品牌理论中创业机会的先验知识探索

1. 研究背景

自从 2000 年 Shane 和 Venkataraman 以机会的存在、发现和利用作为独特的研究领域进行界定后,创业机会作为创业研究的核心主题受到了学者们的持续重点关注,主要涉及机会本质以及机会识别、评估与利用等方面。就机会本质之争基本形成了"存在理论"和"创造理论"二元分立的格局。部分学者对此保持中立态度,认为既存在需要被发现的机会,又存在需要被创造的机会,未来研究将会更多地探讨机会何时以及如何被发现或创造。同时,部分学者注意到机会的时间动态性,并开始探索创业机会由何演变而来,如创业理念、创业梦想、创业概念都可能演化为创业机会(Vogel,2017; Short et al. 2010)。目前对创业机会的研究更多的是选择应用"机会存在"或"机会创造"作为隐含的前提假设探讨创业主体如何识别、评估与利用机会(Suddaby et al. 2015)。在对机会识别、评估和利用的研究中,主要基于个人一机会的二元关系从个人特征差异,如个人的思考与学习,研究了其对机会识别、评估与利用的影响,对机会本身差异(Gregoire and Shepherd,2012)以及创业团队和创业组织如何识别和利用机会的关注仍有待提升。1

2. 研究主题

首先我们可以将创业机会的研究分为三类:机会本质(包括机会创造、创业机会发现、创业机会存在、创业机会构建等),机会识别、评估与利用(包括创业机会识别、创业机会评估、创业机会探索利用等)与其他(包括机会战略定位、机会认同、机会风险等),并给研究者提出了关注国内新一轮改革以及企业家选择进入非正规经济中的进入行动、进入思维模式的差异等方向上的相关建议(陈雪琳等,2020)。而本研究的落脚点在于"机会本质"的先验知识(prior knowledge)上,现有研究表明:与市场相关的先验知识会影响机会的发现过程(S. Shane, 2000)。而本研究尝试从品牌理论的视角切入,从品牌理论中挖掘有助于发现创业机会的先验知识。

3. 研究方法综述

3.1 三维结构理论(资料收集)

三维结构理论,属于系统分析方法的一种。它是由美国贝尔电话公司的系统工程专家霍尔于 1969 年创立的一种关于重大工程项目的设计和实施的组织方法。其中,"三维"是指时间维、逻辑维和知识维。时间维是指工程进度,这一维度上可以将工程划分为若干个工期和阶段,逻辑维是指工程实施的逻辑步骤,知识维是指工程实施自始至终必须具备的各种知识和技术力量。三维结构法一开始是用来重大工程项目的管理,使有限的人力、物力和财力有效地发挥作用。²

在此项研究中,三维结构理论主要的作用是资料收集的整体框架。其中,时间维按照关键品牌理论的时代背景去进行划分。知识维主要是面向关键品牌理论的产生背景、实践模型及案例分析等维度进行整理。同时,由于品牌研究的交叉性,会辅以市场营销以及经营战略的相关研究作为补充。逻辑维主要是以"有助于发现创业机会的先验知识"为核心,并通过借鉴扎根理论的编码技术进行概括与归类。

- 3.2 文献内容分析
- 3.2.1 文献选择

¹ 周冬梅,陈雪琳,杨俊&鲁若愚.(2020).创业研究回顾与展望. 管理世界

^{(01), 206-225+243.}doi:10.19744/j.cnki.11-1235/f.2020.0015.

^{2 《}广告学范式研究》胡维平

关键性品牌理论的选择主要参考卢泰宏教授于 2020 年出版的《品牌思想简史》(国内第一部综合性的可以参考的专门书籍),同时会辅以国内《品牌学》的学科教材进行比照。3由于品牌研究的交叉性,还会参照 R. Bartels、R. Winer & S. Nilsen、三古宏志等学者关于市场营销史、经营战略史进行扩展与补充。

3.2.2 文献编码

在获取到与本研究主题相关的研究文献后,对这些文献进行编码处理,主要关注文献内容里和"创业机会"有关的内容。本研究在编码过程中借鉴了扎根理论分析中的编码方法,即进行了初级编码和聚焦编码两个步骤(卡麦兹,2009)。首先,会先将文献内容打散,然后进行初级编码。初级编码是对相关资料或者数据进行高度概括的过程,一般用词语或者短语。第二步,聚焦编码,聚焦是在初级编码的基础上按照原始定义对初级编码进行归类处理,并分析各个类属的从属关系。

