded, and the growth of the tree is subsequently reduced; this is the equivalent of overestimating market demand. However, successfully rooted trees in nature go on to survive any storm in the environment, impacting the lives of all earthly inhabitants. Successful marketing trees impact the consumer, our king of the marketplace, who constantly seeks to obtain “value” from the products. An example of successful marketing trees are Wal-Mart and Neiman Marcus, both growing during the same decade, or Nokia bringing out new hardware every 30 days.

Marketing executives carefully research good growth (root) factors before starting production (planting seed). The strength and spread of the roots represent the right positioning in the mind of the consumers. Key to the growth of the tree, this positioning ultimately determines the market share. The original Hummer H1 was successfully positioned, as was Old Spice deodorant, which appealed first to first-time deodorant users and then refocused on performance--edging out Right Guard as the top teen brand. The right positioning can hold the product steady during treacherous storms; STP managed to hold on to its market despite problems. “A tree cannot stand without its roots” (Zairian Proverb).

### **PRODUCT, PLACE, AND PRICE: THE TREE TRUNK**

The visible part of the natural tree itself (trunk, leaves, and flowers), symbolizes the four P's of marketing: product, price, place and promotion. The tree trunk is composed only of product, place, and price. Product is closest to the base of the tree since it emanates from the roots and is always the first marketing “P” to be created. The remaining length of the tree trunk is comprised of place and price. More *places* of distribution can contribute to the height of the tree (strength of product line in the marketplace: think of Caterpillar's unparalleled distribution). *Price*, if set at the right level, has the same growth effect, as proper price increases demand (i.e., Wal-Mart as a toy retailer).

Often marketers make the mistake of modifying the visual aspects of the marketing tree trunk when things begin to fall apart. They may use chicken wire to protect the trunk from animals, stakes to twine the tree, and tar or varnish to protect the tree from pests. In other words, they change the product, the place, or the price when in fact they should look below the surface, at the roots (the segmenting, the targeting, and or the differentiation and positioning). This is what Whole Food Markets has done by positioning away from Wal-Mart. The upscale retailer caters to a carefully selected segment of consumers.

By treating the symptoms and not the illness, marketing executives may artificially extend the life of the tree for a greater period of time, rather than nourishing the roots of the tree, which is where probably the problem really is. For example, Toys “R Us” has little hope of competing on price with Wal-Mart. Other marketers may focus instead on altering the last “P” – promotion.

## PROMOTION: THE MARKETING TREE'S FLOWERS AND LEAVES

At the top of the marketing tree is promotion, the most visible element of the marketing mix, represented by the tree's flowers and leaves. Promotion is important because it communicates a promised value and the ability to satisfy a perceived need. When things go wrong in marketing, the marketer may trim, prune or cut promotional expenses so the company can look more economically healthy. This is probably a mistake. Once again, the problem is likely to be in the tree roots (positioning). For example, STP's problem was in its positioning, not advertising, as was Burger King which switched advertising agencies several times until they developed "have it your way" *positioning* (root). From great distances, the visible aspect of marketing, the treetop leaves, may attract the consumer in search of "VALUE". Award-winning advertising agencies like Crispin Porter + Bogusky (CP+B), have proven to be expert in communicating value to consumers.

## THE CONSUMER: ROAMER IN THE MARKETING FOREST

The consumer is the *king* in the marketplace, as the cliché notes. The consumer searches for products and services that provide VALUE to fulfill needs and desires. Consider Starbucks (successful) and Maxwell House (remaining stuck in the past). A customer waters and fertilizes the marketing tree by providing spending money and also by offering feedback. This is known as marketing exchange. Depending upon the timing of sale, the customer may be an innovator, an early adopter, or another category such as late adopter. A distant consumer represents a late majority in the distribution of new product adopters [Hawkins 2004]. He is curious and heading closer. A consumer present at a newly growing marketing tree is one of the *early* adopters.

