
David D. Monieson (1927-2008): The Pursuit of Usable Knowledge in Marketing¹

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This paper presents a biographical sketch of David D. (Danny) Monieson (1927 – 2008) whose academic career in marketing included time spent at the Wharton School of Business at the University of Pennsylvania and the University of Toronto, as well as over forty years at Queen’s University. Monieson published few, but important, contributions to the marketing literature, especially in the history and philosophy of marketing thought, the latter focusing on usable knowledge in marketing. His career touched those of other marketing greats such as Wroe Alderson and Theodore Beckman whose influences are traced in this biographical sketch.

Intellectual biography contributes to our understanding of the history of ideas by examining the origins of an individual’s work, how it came to focus on certain ideas, and the ideological foundations of a subject’s thinking. It helps us to understand achievement by examining a subject’s motives, the personality they brought to their work, and the people and conditions that influenced them along the way. Another role of biography is simply to tell the stories of heroes. In telling those stories, we may also learn more about ourselves. This is an intellectual biography of David D. (Danny) Monieson. He was our teacher, mentor, colleague, and hero.

Dan Monieson retired from teaching in 1991 after 40 years in the marketing academy. Following graduate studies at Ohio State University, he began his academic career at the University of Toronto in 1955 followed by three intellectually stimulating years as a member of the faculty at the Wharton School of Business, then settled down in 1961 at Queen’s University in Kingston, Ontario, Canada where he remained for the balance of his career. Monieson twice won the Queen’s Commerce Society’s Teaching Excellence Award. He was first and foremost an

outstanding teacher. As a consultant, he worked with government and quasi-governmental organizations, with multinational companies in pharmaceuticals, cosmetics, toiletries, confectionaries, and with advertising agencies. His forte was in executive development. Monieson wrote and published selectively, but his work is nonetheless important. Most of his writing appeared in the *Journal of Macromarketing (JMM)*. He wrote the lead article, “What Constitutes Usable Knowledge in Macromarketing”, for *JMM* when it began publication in 1981 and won *JMM*’s 1989 Charles C. Slater Memorial Award for most outstanding article published in 1988 - “Intellectualization in Macromarketing: A World Disenchanted”. His work has also been published in the *Journal of Marketing*, *Journal of the Academy of Marketing Science*, and, in true earlier twentieth century academic tradition, some of his most interesting and important work was published in conference proceedings. He held the Nabisco Brands Chair in Marketing at Queen’s for over 15 years. These achievements are part of what the biographer Milton Lomask (1986) calls “residue” and what makes David D. Monieson a deserving subject for biographical study.

This research is largely based on in-depth personal interviews conducted by the lead author with Monieson in September of 1998. For additional information regarding Monieson’s consulting work, we relied on archival records and a personal interview in 2007 with his long-time friend and client, Mel Goodes. Monieson supervised only two doctoral graduates¹ during his career. Both were collaborators with Monieson on some of his published research and both are co-authors of this biographical sketch. Three of the co-authors were students of Monieson’s, in his MBA courses at Wharton as well as Queen’s, and in his doctoral seminar at Queen’s. Thus, personal reflections of the authors and course notes also provided source material. Additionally, some archival documents were studied including Monieson’s course notes

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from Wharton and Queen's, unpublished research notes, and personal correspondence.

PREPARATIONS FOR A CAREER IN BUSINESS

Dan Monieson was born on August 17, 1927 in Montreal, Canada. His grandparents had emigrated from England in the late nineteenth century and founded the London Paper Box Company in Montreal. The London Paper Box Company produced fancy cardboard boxes used in packaging products such as chocolates and perfume. Dan grew up during the Great Depression, but didn't suffer. His father worked for the family business as sales manager and provided a comfortable life for the Monieson family. In high school, Dan sang in the choir, played hockey, and led a full life. There would eventually be some pressure to join the family business, but his mother didn't want him to take this path. She wanted Dan to "do something with his life". Before he went to university, he briefly thought about a career in dentistry.

After high school, Monieson enrolled at the University of Vermont (UVM). He sang in a dance band for extra cash, played intercollegiate hockey for UVM, and earned his Bachelor of Science degree in technology and economics with a minor in statistics. A career in teaching had never occurred to him, but aptitude tests taken while he was an undergraduate student suggested that he was suited for business, social work, or teaching. One of Monieson's favorite instructors at UVM was a professor of economics and statistics who had earlier taught at Miami University of Ohio and he recommended that Monieson go there for graduate studies. However, after graduation from UVM in the spring of 1949, there was subtle pressure from his uncle, who managed the London Paper Box Company, to join the family business although Dan's own parents were indifferent. Dan's uncle insisted that he learn the business from the ground up and so he began working in the factory punching cardboard for a salary of \$25 per week. When it became clear to Dan that he would have to wait a long time for an office job, he decided to take his UVM professor's advice and enrolled in the MBA program at Miami University of Ohio in the Fall of 1949.

Monieson should have completed the MBA in one year but the research for his thesis on the coal industry dragged on through the summer and autumn of 1950 so, during the Fall semester of 1950, he taught a course in Introduction to Business while still completing his MBA. Of that initial teaching experience Monieson recalled that he quickly learned to be prepared but also spontaneous; he learned that he had to be himself in the classroom. His MBA thesis supervisor, Professor Bice, had invited Professor Harold Maynard from Ohio State University to speak to his MBA class and Bice, who had encouraged Monieson to go on to doctoral studies, introduced Monieson to Maynard.

Monieson was polite to Maynard, but thought "how much schooling do you need?"

When he graduated from the MBA program in late autumn of 1950, Monieson interviewed with the Standard Register Company and was offered a job in Dayton, Ohio. Dan wanted a job in sales because of the earnings potential, but he failed the social independence test required to be a sales representative. Instead, he was offered and accepted a staff position in the marketing department. However, a few months later an illness in the family pulled him home to Montreal and, reluctantly, he resigned from Standard Register.

