

CLEARING THE AIR
Philip Morris International's Smoke-Free Future

TEACHING NOTES

The authors prepared this case solely as a basis for class discussion and not as an endorsement, a source of primary data, or an illustration of effective or ineffective management. Although based on real events and despite occasional references to actual companies, this case is fictitious and any resemblance to actual persons or entities is coincidental.

Teaching Notes

Teaching Plan

The teaching notes for this case allows for a strategy and set of guidelines for the teaching and presenting of the introduction of IQOS by Philip Morris International (PMI). This document will provide a structure and assistance for the teacher in the presentation of the case. The relevance of this case, the teaching objectives and what is to be learned from a practical and theoretical standpoint, as well as the live-presentation of this case, are all covered in the following overview. The overall aim of these teaching notes is to allow for an engaging, thought-provoking and immersive case study, which will bring out the theoretical and practical knowledge of the students who have participated in the Corporate Brand Management & Reputation course in a live-case setting. This case, however, due to its evergreen nature, can expand to other audiences and settings, not only master students. This case provides an example of an organisation entering a new market and developing a new position and transitioning towards a new identity - this is a multi-fold case with a myriad of levels. As the mantra goes: *Management is a wisdom which cannot be taught*, and in our case study, we bring this wisdom to life for the audience in PMI's launch of IQOS.

Case Summary

Philip Morris International (PMI) reacted to the crisis in the tobacco industry by introducing a truly disruptive innovation: IQOS. This electronic device, differently from the traditional cigarette, warms rather than burns tobacco. Thus, even though it is still a product containing nicotine, it allows the smoker to avoid the unpleasant smell of burnt tobacco after having smoked, thereby revitalising the image of the smoker. Moreover, given the smaller amount of chemicals included in the Heets, PMI argues that smoking from an IQOS is less harmful than smoking the classic cigarette or cigar.

To position the product as something totally different from the usual cigarettes, the company decided to open dedicated stores where the electronic device can be purchased, thereby also enabling the customer to be provided with an in-depth explanation about how to use it, alongside the possibility of trying it. These stores were located next to luxury boutiques and were characterised by a very fancy and exotic layout, so as to emphasise the new image of the smoker: a high-class businessman, not the bad smelling Marlboro man.

In order to safeguard the good relationships with distributors, PMI decided that the special cigarettes to be smoked by means of IQOS (i.e., Heets) are to be bought in traditional tobacco shops. In this way, even if the smoker has to visit an IQOS store to obtain the electronic device, he/she still has to enter a tobacco shop to actually smoke, thereby protecting the business of the tobacco shops.

The introduction of IQOS allowed PMI to pursue the vision of replacing the traditional tobacco products with less harmful alternatives, moving towards a smoke-free future.

The class should be invited to think about how the firm can position IQOS, so that stakeholders can perceive it as fundamentally different from cigarettes, despite PMI being the biggest tobacco company in the world. The teacher should also stimulate students to consider how the relationships with Philip Morris's stakeholders should be safeguarded, especially the ones with distributors.

Therefore, the following question should be asked:

How can PMI position IQOS in such a way as to move away from the perception of a traditional smoking product to their new identity of more healthy smoking? At the same time, how can PMI safeguard the traditional relationships with stakeholders, especially distributors?

An Evergreen Case

The "IQOS" case by Philip Morris International (PMI) can be considered as an "evergreen case" due to the plethora of learning outcomes and insights from the decisions made by the management of PMI that were revolutionary at the time. The company was faced with a difficult situation in the beginning of the twenty-first century with dwindling sales and market position, coupled with rising consumer trends, pertaining to a healthy lifestyle and a recognition of the dangers that smoking causes. It is curious to observe that a company of such magnitude, a respected one with a leading market position, had to change and shift its course. We believe that this was a pre-emptive move to escape the inevitable.

Another argument for this being an evergreen case is that it shows the difficult decision of management regarding the change of its positioning and even the business vision. Other companies faced with difficult choices in their industries can learn from the experience of PMI, which took a bold decision in a conservative market. Essentially, portraying itself as the brand leader and visionary of the industry. The change in PMI's business vision was a radical move at the time, which was fuelled by moral and ethical reasons. Corporations that are in industries that bear negative health connotations, for example, can learn from the path of Philip Morris and try to align their future strategic decisions with the broader society in mind. This will help them alleviate any negative public backlashes and even increase their profit margins, as it is shown with IQOS - a revolutionary product with ever-increasing sales worldwide. Furthermore, the management of both internal and external stakeholders can also be looked at as a best practice, when the company decided to retain its existing partner relationships, despite the launch of its new product, which potentially could have been a case of competing with their partners.

