Using Invitational Theory and Practice as a Framework for Optimizing Marketing Education

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Introduction

The pandemic's aftermath has shifted how institutions and their stakeholders seek to function in the "new normal." Marketing students are seeking flexibility in terms of the delivery of content. Like corporate marketers, marketing departments and faculties are challenged with seeking a solution that satisfies the needs of students, accrediting bodies, and provides rigor in terms of curriculum delivery no matter what modality is utilized or the number of students in the classroom. This paper introduces an innovative approach to teaching that seeks to maximize both the student's and educator's success in and out of the traditional classroom.

Invitational Education Theory (IET) and practices (Purkey & Novak, 2016; Purkey, Novak, & Fretz, 2020) offers marketing educators an innovative approach. IET promises to improve and enrich the teaching and learning process by addressing both personal and professional practices. IET is applicable for both small and large college classrooms, and the approach does not require additional funds or training. A special value of IET is that it is inclusive by being culturally responsive. The goal of IET is to build a more positive and humane relationship between professors and students. While IET is new to marketing education, it has found success in the realm of teaching and leadership education. Invitational Education has appeared in over 223 dissertations, master's theses, and conference presentations, 214 articles, and 58 books and book chapters (Edwards, 2021). Therefore, it is an evidence-based n framework to deliver curriculum to students in various class sizes and various modalities of delivery.

Lamont and Friedman (1997) noted changing times allow educators to innovate beyond traditional practice and encourage students to gain more knowledge and skills. The authors also indicated that marketing educators must develop imaginative marketing curricula and methods of delivery to meet the needs of current marketing students.

This paper will be structured as follows. First, the conceptual framework of IET will be summarized to give the reader a more concise understanding of the theory. More specifically, it will highlight the three foundations of IET including (1) the democratic ethos, (2) self-concept theory, and (3) the perceptual tradition, and how they shape content delivery. Practical application and examples of traditional practice will be reviewed. IET also identifies how the five elements of intentionality, care, optimism, respect, and trust (i.e., I-CORT) are essential elements to establish an inclusive, relation centered, educational practice. I-CORT parallels current marketing theory of being relational (Bradley, 2008) versus transactional. Practical application of I-CORT will also be shared to benefit the reader.

The marketing students' verbatim responses as taken from the southern R1 university's end of course evaluations will also be shared as evidence to the effectiveness of utilizing IET in marketing education. In addition, IET explores how the five domains of people, places, policies,

programs, and processes (5 Ps) enhance student learning. Also, an explanation is presented on the various levels of intentionality and the interlocking dimensions that shape the marketing educator's ability to be both professionally and personally inviting with self and others. Moreover, a quantitative analysis will be conducted showing a comparison of mean scores taken from university administered student evaluations for classes ranging from 40 to 1250 and delivered both online and in-person. Grade distributions will also be offered as evidence of IET's application both online and in the classroom. The findings reveal classes taught by professors using IET had higher mean scores than those not using IET. What was encouraging with the results were class size or delivery method (i.e., in-person or remote) were not a factor, more specifically, mean scores were higher for instructors regardless of class size and the delivery method. These encouraging results show the success IET has in delivering marketing content in the classroom and online for any size class.

Conceptual Framework

Simply stated, IET can be thought of as a mindset that encourages people to realize their potential in all aspects of worthwhile human endeavor (Purkey & Novak, 2015). Specifically, IET provides a learning environment that intentionally summons people in educational settings to become part of a learning culture through intentionality. The conceptual model for IET lists the five parts that make up the framework of IET (Purkey & Novak, 2015).

Foundations

IET is anchored by three conceptual foundations. These are the democratic ethos, self-concept theory, and the perceptual tradition. Each will be discussed below.

Democratic Ethos

Democracy is a belief that all people matter, especially when decisions are being made that affect them. Those affected should have a say in the desired outcome. This increases their buy-in and is like implementing marketing strategy and seeking buy-in from employees to realize the goals the firms seek to achieve.

Self-Concept Theory

Self-concept acts as both a precursor and outcome of human activity, defining individuals as "I," "me," or "my." Self-concept is internal dialogue and is what individuals say about themselves to themselves (Purkey, 2000). Therefore, by creating a positive environment, students will be encouraged to develop positive behaviors and achieve greater success in school and beyond due to positive and realistic self-conceptualization.