Back in Montreal, Monieson began looking for work. In addition to sales, he was interested in market research and applied for positions at several advertising agencies and research houses including Young & Rubicam where he met Hal Poole, who was the market research director there and who would later become a colleague of Dan's at Queen's University. Monieson eventually accepted a position as assistant manager of the Methods Research Section of Canadian Industries Limited (CIL). Methods Research involved the management of paperwork systems and inventory control, but Monieson was still interested in market research. CIL promised him the job as market research manager but wanted him first to go back to school for more graduate course work in statistics and research methods. So, late in the summer of 1952, Dan Monieson contacted Professor Harold Maynard at Ohio State University (OSU) and was soon enrolled in the PhD program in applied economics (marketing) at OSU. He had no intention of completing the PhD, but simply wanted to take some graduate courses as preparation to become market research manager for CIL in Montreal. This was a major crossroad.

INTELLECTUALIZATION ...

At Ohio State University (OSU) from 1952 through 1954, Monieson's teachers included Harold Maynard, William Davidson, Ralph Currier Davis, and Theodore N. Beckman who supervised Monieson's doctoral dissertation. His classmates included Robert Buzzell (later a professor at the Harvard Business School) and William Lazer (who became a professor at Michigan State University and later President of the American Marketing Association), both of whom also completed dissertations under Beckman's supervision. And there was another student at OSU that had a profound and lasting influence on Dan Monieson. In November of 1952 in the music room of the student union, he met Lois Glenn with whom he fell in love and later married. Lois was more than a romantic interest for Dan. At OSU she was a graduate student in sociology and later encouraged Dan's interest in the sociology of knowledge.

Maynard taught the doctoral seminar in the history of marketing thought. For the most part, the reading materials for that course were taken from Robert Bartels' dissertation

work on “Marketing Literature Development and Appraisal” which was supervised by Maynard and Beckman, completed in 1941, and eventually published in 1962 as *The Development of Marketing Thought*. Maynard had a strong interest in the history of the marketing discipline and Monieson recalled that the walls in Maynard’s office were covered with pictures of pioneer marketing scholars. Interestingly, the historical component in Monieson’s own dissertation was quite different from Bartels’ work as it traced portrayals of the role of marketing middlemen as producers of value from ancient Greek scholars through various schools of economics including the Mercantilists, Physiocrats, Classicists, Austrian School, Neoclassicists, and twentieth century dissenters – none of which had been discussed in Bartels’ work. Monieson never published any of this particular historical research and the ideas did not become part of the marketing history literature until the 1980s when Donald Dixon and (his student) Eric Shaw began to write about them. It did, however, kindle Monieson’s interest in understanding the roots of the marketing discipline and how it has evolved over time. That interest in the history of marketing thought became an important part of his later contributions to the marketing literature (Jones and Monieson, 1987; 1988b; 1990a; 1990b; 1992).

Monieson acknowledged that his most influential teacher was Theodore N. Beckman. One of the first courses he took in the OSU doctoral program during the fall of 1952 was Beckman’s. Soon thereafter he became Beckman’s graduate assistant for the undergraduate course in Credits and Collections. Later, Beckman supervised Monieson’s (1957) dissertation on “Value Added as a Measure of Economic Contribution by Marketing Institutions”. At OSU, and especially as Beckman’s student, Monieson gained “an incredible education in marketing” (1998) and developed strong beliefs about the integration of theory with practice that laid the foundation for his subsequent consulting work.

As detailed elsewhere, Beckman was one of the preeminent marketing scholars of the twentieth century (Jones, 2007). During his career, he published more than 200 articles and seven books including seminal works in credit, wholesaling, and marketing productivity, as well as a *Principles* textbook that was revised through nine editions. He supervised more than 50 doctoral students, including Dan Monieson, many of whom went on to distinguished careers. Beckman served as Associate Editor of the *Journal of Marketing* from its inception in 1936 through 1938, and was Vice President of the American Marketing Association (AMA) in 1939 and of the American Statistical Association in 1940. Among his many awards and recognitions, he received the AMA’s Paul D. Converse Award for original contributions to the science of marketing in 1961.

Monieson described his teacher as a “master who commanded attention” (Monieson, 1992). Even for his

graduate courses, Beckman locked the classroom door when the seminar was to begin and no amount of knocking at that door would get a student admitted once the class was in session. Students were “in mortal fear” of Beckman’s questions; Monieson admitted that Beckman “scared the hell” out of him (1998). Nevertheless, Monieson consistently challenged the master and gained his respect. As strange as it may seem today, the reading material for Beckman’s graduate seminar was his (Maynard and Beckman, 1952) *Principles of Marketing* textbook. The doctoral students analyzed that textbook, page by page, taking apart each statistical table (and there were many) and carefully examining the sources of information. This was evident in Monieson’s own copy of the book which is filled with margin notes, calculations, underlining, and colorful expressions of appreciation! As an undergraduate textbook, Beckman’s *Principles* was also unusual because of its close attention to epistemological issues, particularly the first chapter where careful distinctions were drawn among facts, principles, and theories. However, Beckman’s epistemology intellectualized marketing and, as Monieson later realized, limited the ability to truly know marketing. More about that later. On the other hand, Beckman also believed that theory must be grounded in practice.

For his grounding, Beckman consulted extensively with businesses, trade associations, federal and state governments, and was in high demand as an expert witness. In fact, he often used the title “Professor of Business Organization and Consulting Economist”. Beckman believed that consulting was essential to understanding the connection between theory and practice. In one of his requests for permission from OSU to perform outside service, he wrote the following rationale:

The testimony will revolve around the questions as to what is manufacturing, what is retail sale, and what is retail establishment. My interest in this case is purely academic, as I have been working on these technical questions for years and am anxious to get as many court decisions bearing on these points as possible in order to promote better statistics in the field of marketing and to clarify some important concepts (Beckman, 1954).

Beckman also felt that consulting made him a better teacher:

I regard this as the most constructive work any faculty member in commerce can do. In addition, such work gives one keen insight into the problems of business and its relation to the government. As this has been on the wholesaling level, it fitted into the work I do in teaching the course in Wholesaling and in doing research on the subject. In fact, I know of no better laboratory (Beckman, 1954).

