How Do Category Managers Manage? –A network management perspective

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Abstract

The aim of this research is to explore the managerial role of category managers in purchasing. A network management perspective is adopted. A case based research methodology is applied, and three category managers managing a diverse set of component and service categories in a global production firm is observed while providing accounts of their progress and results in meetings. We conclude that the network management classification scheme originally developed by Harland and Knight (2001) and Knight and Harland (2005) is a valuable and fertile theoretical framework for the analysis of the role of the category manager in purchasing.

Keywords: Category management in purchasing; Roles in purchasing; Management in networks

Introduction

Increasingly organisations organise their procurement activities in accordance with the practice concept category management (O´Brien, 2009). However, although the category manager role is now widespread in organisation, we only know very little about the details of the function, and how it is understood and executed in practice.

The purpose of this paper is to contribute to an increased understanding of the managerial role of the category manager. How can we understand the managerial role of the category manager? What exactly does "manager" mean in the case of the category manager? These are central questions explored in this paper.

In order to contribute to an increased understand of the managerial roles of the category manager, this research adopts a network perspective. When adopting such a perspective we assume that the category manager can be understood as a central note in a resource network with a function to organise and promote change and improvement in specific category component supply chains, but without any formal managerial authority. An initial list of role definitions is develop from previous research on managerial and network management roles (e.g. Axelsson, Rozemeijer and Wynstra, 2005; Harland and Knight 2001; Johnsen, Wynstra, Zheng, Harland, and Lamming, 2000; Knight and Harland, 2005). A multiple embedded case study approach is applied. We study how category managers, responsible for a diverse set of component categories, but within the same organisation, account for how they perform their managerial task. Specifically we are interested in understading when and how the category manager performs in differet managerial roles. As our data, we observe and transcripe dialogue from a string of category manager accountability meetings, as well as a string of interviews.

Findings suggest that the category manager role indeed can be understood and classified according to the developed conceptual role classification list. We further conclude that the analysis performed provides us with new and more detailed knowledge about how management, in the case of the category manager function, unfolds in a practice. We are able to illustrate the complexity involved: How the category manager occupies multiple

and parallel roles and how these are related. Another finding suggests that the category manager's managerial role is dynamic: It changes over time as category knowledge matures. Also we provide evidence and discuss how contextual factors such as the nature of the category, the experience and interests of the category manager and more, seems to influence the managerial role performed. These and other findings will be discussed in detail in the paper.

This research presents only a few cases, all of which are embedded in the same organisational context. The purpose is therefore not to generalise findings, but to contribute to a richer and deeper understanding of the dynamics and interconnectivities involved.

Insights from this research should be useful to practitioners in defining the category manager role and function, as well as the competency development requirement and potential in a specific organisational context.

This research claims originality on two accounts. First, what is suggested and applied is a new approach to the study of the managerial networking role of the category manager. This approach focuses on following in detail the accounts of management as presented by the category manager in closed accountability settings. Second, and based on the results obtained, we suggest a new and more dynamic understanding of the role of the category manager as a more fertile conceptualisation for research and practice on category management in the future.

The remainder of this paper is structured as follows. In the next section, a review of the relevant literature on category management, roles in purchasing and management in networks is conducted. This is followed by an outline of the research framework and its foundation in role theory. Subsequently, the method used, and results are presented. A discussion and conclusion section finalizes the paper.

Background literature

To underpin our research, three broad streams of research that related to our core research subject are reviewed briefly: category management in purchasing; roles in purchasing; and management in networks. The intent is to highlight several concepts and constructs that were critical in the initial framing of the research design as well as to provide a platform from where contributions can be identified.