The Perceptual Tradition

The perceptual tradition emphasizes that perceived events in one's life, not the event alone, is a key element in guiding the perception they have of situations (Purkey, Novak, and Fretz, 2020). IET provides a way to recognize and accept the perceptions of others and use this understanding to create shared classroom successes.

The Five Elements of I-CORT

The five interdependent elements of I-CORT are (1) intentionality, (2) care, (3) optimism, (4) respect, and (5) trust. These elements closely resemble modern marketing strategy that focuses

on relationship (Bradley, 2008) versus transactional practices to enhance the customer's experience. Each will be further reviewed below.

Intentionality. An intentional professor maintains a consistent stance that purposively offers students something beneficial for consideration. Intentionality begins with educators and cascades to students to create an environment that strives to maximize student achievement. Intentionality allows for students to see their education as a place of opportunity due to the positive intentions of their professor (Gillespie, 2005). Intentionality has also been found to create value in markets between customers and firms (Hawa, Baker, & Plewa, 2020). This same premise holds true for students, as the more intentional a professor is with his or her teaching, the greater the student success will be.

Care. Care is the most important of the five elements of I-CORT. Care reflects current marketing theory emphasizing the formation of good relations with a firm's target market (Raggio, Walz, Godbole, & Folse, 2014), encouraging positive word of mouth (Brown, Barry, Dacin, & Gunst, 2005), brand trust (Ha & Perks, 2005), and greater customer loyalty (Ahearne, Bhattacharya, & Gruen, 2005). Care was also recognized as a key characteristic possessed by marketing educators (Conant, Smart, & Kelley, 1988). In 2001, Hennig-Thurau, Langer, and Hansen. reported that marketing educators need to focus on a student-centric model for success as they are both active and collaborative partners in their student's education.

Optimism. IET stresses that human potential is boundless based on the educator's optimism for the material taught and its impact on their student's lives. Optimism brings out student capabilities by creating a welcoming climate where diversity is encouraged. A study conducted by Medlin and Faulk (2011) found that in an academic setting, there is a positive relationship between engagement and optimism, and this relationship leads to higher levels of student performance. An empirical study conducted by Hough, Sumlin, & Green, (2020) found that of three antecedents to performance (i.e., organizational trust, ethical environment, and workplace optimism), workplace optimism had the greatest impact.

Respect. IET asserts that students are capable, valuable, and responsible, and should be treated as such. By marketing educators being intentionally inviting, they create culturally responsive places, policies, programs, and processes that establish respect, thus encouraging students to excel. Work by Lincoln (2008) found that respect leads to higher levels of rapport between educators and students from all cultures. Additional research conducted by Hair (1990) reported that respect given at the marketing department level helps individuals meet their goals when they feel they are part of the bigger picture and can contribute. Respect helps marketing educators both at a personal and instructional level and is a key element in teaching.

Trust. The fifth I-CORT indicator of personal and professional success is trust. Trust in marketing education has shown to increase student focus, improve coordination and communication, boost collaboration, and encourages group members who are not performing to meet the expectations of the team (Huff, Cooper, & Jones, 2002). Trust helps students make more meaningful and productive decisions toward their success. Therefore, creating a trusting setting for students provides one of the keys to maximizing their performance and success. Table 1 demonstrates how I-CORT might be evidenced in relation to traditional approaches to teaching a marketing course compared to an invitational approach.