Learning Objectives

Identity and Positioning

We consider the case about IQOS as particularly helpful to have a more in-depth and practical understanding of the concepts of identity and positioning.

The importance of identity is emphasised by Roper & Fill (2012) when they consider that the first ingredient for a positive reputation is having a well-defined identity. van Riel & Fomrbun (cited in Roper & Fill, 2012) argue that the concepts of identity and identification can be considered as answers to four questions:

1. Who are we?
2. What do we stand for?
3. What is our purpose?
4. What does it mean to be involved in this company?

In other terms, the concept of identity can be considered as the way the company wants to be perceived by both internal and external stakeholders. This explains the relationship between identity and positioning: which position the company desires to occupy in stakeholders' hearts and minds, especially with respect to competitors (Keller et al., cited in Urde, 2013). The desired positioning of a company is related to its mission and vision and to its core values. In fact, in Urde's (2013) Corporate Brand Identity Matrix these three elements form what the author calls a strategic diagonal. The idea is "to align the organisation's reason for being and its direction with the intended position" (Urde, 2013, p.753).

In the case under consideration, Philip Morris International (PMI) recognised the need to depart from its vision, because being considered the largest tobacco company in the world was not profitable anymore due to the increasing people's interest in healthier lifestyles and the downgrading image of the smoker. The new vision was constructed to substitute the common cigarettes with less dangerous smoke-free alternatives. It goes without saying that to pursue such a new vision, there was the need to find a radically different positioning of IQOS, not only with respect to competing cigarettes brands, but also with respect to the same brands of cigarettes belonging to PMI's portfolio.

To convey the desired identity, Roper & Fill (2012) consider communication as the main tool exploited by companies. More precisely, symbolism, planned communications and behaviour build the so-called "corporate identity mix", i.e., those communication elements that are utilised more frequently to inform about the identity (Roper & Fill, 2012). But interestingly, the key element in the positioning of IQOS was

represented by the specific store where people could buy the device: it was the idea of the IQOS store that truly emphasised the new identity and positioning of PMI as pursuing the vision of creating a smoke-free future. It should also be noted that this was probably due to the severe regulations regarding the advertisements of tobacco products. That is, since in many countries it is not allowed to advertise nicotine products, PMI had to manage without the traditional communication strategies and decided to carry the intended message by opening the specific stores.

As a consequence, the case provides evidence of how companies can tailor the positioning of their products and their brands, taking into consideration their business model and *raison d'etre*.

Stakeholder Management

A corporate brand has to deal with a large number of stakeholders, both internally and externally - ranging from employees, to customers, to suppliers, to government, to media, and everything in between (Roper & Fill, 2012). It is also vital for an organisation to share their values with their various stakeholders to help strengthen the corporate brand (Roper & Fill, 2012). Corporate communication is one of the key ways to be able to influence stakeholders' view and perception of the organisation in a more favourable light (Roper & Fill, 2012). In the case of Philip Morris International (PMI), this move toward IQOS can be seen as the beginning of a broader shift of their values, culminating in the new vision of a 'smoke-free world'. The organisation needed to begin to change the conversation with its stakeholders from more traditional tobacco and cigarette products to the health-alternative IQOS, from legislators and decision makers down to the front-facing partners.

According to Roper & Fill (2012), corporate brands need clearly defined stakeholder engagement for different stakeholder groups as part of a proactive approach to managing your reputation. Lobbying, defined as "persuasive communication designed to influence policymakers" (Roper & Fill, 2012,p.296), was a tactic used by PMI to push through their interests in maximising sales of their traditional tobacco products. However, with the introduction of IQOS, PMI moved away from lobbying and decided to work with legislators to ensure that they could bring IQOS to markets safely and to the right audiences (LaVito, 2019). As well as this, PMI needed to instil trust in its partners when they were launching the new IQOS, and to ensure that the Heets would be sold through the traditional partners - an important aspect for a corporate brand's strength is through creating trust with their stakeholders (Roper & Fill, 2012).