Category management in purchasing

Category Management, although originating and dominant within a marketing and retail context (Arkader and Ferreira, 2004; Harris and McPartland, 1993), is now considered a well founded, well structured and essential strategic purchasing approach (O´Brien, 2009; van Weele, 2010, p. 207). Although different definitions of "category management within a purchasing context" have been proposed some defining features are shared across definitions. In category management, the product, services or components bought by the organization is broken down or segmented into categories which are discrete groups of organizational spend of functional related and strategically similar products, services or components (O´Brien, 2009; van Weele, 2010). Another defining feature of category management within a purchasing context is the formation and maintenance of cross-functional sourcing or commodity teams (O´Brien, 2009; Trent, 1998; van Weele, 2010). The role and endurance of the team and its members varies across organizations (Englyst, 2008), and literature propose a multitude of different functions and challenges related to these teams (Andersen and Rask, 2003; Driedonks, Gevers and van Weele, 2010; Pearson, 1999). Existing literature provide little empirical insights and guidance in relation to the execution and challenges faced

by the category manager or sourcing team manager/leader role (Driedonks et al., 2010, Kern, Moser, Sundaresan, and Hartmann, 2011).

Roles in purchasing

Within the literature on purchasing and supply management it is now widely recognised that shifts in the surrounding business environment have implications for the procurement function (Pagell et al., 1996; Tassabehji and Moorhouse, 2008; Zheng et al., 2007). Specifically factors such as, increased globalization, technological advances, increased levels of outsourcing and new demands on sustainability have all been suggested as key driving forces in the pressure for change meeting procurement functions in the last two decades (Cousins et al., 2006; Gadde and Haakansson, 1994; Giunipero et al., 2005, 2006; Monczka and Trent, 1998; Zheng et al., 2007).

The procurement function, it is argued, must respond to these and other challenges by moving to a more strategic oriented role (Carter and Narasimhan, 1996). A process oriented and integrating role away from a purely commercial and prise focused logic to a logic of cross functional involvement, internal and external integration, relationship management, (Tassabehji and Moorhouse, 2008). Some organizations have successfully transformed their procurement practices accordingly and have become more strategic in their nature (Giunipero and Pearcy, 2000; Cousins et al., 2006), while others are still in progress following different stages of maturity development (Van Weele and Rietveld, 1998).

In an alignment type logic, when procurement function objectives change so must the roles and accompanying skill set of the employees executing procurement activities (Giunipero and Pearcy, 2000; Humphreys, 2001; Pagell et al., 1996; Tassabehji and Moorhouse, 2008). Cousins et al. (2006) citing Faes, Knight and Matthyssens (2001) states that *"The role has moved from that of a buyer, focusing predominantly on price, delivery and quality, to that of a purchasing professional managing strategic long-term, complex agreements between internal stakeholders and suppliers (Faes et al., 2001)"*. Overall we can say that buyers are becoming supply managers operating in a dynamic environment and acting as agents of change. Supply managers both respond to, but also initiate and manage change in the supply network, and they do so increasingly not only by themselves but via network resources and their participation and management of cross-functional teams (Driedonks et al., 2010). In a fairly recent study Tassabehji and Moorhouse (2008) asked procurement professionals to assess their own role in the organization and if and how it had changed. Specifically they asked what portfolio of skills they believed that would enable them to fulfill their role effectively in the future. Based on interviews and a review of existing literature on procurement skills, the authors identify a new skill set for procurement professionals relevant for the current environment.

Management in networks

Can networks be managed? This is a central, seemingly simple but still very much debated question. To a large extend the answer depends on the definition of management. Management understood as the systematic planning and control of networks might be near impossible for any network actor without excessive power. Management understood as influence of a network and how it moves to some extend can on the other hand be expected to be available to more network actors (Harland and Knight, 2001, p. 477). The second type of management however rests on a set of quit different managerial roles and skill. Specifically since direct control is deemed near impossible in a network setting, mobilizations of resources and coordination of other network actors can be regarded as central role activities in this second type of a more indirect or subtle management understanding. Harland and Knight (2001) says that

"Indeed, the prospect of an actor involved in a network over the long-term having no opportunities to influence the network (beyond its immediate relationships) seems unlikely", and continues to define "managing the network" as the instances where opportunities to achieve organizational objectives are exploited via the network (p. 478). Very few publications are explicit about the definition of "network management" and even fewer present models categorizing the components of managing (Agranoff and McGuire, 2001; Ford, Gadde, Håkansson, and Snehota, 2002; Harland and Knight, 2001; Järvensivu and Möller, 2009; Johnsen et al., 2000; Knight and Harland, 2005; Snow, Miles, and Coleman, 1992).