Whether for philosophical or pedagogical reasons, Beckman believed it was important to stay connected with the business world if one was going to teach marketing. That later became a mainstay of Monieson's pedagogy who, like Beckman, came to believe that the business world was a laboratory for his teaching. Monieson acknowledged that Beckman's example in this regard, together with his doctoral seminar in marketing, "laid the foundation of his own subsequent consulting work" (1998). He had begun to recognize the importance of usable knowledge.

After taking Beckman's doctoral course, Monieson became his graduate assistant, grading papers for Beckman's course in Credits and Collections. Beckman's own doctoral thesis entitled *Credits and Collections in Theory and Practice* was immediately published as a book (1924) and later revised through eight editions over a 45 year period. Given Beckman's influence on Monieson, it isn't surprising that the year after Monieson's PhD was completed, he edited *Credits and Collections in Canada* (1958) and was involved in running the distance education program of the Canadian Credit Institute. However, "credits and collections" was not the subject of his dissertation.

Beckman's most important contributions to marketing thought were undoubtedly on the topic of marketing productivity (Jones, 2007). He was deeply concerned with the popular misconception that marketing was an unproductive, unnecessary part of the economic system. During the 1950s, Beckman developed the concept of "value added by marketing" and focused his attention on developing measures of that value. He wanted two doctoral students to work on the topic. With Monieson's undergraduate training in economics and statistics, he was a likely candidate.² Dan had been interested in the start-up of the Canadian Broadcasting Corporation as a topic, but "Beckman ignored that" and told Dan that he should work on value added. While Beckman provided the conceptual foundation for Monieson, it was up to the student to figure out precisely what he was going to do with it. His dissertation subsequently further developed the concept of value added by marketing and devised methods of measuring the value added by marketing institutions. These measures were tested using data from the 1948 U.S. Census. Except for the historical content, Monieson's dissertation was a rigorous empirical study heavily laden with economic statistics. It was an exercise in what he later termed "intellectualization" and the last time he would do that sort of research.

Monieson's (1988a; 1989) notion of "intellectualization" refers to a process of continuous rationalization of society's activities, including marketing, to create an ordered and predictable world. It is a linear kind of thinking with teleologic and reductionist overtones where every phenomenon can be rationalized and calculated, where values and value judgments have no

place, resulting in what Monieson called disenchantment. Intellectualization seemed necessary for academic respectability, but it stood in the way of understanding the beauty, magic, and poetics of marketing. Monieson soon felt that disenchantment and struggled for most of his career to find a balance between scientific knowledge and what he termed "usable knowledge".

... IN A WORLD DISENCHANTED

Through connections between Harold Maynard and Queen's University economist, William MacIntosh, Monieson was offered a one year sabbatical replacement position at Queen's University in Kingston, Ontario. During the 1954/55 academic year at Queen's, Monieson was still completing his dissertation on value added in marketing, but presented some of his findings (Monieson, 1955) at the December 1954 American Marketing Association conference in Detroit. In the audience for that session was Wharton Professor Reavis Cox who was sufficiently impressed to tell Monieson to get in touch with him when the dissertation was completed.

Apparently there was no permanent opening at Queen's at that time or, if there was, Monieson didn't pursue it. Even though he still had mixed feelings about becoming a university professor, Dan was in love, wanted to get married, and had started to like teaching. So, he returned to OSU for the summer of 1955 during which time he completed his dissertation. Dan and Lois were married in early September that year and immediately moved to Toronto, where Dan joined the faculty of the University of Toronto. Of his short stay there (1955-58) Monieson recalls mostly his foray into consulting, initially doing market research for corporate clients in Toronto. This was a function of his prior interests and of his realistic appraisal of the economic reality he faced as a university professor in the 1950s. The University budget was restricted at the University of Toronto and salaries reflected that reality. Monieson made up his mind then that he would never be poor. The idea of business as a laboratory for teaching would become important later. At this point in his career, he did consulting to help pay the bills.

When his dissertation was completed in 1956, Monieson sent a copy to Reavis Cox who invited Dan to come to Wharton. Monieson joined the faculty of the Wharton School at the University of Pennsylvania as Associate Professor in the autumn of 1958. His experience at OSU may have provided the foundation for Monieson's academic career, but Wharton inspired him. The intellectual atmosphere and thinking was very different from OSU. The latter was traditional in its emphasis on economics and the department was heavily influenced by Beckman's thinking. Wharton was more eclectic, more multidisciplinary, with a faculty including Reavis Cox, who was interested in Monieson's work measuring value added, who shared Dan's interest in history, and whose

interdisciplinary perspective was part of the culture at Wharton. That culture included Ralph Breyer (whose ideas about wholeness and order in marketing and the organic nature of social groups was ultimately an important theme in Monieson's later work), and of course, it included Wroe Alderson.

Between 1944 and 1959, Alderson worked primarily as a marketing consultant (Wooliscroft, 2006). He joined the faculty at Wharton full time in autumn of 1959, a year after Monieson arrived, so they overlapped for only two years. Even so, it was an important two years for Monieson's intellectual development. Before arriving at Wharton, Monieson had "absorbed" Alderson's (1957) book, *Marketing Behavior and Executive Action* and found its sociological approach very appealing. He even used it to teach the MBA course in marketing management when he joined Queen's University full time in 1961 and later credited Alderson's book, along with E.O. Wilson's (1975) *Sociobiology: The New Synthesis*, as the most influential in his thinking. At Wharton he also became interested in epistemology as he began to question how one learned about marketing.

During his three years at Wharton, Monieson supervised 25 MBA theses. His Fall 1958 MBA class included, among its 12 or so students, Louis Stern, Henry Assail, G. David Hughes, William Rudelius, and Stanley Shapiro – all of whom went on to distinguished academic careers. As noted above, Monieson was instrumental in Shapiro's dissertation and the two later became close friends and colleagues. Monieson continued to consult, notably with the Ontario Hog Marketing Board. He hired Shapiro as his assistant and the Hog Board, viewed as an Aldersonian Organized Behavior System, became the subject of Shapiro's dissertation. Wharton was intellectually stimulating for Monieson, but his ideas about epistemology in marketing, about the biological and evolutionary dimensions of Alderson's work, and about the fusion of other disciplines with marketing, which began to take form during this time, were not fully developed until many years later.