3.3 基于实践的品牌关系模型(整合)

在我国,明清时期便开始应用"字号"、"招牌"、"牌子"等字眼,表达与商标、商号、品牌等的相关之意。但直到 20 世纪 80 年代,才将英文"Brand"译为"品牌"二字。⁴ 实际上,英语"品牌"(brand)一词源于古挪威语的"brandr",意思是"打上烙印"。⁵ 而打上烙印这个动作,我将其理解为处理社会关系的实践,即处理社会内部人与人之间关系的活动。例如,古时候的人,为了防止自己的家畜被盗,亦或者是因为自家牲畜养殖得更好为了和其他人的区分开来以获得更好的回报,而做出了打上烙印这个举动。这个举动是为了其他人看到这个烙印并能理解其含义,而本质上即为处理社会关系的一种类型。而人们为了生产实践的更好发展,就必须维护和巩固那些有利于生产发展的社会关系,调整或改变那些不适合生产发展的社会关系。⁶ 而我认为,品牌符号的出现,便是一种调整或改变。

在实践的形式上捋清了品牌产生的背景后,再从实践的结构上来理解。实践是一个以人为主体的复杂的物质系统,由实践主体、实践客体和中介三大要素所构成。实践的主体又可分为个人主体、群体主体和社会主体。实践客体是指实践主体所要探索和改造的对象,主要包括自然形式的客体、社会形式的客体和精神形式的客体。在实践的主体和客体之间还有一个将这二者现实地连结起来的中介,这就是各种形式的工具、手段以及运用、操作这些工具的程序和方法。而品牌则为精神形式的客体(指人类精神生产的结果以物的形式存在,并成为人们实践活动的对象)。而所谓的实践活动,是主体与客体的相互作用,这种相互作用是通过主体客体化,和客体主体化的双向运动。正如马克思所指出的"在生产中,人客体化,在消费中,物主体化"。

在一般的商业环境下,当品牌作为精神形式的客体时,实践主体既有企业,也有消费者。例如,企业作为群体主体发挥其主观能动性塑造品牌,消费者作为个人主体去理解品牌所体现或携带的精神内容。与此同时,企业在塑造品牌的时候,品牌也在影响着企业的发展,消费者去理解品牌的意义时,品牌也在向其渗透和转化。而当品牌作为中介时,会出现实践主体是企业,实践客体是消费者的情境,也会有消费者是实践主体,企业是实践客体的时候。例如,当企业通过大量的品牌曝光试图影响消费者购买行为的时候,便会出现第一种情况。当消费者通过推荐、反馈、投诉试图影响企业的时候,便

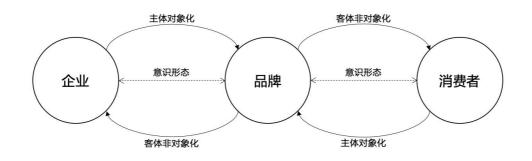
³ 关于品牌学这一学科的建设,国内研究实际比国外研究更体系化,不足之处在于只是对于理论的整合。

⁴ 胡晓云.(2016)."品牌"定义新论. *品牌研究*(02),26-32+78. doi:10.19373/j.cnki.14-1384/f.2016.02.003.

⁵ 保罗·斯图伯特主编. 品牌的力量[M]. 北京: 中信出版社会, 2000: 2

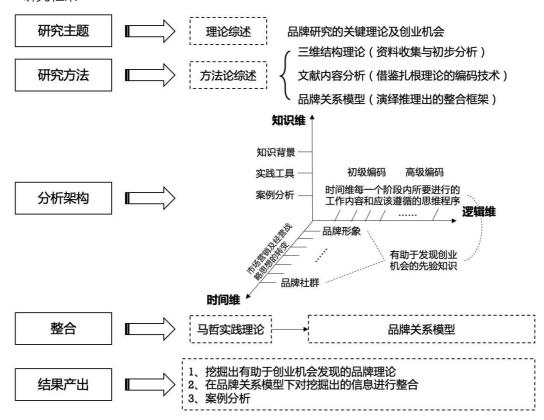
⁶ 马克思主义哲学原理 [M] . 唐晓勇 成都: 西南财经大学出版社, 2010: 50