Network management has recently been defined as the dual task of restructuring the existing network and at the same time improving the conditions of cooperation within the existing structure (Järvensivu and Möller, 2009, p. 658).

Snow et al. (1992) identifies five types of actor roles in a network: designers, producers, suppliers, marketers/distributors, and brokers. The broker is understood to be the manager of the network in the sense that the role operates *across* rather than *within* hierarchies, creating and assembling resources controlled by outside parties (p. 15). Snow et al. (1992) continues to define three types of network brokers. The *architect* facilitates the emergence of specific operating networks. The *lead operator* formally connects specific firms together into an operating network. The *caretaker* focus on enhancement activity, shares information among firms about how the network runs, and may engage in nurturing and disciplinary behavior in regard to other potential or present members of the network.

Agranoff and McGuire (2001) present a "common network management sequence" (p. 322). The sequence entails four steps. The first step activation structures and identifies participants for the network. The second step framing has as its objective involves establishing and influencing the operating rules of the network and altering the perceptions of the network participants. The third step mobilizing involves building commitment among actors. Finally as the fourth step, synthesizing involves creating conditions for productive interaction and removing obstacles to cooperation.

Ford et al. (2002) develop a network management model consisting of three components. The premise of the researchers is that all nodes (individual or firm) have a *picture* of the network, as it looks from their point of view. This picture dictates the activities of *networking* between the nodes to provide certain *outcomes.* Networking is a main task in managing the supply network, as this provides the network outcomes from which the node takes its success or failure (Ford et al. 2002). The network picture directs attention towards where different types of networking should be a potential valuable endeavor. Johnsen et al., 2000 presents a model listing and defining activities of "networking" in relation to navigating a supply network. Other researchers, building on role theory have presented a more detailed list of managerial actor roles in a network (Harland and Knight, 2001; Knight and Harland, 2005), than the one provided by Snow et al. (1992).

Theoretical framework

In this research we adopt the supply network role classification framework developed by Harland and Knight (2001) and Knight and Harland (2006). The framework consists of six distinct but closely related supply network management roles (Figure 1). While we will not repeat the complete discussion made in the original contribution here, we can say that the role classification framework rests on a solid theoretical base in role theory. Role theory's central premise is that an actor should be viewed as a collection of social roles, and that these to some extend are enacted, performed or socially

constructed in the situation (Goffman, 1959; Newcomb, 1953). Individuals do not possess fixed or transsituational roles, rather *"situations evoke various "identities" or "roles" within individuals"* (Montgomery 1998: 96). The notion that roles are evoked and performed in situations fits well with our research strategy and methodology, where we observe category managers own account for situations where they seek to obtain certain network outcomes or innovations. We observe how category managers construct their own identity as network managers. Specifically we observe their account for how they engaged in different forms of networking while responding to the network picture they have formed (Ford et al., 2002). We thus observe how the category managers themselves draw in and construct the resource network and the physical supply network they seek to change to obtain certain network outcomes.

Network management role	Description	Competences required in the role
Innovation facilitator	• Facilitate process innovation in sourcing and procurement • Identifying new ways of linking resources and activities	• Group facilitation • Change management • Knowledge management • Lobbying • Project management • Strategy and strategic management
Network Structuring Agent	• Maintain links between nodes • Facilitate interface between nodes	• Change management • Conflict resolution • Lobbying • Strategy and strategic management • Project management
Co-ordinator	• Manage activities in the network • Manage effort towards same goals	• Group/Team management • Project management • Information sharing • Knowledge sharing
Advisor	• Provide advice on problem solving • Problem identification abilities • Coach co-workers, subordinates and suppliers	• Solution oriented • Strategic minded • Accepted credential • Proven performance record
Information Broker	• Knowledge dissemination • Facilitate information flow • Data production • Data assessment	• IT capabilities • Knowledge management • Information sharing • Analytical abilities
Relationship Broker	• Nurturing direct and indirect relationships in the network • Aligning activities in network • Configuring and re-	• Agenda setting • Change management • Conflict resolution • Leadership • Policy management • Strategy and strategic

	configuring resources	management

Figure 1: Role classification framework developed from Harland and Knight (2001) and Knight and Harland (2006)