Settling Down at Queen's

In 1961, the Moniesons moved to Kingston, Ontario and Dan joined the Queen's School of Business as a faculty member. This would be home for the rest of his career, although other opportunities were considered from time to time. His graduate studies at OSU gave him a solid education in marketing, an appreciation for the history of the discipline, and a sense of the importance of consulting in 'feeding' his teaching. The latter would also influence some of his later thinking about epistemology in marketing. His three years at Wharton had been intellectually stimulating and planted the seeds of some of Monieson's significant later contributions to the marketing literature on usable knowledge and Complexity theory. In the years

leading to his appointment at Queen's, instrumental connections had been made with scholars such as Theodore Beckman, Wroe Alderson, and Stanley Shapiro, all of whom influenced Monieson's later work. But for now, as he settled into his university career, he focused on his teaching. Teaching was job one then and throughout his career.

At Wharton, Monieson had taught the MBA Marketing Management course using a combination of seminar discussions of assigned readings and some case discussions. The readings drew heavily from Alderson's (1957) book cited above, John Howard's (1957) book on *Marketing Management*, and journal articles predominantly from the *Harvard Business Review* and *Journal of Marketing* (Hickey, 1960-61). Class sessions were run like a seminar. There was little or no lecturing. Later, when Monieson returned to Queen's full time, he used Alderson's *Marketing Behavior and Executive Action* in his MBA course in marketing management requiring his graduate students to interpret Alderson's work. The challenge in that is reflected by the fact that marketing scholars have spent the last *fifty years* trying to interpret Alderson's work, with varying degrees of success (Wooliscroft *et al.*, 2006). In his undergraduate courses, however, conventional textbooks such as Maynard and Beckman's (1952) *Principles of Marketing* and later Kotler's (1967) *Marketing Management* provided the grist for Monieson's teaching mill. His sense of drama, forceful personality, and spontaneity in the classroom later made him a legend in the School of Business and among other students at Queen's. Like Beckman, he used the expertise gained as a consultant to bring marketing alive and was regarded as a master teacher who commanded attention. However, while Monieson had little tolerance for fuzzy thinking and could find the flaw in an argument with lightning speed, he was not feared. He inspired incredible loyalty among both students and colleagues. His humanity always shone through. The following example of this has become legendary at Queen's.

Early in his career at Queen's he was asked to teach a course in business for engineers. It was the late 1960s, when gender stereotypes were being questioned and fashion was changing rapidly to reflect these blurring lines. Dan arrived on the first day of class fashionably dressed in a grey suit and pink shirt only to be met with derision and laughter from his largely male, conservative audience of students. He met the challenge head on, betting that all the men in the class would be wearing pink shirts by the end of the semester because their girlfriends were the influencers and/or decision makers when it came to making clothing purchases. Despite what could have been a rocky start, Dan won over the class and engaged them in the topics of business and marketing. As a mark of the great respect he had earned from the students, the entire class showed up for the last session wearing pink shirts.

During the early 1960s, Monieson began to truly appreciate the importance of consulting to his teaching. He had little business experience, so consulting provided a vital link to marketing practice. It provided him with examples to use in class and added depth to his teaching. His clients included Canada Iron and Foundry, Frigidaire Canada, the Canadian Royal Commission on Food Price Spreads (Monieson, 1959), the Institute of Canadian Advertisers, Canadian Advertising Agency Practitioners, Canadian Credit Men's Association, Molson's Breweries, Canadian General Electric, Shell Oil Company, J. Walter Thompson Advertising, and Nestle. By 1964 he began a 30-year relationship consulting for Warner-Lambert Canada (WLC) initially working with someone who would become one his closest friends, WLC President Donald McCaskill. In 1964, McCaskill was introducing the brand management system at WLC. Monieson developed and delivered a course on brand management for WLC and worked extensively with their brand managers. In 1965, Monieson was instrumental in bringing Mel Goodes to WLC. Goodes had earned a Bachelor of Commerce degree from Queen's in 1957 and met Monieson at Queen's that year even though in 1957 Monieson was still a faculty member at the University of Toronto. As a result of Monieson introducing Goodes to McCaskill, Goodes joined WLC and worked for Warner-Lambert for 34 years eventually becoming chairman and chief executive officer before retiring in 1999. Goodes and Monieson formed a close friendship and collaboration that resulted in Monieson consulting for Warner-Lambert well into the 1990s. For over 30 years, Monieson was instrumental in developing marketing managers at Warner-Lambert worldwide. Most of that work is best described as executive development. Monieson was so successful as an executive educator because he was "pragmatic... a great communicator... and trustworthy." He had a "magical way" of handling a group of executives, of getting them to open up and participate in a case discussion (Goodes, 2007).

Ironically, during the 1960s Monieson's consulting experiences fed a growing disenchantment with his teaching as he became increasingly aware of the disparity between what was written in marketing textbooks and what was practiced in business. He had begun to see the tension between science and tacit, ordinary, personal knowledge.

Job offers in 1965 from the business world (Bank of Montreal and General Steel Canada) were very tempting. Added to this was the fact that Monieson was dissatisfied with the direction the School was headed in 1966 under then acting dean Bill Leonard. There was:

... a sense of lethargy, considerable confusion, and a general sense of frustration about wanting to get on with the new but being frustrated by a certain sense of control by the old... . If [Leonard] had aspirations to be dean, this year [during which he was acting dean] made

it abundantly clear that the choice should lie elsewhere (Daub and Buchan, 1999, p. 50).

Monieson actually submitted his resignation, but was talked out of leaving by former Business School dean, then Vice-Principal of Finance, L.G. Macpherson. That same year Richard Hand was appointed the new dean of the School, which had a great deal to do with Monieson staying at Queen's:

[Hand] had the singular ability, in a self-effacing way, of making the person he was talking to feel like a potential Nobel laureate whose opinions he valued highly... he was genuinely an intellectual and teacher (Daub and Buchan, 1999, p. 56).