会出现第二种情况。



品牌关系模型假设

4. 研究框架



5. 研究贡献

理论上,以品牌的视角补充关于创业机会发现的理论方法;实践上,给予创业者在发现创业机会的过程中理论的支撑和实践的工具。

部分预备资料整理:

 [[[[]]	β分测备资料整理 : ────────────────────────────────────		
出版年	品牌、营销、经营战略相关研究	影响	
1911	Taylor, F. W. (1911). The principles of scientific management. Boston: lndyPublish.com .	科学管理法,理性人假设的范本	
1912	Schumpeter, J. A. (1912). Economic doctrine and method: An historical sketch. London: George Allen.	企业家不断的创新正式经济变革的动力——熊彼得	
1917	Fayol, H. (1917). Administration industrielle et géné rale: P évoyance, or anisation, co mandement, c o rdination, co trole. Pa is: Du od et E. Pi at.	经营管理流程 1949 年翻译为英文本	
1924- 1932	George Elton Mayo, hawthorne experiment	人际关系论,社会人假设的起源	
1938	Barnard, C. I. (1938). The functions of the executive. Cambrigde, MA: Harvard University Press.	将企业定义为一个整体系统而非简单的结构。而构成这个整体的三个要素是"共同目标""贡献欲望"和"信息交流"。	
1946	Drucker, P. F. (1946). Concept of the corporation. Boston, MA: Beacon Press.		
1947	Ansoff	首次提出多元化战略	
E. 50c	Rose Reeves: USP unique selling proposition		
1954	Drucker, P. F. (1954). The practice of management. New York: Harper & Row.	确立了德鲁克在经营管理领域学的领导地位,提出了三个准则:以客户为目的、人员性机构、社会性机构	
1955	Gardner, B. B., & Levy, S. J. (1955). The product and the brand. Harvard business review, 33(2), 33-39.	关于品牌的第一篇论文, 品牌形象 理论的奠基之作	
	麦肯锡		
1960	Light & King	对品牌内涵及外延进行了规范性研究	
E. 60c	品牌生命周期理论 曼弗雷·布鲁恩		
1962	Chandler, A. D. (1962). Strategy and structure: Chapters in the history of the industrial enterprise. Cambridge, MA: The M.I.T. Press.	被誉为"最初的经营史学家"	
1962	Rogers, E. M. (1962). Diffusion of innovations. New York: Free Press of Glencoe.	从客户的角度说明了新商品的扩散流程,产品生命周期理论的 前身,并提出了S曲线	
1964	BCG John S.Clarkeson 从学习型曲线中获益 哈佛商业评论	后发展为著名的经验曲线 "竞争"的革新,可分析竞争状态	

Ansoff, H. I. (1965). Corporate strategy. New York etc 模式 (strategy, structure, system) 差距分析、安東未矩阵与 核心竞争力的概念 核心竞争力的概念 路側電子放射中,推广了战略设计的手段与 SWOT分析法 核心竞争力的概念 路側電子放射中,推广了战略设计的手段与 SWOT分析法 おきっといって、	1005	Appett II I (1965) Comparete stretches New Y	
Kin	1965		
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SGR=sustainable growth rate(可持续增长率) D/E=debt/equity ratio(资本充足率)R=ROA(净资 产收益率) i=interest rate(1-taxation rate、资产净利率) p=retention rat-io(自留额比率) 1967 Kotter, P. (1967). Marketing management. Englewood Cliffs: Prentice-hall. 1969 BCG, Richard Lockridge 市场增长率-相对市场份额 "资源分配"的革新,可分配业务间的资源 矩阵 1969 Trout, J. (1969). Positioning" is a game people play in today's me-too market place. Industrial Marketing, 54(6), 51-55. 1972 1975 Michael Porter, Five Forces 1977 John Kenneth Galbraith, BBC, The Age of Uncertainty 1978 Jacoby, J., & Chestnut, R. W. (1978). Brand loyalty: Measurement and management. London: Macmillan. 1979 Ansoff, H. I. (1979). Strategic management. London: Macmillan. 2	1966	BCG, Alan Zakon 可持续性成长方程	简而言之,"如果对业务有信心就贷款吧!"
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<u>_</u>		names. Business Horizons, 24(2), 36-41.	