Methodology

The objective of the research was to understand the role of the category manager in a network management perspective. In order to address this objective, the research used a case based research method. Qualitative and in particular case study research is particularly appropriate in the early stages of theory building where comparably little is known about the phenomenon under study (Miles and Huberman, 1994) A case study approach was deemed appropriate for understanding the expected complex interrelation between the different network management roles that are too complex for the survey or experimental strategies (Yin, 2003), and to enable the in-depth examination of dynamics present in a single and unique setting (Eisenhardt, 1989). The results from case studies cannot be subject to statistical generalization or theory-testing, but case studies can be used to generate theoretical constructs, propositions and/or midrange theories (Eisenhardt, 1989; Yin, 2003).

Case selection

The case firm Bearing-technologies ("Btech" is an acronym due to confidentiality reasons) is a producer of industrial production equipment, a leader in its line of business. Btech is based with its headquarters in Europe, but today operates its business globally, with a supply network increasingly global. Due to increased competition from Chinese low cost competitors Btech formulated and launched a new focused sourcing strategy in 2010. The main objective of the strategy was to accelerate and increase the firms low cost sourcing in order to take on the competitive cost pressure. In other words it was a process that required major changes in the supply network at Btech. A major leaver to achieve this objective was the concept of category management. Recently the different business divisions and facilities had managed and sourced locally, but now with the emergence of the new sourcing strategy a centralization process governed by a range of cross-functional, cross-divisional and global category team was enforced on the organization. For each team a category manager was put in charge, but this person did not have any formal management authority. In all categories the category manager's background was in strategic procurement.

The Btech case is particular relevant for this study since the recently launched new focused sourcing strategy and its supportive category or sourcing team structure made this a unique case and moment to study the category managers in action. Within Btech three different categories were selected for this study, each of these categories and their management performed by the category manager is considered a unique case entity. Thus we apply a multiple embedded case-study approach. Although the organizational parameters of the case are that of a single firm, we will look at the processes within three categories, and draw conclusions based on similarities and differences found within and across these different categories. This gives an opportunity to speculate on the impact of the diversity of the three categories related to the managerial accounts.

Yin (2003) states, that the use of single-case research can be justified if the case in question is representative of other possible cases. However, using a single-case research approach has often been criticized for being too minimalistic, or narrow, in its data collection and analysis thereof. The multiple-case approach provides more variable data than a single-case approach. Multiple cases provide better grounds for theory because they allow for comparisons which explain if findings are only observable in a single case or are consistently found in several cases (Eisenhardt and Graebner 2007). The three different categories were selected based on their diversity, both in relation to the

functionality and physical nature of the category itself, but also in relation to how long time the category had been involved in the category management process.

Data collection and analysis

To answer our research question we collected data from three different sources: Observations, interviews and archival data. In the period from September 2010 until March 2011 a total of 32 meeting observations were made. A standard meeting ranged from 25 minutes until 50 minutes.

The primary location for our observations were "blackboard meetings". Theses meetings were held every second week and functioned as a sort of accountability and progress setting in which the category manager had to account for results achieved and obstacles meet. These meetings were ideale settings in which we could observe dence representations of how the category manager perseived and performed the category manager role. Our presence in the meeting were purely observative and we did not take part in the dialogue at any point in time. Meetings dialogue were recorded and subsequently transcribed.

Interviews were conducted mainly as a supplements to meeting oberservations. Some interviews could follow immediatly after a "balckboard meeting" in order to clearify specific deatiles in dialogue that came up during the meeting oberservation, or to explore how meeting participants had percieved the meeting. Interviews were also used at a lather stage after data from the blackboard meeings" had been coded and analysed, this in order to have the category managers reflect on their own role and activities. Interviews were recorded and transcribed.