Nevertheless, Monieson continued to worry about the relevance of his teaching. He took a sabbatical in 1968/69, travelled extensively and began reading about the philosophy of science and quantum physics. He sought out and read critiques of marketing such as John Kenneth Galbraith's (1967) and Paul Baran's (1973) works in economics. At the end of the sabbatical year, he resolved to change his approach to teaching and to write about the disparity between what was typically taught and what was actually practiced by business people.

IN SEARCH OF USABLE KNOWLEDGE

Monieson's search for usable knowledge began in earnest during the 1970s, a decade he later described as a time of personal discovery. His consulting work had convinced him that marketing practitioners didn't practice what most marketing teachers taught, that practitioner knowledge was very different from the knowledge that marketing scholars developed and published. Each thinks and knows differently; each uses a different epistemology. But for marketing knowledge to be meaningful, it must be usable for practitioners.

By 1971, Monieson shifted his teaching entirely to the case method. His MBA course that year in marketing strategy is actually very similar to the course he taught at Wharton 10 years earlier except that there was much heavier use of cases. A textbook was recommended, but not required and, as he did at Wharton, he provided students with copious notes for background reading. However, all of the in-class time was now spent analyzing and discussing marketing cases (Monieson, 1971). His use of cases may, in part, have reflected his belief in the importance of narrative and marketing stories that bring the discipline alive compared to what he found to be the "dry, unreadable, scientific linear approach" used in marketing texts. By 1982 his MBA course was exclusively case-based; no textbook was even recommended and no notes were provided. In each class, a new Harvard Business School case was analyzed and discussed. There were

learning points summarized at the end of every class, what Monieson called his “aphorisms” or “rules of thumb”. Even in his MBA course he raised the question of how we know what we know and discussed the role of tacit knowledge. While acknowledging popular models of marketing behavior such as the product life cycle and various grid models of decision-making, Monieson criticized them as rigid and deterministic, arguing that the very reason they were popular was because they brought “order to chaos”, ironically a phrase he borrowed from dissipative theory.

During the early 1970s, Monieson became a student again, reading voraciously across a wide range of disciplines including the philosophy of science, epistemology, sociology, biology, history, physics, chemistry, and economics. Over the next 20 years there were two common threads through his reading and thinking – epistemology and Complexity theory. Monieson came to believe that any general theory of marketing must be based on Complexity theory and any understanding of Complexity theory must embrace a broader approach to developing knowledge than the one that had dominated the marketing discipline since the late nineteenth century. The subjects most represented in Monieson’s library³ were philosophy (particularly epistemology), sociology and its related field of sociobiology. Of course, his library includes the two books that most influenced his thinking - Alderson’s (1957) *Marketing Behavior and Executive Action* which laid the foundation for a multidisciplinary general theory of marketing and E. O. Wilson’s (1975) *Sociobiology: The New Synthesis* which started the sociobiology debate and popularized the term. The most recent additions to the library focus on Complexity theory.

Sojourns to the Management Development Institute at IMEDE in Lausanne, Switzerland in 1974/75 and to the Harvard Business School in 1978/79 led to his first serious writing and publication in years. He’d become interested in distributive justice and while at IMEDE wrote and published two short articles about the right to consume (1975a; 1975b). Drawing from critical economists such as John Kenneth Galbraith and Paul Baran, Monieson called for a more effective working of the market economy. Marketers stimulate demand, he wrote, not only from affluent consumers, but also from the poor - who are unable to satisfy their wants in our market economy. Marketers manipulate the expectations of all of us, affluent as well as poor. By virtue of their actions, Monieson continued, marketers have forced the poor into the market and they too have “the right to consume at levels that closely approximate [their] acquired consumption patterns” (1975a, p. 40). It was sobering advice coming from a marketing professor in a business school in the mid-1970s. This early writing by Monieson on distributive justice brought into focus for him the inescapable need for values and value judgments in marketing. Distributive justice became Monieson’s favorite example of why science could never

lead to a complete or satisfactory knowledge of marketing. There was an ethical, moral core to his teaching. Monieson argued that if marketing had ‘prowess and control’ then it also had responsibility. In re-reading the notes taken in Monieson’s 1991 doctoral seminar, one of this paper’s authors was struck by his foreshadowing of criticisms of the marketing discipline that “ordained” certain values (like materialism). Monieson was an early critic who noted that while there has been considerable study of how society affects marketing, there had been far less work on how marketing has affected society.

Monieson also understood the importance of paradox and brought the need to incorporate and understand opposites into his teaching. Drawing on a wide range of literature such as Pirsig’s *Zen and the Art of Motorcycle Maintenance*, and Mary Shelley’s *Frankenstein*, he illustrated the nature of ambivalence and how interpretations of concepts evolve over time as the need to understand the ambivalence between opposites arose (love and hate, man and monster, nature and technology).

As a visiting scholar at Harvard in 1978/79, Monieson made good use of the resources of the Baker Library to investigate the origins of the marketing discipline which he traced to the German Historical School of Economics, although those ideas were not published until much later (Jones and Monieson, 1990b). Monieson’s purpose in this historical study was to demonstrate that, in its beginning, the marketing discipline had developed a need for academic respectability and adopted a scientific ideal as the means of achieving academic legitimacy. The technical rationality and empirical investigations to inductively develop law-like generalizations that characterized the study of marketing by German-trained American economists beginning in the late nineteenth century laid the foundation for the logical positivism that dominated marketing scholarship throughout the twentieth century. He later described this process as one of intellectualization (1988a; 1989).