Table 1

ICORT in Relation to Traditional Approach and Invitational Approach

The Five I-CORT Elements	Traditional Approach	Invitational Approach
Intentionality	• Arrive to class not before, but at the starting time. • Instructor distributes and collects student materials without comment. • Instructor dresses in very casual clothing. • Instructor may or may not begin and end class on schedule.	• Instructor arrives to class before students and ensures the classroom is arranged in a welcoming environment. • Instructor asks students to help distribute and collect materials. • Instructor dresses that express respect to students and pride in their job. • Instructor is intentional about starting and ending class on time.
Care	• Instructor distributes class materials and explains requitements. • In large classes, the instructor fails to put any effort into learning student's names. • The instructor sticks close to the course content without personal comments. • The instructor ignores the classroom's temperature and lighting. • The instructor states the grading requirements just once in the syllabus.	• Instructor welcomes students and collects a brief data sheet on each student, asking for contact information and any special needs. • In large classes, the instructor works hard to learn names or uses name tents they distribute day one. • The instructor shares personal experiences to make the learning more relatable. • The instructor carefully attends to making the classroom comfortable for students. • The instructor reviews the syllabus grading requirements to ensure they are up to date.
Optimism	• Instructors use the same lecture notes with no updates or changes. • Instructor does not review the last lecture and starts with only new material. • Instructor attention is focused on just presenting the course content without asking questions of the class to gauge	• The instructor uses updated lecture material to improve the lecture. • Instructor reviews the previous material from class and then begins with new material. • Instructor asks questions while lecturing to see if students are comprehending the material.

	• if they are comprehending the material. • Instructor speaks to students as they feel with no regard for the negative impact words may bring.	• Professor uses words that have a positive influence and avoid using those with a negative connotation.
Respect	• When using multi-media, the instructor faces the screen and not the class. • Instructor never compliments students for their hard work. • Instructor rushes through the lecture material to stay on track with the syllabus. • Instructor returns student assignments on their time frame. • Instructor cancels class without notice. • Instructor leaves as so as class is over without stay to address student questions.	• Instructor faces the class when using multi-media. • Instructor complements students for their abilities in every possible way. • Instructor takes their time with the lecture material as they concentrate on student comprehension. • Instructor returns student assignments promptly, so students know where they stand with their grade. • Instructor never cancels a class and will ask a colleague or PhD student to cover. • Instructor stays after class to answer questions and prepare the classroom for the next group of students.
Trust	• Instructor shares information that was told to them in private. • Instructor singles out students during class and embarrasses them to prove a point. • Instructor acts as they please with no regard for how it will affect students.	• The instructor allows students to confide in them and does not share the information. • Instructor never embarrasses a student in class by singling them out. • Instructor thinks before acting to not offend anyone.

Table 2 below demonstrates verbatim student responses taken from teaching evaluations distributed at the end of spring 2019 and spring 2021 semesters by the participating university. Classes were taught online, in-person, and varied from 30-1250. Instructors' designation for using IET was determined by a review of the philosophy of teaching statement for the department. Each element of I-CORT is used to demonstrate how effective IET is in marketing education.

Table 2

Student Verbatim Responses in Relation to I-CORT Element

Intentionality

"He makes his live videos of the lectures and then posts them right after he is done in case anyone could not attend. He is very accommodating during the pandemic for people's personal lives and answers any questions openly that his students have. He puts in a lot of effort to be the best that he can, and it truly shows!"
     "He makes himself extremely available for students and encourages us to participate."
     "He is the most engaging, efficient, and easy to talk to professor! He has mastered the impossible task of teaching us valuable information, letting us look at extremely current/relevant topics, while letting us have fun and have a say in how the class goes."

Care

"This was an enjoyable class, and it was clear that you really care about your students and their success."
     "Professor X is really good at communicating the material and keeping students engaged despite the online platform. He is very caring and makes me more confident in learning online."
     "He got to know every student which makes you want to participate even more."

Optimism

"With everything going on with COVID-19, the Professor did a great job of making the course flow smoothly."
     "It helped me understand a marketer role in the business world."
     "Professor X is one of those professors that you want to communicate with after taking his class and show him how much the course material helped in the real world!"

Respect

"Dr. Y is an amazing professor because his goal is to teach his students, while also demonstrating the highest level of respect for his students that I have ever seen."
     "Great communication and made the assignments interactive and engaging."
     "Dr. X made it a priority to learn my name which is difficult to pronounce. Most of my other professors continually mispronounce it despite me correcting them. His efforts made me feel respected as a student and person."

Trust
"Thank you for being so caring and aware of the situations that have changed, and impacted student's lives due to COVID-19! Your efforts do not go unnoticed!"   "Best professor! Knows his material and gives students confidence to reach their goals."