The data analyses process followed a two step approach. First, within-case analysis following the procedure of Miles and Huberman (1994) where conducted. In each of the categories each researcher read and coded the category managers' account of his/her managerial efforts in the category, according to the role definition outlined in table 1. The coding of the two researchers where the subsequently compared, and instances of differences in the interpretation of data were resolved before the coding process were called complete. Second, cross-case analysis identified common themes as to how category managers engaged in the supply network.

Findings

In the following, the key findings from the empirical study are summarized. The network management roles are used as a structure.

The category manager acting as innovation facilitator

According to the role definition, the innovation facilitator promotes and facilitates product and process innovation. Across the three different categories we observed the role materialize a total of 15 times corresponding to only 6% of the observed role instances. Thus, the role although identified in most of the observed meetings, and performed by all involved category managers at some instance, was relative modest represented in the accounts made.

Overall we found that the proposed innovations as accounted for by the category managers could be classified into two major categories. One set of innovations were directed directly at the supply network (henceforth "supply network innovations" (SNI)), and were designed to improve the performance of the network (e.g. suggested change of supplier; suggested outsourcing; suggested product substitution). The category manager had no formal leadership authority in the supply network, and therefore SNI where in the form of suggestions. The other set of innovations were directed towards the procedures and systems that governed the project or the supply

network (henceforth "procedure and system innovations" (PSI)) (e.g. sharing project organizational charts; improving IT-system so project work could be shared ect.). PSI would eventually, it was argued, manifest as performance improvements in the supply network since this type of innovation would enable new forms of- or improved decision making.

Although cautions should be taken, due to the small sample, our data indicates a different between the two types of innovations in relation to their origin. It seems that PSI innovations all originated from relational settings in the network and often referred to as output from category meeting. SNI on the other hand were only in a few instances referred to as being the product of interaction, most often SNI seemed to be the brainchild of the category managers themselves.

Another indication of a difference between how the network approached SNI versus PSI, was in respect the accounts made of the challenges of the subsequent implementation of the innovation. PSI had only short considerations of subsequent implementation work, and change management attached to them, whereas SNI in the accounts made by the category managers seemed to be only the beginning of a long journey involving many network management roles and competencies.

The category manager acting as network structuring agent
The role of the network structuring agent is defined by a concern for maintain links between nodes and facilitating interface between nodes. Across the three different categories we observed the role materialize a total of 75 times corresponding to 30% of the observed role instances. Thus, the role was found to be widely used in the accounts made by all category managers.

Overall we found that the category manager in his/her accounts pointed towards playing an active role in two different types of network structuring processes. First, there is what we can call direct network interface/link facilitation/maintenance (DL). These are instances where the category managers strengthen their own attached network and their position as active agents in it. As an example of this DL type, we can take the direct links to the category team members and the establishment of regular category team meetings or the inclusion of a new member. Second, there is what we can call the leveraging of indirect power links (IPL) with a direct purpose. These are instances where the category manager uses an already established direct link in the network in order to maintain other existing links or facilitate new interfaces between other notes. This is exemplified from our data in the instance where the category manager of the bearings team has realized that the time allocated to participate in the category team for team member 4 is too small. The category manager voices her concerns over this to the relevant managers; the vice president of sourcing, the procurement manager who is team member 4's line manager, and the category strategy project manager. Thus, the category manager is drawing on the resources of managerial power to act upon this conflict in resource allocation.

The category manager acting as Co-ordinator
The co-ordinator role is to make sure that activities in the network are consistent and that the effort of the network is focused towards a certain outcome. Across the three different categories we observed the role materialize a total of 31 times corresponding to only 13% of the observed role instances.

Btech defines as part of the job role of category managers, that they must be able to supervise, organize and manage the efforts of their co-workers in connection with the category management processes. One instance of dialogue from one observed meeting

illustrates how the category managers succeeded mobilizing team member 3 to work for the team.