Shortly after returning to Queen’s from Harvard, Monieson was invited to write for the 1980 American Marketing Association Winter Educators’ Conference a paper about Alderson’s contributions to marketing theory. Monieson was fascinated with the sociology of knowledge and loved to trace intellectual “family trees” and the lines of influence among scholars. In “Biological and Evolutionary Dimensions of Aldersonian Thought: What He Borrowed Then and What He Might Have Borrowed Now”, Monieson⁴ (1980) focused on Alderson’s functionalism and demonstrated convincingly how Alderson built upon the work of the sociologist, Talcott Parsons. Alderson died in 1965 not long after his seminal work on marketing theory was published. Parsons’ subsequent writings integrated evolutionary biology with his ideas about social systems and, Monieson speculated, would surely have influenced Alderson’s thinking. Those remarks were nonetheless just a segue for Monieson to speculate about the potential influence of E.O. Wilson’s

sociobiology on Alderson. Had Alderson lived another 15 years, would ideas such as ecological competition, population biology, adaptive demography, behavior scaling, and social drift, have formed part of his theory of marketing? Monieson thought they would have. He also believed that any theory of marketing must move beyond the old social sciences and systems theory and incorporate the ideas of Lindblom and Cohen (1979) about usable knowledge and practical judgment, and about the new biology or sociobiology being studied by E.O. Wilson.

E.O. Wilson's (1975) *Sociobiology: The New Synthesis* was a revelation to Monieson:

That book was important to me. I saw things in it... almost poetic. I gave a talk about it at Queen's and I don't know what people thought of me, but they didn't know the student part of me.... [The] biological determination of social behavior is a legitimate aspect of marketing (Monieson, 1998).

In an unpublished, undated manuscript (probably written circa 1980), Monieson clearly and concisely summarized Wilson's *Sociobiology* and his subsequent Pulitzer Prize winning (1978) *On Human Nature*. He focused on Wilson's criticisms of other social sciences (sociology, psychology, cultural anthropology, and economics) for wholly inappropriate approaches to theory building and then concluded:

What would Wilson say of our progress in marketing? Would we not react in the same manner as those in the disciplines named in the above quotation? We are from the same source. Are not our models of buyer behavior nothing more than 'tedious cross-referencing of different sets of definitions and metaphors,' and must we also await the new neurobiology to develop an 'enduring' set of first principles of buyer behavior? ...

The corner gets progressively smaller to one caught here. Helplessness and a mental form of oblivion will result unless one hooks on to some article of faith, hope, religion, love. One must confront and conciliate with the duality of scientific knowledge and values, or go 'crazy' (undated circa 1980, pp. 6-8).

As the "new biology" was replacing outdated notions of 'old' biological ideas, the implications for marketing were clear to Monieson:

Some very simplistic, often erroneous, and sometimes dangerous notions are lifted from biology and taken up with similar effect on marketing studies in particular and business studies in general.... A major problem arises when we borrow and try to apply evolutionary theory to marketing and business modeling; we have to develop a proper understanding of the borrowed theory, we have to appreciate which variant of theory we are

using, and we have to be logically faithful to that which we borrow (undated circa 1980, pp. 16-18).

Interestingly, while he believed that there were important potential conceptual applications of sociobiology to marketing, in this unpublished paper Monieson focused most on the epistemological implications of Wilson's work.

In 1980, Monieson was invited to write a paper about usable knowledge for the upcoming Macromarketing Conference. The following year, when the *Journal of Macromarketing* was founded, Monieson's revised paper about "What Constitutes Usable Knowledge in Macromarketing?" was the lead article in the new journal. It was the first full, published statement of his beliefs about usable knowledge.

What Constitutes Usable Knowledge in Marketing?

The essence of Monieson's ideas about epistemology was captured in three important articles. In "What Constitutes Usable Knowledge in Macromarketing?" (1981a), he described the dichotomy between practitioner knowledge and marketing science, traced the origins of marketing science to the very beginnings of the discipline, and argued for what he called usable knowledge which he described as a combination of practitioner knowledge and marketing science. Several years later he refined his case for usable knowledge, largely through a detailed critique of marketing science, in "Intellectualization in Macromarketing" (1988a; 1989). It is important to note that while the titles of these articles and some of the examples discussed in them focused on macromarketing, Monieson's ideas about usable knowledge were targeted at the marketing discipline in general.

As a marketing professor, Monieson's experience consulting with business firms had convinced him that there was a dichotomy between marketing practitioners and marketing scientists. He made the point that in an information-dominated society, it is the individual, not the group, that creates knowledge. Each individual has a different perception of events and of what is important. Using contemporary advertisements, he illustrated the social construction of reality for his students and demonstrated how each individual has a different communicative experience when viewing an ad. Students could quickly and clearly see how varying perceptions resulted in different knowledge and outcomes. In other words, there is more than one reality among practitioners that marketing scholars need to understand, but may not have the tools to explore. Each thinks and knows differently from the other; however, most marketing scientists seem only to pursue and respect knowledge "within a scientifically rationalized model of reality" (1981a, p. 15) whereas practitioners create individual reality as a consequence of practice. Given the need to

understand marketing knowledge from the perspective of multiple individual realities, Monieson sought alternative theories as explanatory tools – theories like Complexity theory.

Monieson agreed with Polanyi (1958) who wrote that practitioner knowledge includes a tacit dimension which permits them to know more than they can tell, a knowledge based on experience. To Monieson, there is an art or craft to knowing in this way that is phenomenological. Monieson also saw a parallel between tacit knowledge and Lindblom and Cohen's (1979) concept of ordinary knowledge, a personal type of knowing based on the common sense that is used in practical problem-solving. Monieson was sometimes misunderstood to be dismissing marketing science altogether. However, he was careful to note that "if we want to know and to understand the marketing practitioner then it appears that we will have to employ a mode of thinking that transcends but somehow *does not exclude scientism*" (1981a, p. 17 emphasis added). Anyone who thinks otherwise need only read what Monieson wrote about the cognitive sciences and marketing in "Artificial Intelligence and the Human Mind: A Review Essay - *Godel, Escher, Bach: An Eternal Golden Braid*" (1983). In fact, Monieson's concept of usable knowledge combined ordinary, reflective, practitioner knowledge with scientific knowledge. He later refined this definition of usable knowledge to include three basic elements: information, interpretation, and criticism (1988a). Presumably marketing science provided information whereas marketing practice yielded interpretation. Criticism is what allows us to introduce values and value judgments to our knowledge of marketing. Using distributive justice as his example, Monieson argued that marketing problem-solving (practitioner knowledge) must include values and value judgments. And so, criticism must be part of usable knowledge.