1982	Peters, T. J., & Waterman, R. H. (1982). In search of	 《追求卓越》以 6 个财务指标为标准,选择了 43 家超优质的
	excellence. New York: HarperBusiness Essentials.	公司,并叙述了它们的 8 个共同特质。并提出 7S 模型。来自 Mckinsey
1983	博思艾伦咨询公司首次提出 SCM	供应链管理
1983	埃森哲提出 CRM	客户关系管理
1984	Mckinsey, Richard Pascale, Honda Effect	《战略的视角:本田成功背后的故事》
1985	Porter, M. E. (1985). Competitive strategy: Techniques for analyzing industries and competitors. New York: Free Press.	新增了价值链 Value Chain 理论
1986	Foster, R. N. (1986). Innovation: The attacker's advantage. London: Book Club Associates.	创新的双 S 曲线
1986	Park, C. W., Jaworski, B. J., & MacInnis, D. J. (1986). Strategic brand concept-image management. Journal of marketing, 50(4), 135-145.	提出了 BCM(品牌概念管理)框架
1989	Farquhar, P. H. (1989). Managing brand equity. Marketing research, 1(3).	Cited:2638
1989	Camp, R. C., & American Society for Quality Control. (1989). Benchmarking: The search for industry, best practices that lead to superior performance. Milwaukee, Wisc: Quality Press [for the] American Society for Quality Control.	标杆管理法: 寻找最佳实例,并在自己公司中适用实行
1990	Stalk, G., & Hout, T. (1990). Competing against time: How time-based competition is reshaping global markets. New York: Free Press.	时基竞争战略,以日本企业的经验为基础、重视能力的战略论, 来自 BCG
1990	Senge, P. M. (1990). The fifth discipline: The art and practice of the learning organization. New York: Doubleday/Currency.	创造了"学习型组织"的概念
1990	野中郁次郎《创造知识的经营》	SECI 模型
1990	Aaker, D. A., & Keller, K. L. (1990). Consumer evaluations of brand extensions. Journal of marketing, 54(1), 27-41.	
1991	Aaker, D. A. (1991). Managing brand equity: Capitalizing on the value of a brand name. New York: Free Press.	首次 回答了品牌资产的含义和具体构成要素;最早强调了品牌 联想的重要性,并且初步探讨了评估品牌资产的方法;提出了 管理品牌资产的若干基本问题。
1992	Collins, J. C. (1992). Built to last: Successful habits of visionary companies. New York, NY: Harper Collins, Pub.	

1992	Kapferer, J. N. (1992). Strategic Brand Management: New Approaches to Creating and Evaluating Brand Equity. HAL.	最早 开创了战略品牌管理 SBM 的概念,并率先创建了品牌金字塔模型。-2012
1992	Schultz, D. E. (1992). Integrated marketing communications. Journal of Promotion Management, 1(1), 99-104.	IMC 理论的奠基之作,为之后的整合品牌传播奠定了基础
1992	De, C. L., & McDonald, M. (1993). Creating powerful brands: The strategic route to success in consumer, industrial and service markets. Oxford u.a: Butterworth Heinemann.	欧洲影响最大的品牌学术教科书,-2010,4th
1993	Hammer, M., & Champy, J. (1993). Reengineering the corporation. London: Nicholas Brealey.	《企业流程再造》
1993	Keller, K. L. (1993) . Conceptualizing, measuring, and managing customer-based brand equity. Journal of Marketing, 57(1), 1-22	提出了"基于顾客的品牌资产"的全新理论,为后来的战略品牌管理奠定了基础
1993	J. F. Moore Business Ecosystem	为后来的品牌生态战略奠定了基础
1994	Hamel, G., & Prahalad, C. K. (1994). Competing for the future. Boston, Mass: Harvard business school.	与收益关联的持续性竞争优势能力,即核心竞争力——能力在 先,定位在后
1994	Schultz, D. E., Tannenbaum, S. I., & Lauterborn, R. F. (1994). The new marketing paradigm: Integrated marketing communications. Lincolnwood (III.: NTC Business Books.	将" 整合营销传播 "提升到营销学范式的层面
1995	Negroponte, N. (1995). Being digital. New York: Alfred A. Knopf.	麻省理工计算机科学家尼葛洛庞帝提出了"数字化"这一专业术语
1995	Bower, J. L., Christensen, C. M., & Harvard Business Review. (1995). Disruptive technologies: Catching the wave. Boston, MA: Harvard Business Review Video.	首次提出" 颠覆式创新 "的概念
1996	Barney, J. B. (1996). Gaining and sustaining competitive advantage. Reading, Ma: Addison-Wesley Publishing.	以资源基础理论 RBV 演化的 VRIO 框架
1996	Porter, M. E. (1996). What is strategy?. Boston, Mass: Harvard Business School Press.	三种基础的定位方式:缩减商品及服务、客户需求、客户的易接触程度
1996	Kaplan, R. S., & Norton, D. P. (1996). The Balanced Scorecard: Translating Strategy into Action. Boston: Harvard Business Review Press.	平衡记分卡 BSC,以财务指标连接,将定位(客户视角)与能力(业务与学习视角)结合的一次伟大尝试
1996	B3C 战略	