Through stakeholder engagement, PMI was hoping to change the tune of their reputation, which of course is defined as what customers and other non-customer stakeholders think of your corporate brand (Urde, 2021a). Framing, where an organisation draws audiences toward a specific view or lens which is deemed beneficial for the organisation (Roper & Fill, 2012), was a crucial tactic employed by the organisation in this move and launch of IQOS - with the intention of the brand to

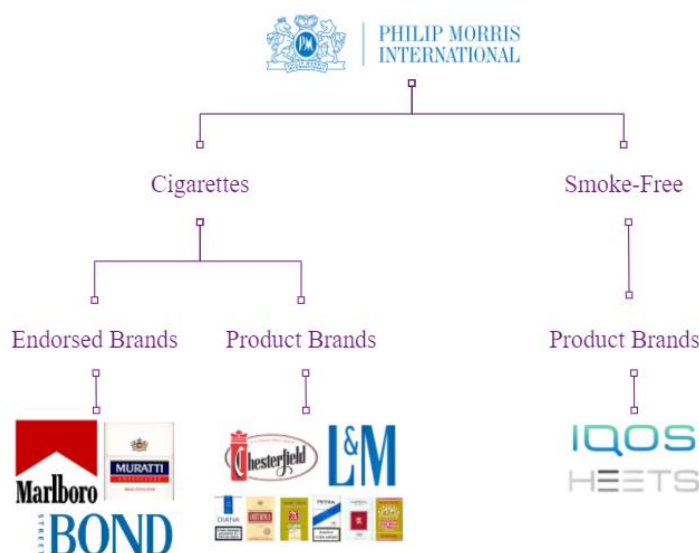
position themselves in a new light, with IQOS as the first step in creating a healthier alternative to traditional tobacco, and for stakeholders to see the organisation in this new way.

Brand Architecture

Brand architecture is a relevant learning outcome when we discuss the case of the introduction of IQOS by Philip Morris International (PMI), and according to Roper & Fill (2012, p.143) “the brand architecture of an organisation can help us to understand the difference between corporate branding”. The product represents the new business vision of PMI and a turning point in its strategy. As a result, the company created a new brand labelled “Heets” which unites all smoke-free heating products. The management board of PMI made a wise decision to refrain from branding the product and allow it to exist on its own. The reason for this was that IQOS had to be perceived as a product that ushers the change and discontinues the old vision of PMI.

Thus, continuing the strategy and idea of their old brand architecture – “House of brands” with a high degree of freedom (Kapferer, 2012). However, when we further explore their brand portfolio within the House of brands, we can observe two trends that PMI is practicing – they are utilising a daughter-mother brand strategy, while in parallel, they have strong product brands with a life of their own and the mother being in the background (Urde, 2020). Below you can observe how the current brand architecture of PMI is formed in **Exhibit 1**:

Exhibit 1: Philip Morris International Brand Architecture



The most famous brand that the company has is Marlboro. The brand awareness and recognition of this brand is huge with people associating easily with the smoking cowboy from the commercial. Alongside Marlboro, PMI owns Philip Morris, Muratti, and Bond which have a clear company signature by having the PMI logo next to the brand name, which elicits a classic case of an endorsed brand (Kapferer, 2012). These

are also the most popular cigarettes of the company, so the influence on recognition and awareness is both ways. The other focus of the company is on strong cigarette and smoke-free product brands, where the corporate brand is not evident on the product packaging (Urde, 2021b), and a separate organisation manages them - L&M and Chesterfield. In addition, the newly created Heets brand with IQOS goes into this category. The decision not to endorse IQOS was necessary because PMI was essentially entering a new market, and at the same time creating it within the tobacco industry.

Key Learning Objectives

Based on Bloom et al.’s (1956) taxonomy of educational objectives, the speakers have devised a succinct table with the “Key Learning Objectives” and takeaways from this case that will stimulate the intellectual discussion as well as enriching the cognitive abilities of the participants:

Exhibit 2: Key Learning Objectives

Key Learning Objectives		
Remembering	...how companies can reposition when faced with an industry-related crisis, related with the changing consumer trends and their preference to lead a healthier lifestyle, coupled with the proliferation of information that smoking leads to cancer and other negative health impacts	Here: the case of PMI and IQOS
Understanding	...how the brand architecture changes when a new product is included different from the traditional ones. How the radical decision to change business vision can reap the potential benefits and change the industry direction	Here: Use the concepts from the Teaching Notes document and the Corporate Brand Management course such as brand identity, positioning and brand architecture
Applying	...the key concepts learnt during the courses of Corporate Brand Management & Reputation and Strategic Brand Management about positioning and repositioning strategies, alongside the principles underlying the vision & mission of a brand; applying the principles of stakeholder management	Here: how PMI aligned the positioning of IQOS to its new vision & mission; how the relationships with distributors were safeguarded
Evaluating	...the success or failure of a repositioning strategy that follows the development of a new vision	Here: was IQOS positioning successfully aligned with PMI’s new vision of a smoke.free future? Why/why not?; was PMI able to also protect the interests of traditional tobacco shops? Why/why not?
Creating	...a bespoke account of brand and organisational repositioning to a new value proposition through the launch of a new product category, and its impact of the brand	Here: PMI’s development and strategy in launching IQOS both in the public domain and in the context of their key stakeholders.

Case Teaching & Discussion

Presentation Introduction

In order to have an enriching experience when presenting and discussing the case of IQOS, the teachers should try to create the highest possible amount of interaction. This will ensure that all the students are involved and motivated to listen carefully to the presentation of the case and to challenge themselves to find a solution to the questions.

A good way to break the ice is asking the class whether somebody smokes or has ever tried to smoke tobacco. In case the teaching takes place through a virtual meeting, as unfortunately the Covid-19 pandemic has forced many schools and universities to do over the last year, it may be helpful if the teachers make the question directly to randomly selected 4-5 students. If, instead, the presentation is held in real life, encouraging participants to reply by raising the hand might be enough. Assuming that at least a smoker attends the presentation, the teachers may ask a follow up question to figure out whether the smoker(s) has/have ever heard about Philip Morris International (PMI). The respondent(s) could be invited to mention some brands of cigarette or tobacco products belonging to PMI's portfolio.

After this informal and preliminary phase, the lecturers may start illustrating the crisis that was hitting the tobacco industry, giving a special attention to the increasing interests of people to conduct healthier lifestyles and to the worsening of the reputation of the image of the smoker, with a special emphasis put on those unpleasant features such as the odour of cigarette and the stereotype of the Marlboro man. This overview is needed to introduce the difficulties faced by PMI, mainly in the form of decreasing sales.

At this point, in order to prevent a reduction of the students' attention, the teachers may ask if anybody in the (virtual) room has ever heard about IQOS. After someone's response, the short video which illustrates how to use the device can be shown, named IQOS - How To Use. Once the movie is over, the teachers should quickly enlist the key advantages of smoking IQOS: less unhealthy consequences due to the lower content of chemicals and due to the fact that tobacco is warmed, no unpleasant smell of cigarette, fresher flavours like mint or tea. In such a way, it can be made clear why the product represents a successful solution to the crisis faced by Philip Morris: it accommodates the desire for healthier lifestyles, and it does not impact negatively on the smoker's image.

As a last step in the presentation process, the teachers should lead the students to the case questions. In this phase it is important to make sure that attendants understand that the interest is in how IQOS can be positioned so as to be perceived as fundamentally different from common tobacco products though being marketed by the largest tobacco industry in the world. To reach this goal, it is advisable that the teachers make two important premises to help students understand the contrast:

1. PMI is the biggest tobacco company in the world and owns top-of-mind cigarette brands like Marlboro and Chesterfield
2. IQOS is marketed by PMI but the company wants it to be perceived as unrelated to cigarettes

After having checked whether the class has grasped the premises, the teachers should then invite the audience to think about how the product's positioning strategy should be carried out in order to avoid the undesired associations of IQOS to other tobacco products. Scholars should further be stimulated to consider how the firm can safeguard the relationships with the traditional distributors (i.e., tobacco shops), given that positioning IQOS as something totally different from cigarettes might contrast with the interests of these important stakeholders.

Presentation Discussion

There is a myriad of challenges which are associated with managing discussions online. However, given the experience of the teachers in coordinating and taking part of discussion through online methods such as Zoom and Microsoft Teams, the discussion part of the case should aim to be as insightful and fruitful as it can be. The aim of the discussion is to be participatory for all involved and allow the audience to bring insights and their thoughts through, and to turn the discussion into more of a natural conversation and debate on the case at hand.

With this in mind, the case teachers will select specific students to give their overall thoughts and start the discussion with the rest of the class. One of the case teachers will lead the overall discussion by asking questions, with the second and third teachers providing objective thoughts and relaying comments from the audience. The case teachers need to remain objective and neutral in these circumstances, and not to let the mask slip in terms of providing the management decision answer to the case question.