Immediately following the publication of "What Constitutes Usable Knowledge in Macromarketing?", Monieson was challenged by a colleague at Queen's who, anticipating Hunt (1989), interpreted Monieson's ideas narrowly and dismissed him as a "pessimistic", "gloomy", critic of marketing and described his work as part of a "crisis literature". The attack from his Queen's colleague prompted a passionate defense that adds clarity and depth to the arguments published in 1981:

This paper is not a *cri de coeur*; I am not at all unhappy, unduly pessimistic, or gloomy.... There was no baleful cry straining to be emitted from my throat. I am quite at home with research methodology, and use that which is usable in business consultation. It would not have been possible to have spent so many years with so many large, sophisticated business firms if I were doing otherwise. My own observations and experiences in consulting anticipated the research results of the [AMA's] Massy-Greyser report: much of what

marketing academics do is, to be most charitable, useless to businessmen. My reference is the Commission's evidence – not mine. The Commission maintains enough faith to exact a belief that more than the given 25-year scope of their study is required to prove out to the businessman what we academics have been and are presently producing. I say that they [the Massy-Greyser Commission] should stick with their results and not profess to an article of faith that goes contrary to their derived results. Further, I say that so long as the academic pursues the path that he is on, his work will be usable to the practitioner only by chance. This is because we have made the field a narrowly focused discipline. We may use the businessman and his firm as the object for our investigation, but we do so really for our own selfish purposes. Given our present course, we may someday exalt our discipline to a level higher than it presently is; but the results of our work will continue to be useless to the practitioner – probably even more so. Given the politics and the sociology of knowledge of our field, I do not see much change in our present direction. I, for one, think as Alfred Marshall, that we are the "handmaidens to businessmen." If many more of my colleagues feel as I do, then perhaps the direction could be changed. But this will require a new way of thinking in and about our field. I suspect that it would have to a "science plus" mental construct. I went out of my way to reference very successful and famous scientists on this matter, and I could have referenced even more, to demonstrate that there are others who think like me, and feel as I do. I do not want to destroy our science; I want to improve it, and bring into it in a systematic manner, the poetics, the 'art' of the field (Monieson, undated circa 1981).

Monieson had a vision of marketing academics working together with marketing practitioners to combine practitioner knowledge with scientifically derived knowledge. He hoped that this "science plus" model might produce knowledge that was usable to practitioners and if the knowledge marketing academics produce isn't usable to marketing practitioners, then what is the point of what we do?

As mentioned above, by 1988 Monieson had refined his concept of usable knowledge to include values writing that, "human values have to be incorporated so that the science of macromarketing is conducted by humans in the service of humans" (1988a, p. 4). His "Intellectualization in Macromarketing: A World Disenchanted" was first presented at the 1988 AMA Winter Educators' Conference (although, it didn't appear in the proceedings) where it was described by the editor as "one of the more exciting presentations" of the conference (Shapiro, 1988, p. 523). Dholakia (1988) hailed the paper as "one which will achieve landmark status" and hoped that it would "shake up and loosen ... the moribund knowledge structures of

micromarketing” (p. 11). Monieson’s paper was subsequently published in the *Journal of Macromarketing* where it generated sufficient controversy to prompt a rebuttal from Shelby Hunt (1989) and a rejoinder by Monieson (1989). In it, and these were the last words ever written by Monieson in this debate, he concluded:

Logical positivism is dead, but its spirit continues to pervade the research agenda of marketing academe.... Knowledge derived from empirical science (information) has to meld with hermeneutics (interpretation) and critical rationalism (criticism) to produce a metascience particular to its domain. Only then can reenchantment begin (Monieson, 1989, p. 15).

As if mocking the broadened marketing concept ‘school’ which was a frequent target of his critiques, Monieson illustrated his point with the example of the intellectualization of love. Viewed, if you will, from two worlds, one analogous to the practitioner’s, the other to the scientist’s:

The first is a world of our everyday experience, our subjective world. The second is a world that science presents to us, one that is ‘different and seems to make greater claims to truth’ (Barrett 1978, p. 46).... In the first world love is real in all its subjective complexities, mysteries, wonders, fears, hopes. It has ontological meaning. In the second world love is reduced to those attributes deemed to be calculable. Love becomes a mirrored phantom of the subjective experience, but it has been made into a scientifically observable thing.... The intellectualization of love is proceeding very nicely. However, will this kind of love-observing and counting truly uncover the mysteries of love and what we subjectively experience? I think not. The poetics of love remain intact (Monieson, 1989, p. 14).

“Intellectualization in Macromarketing: A World Disenchanted” won Monieson the Charles C. Slater Memorial Award for best article published in 1988 in the *Journal of Macromarketing*. Unfortunately, it has not to date achieved the status hoped for it by Dholakia. Perhaps some day it will.

HISTORY OF CONTEMPORARY MARKETING & DEVELOPMENT OF MARKETING THOUGHT

This was the original title used by Monieson in his 1983 proposal for a doctoral seminar in Marketing at Queen’s. Ironically, given his later (1989) debate with Shelby Hunt in the pages of the *Journal of Macromarketing*, in the last paragraph of his course proposal Monieson cites Hunt’s (1976) book on marketing theory and notes that Hunt’s “view represents the currently positivist notion of marketing science and will therefore be

referred to at the appropriate time in the course” (1983b). Monieson first taught the course in the Fall semester of 1983 and it was the last course he taught before retiring in 1991. That seminar tied together much of Monieson’s thinking about the evolution of the epistemology of the field and the academic and practical consequences thereof. The full course syllabus with reading list and assignment sequence is available on the CHARM website, www.charmassociation.org. However, from the *topic outline* alone one can readily see Monieson’s overall thesis.