Project manager: Then there's this [Team member 3] case.
Category manager: Yes, and actually something positive has happened there because [Team member 3]... I couldn't be there... But [Team member 3] had a meeting with engineering on this case and they have now allocated resources and have started and...[Team member 3] he's on vacation right now, but as soon as he's back they'll do an update on where we are at, and then it's our intention to invite [Supplier] up for deciding whether it's a go or a no-go. So it's very close to the fact that if there aren't that many complications with specification and such, then we're very close to succeeding with the first quarter.

The category manager acting as advisor

The advisor role is one in which the category manager identifies problems and suggests solutions to these problems. The category manager contributes to problem identification and solving and shows other nodes in the network how to get around obstacles and perform tasks. Furthermore, it is a role in which the category manager can coach other network members and share his knowledge. The role of advisor is closely connected to the information broker. This can explain the reason why this role is performed only 11 times corresponding to only 4% of the observed role instances in the blackboard meetings that have been observed. As an advisor, the category manager is also disseminating information and knowledge to the other nodes in the network. Another explanation for the few instances of this role could be the low maturity of the categories, the proposition being that a supply network has to be mature in order for advisory roles to become legitimized between members.

The category manager acting as information broker

The information broker role is performed when the category manager is disseminating information amongst the nodes in the network, in order to keep everyone up to speed and make sure that decisions are made based on a solid information foundation. In this role the category manager must have an analytical mind and be able to interpret information accurately to take quick decisions. Across the three different categories we observed the role materialize a total of 65 times, corresponding to 26% of the observed role instances. This makes it the second most frequent role which we identified.

The category manager is performing a combination of three sub-roles in the information broker role. First, the category manager is *monitoring* the network for information which he can use in his efforts. This information does not only come from dedicated information exchanges but also through other, unexpected sources. Second, the category manager subsequently *disseminates* the information he's received to other nodes in the network. This is partly what the blackboard meetings are about, informing the other nodes on what is going in the category so that they can base their future actions on valid information rather than guesswork. Third, the category manager acts as a spokesperson for the category. This is an important role for creating a stronger network because by announcing the successes that have been achieved in the category throughout the network, acceptance and reciprocity can be created from the other nodes (Axelsson, Rozemeijer & Wynstra 2005).

Relationship Broker

The network role of relationship broker is one where the manager is nurturing direct and indirect links in the network, and aligning activities between nodes (Harland, Knight 2001). It is not unlike the network structuring agent role in that the links between the nodes, i.e. their relationship, is where the focus lies. Across the three different

categories we observed the role materialize a total of 49 times corresponding to only 20% of the observed role instances.

Discussion and conclusion

This research explored the question "How Do Category Managers Manage? A network management perspective was adopted and a case study approach applied.

Findings suggest that the network management classification scheme originally developed by Harland and Knight (2001) and Knight and Harland (2005) is a valuable and fertile theoretical framework for the analysis of the role of the category manager in purchasing. Specifically research demonstrates the strengths of analyzing the role of the category manager as a manager of networks. Preliminary analysis suggests that the observed category managers can be identified to occupy all roles, but some of them more frequently than others. In more detail we can say that the broker roles ("Network structure agent", the "Information broker", and the "relationship broker) where the category manager manages mostly via others actors and resources in the network dominates. This preliminary finding underlines the importance of competencies that can leverage network resources and other network actors' competencies versus hard personal competencies.

Two main contributions can be identified. First, this research demonstrates a new approach to the study of roles and competencies in purchasing. It adopts a network management perspective originally designed to the study of firms in networks, and it observes the actors construct their own network picture and how they engage in networking activities in the supply network. Second, it provides some interesting but preliminary observations as to the relative role frequency, differences between categories and relations between network management roles. However these have to be analyzed further in this research before final conclusions can be made.

The study has several limitations. The purpose of the study is not to generalize findings, but to provide more insights and a new perspective and approach to the study of roles in purchasing, that fist well the new purchasing reality. The blackboard-meeting setting, although providing a real life context is also in a certain sense biased since the meeting agenda and the questions and responses from the other meeting actors implicitly forms the category managers responses and thereby their account of how they manage the network.

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