1996	Aaker, D. A. (1996). Building Strong Brands	使得对 强势品牌 的机理研究(如品牌崇拜、品牌挚爱等)成为学术研究的长期目标,对强势品牌的追求成了品牌管理的现实目标,对强势品牌的价值评估和全球最有价值或最佳品牌排行榜的发布吸引了全社会的瞩目。这些都源于阿克强化和确立了强势品牌这一重要的战略概念。
1997	Christensen, C. M. (1997). The innovator's dilemma: When new technologies cause great firms to fail. Boston (Mass.: Harvard Business School Press.	创新者的窘境
1997	Aaker, J. L. (1997). Dimensions of brand personality. Journal of marketing research, 34(3), 347-356.	品牌个性的奠基之作,大五模型——Sincerity, Excitement, Competence, Sophistication, Ruggedness. 以及品牌原型——Brand Archetype。也为品牌关系的研究提供了基础。
1998	Mintzberg, H., Ahlstrand, B. W., & Lampel, J. (1998). Strategy safari. London: Prentice Hall.	战略无法模式化,应根据情况而定
1998	Keller, K. L. (1998). Strategic brand management: Building, measuring, and managing brand equity. Upper Saddle River, N.J: Prentice Hall.	被誉为 品牌圣经 ,2019 年更新至 5th
1998	Fournier, S. (1998). Consumers and their brands: Developing relationship theory in consumer research. Journal of consumer research, 24(4), 343-373.	品牌关系的奠基之作,将品牌关系类比成人际关系,提出了品牌关系质量模型
1999	竞争性品牌塑造 Nilson	
1999	Schmitt, B. H. (1999). Experiential marketing: How to get customers to sense, feel, think, act, and relate to your company and brands. New York: Free Press.	首次提出了体验式营销,为品牌体验奠定了基础
1999	Evans, P., & Wurster, T. S. (1999). Blown to bits: How the new economics of information transforms strategy. Boston, Mass: Harvard Business school.	网络资本主义的企业战略
2000	麦肯锡提出"数字品牌化" Digital Branding 的全新理念	
2000	Aaker, D. A., & Joachimsthaler, E. (2000). Brand Leadership: The Next Level of the Brand Revolution	提出了在信息经济环境中强化品牌管理的四条途径: 品牌识别的深入完善; 建立品牌架构; 超越广告的品牌传播; 全球品牌管理。
2001	Leslie Chernatony, From Brand Vision to Brand Evaluation	-2010, 3rd.
2001	Schmitt, B. (n.d.). Customer Experience Management:A Revolutionary Approach to Connecting with your Customers. John Wiley & Sons, Inc.	顾客体验管理