Domains: The Five Powerful Ps

     The "Five Powerful Ps" (people, places, policies, programs, and processes) that create and maintain any educational culture are all instrumental in determining the success or failure of the educative process. Student success depends on each of these to realize their potential because they function simultaneously. As graphically exhibited on the cover of this journal, IET uses a starfish analogy to represent the interdependency of the 5Ps. Just as each arm of a starfish applies constant and persistent pressure upon a mussel, IET's goal is to apply a consistent and persistent level of intentionality using all the Powerful 5 Ps to achieve student success.

Levels of Functioning

One's intentionality to be inviting can be misunderstood, thinking that educators must be nice, give extra credit, pay a compliment, or make exceptions. While these are surface examples of being inviting, IET requires more. The following are four levels of functioning marketing educators demonstrate in their teaching both in and out of the classroom.

Intentionally disinviting. This the lowest and most lethal level of functioning. The educator's negativity is deliberate with the intention of demeaning, discouraging, and defeating their student's self-worth and academic development. Examples include criticizing students for asking questions or discriminating against certain individuals and groups. Inviting professors are memorable, while intentionally disinviting professors are forgettable.

Unintentionally disinviting. The second negative level of functioning results from a consistent lack of direction in teaching. Behaviors that signify this low level of functioning include a lack of care, being condescending, dictatorial, and thoughtless. Professors at this level have no idea they are exhibiting these behaviors, but the damage is already done to the students.

Unintentionally inviting. The positive third level of functioning is the marketing educator who practices many actions associated with IET but has no idea they are doing so. An analogy of an unintentionally inviting professor is an early "barn-storming" airplane pilots who flew "by the seat of their pants" when the weather was clear. When storms gathered, they had to land because they had no dependable guidance system. In marketing education, professors tend to use a particular methodology to teach because it usually works. However, when asked their philosophy of teaching, they may lack a dependable theory of practice. Unfortunately, when events disrupt how they teach, they become disoriented. Disruptions may cause them fall back to the two lower levels of functioning. This negative behavior results from a lack of a consistent stance.

Intentionally Inviting. At the highest level of functioning are exhibited by intentionally inviting educators who have a positive and consistent guidance system. If disruptions occur, their response is consistent with I-CORT. An analogy for this top level of functioning are pilots of modern jetliners. Because they have a reliable evidence system, they can navigate around threatening storms. Consistent with marketing strategy, marketing educators devise and implement a tactical and strategic plan. Their academic plan is long-term in nature and is designed to ensure student success. When they experience issues, they adjust their tactical plan, but their strategic plan does not waiver. A plan is only as good as its execution and only as successful as the instructor putting it into action.

The Four Corner Press

A significant goal of IET is to summon marketing educators to develop themselves, both personally and professionally. The Four Corner Press emphasizes being personally and professionally inviting with oneself and others. Seeking an ideal balance among the four corners is difficult at times, but the goal is to seek balance and find harmony among the four corners.

Corner one: Being personally inviting with oneself. This corner is crucial in becoming an intentionally inviting marketing educator. It is important to view oneself as able, valuable, and responsible. This requires continually reinventing oneself and striving to maintain good mental and physical health. When one is intentionally caring, optimistic, respectful, trusting (i.e., I-CORT) towards oneself, it is easier to share the same about others.

Corner two: Being personally inviting with others. This second corner considers the thoughts, feelings, and goals of others, and getting to know others as people and not as labels. Being personally inviting with others is empathy expressed by concern, and support. This helps students and colleagues understand that all are on a journey of learning and improvement. From an IET viewpoint, education should be human first, and only after that, professional. A professor's life is never so busy that there is no time for an inviting act.

Corner three: Being professionally inviting with oneself. This third corner maintains having an ethical awareness that is both positive and realistic. In practical terms it means to seek out the latest technology, attend conferences and webinars, and seek any other means to stay current and relevant in marketing education. Staying relevant in a changing world is vital just as firms seek to continuously improve to maintain a competitive advantage. Skills and information typically have a short shelf life, so staying current helps marketing professors grow professionally.

Corner four: Being professionally inviting with others. This corner is the capstone of a truly inviting professor. From an IET perspective, it is essential that marketing professors reflect often on the way they conduct their day-to-day professional activities and responsibilities. Being professionally inviting in teaching marketing can mean using simulations, discussion boards, and intentionally giving students a great deal of responsiveness in class discussions.