A different consumer seeks different forms of value from a chosen market tree (product line). The relevance of the differentiation between products in the marketplace affects the probability of achieving brand loyalty. The goal of all the marketing trees in the forest marketplace is to capture the heart and mind of the consumer, his loyalty. Once this happens, a dedicated of consumer will nurture the marketing tree continuously, essential for life (profits and customer feedback); for example, consumer loyalty to Tide, Apple Macintosh or Harley Davidson.

A happy customer can also nurture the marketing tree by encouraging other prospects to become customers through word-of-mouth testimonials (called viral marketing). Companies can provide mechanisms for this communication in order to increase the product's growth. For example Tremor, a marketing arm of Procter & Gamble, recruits "connectors." These are voluble teens with a wide social circle that will endorse products in school cafeterias, sleepovers, cell-phone conversations and by e-mail. These connectors are volunteers receiving only coupons, product samples and the thrill of being insiders. This approach has been so successful that these connectors expanded from just promoting P & G Brands to promoting many other brands and Tremor is now building a new connector group of mothers [Wells, 2005]. Burger King [BK] provides another example of very successful viral marketing: using the Internet for interaction with prospects and customers because of the great overlap between Web regulars and BK's core audience. As described in 2004 articles by Bob Garfield in Nation's Restaurant News, the company created [www.subservientchicken.com](http://www.subservientchicken.com) to promote its "TenderCrisp" chicken product. Visitors to the site could make the cartoon chicken roll over, flap its wings, etc. by typing in commands. This tied into BK's successful "Have It Your Way" marketing campaign. Launched without any promotion, the site ended its first day with one million hits. Due to world-of-mouth comments by viewers, by the end of the first week it had 46 million hits, by the end of nine months, 385 million.

An unhappy customer's negative comments are akin to hitting the marketing tree with an ax; a large enough number of unhappy customers will fell the tree (e.g. Crystal Pepsi).

## MARKETING RESEARCH: THE SUN

The sun, life-giving source of illumination and energy for living things, is the equivalent to *marketing research* for the marketing tree. When marketing research is not properly conducted, the product does not sell and may be discontinued. Lack of prior consumer research is also predictive of failure. For example, Kimberly Clark's Avert Virucidal tissue was a blunder. People didn't believe the claims that

Vitamin C derivatives incorporated into the tissues could kill cold and flu germs. They were also frightened by the “-cidal” in the name, that they connected to the word “suicidal” [Kerin 2006].

The commercialization stage (launching a new product), at the end of the *new product development process*, is a crucial period. Careful research is needed to avoid failure. Marketing executives (farmers) must be aware of what causes damage or destruction to young products (trees): sudden appearance of competitive products (other trees), bad timing (improper time of the year for planting), poor customer feedback (lack of fertilizer), too little proper research (too little sunlight), a too small target market (wrong soil content), and so forth.

### **MARKETING INTUITION & PRIOR EXPERIENCE: THE MOON & THE STARS**

Good marketing plans need more than rational marketing research about the specific project. Just as an experienced professional does in many fields, experienced marketers can draw upon prior knowledge and related research and can use their intuition. The moon and the stars represent these qualities. In *Coaching the Alpha Male*, Ludeman and Erlandson [2004] evaluate the ability of *alpha male* CEOs, such as Dell Computer’s Michael Dell and Intel’s Andy Grove, to make accurate business decisions based on instant, innate yet inexplicable knowledge. Gladwell (2005) discusses the phenomenon intuition in his book *Blink*. He writes about the incredible gift of subconsciously understanding and evaluating a situation instantly and achieving positive desired outcomes.

The moon and stars in the marketing forest also represent future products and advanced technology e.g., digital TV advertising. Nighttime marketing fits into this picture when remembering that the sun is really a star and that somewhere on the earth it may be shining on consumers. EBay Inc, Sony Walkman and Sony video camera, iPod, and Google are great examples of 24-hour creative marketers.