2001	Muniz, A. M., & O'guinn, T. C. (2001). Brand community. Journal of consumer research, 27(4), 412-432.	首次提出了"品牌社群"的新概念,基于对某个品牌的崇拜而形成的特殊的、不受地域限制的社交群体。
2002	Holt, D. (2002). Why Do Brands Cause Trouble? A Dialectical Theory of Consumer Culture and Branding. Journal of Consumer Research, 29(1), 70-90. doi:10.1086/339922	探讨消费者文化与品牌化的关系
2003	Keller, K. L. (2003). Brand synthesis: The multidimensionality of brand knowledge. Journal of consumer research, 29(4), 595-600.	Cited:2767
	创新者的解答	
2004	Park, C. W., MacInnis, D. J., Priester, J., Eisingerich, A. B., & Iacobucci, D. (2010). Brand attachment and brand attitude strength: Conceptual and empirical differentiation of two critical brand equity drivers. Journal of marketing, 74(6), 1-17.	从 进化论 的角度分析品牌的起源,将品牌与品类完全绑定
2004	Holt, D. B. (2004). How brands become icons: The principles of cultural branding. Boston, MA: Harvard Business School Press.	文化品牌战略
2005	Kim, W. C., & Mauborgne, R. (2005). Blue Ocean Strategy. Boston, Mass: Harvard Business School Press.	蓝海战略,主张摒弃群雄纷争血染疆场的"红海战略",而推行基于新价值与成本、无竞争的"蓝海战略",同时它也否定了波特一直提倡的"权衡附加值或成本"。
2005	Friedman, T. L. (2005). The World is flat: A brief history of the twenty-first century. New York: Farrar, Straus and Giroux.	世界是平的
2005	Florida, R. L. (2005). The flight of the creative class: New global competition for talent. New York: HarperBusiness.	创意阶层的崛起
2005	Lindstrom, M. (2005). Brand sense: Sensory secrets behind the stuff we buy. New York: Free Press.	开创性地提出了感官品牌的理论
2006	Park, C. W., MacInnis, D. J., & Priester, J. (2006). Brand Attachment: Constructs, Consequences, and Causes.	提出了品牌依附的概念
2007	《异类营销》	
2007	Elliott, R. H., & Percy, L. (2007). Strategic brand management. Oxford: Oxford University Press.	-2018, 4th. 强调了"品牌的社会-文化"的独特视角

2009	Beverland, M. (2009). Building brand authenticity: 7	提出品牌的 真实性 ,即消费者对品牌感知和认同的核心
	habits of iconic brands. Houndmills, Basingstoke,	
	Hampshire: Palgrave Macmillan.	
2009	B.H. Schmitt 《品牌体验量表》	
2009	Hand of Brand Relationships	
2009	Kapferer《奢侈品战略》	
2009	Muniz 品牌社群如何创造价值	强调了品牌社群中品牌体验互动影响的价值, 主张顾客与公司
		合作创造价值,特别是,提出了"浸合战略"(Engagement
		Strategy) 的新思想。
2010	Park, C. W., MacInnis, D. J., Priester, J.,	提出了有效的品牌依附测量量表
	Eisingerich, A. B., & Iacobucci, D. (2010). Brand	
	attachment and brand attitude strength:	
	Conceptual and empirical differentiation of two	
	critical brand equity drivers. Journal of	
	marketing, 74(6), 1-17.	
2010	Holt, D. B., & Cameron, D. (2010). Cultural strategy:	文化创新理论,社会的历史变迁为新的文化创造了需求
	Using innovative ideologies to build breakthrough	
	brands. Oxford: Oxford University Press.	
2011	创新者的基因	
2012	Govindarajan, V., & Trimble, C. (2012). Reverse	逆向创新
	innovation: Create far from home, win everywhere.	
2012	Facebook, Eytan Bakshy, Role of Social Networks	人们主要是与强关系(关系较近)的朋友圈分享情报,但是他
	in Information Diffusion	们也从弱关系(几乎不互相评论或点赞)中收集情报,尤其是
		重要情报,几乎都是从弱关系处得来的。
2012	野村恭彦《创造未来中心》	知识产权战略
2013	Kumar, N., & Steenkamp, JB. E. M. (2013). Brand	专门研究新兴市场品牌全球化的第一本重要的著作
	breakout: How emerging market brands will go	
	global. Basingstoke: Palgrave Macmillan.	
2013	Christensen, C. M. (2013). The innovator's	颠覆式创新的延续
	dilemma: When new technologies cause great	
	firms to fail. Boston, Massachusetts: Harvard	
	Business Press.	
2014	Aaker, David. (2014). Aaker on Branding: 20	阿克品牌框架: 品牌资产、品牌愿景、品牌活力、品牌相关性、
	Principles That Drive Success. New York City, NY:	品牌组合
	Morgan James Pub.	
2014	Kompella, K. (2014). The definitive book of	
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	branding. New Delhi, India: Sage Response.	

2016	Park, C. W., MacInnis, D. J., & Eisingerich, A. B. (2016). Brand admiration: Building a business people love. Hoboken: Wiley.	创立"品牌魅力模型 BAM"
2017	《故事化品牌》	
2017	Steenkamp, JB. E. M., & Springer Nature. (2017). Global brand strategy: World-wise marketing in the age of branding. London: Palgrave Macmillan.	开发了品牌全球化的管理工具
2018	Brand Relationships, Emotions, and the Self	