Marketing was a *handmaiden to technology* (Chandler, 1977; Boorstin, 1974). That is, “the technology of an era dictates the framing of problems and the problem solving techniques.” Contemporary marketing technique followed important technological developments of the late eighteenth and early nineteenth centuries. At the same time, contemporary marketing technique preceded the origins of any science of marketing. The *intellectualization of marketing* practice thus began in the late nineteenth century (Monieson, 1988a; Jones and Monieson, 1990b) and continues today. One of the consequences of that intellectualization was a definition of marketing that promised the delivery of a standard of living. It was a promise and responsibility unfulfilled and that *performance* has not gone uncriticized, although the *reaction* is found in a literature not read by many marketing students (e.g. Baran, 1973; Galbraith, 1967). Emerging ideas from sociobiology about human nature (Wilson, 1975) and from the study of the mind (Hofstadter, 1979; Monieson, 1983) required a complete rethinking of our notions about the *human factor* in marketing, about markets and marketing. Monieson believed such ideas also required new thinking about teaching. He noted that the teaching of marketing lagged practice. Much of what appeared in marketing textbooks and classroom approaches was based on “Newtonian physics which is linear and involves the breaking down of phenomenon into parts so that it is teachable. Quantum physics, on the other hand, requires a process of synthesis which is largely unteachable”, although it is knowable. Recent studies of the human mind acknowledge that there are approaches to knowing that go *beyond analytical thought*, including personal knowledge (Polanyi, 1958), tacit knowledge, and reflective knowledge (Schon, 1983) – all of which are essential parts of *usable knowledge* (Lindblom and Cohen, 1979; Monieson, 1981a). All of this leads to, and indeed is part of, Complexity theory. Marketing can no longer be understood in terms of the quantum (physics) world, but must be understood from the post-quantum world of the Complexity sciences. *Marketing in a quantum world* must give way to a theory of marketing based on Complexity theory (Gleick, 1987; Monieson, 1981b; Warsh, 1984).

Well into retirement, Monieson continued to read about Complexity and to think about its application to marketing. To this day only a handful of marketing scholars have attempted to apply Complexity theory to

marketing (e.g. Hibbert and Wilkinson, 1994; Wollin and Perry, 2004). For years, Monieson planned to write a book about Marketing and Complexity but, unfortunately, never did so. During our 1998 interview with Monieson, he admitted that it was unfinished business.

EPILOGUE – PHILOSOPHER AND PRAGMATIST

Monieson was once described as a philosopher and pragmatist (*Inquiry Magazine*, 1976). Despite a family background in business, he had little personal experience in business when he began his academic career. Consulting provided that essential link between practice and teaching. Theodore Beckman and, later, Wroe Alderson were role models in that regard. Monieson's pragmatism grew out of his consulting work and was carried into the classroom. It also influenced significantly his writing about the philosophy of marketing thought. As a marketing philosopher, he was primarily interested in epistemology and, to a lesser extent, in history. He spent his life and career in the pursuit of what he called usable knowledge. His published work on that topic is undoubtedly his most important.

If not for a chance meeting with Harold Maynard in 1950, Monieson might have never attended the Ohio State University's doctoral program or developed an interest in the history of the marketing discipline. Ironically, Monieson pursued that interest, not for its own sake, but in order to document the process of intellectualization in marketing. Ultimately, it may be his work on the history of marketing thought that has had the greatest influence on others. A small but continuous stream of Monieson's students and colleagues have pursued historical research⁵ (see under Other References Cited, Beckman, 2005; Bourassa and Cunningham, 2005; Bussiere, 1999; Cunningham and Jones, 1995; Cunningham, Taylor and Reeder, 1993; Cunningham and Wetsch, 1999; Harris, 2005; Jones and Richardson, 2007; Neilson, 2001; 2003). Monieson's own published work on the history of marketing thought grew out of dissertation work he supervised (see under Bibliography of Monieson Publications, Jones and Monieson, 1987; 1988b; 1990a; 1990b; 1992).

Wroe Alderson's work had a tremendous influence on Monieson's thinking. Like Alderson (Halbert, 2006), Monieson was a voracious reader and had tremendous breadth of knowledge. Perhaps in part as a result of that, both Alderson and Monieson were difficult to read. Both held strong beliefs against reductionism and followed a multidisciplinary approach to the study of marketing. In sociobiology and Complexity theory, Monieson believed he had found the basis to further develop Alderson's sociological approach to marketing theory. Except for some tentative ideas about sociobiology (Monieson and Shapiro, 1980; Monieson, undated circa 1980), his thoughts

in that connection were never written down. Monieson admitted that he found writing "torturous". He never felt any great compulsion to write and would have published less if not pushed to do so by his friend and colleague, Stanley Shapiro. He wrote in pencil (with an eraser), started with an expression, and his first draft was usually his final one.

In spite of the fact that he published less than many of his colleagues, he left a huge legacy at Queen's. His devotion to the School was manifest in later years when he worked tirelessly to raise funds to build a new School. Fitting for a scholar of usable knowledge, a research center at Queen's bears his name and its purpose is to better understand knowledge-based enterprises. The Centre's mission was chosen because Dan wanted a Centre that would benefit all faculty and students, no matter what their functional discipline. He believed the need to understand how knowledge was created and applied was universal to all business disciplines.

Monieson was a rebel and innovator. Working outside the mainstream of marketing science, indeed swimming against it for much of his career, his ideas have not received the understanding or appreciation we believe they deserve. However, as Fisk (1988) noted even then in his commentary on Monieson's intellectualization thesis, there are interpretive studies of subjective phenomena, studies that explicitly incorporate researchers' values, being published in the mainstream marketing journals. Perhaps, as Fisk suggested, the revolution in marketing thought and thinking called for by Monieson is well under way.

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NOTES

¹ While he was not officially the dissertation supervisor, Monieson played a key role in shaping the dissertation of one of the authors (Shapiro, 1961), who was supervised by Reavis Cox at Wharton.

² The other student that worked on value added was Robert Buzzell.

³ The Monieson Library includes some 600 books and is displayed at The Monieson Centre at Queen's University. A full bibliography including commentary is posted on the CHARM website, <www.charmassociation.org>.

⁴ The authorship was credited to Monieson and Stanley Shapiro, however Shapiro maintains that the ideas and writing were largely Monieson's.

⁵ Since 1997, the best student paper presented at the biennial CHARM conference is awarded the David D. Monieson Best Student Paper prize. Four of the five past winners are Queen's graduate students.