

WILLIAM R. DAVIDSON: A LIFE IN RETAILING MANAGEMENT, HIS CAREER AT OHIO STATE UNIVERSITY

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ABSTRACT

This paper is the first of two biographical sketches that examine the life and career of William R. Davidson. His half-century of outstanding contributions to retailing and marketing education was divided chronologically between the Ohio State University and Management Horizons, a consulting firm founded as an independent company in 1968, merged with Price Waterhouse LLP in 1985 and becoming part of PriceWaterhouseCoopers in 1998. This paper focuses on the former period.

INTRODUCTION

One of the roles of history is to tell the stories of heroes. Heroes deserve credit for the inspiration and leadership they have provided us. And in telling those stories about others, we might also learn more about ourselves. Those are the more significant motives behind this biographical sketch of William R. (Bill) Davidson. His many and significant contributions to the development of marketing thought give Davidson what the biographer Milton Lomask calls "residue" (1986), sufficient to be worthy of biographical study.

Davidson's career in retailing management includes a half-century of significant achievements both in industry and the academic world. He was a member of the faculty at the Ohio State University for 25 years (1947 - 1972), during 3 of which he served as Chairman of the Marketing Department. He was elected President of the American Marketing Association in 1963-64. In 1968 he co-founded the successful consulting firm of Management Horizons which he then guided for almost 30 years. Chronologically, Davidson's career can be divided into two phases: the first as a teacher - consultant at Ohio State, the second as a consultant - teacher at Management Horizons. During that half century Davidson wrote and published over 40 articles, 3 monographs, and 3 books including best-selling textbooks on marketing and retailing. Among his most significant contributions to marketing thought is his book titled Retailing Management, the first edition of which was written as a faculty member at the Ohio State University (1953), the sixth and final edition published some 25 years later (1988) well into his tenure as Chairman of Management Horizons. The latter achievement reflected Davidson's unique approach to marketing education. Whether working in the academy or industry, Davidson always saw himself as both a learner and a teacher.

THE FIVE AND DIME - BEGINNINGS OF A CAREER IN RETAILING

Bill Davidson's grandfather was a wheat farmer whose four sons, including Bill's dad, also became farmers. That chain was broken, however, shortly after Bill was born on July 19, 1919. A few years later his parents' concern with ensuring a quality education for Bill and his three sisters led to the family's move to Emporia, Kansas. There they established a retail store known simply as "Davidson's". It was a full service grocery store and provided Bill with a "significant exposure to retailing" at an early age (Davidson 1998). Working in the family store he learned lessons about managing supply sources, credit management, customer service, pricing, and merchandise display. Later, during high school, he added to that experience with a part-time job at the Emporia Market, a grocery store which was not in competition with his own family's business.

Davidson earned his way through a B.A. degree at the College of Emporia with part-time jobs at the Rainbow Bakery and as a stock person at F.W. Woolworth. At the bakery he worked in packaging and loaded delivery trucks, learning the difficulties of matching supply with demand and found the scheduling and logistics of bread production and distribution fascinating. On weekends he occasionally rode in the delivery trucks with the bread salesmen to see what they did. Graduating in 1940, he was offered a position in Woolworth's Emporia store as Assistant Manager. In retrospect, it wasn't so much that Davidson had chosen

a career in retailing. Rather, jobs were difficult to find in 1940 and he was thankful just to have one.

He was amazed at Woolworth's ability to systematize thousands of SKUs across different seasons from suppliers all over the world and observed a performance expectation by the company and a discipline that is uncommon even today (Davidson 1998). Later, that discipline became an often-cited lesson for his Management Horizons clients. Ironically, Woolworth became an important client for the successful consulting firm. After nine months at the Emporia store, Woolworth transferred Davidson to a much larger store in McPherson, Kansas. His store managers were mentors. Indeed, Woolworth had an official position for entry level management trainees known as "learners". And even though Davidson joined the company above that official rank, he still considered himself a learner and his managers as teachers. After a year, however, the budding career in retailing was put on hold. On December 7, 1941 Davidson heard on the radio about Pearl Harbor and as he later reflected, "that was the end of my Woolworth career" (Davidson 1998).

Davidson had actually enlisted while still in Emporia. He wanted to choose his brand of service rather than be drafted and had reasoned that becoming a U.S. Navy carrier pilot was a reasonably high level way to join the war effort. It promised adventure, good training, and most importantly to Davidson - control, since ultimately he could, and would be, flying his own plane. Davidson flew F6Fs and SBDs off carriers during the war in the Pacific and was awarded a Presidential Citation, the Purple Heart, and the Distinguished Flying Cross.