The main question for the discussion will be on display for all to reference and will be the starting point of the discussion. A selection of supplementary discussion questions have been developed for the overall discussion and answering the main question, and they can be found below. It is important to note that not all questions will be used, and they will be selected based on the answers given by the audience in order to guide the discussion toward the answer of the main questions. To begin the discussion, the following discussion question will be used in order to get the audience involved and get the discussion underway: In essence, what are Philip Morris trying to achieve with the introduction of the IQOS?, followed by the guided discussion to produce an audience-answer to the main question.

MAIN QUESTION: How can PMI position IQOS in such a way as to move away from the perception of a traditional smoking product to their new identity of more healthy smoking? At the same time, how can PMI safeguard the traditional relationships with stakeholders, especially distributors?

POTENTIAL DISCUSSION QUESTIONS:

1. So, what are Philip Morris International trying to do here? [potential first question of discussion]
2. How would you define the structure of PMI's brand portfolio?
3. What prompted PMI to perform such a step? Was it pushed by consumer trends? [linked to 1]
4. Who would be PMI's main traditional stakeholders, aside from distributors?
5. What would your first step be, if you were to reposition your brand/product? [layer discussion on top → second, third steps etc]
6. Which aspects of the Urde's (2013) Corporate Brand Identity Matrix will be most affected by a repositioning of a brand?
7. Are there any examples of other companies who have shifted in promoting more healthy messages or lifestyle?
8. What makes positioning the IQOS different to positioning a similar tobacco product?
9. *Do you envisage a different approach when you saw the Management decision of the Board?*
10. *What do you think about the stakeholder strategy and the way IQOS was distributed? Do you think that these decisions will positively affect the brand?*

Conscious of the strict time constraints, it will be important for the case teachers to keep an eye on time management, with one teacher keeping track of the discussion length. As the discussion comes toward an end, or time becomes a factor, the teachers will lead the discussion to a conclusion, and ask the audience for their final recommendations before the teachers move onto the management decision and conclusion of the presentation.

Presentation Conclusion

The case team must keep careful track of time and be aware that there are going to be other teams to present during the Case Days. This is amplified by the notion that the presentation team is going to present first. With this in mind, towards the end of the Presentation Discussion, the presenters should start funnelling the discussion to its natural end and present the actual Management Decision to the class. This is in line with other research being done in the way of presentation handling and it does not

mean that the speakers hamper the expression of opinions, or the discussion itself. Sometimes brevity is preferred over endless discussion. By utilising a participatory approach, the presenters will aim for achieving meaningful contributions from the audience and it is proven by Lee and Bozeman (2005) that collaborative learning increases scientific productivity, by internalising other views and enlarging the perspective of the participants. This participatory approach will also lead to a collaborative discussion for the final section of the case study: discussing alternative solutions. The case teachers are also prepared with a selection of two discussion questions (italicised questions above), will lead into this discussion.

Elaborating on the Management Decision is the apotheosis of the case study; therefore, it should not remain under discussed. The point is that the audience should have the necessary time to reflect on the actual decision made by Philip Morris International. The research team has envisaged five minutes for this task, and within the three or four minutes a healthy reflection should be made about the decision of the company. At the end of the concluding remarks, the final speakers will wrap up the presentation by thanking the audience for their participation and attention.

Case Time Management

In order to teach this case, appropriate time management is crucial. With this in mind, a draft schedule has been developed and proposed in order to go through the teaching of the case. The time allotted for this case is 30 minutes at present but can also be extended to 45 mins. Within the two allocated time slots, an estimated time has been given for each of the main points: introduction to the cigarette industry, Philip Morris International and its place in the market, the introduction of IQOS, the discussion of the main question of the case and overall discussion, and lastly the management decision. The proposed time schedule and plan can be seen in **Exhibit 3** and **Exhibit 4**.

Exhibit 3: Time Plan for 30 Minute Presentation

<i>Introduction to the Case (11 mins)</i>	<i>Discussion (10 mins)</i>	<i>Management Decision (4.5 mins)</i>	<i>Teaching Notes & Conclusion (4.5 mins)</i>
Introduction (2 mins) A Changing Smoking Industry (3 mins) Introduction to PMI (3 mins) Development of IQOS (3 mins)	Main Questions (5-6 mins) Supplemental Questions (2-3 mins) Concluding Remarks (1-2 mins)	The Physical Store (1.5 min) Distributor Relationship (1.5 min) Brand Impact (1.5 min)	Teaching Notes (3.5 mins) Presentation Conclusion (< 1 mins)