### **INTERNAL MARKETING AND THE CULTURE OF THE ORGANIZATION: THE TREE SAP**

The sap of the marketing tree is the culture of the organization (internal marketing). Without a strong corporate culture reaching every part of the marketing tree - root to leaf - the organization remains weak. Employees may be thought of as tree leaves. When they separate from the company, a strong organizational culture ensures in time the arrival of new bright and motivated employees. For example, since 1983 Ritz-Carlton’s customer-contact employees have helped the hotel to win virtually every major award that the hospitality industry bestows [Armstrong and Kotler 2007].

### **STRENGTHS: THE TREE BARK, RINGS, CHLOROPHYLL, AND FERTILIZERS AND WEAKNESSES: FUNGUS AND WORMS**

Sap is not the only promoter of strength. Just as abundant chlorophyll aids natural tree life, in the marketing tree it represents a solid internal structure and communication system. If the tree does not look green enough (in color for the natural tree, in monetary profits for the marketing tree) then it might be lacking internal strength. A natural tree’s resistance to plagues in its bark, branches and leaves would be the equivalent to a marketing tree’s resistance to internal financial, marketing and/or production problems. Just as a natural tree accumulates rings throughout the years, a marketing tree’s rings are the marketer’s years of experience in the industry.

Weaknesses could also be present. A natural tree’s infection or fungus translates to a marketing tree’s lack of internal communication or poor administration. Fruits attacked by worms that fall onto the ground may weaken a natural tree; similarly, poorly defined company internal processes can weaken a marketing tree.

### **MARKETING ETHICS AND SOCIAL RESPONSIBILITY: TREE TYPE AND LOCATION**

A natural tree’s type and location can be thought of as allied to Marketing ethics and social responsibility. The tree type represents the type of product, for example, Ford-Explorer/Firestone charges. Tree location can be thought of as production site (Nike “sweatshop” charges). Just as trees can be planted even though they produce flowers that may cause severe allergies, organizations can knowingly make products that cause damage and represent health hazards.

Tree farmers must be careful to self-regulate. A tree too tall and too powerful creates a long shadow and strips too many nutrients from the soil; this may anger other farmers. In the marketing forest this is called a monopoly. Governmental action may cut down the tree or divide the resources. An example is the European Commission ordering Microsoft to offer a version of Windows with its media-playing software stripped out. A marketing tree grows rapidly and successfully if its social impact is widely accepted. Viagra, Nokia, Ipod, and Starbucks all represent marketing trees whose exotic flowers attracted customers.

### **THE MARKETING PLAN: ALL ELEMENTS IN THE TREE METAPHOR**

The complete marketing plan includes all parts of the marketing tree: roots, which choose the values for the customer (STP), the trunk that provides the value (product, place and price), and the leaves and flowers that communicate the value (promotion) for the customer (king). Choosing, providing, and communicating value represent the value creation and delivery sequence, according to Kotler [2006]. In addition, other aspects such as the external forces (weather changes), potential customers, marketing research (sun), competition (other trees), regeneration (pollination), internal organization (the tree sap), etc. are all important elements in a marketing plan. Marketing plans require flexibility. For example, if the marketing tree faces a sudden drought (lack of material to create the product), options such as obtaining water (similar usable material) from a nearby well (different supplier) or through a gardener (consultant), could be considered.

### **LIMITATION OF THIS METAPHOR**

According to Arndt (1985) metaphors are partial truths and incomplete models. No single metaphor can capture the whole of a selected aspect of reality in its full complexity. Adopting a metaphorical view of science means adopting a pluralistic perspective. Many metaphors are needed to throw adequate light on a phenomenon and as Oscar Wilde said: "truth is rarely pure and never simple."

### **SIGNIFICANCE OF THIS TEACHING TOOL**

Using metaphors to enhance teaching is a technique with a strong base in the literature in many disciplines. The marketing tree metaphor was developed by the author over a period of time in college marketing classes. The use of the metaphor seems to have improved student understanding of marketing. Further studies are being designed to empirically prove increased learning through the use of the marketing tree.

### **END NOTES**

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