War experiences raised a lot of questions about life choices for Davidson. On reflection he speculated that, had it not been for the war, he probably would have stayed at Woolworth and within three years would have had his own store. Nevertheless, he did not return to the "five and dime". By the time the war was over, he had saved some money and under the GI Bill had earned 4 years of education benefits. The "learner" decided to return to school.

AN OFFICE AND SALARY LIKE MR. WHITESIDE'S

During the war Davidson met and later married his Navy payroll disbursement officer, Anne Anderson. Upon returning to the U.S., the newlyweds stayed temporarily with Davidson's in-laws who suggested that he look into the MBA program at Washington University (St. Louis). Davidson's then first choice was Harvard but, while he was accepted there, would have had to wait a year and half for the backlog of war-interrupted students to clear. In 1946 then, he enrolled at Washington University.

The next year was a pivotal one for Davidson. As a graduate student at Washington University, he came under the mentorship of Professor Joe Klamon who taught marketing, but also did considerable consulting, especially as an expert witness. This later became a powerful career model for Davidson. Through Klamon, Davidson became involved with market research work for a St. Louis advertising firm where he met Henry Whiteside, an executive in charge of market research. With Whiteside as a role model, Davidson was drawn to a career in market research, which was then a rapidly growing field. For his MBA thesis he chose to study newspaper consumer market research programs. Both Klamon and Whiteside told Davidson that to get anywhere in this field he should get his Ph.D. and Klamon was particularly influential in Davidson's eventual selection of the Ohio State University.

Klamon's advice was typical of the graduate school selection process at that time. He suggested that Davidson choose a university where he might work under one of the "big wheels" or "big guns" in marketing. In Klamon's opinion during the late 1940s there were still relatively few such schools, one of which was the Ohio State University. Ohio State had two big guns - Harold Maynard and Theodore Beckman, and in the Fall of 1947 Davidson began his doctoral program under their supervision. Just five years later (1952), the latter's name would appear along with the big guns on the cover of the fifth edition of their Principles of Marketing (1952).

Remember that the decision to do a Ph.D. was intended as a step towards a career in market research. In 1947 Davidson was more interested in an office and salary like Henry Whiteside's than in the cubicle and stipend he earned as a teaching assistant. However, the War had created a huge demand for college education

and universities could easily see the coming flood of business undergraduates. Davidson's doctoral courses in marketing included over 30 students, half of whom (including Davidson himself) were already teaching. Without realizing it, he was soon immersed in his academic career. During his second year in the doctoral program, largely because of his experience at Woolworth, Davidson was asked by Maynard to teach a course in Retailing.

His MBA had directed Davidson away from retailing towards market research as a field of interest. But that decision, in turn, led him to further graduate work, away from a career in industry towards an academic career. Eventually, these seemingly different roads would become paved over in a career which blended scholarship with practice, and retailing with market research.

BIG GUNS AND BILLY THE (JUNIOR COLLEAGUE) KID

Davidson's major in the doctoral program was, of course, Marketing. Several of his professors were influential, including Ed Smart in Statistics, Charles Dice in Finance, Robert Patton in Economics and Harold Maynard whose course in the history of marketing thought had a significant influence on Davidson. One of the required readings for Economics was Adam Smith's Wealth of Nations which Davidson feels even to this day is one of the most important books he ever read. Along with Smith's The Complete English Tradesman, it put marketing into a historical perspective and showed the young doctoral student how differently marketing was viewed during Adam Smith's time as compared with the twentieth century. Maynard's personal knowledge of many of the pioneer scholars in marketing was also fascinating to Davidson. The teacher developed in his student an appreciation of history which continued throughout the latter's career and recently led to the writing of The History of Management Horizons (Davidson 1996).

The most significant influence on Davidson early in his academic career, however, was wielded by Professor Theodore Beckman whose career spanned a half century at Ohio State. Among Beckman's many distinctions were seminal contributions to the fields of wholesaling, credit management, marketing productivity, and a Principles of Marketing text which evolved through 9 editions over 46 years (Jones 1993). Maynard may have been "big", but Beckman was, in Davidson's words, a "titan". Davidson described Beckman as a "formidable" and "ferocious" teacher who would lock the door to his classroom at the start of class... "you didn't want to be caught unprepared" for Beckman's course (Davidson 1992; 1998). Davidson prepared so thoroughly, in writing a term paper for Beckman, that he discovered an error in the titan's Principles textbook. That work resulted in an invitation for Davidson to help revise the fifth edition of Principles of Marketing (1952), the best-selling textbook first authored by Beckman and Maynard in 1927. Thus began a long relationship between Beckman and Davidson.