One's ability to balance and harmonize these four corners is not easy, but the result is to have a beneficial presence with yourself and others both professionally and personally. It will also help in one's ability to sustain desire, commitment, and enthusiasm for teaching in the new normal.

Methodology

Using Pearson Correlations testing the relationship between IET practices and student satisfaction. Amos and Purkey (1988) conducted a seminal quantitative research study. Data was collected from 1045 students of 74 dental hygiene instructors at 22 colleges in the Southeastern section of the United States using the *Invitational Teaching Survey (ITS)*. ITS identifies and measures professional and personal inviting teaching practices. In addition, the *Student Attitudinal Outcome Measure (SAOM)* was developed and validated student satisfaction with the course, subject matter, and self-as-a-learner. The results found a strong and positive relationship between inviting instructor practices (i.e., total ITS scores) and student affective outcome measures (i.e., total SAOM scores) ($R^2 = .72$). In addition, professionally inviting ($R^2 = .67$) and personally inviting ($R^2 = .69$) sub scores were also strong and positive. Moreover, when combined, professionally and personally inviting sub scores were $R^2 = .72$, thus indicating a strong and positive relationship. The authors also used ITS sub scores as predictors of SAOM sub scores and found that (1) ITS sub score of coordination was the best predictor of course and subject matter. (2) ITS sub score consideration was the best predictor of instructor outcomes. (3) ITS sub scores coordination and consideration were the best predictor of self-as-a-learner. Comparing the SAOM and ITS sub scores using forward stepwise regression found consideration and coordination accounted for 52% of the variance. The results showed that instructors that rated highest using both being professionally and personally IET maximized student satisfaction.

This present study will compare mean scores of classes taught by a variety of marketing instructors at a major R1 university in the South. Mean scores were gathered from both Spring 2019 and 2021 undergraduate teaching evaluations using a five-point Likert scale comparing the question "what is the instructor's overall performance?" The data for 2020 was not available due

to COVID and the University not issuing student evaluations. Student evaluations were analyzed comparing instructors using IET and those that did not. In 2021, class sizes ranged from 30 to 1250 students and the content was delivered in-person and remote. The larger classes (i.e., those greater than 100) were taught remote.

Table 3 below shows the quantitative findings of this present study. Specifically, it compares instructor mean scores from student evaluations for IET and non-IET instructors using remote and in-person classes, plus those mean scores comparing the marketing department and University. It also identifies the class sizes and mean scores for IET faculty and non-IET faculty to demonstrate the application it provides students in larger classes taught online. Finally, Table 3 identifies grade distribution for instructors using IET versus other teaching methods using grade distributions for marketing research sections taught by various professors; two sections were taught remotely, and three sections were taught in-person. Class sizes varied from 30 to 70 students. These sections utilized the same textbook, publisher's exams, final project criteria, and five assignments used for AACSB accreditation. Additionally, 4 of the 5 professors utilizing IET have been awarded either College of Business Teaching Awards, University Teaching Awards, or both as selected by their peers.

Table 3

Spring 2019 and 2021 IET and non-IET Teaching Methods by Teaching performance, Class

Size, and Grade Distribution

Mean Scores	IET Spring 2019	Non-IET Spring 2019	IET Spring 2021	Non-IET Spring 2021
Average mean scores	4.77	4.01	4.84	4.01
Average Marketing Department Mean Scores	4.54	4.54	4.51	4.51
Average University Mean Scores	4.31	4.31	4.33	4.33
In-person delivery of content	4.77	4.19	4.87	4.09
Online delivery of content	4.71	3.72	4.74	4.04

Class Sizes	IET Spring 2019	Non-IET Spring 2019	IET Spring 2021	Non-IET Spring 2021
Class Size less than 60	4.87	4.09	4.77	4.04
Class size ranging from 450-1250	4.72	N/A	4.71	N/A