Exhibit 4: Time Plan for 45 Minute Presentation

<i>Introduction to the Case (12 mins)</i>	<i>Discussion (15 mins)</i>	<i>Management Decision (5 mins)</i>	<i>Alternative Case Solutions (8 mins)</i>	<i>Teaching Notes & Conclusion (5 mins)</i>
Introductions (2 mins) A Changing Smoking Industry (3.5 mins) Introduction to PMI (3.5 mins) Development of IQOS (3 mins)	Main Questions (8-9 mins) Supplemental Questions (3-4 mins) Concluding Remarks (1-2 mins)	The Physical Store (1-2 min) Distributor Relationship (1-2 min) Brand Impact (1-2 min)	Discussion of alternatives (8 mins)	Teaching Notes (4 mins) Presentation Conclusion (<1 min)

Reflection

The writing of this Master case assignment was part of the BUSN35 Corporate Brand Management and Reputations course at Lund University. It was a difficult but rewarding journey and endeavour. The only and most significant difference, compared to other courses, was the emphasis on the actual presentation and teaching of the written case, alongside the subsequent management decision. None of the project team members had previously experienced such a task in a university, which meant that this project was highly relevant and could serve as a preparation for our future jobs. It is observed in research universities that most of the teaching and assignments revolve around research papers that aim to reflect and improve the current state of knowledge in the area. This is a magnificent training for an academic career, but it is a rule of thumb that most students tend not to use as much knowledge, as they want to, from university in their careers. And the majority of students do not venture in academia but in the labour market, thus sometimes some end in situations when they feel unprepared for the challenges at the workplace. This was the first course for all of us that emphasised both practical and pedagogical skills, and it must be used as an exemplar for other MSc degrees.

Our research endeavour started with the enrolment in BUSN35 in December. At that time, we were intrigued by the presentation given to us by Associate Professor Mats Urde in the beginning of that month. We decided that this was the ultimate course for us that would build on our previous knowledge from the Strategic Brand Management course and would act as a natural continuation of the discipline. Furthermore, the ability to work in a team and collaborate on a daily basis was mutually beneficial for us. The reason was that most employers perceive team work as one of the most important and transferable soft skills, thus making us attractive in the labour market.

We started the process of brainstorming different topics for the final Master case in parallel with the non-graded SGA assignments, which further complemented our understanding of the intricacies of Corporate Brand Management. The research team decided to schedule bi-weekly meetings to narrow down and discuss the plethora of possibilities. Three topics emerged that caught our interest and each one of us developed: The launch of IQOS that transformed Philip Morris International (PMI), Sports-washing – the case of Red Bull, and the failed market entry of TESCO in the Chinese market. We were on board with all ideas and no matter which would end up doing, we would be delighted to do so. With the help of Mats Urde, who guided our focus and offered invaluable advice, we managed to narrow down and refine our topic. Looking at PMI and IQOS was a unique experience for us since we are people that do not smoke. So, the introduction of a smoke-free device was an important development even for non-smokers, which will eliminate the threat of “passive smoking”. We continued developing the case, we focused a lot on group work and collaboration, as well as openly discussing our writing style, ideas, and issues. When a group member fell behind, we would always help each other. Moreover, we studied together for the Quiz, which was outstanding since we shared our knowledge and questioned each other on different topics. We had established the perfect knowledge internalisation process.

We learned a lot from the case, and observed a magnificent phenomenon, pertaining to a company that is considered the emblem of its industry, changing its whole business model upside down, by introducing such a product innovation and committing to a non-smoke future. Throughout the research process we read an enormous amount of heavily opinionated articles about the negative aspects of the tobacco industry, and it was very difficult to see through that there was a positive side that was embodied in the bold decision of PMI to aim to shift consumer preferences from the traditional staple cigarettes to the IQOS devices and its product derivatives. So, we learned how to think systematically and critically evaluate the information that is on the vast online realm. Furthermore, we constructed our presentation slowly piece by piece after every session, so as to keep consistency and coherence between the written documents and the visual material.

Overall, we are delighted by this course and in particular this Master case assignment. We honed and improved our managerial capabilities, our presentational skills, and our digital prowess, since teaching a case through the Zoom platform was a challenging and daunting experience, but at the end - rewarding. Being able to be in the footsteps of a Professor was something we had not experienced before, and we cherished every moment of it. We would definitely recommend this course to future students of this master's programme.

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