The similarities between the careers of Beckman and Davidson are surely more than just coincidence. Both served with distinction in the military, albeit in different World Wars. Both focused their intellectual curiosity on channels of distribution - Beckman with an emphasis on wholesaling, Davidson on retailing. Both had a deep appreciation of history - Beckman's stimulated by a course on the history of economic thought taught by M.B. Hammond at OSU, Davidson's from Maynard's course on the history of marketing thought. Both began executive training early in their careers - Beckman at the request of his dean (James Hagerty) to teach at the NACM Institute on Credit (Jones 1993), Davidson at the request of his department chair (Harold Maynard) to teach executive training sessions on retailing for the National Association of Retail Dealers (NARDA). Both scholars went on to do extensive consulting and work as expert witnesses, in part motivated by their executive development teaching. However, therein lay a significant difference in the two careers as Davidson eventually travelled the extent of the continuum from an academic life to the business world.

Retailing Management

Shortly after Davidson's involvement with the fifth edition of the Principles text, Maynard approached Davidson, now a full time member of the faculty, to work with another OSU faculty member, Paul Brown, in writing a retailing textbook. Retailing Principles and Practices was completed and published in 1953, but Davidson knew it was not a good fit of co-authors and was dissatisfied with the finished product. A reviewer for the Journal of Marketing seemed to notice the different approaches and styles of the two authors,

commenting that "the opening chapter is a pedantic beginning for an otherwise commendatory and thoroughly practical work" (Faville 1953, p.100). Davidson undertook the second edition alone, giving the book a more managerial focus; the result gave its author much more satisfaction and pride. Again, the Journal of Marketing review agreed. In comparing it with the first edition, Retailing Management (as it was retitled) included "significant changes, not so much in organization as in content and viewpoint... [including] the very best of recent practice.... by incorporating considerable analytical and managerial material in the text, the authors have improved the offering" (Halper 1960, p.123). The book was also hailed as the first text-case book available in Retailing and became the best-selling retail text in 4-year colleges.

Davidson continued to revise Retailing Management well after he had left OSU to run Management Horizons, with some of his most interesting and important conceptual innovations appearing in those later editions. Ideas such as the "geometry of environmental opportunity model", the "institutional life cycle in retailing", and the concept of core versus fringe customers were just a few that combined Davidson's university experience with Management Horizons consulting work and were disseminated through the Retailing Management textbook¹.

Of course, Davidson's interest in retailing went back to his high school days. When it came time for him to do a thesis at OSU, he chose to study the "Use, Productivity, and Allocation of Space Resources in Department Stores" (1951). In those days the usual process for arriving at a thesis topic was for your supervisor, especially if it was Beckman, to assign it. That didn't happen in Davidson's case. In the course of his dissertation work he learned a great deal about department stores and met some of the most important executives at some of the biggest stores in America. It opened doors and established contacts which were to play a significant role throughout the rest of Davidson's career.

HIS CAREER AT THE OHIO STATE UNIVERSITY

Davidson liked teaching. He was also very good at writing. That was evident from his work on the fifth edition of the Principles book and from his revision of the Retailing text. So what began as a means to become an executive in marketing research quickly became an end in itself.

During the 1950s Davidson established his reputation as a scholar and diversified his teaching skills. With his thesis completed and graduation in 1951, he was offered and accepted a position as Assistant Professor at OSU. The next year was his first on the Principles book and the year after saw the publication of the first edition of the Retailing text. A run of articles published mainly in trade journals throughout the 1950s explored broadly the area of retail store profitability.

As previously mentioned, during the mid-1950s the National Association of Retail Dealers (NARDA) approached Maynard (then Chair of the Marketing Department at OSU) to offer through the University a 1-week program on retailing for NARDA members. Maynard turned it over to Davidson who began a long involvement with executive training. About the same time, the Ohio Manufacturers Association also contacted Maynard about a similar program which led the School to establish one of the earliest university executive development programs in America under Davidson's leadership. The newly promoted Associate Professor served as the program's first director from 1955 to 1958. This provided him with administrative experience which he would draw upon again and again in his career, and diversified his teaching as increasingly his students were managers and executives rather than 20 year old undergraduates.

Davidson spent 1958-59 as a Visiting Professor at Stanford University where his teaching responsibilities afforded much time for revising the Retailing book. It was a time for reflection and seemed to redirect his career somewhat. When he returned from Stanford to Ohio State in 1960, the completed

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This is elaborated on in the second biographical sketch, "William R. Davidson: A Life in Retailing Management, His Career at Management Horizons (MH), a Division of PriceWaterhouseCoopers", by Robert Tamilia.

manuscript for the second edition of Retailing Management was published. Articles began to appear in more scholarly journals. A productive relationship was struck with a new member of the marketing faculty, Alton Doody, who would eventually become Davidson's partner in founding Management Horizons.