Grades	Fall 2020 Remote IET	Fall 2020 Remote Non-IET	Spring 2021 In-person IET	Spring 2021 Remote IET	Spring 2021 In-person Non-IET
A	52.2%	15.6%	44%	44%	14%
A-	26.1%	0%	44%	22%	21%
B+	4.3%	18.8%	12%	22%	21%
B	4.3%	46.9%	0%	12%	21%
B-	8.7%	0%	0%	0%	14%
C+	2.2%	12.5%	0%	0%	0%
C	2.2%	6.3%	0%	0%	9%
C-	0%	0%	0%	0%	0%

Findings

The results of the quantitative analysis support the theoretical nature of IET as an approach for optimizing student potential. If employed, a MANOVA would identify the actual significance of demonstrated differences. Instructors practicing IET had higher mean scores than those who do not practice. What is most encouraging is that instructors utilizing IET had higher mean scores for their overall performance in the face-to-face classes for both periods assessed. What is very encouraging is that this performance was mirrored for their online classes. Online classes reviewed varied from 450-1250 students, indicating the IET is a method of teaching marketing that is suitable method of delivery, plus in-person. In addition, IET instructors also had higher mean scores than both the university and department averages, while non-IET instructors failed to score higher. Moreover, grade distributions were higher for students in classes taught using IET than those that did not. Based on the results, sections using IET had higher grade distributions than those not utilizing this method. While comparing grades has been met with reluctance, the results suggest the positive influence of using IET versus other teaching techniques both remotely and in-person.

Overall, the results demonstrate that intentionally inviting students to have a greater part in their marketing education exhibits encouraging results. Overall performance is ranked higher, and grades seem to be positively impacted. Based on these results, it is reasonable to suggest that IET practices demonstrate a feasible and no-cost option for yielding positive student outcomes.

Contributions and Implications

The authors believe that IET offers many opportunities for marketing education. It allows professors at the collegiate level, who have been educated more toward doing research rather than

toward teaching, a means to reconceptualize the way they teach marketing content in their classrooms or online. It also provides a roadmap, like marketing strategy, on how to deliver marketing content. IET also gives marketing educators a way to increase student engagement which enhances comprehension. An additional contribution is a framework that can be reflected upon by educators to improve their personal and professional lives. IET is especially relevant today as it seeks inclusion, encourages human relationships, and has an interdisciplinary focus.

Practical applications of IET could include redesigning class materials such as syllabi, handouts, discussion boards, case studies, and evaluation methods to make them as welcoming as possible, both in the classroom and virtually. Course materials can exhibit the five I-CORT elements. For example, a welcoming syllabus can open with a statement on the relevance of the course and how it will help student succeed. Statements on "What you can expect from your instructor" have a similar impact of developing a positive relationship between marketing professors and students. A simple implication of IET is to learn students by their preferred name. This can be a challenge in large classes, but it is an important step towards communicating a sense of care and respect for students. Moreover, making yourself available to students is critical. Schedule office hours at times when students will be able to attend. Also, when students come to see you, provide them your undivided attention, and make the student's visit to your office a pleasant experience. Offer advice, go over questions, and address concerns students may have with honest and encouraging suggestions. A warm, open, and respectful conversational style helps students ask questions without fear of reprisal.

Limitations and Future Research

To determine actual statistical significance, data analysis should employ a MANOVA to determine the significance of difference. As currently known, limitations of this study include possible perceived infringement on how marketing instructors prefer to deliver marketing content. IET is a choice, not an edict, and is based on voluntary adoption and practice. The results of this study were tested at one Research One school in the South. The results may not be generalizable to other regions of the US.

Future research could include conducting a large-scale quantitative study to measure the significance of I-CORT for each of the five elements or I-CORT. Every student is an individual, so further quantitative research may provide additional insights contributing to learning.

Conclusion

`   An Invitational Theory of Practice (IET) offers marketing instructors a language of transformation to enrich their lives and those of students by creating and maintaining a teaching environment that cordially summons students to get the most out of their marketing education. IET has met significant success in education primarily at the K-12 level, however its successes have been reported in other disciplines as well (Edwards, 2021). This innovative teaching may be well received and practiced by professors at colleges and universities. The authors believe that by implementing this innovative way to deliver marketing content, marketing educators will find greater joy in their teaching, greater satisfaction in their careers, and their students will learn more about marketing.

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