During the next decade Davidson added significant administrative service to his academic portfolio. Since 1954 he had been active in the executive of the American Marketing Association (AMA), serving as Chairman of the Committee on the Teaching of Marketing, later as Vice President of the Education Division, and in 1963 he was elected President of the AMA. As a leader of the marketing academic community, Davidson seemed to become more reflective and critical of the discipline.

The early 1960s saw fundamental and significant changes occurring in collegiate business education including marketing. In 1959 two landmark studies of business education were published by the Ford and Carnegie Foundations. Both reports included harsh criticisms of the descriptive, vocational character of collegiate business education at that time and advocated an emphasis on behavioral sciences, quantitative methods, and managerial economics. The impact on curricula was swift and enduring. It led to a period in the development of marketing education which Lazer and Shaw later called "differentiation and legitimization" (1988). One big gun who was at the battle front called it a marketing renaissance (Davidson 1963).

Davidson used the term "renaissance" in the sense of a rebirth which called for a re-examination of the nature and purpose of marketing (1963). His own answer to that challenge (together with input from colleagues at OSU), was a philosophy of marketing education that went beyond the micro-management dimension and stressed the macro-social process of marketing. Davidson was concerned that the aggregate social impact of marketing activity was commonly underestimated, that marketing was more of a formative factor and less of an adaptive factor in society than was then suggested by many marketing professors and textbooks. He called for recognition of the roles played by influencers and interests other than consumers and of the formative, as well as adaptive, aspects of marketing in society. This broader perspective on marketing was certainly consistent with some aspects of the Foundation reports cited above. It added to Davidson's image a quality of the senior statesman which he was becoming.

The first collaboration between Davidson and Doody also appeared in 1963, a paper in the Journal of Marketing about the future of discounting. That was followed by articles in the Harvard Business Review on small-scale retailing (1964), and on the "Next Revolution in Retailing" which the authors predicted would be driven by computers (1967). The latter was a fascinating prophesy which bore uncanny resemblance to the internet commerce of today. Some readers were shocked; others laughed. Whatever the reaction, there was lots of it as their paper sold the most reprints of any HBR article in 1967. Doody and Davidson also joined forces for the third edition of Retailing Management (1966) and the two partners rapidly became big guns in the field of retailing. By 1968 they had formalized their consulting activities, which had become a considerable undertaking, under the name of Management Horizons.

It was curious, then, in light of their growing reputations as authors and consultants in retailing, that Davidson agreed in 1967 to serve as Chairman of the Marketing Department at OSU, a position he held for three years. That seemed to bring him to another crossroad in his career. At the conclusion of his term as Department Chair, he was being considered for the Dean's position, at other institutions as well as OSU. Did he want to take that next step up the academic ladder? It was becoming increasingly difficult to blend his consulting activities with his university job, not just because of the workload, but because of the changing attitude of academics towards consulting.

During the 1950s, when Davidson was building his academic career, consulting had been regarded as a "matter of high esteem", "something you put on your CV with pride" (Davidson 1998). It was highly regarded by the entire academic community, considered as something which enhanced a professor's teaching and brought prestige to the university. While there had always been limits on how much one should do, there were many opportunities to do it and be well paid. Perhaps because of that, some faculty members abused their opportunities. Whatever the reasons, by the late 1960s the attitude towards professor-consultants had changed, often to one of envy and resentment. With the growing success of Management Horizons, Davidson was faced with a choice.

In 1972 he decided to leave Ohio State University and devote his full energy to making Management Horizons a success. However, that did not mean an end to teaching or scholarship. The teaching and the learning never stopped. It did, however, mean that Davidson would get that office and salary like Mr. Whiteside's!

SUMMARY

William R. Davidson entered academic life at a unique time in the history of business education, a time when there was exploding demand for education, knowledge and expertise, and little supply of the same. Those conditions presented tremendous opportunities and Davidson capitalized on them. His contributions to our conceptual understanding of marketing became more significant during his tenure at Management Horizons, a period not focused on in this paper. Even then, however, he was more concerned with learning and teaching how institutions adapted to changing conditions than with principles or, what his teacher Theodore Beckman referred to as "the eternal verities" of marketing (Davidson 1998). Davidson fashioned a distinguished career as a scholar, teacher and consultant in retailing management. And if the 'system' eventually made it difficult to blend consulting with working in a university, Davidson never stopped believing in the symbiotic relationship between the two. In many universities today, "consulting" is still a dirty word. Davidson's career should illustrate vividly how consulting can be viewed as a "contribution to the discipline".

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