

How Lean Marketing can improve the integration with the Supply Chain

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Abstract: The paper aims to develop a comprehensive framework for Lean Marketing and Sales, making it accessible to specialists and newcomers. This manuscript addresses the gap in applying Lean methodology within the Marketing and Sales department, despite its widespread success in operational and Supply Chain efficiency across various business sectors. The framework defines Lean Marketing and Sales as the systematic application of Lean principles to improve efficiency and integration with the Supply Chain, eliminate waste, accelerate production cycles and professionalize internal Marketing and Sales in an area wider than the Lean Supply Chain. The study identifies three main objectives of Lean Marketing and Sales with the integration of the Supply Chain: defining and eliminating waste, accelerating production cycles and enhancing professionalism. Interviews with Marketing and Sales leaders without prior Lean experience provide insight into effective Lean marketing and Sales applications. Interviews reveal that Lean principles align well with Marketing objectives, underscoring Marketing's central role in supporting principles such as value and flow. From a methodological perspective, future research could benefit from a more quantitative approach. Despite its limitations, the paper provides a crucial foundation for Lean Marketing and Sales research, offering implications for academia and practical tools for industry professionals. Examining enablers highlights the importance of cultural alignment, holistic strategy, and collaborative planning for a successful Lean transformation. The study encourages further practical research, highlighting the need for diverse participation and investigations into the applicability of the framework in companies adopting Lean. The study promotes research on Lean Marketing and sales, offering valuable insights for both the academic and professional world. In conclusion, this fundamental exploration of Lean principles in industrial Marketing reveals key insights and recognizes limitations.

Keywords: Lean Marketing & Sales, Supply Chain Management, Lean Principles, Cultural Alignment, Supply Chain-Marketing Integration

1. Introduction and literature review

The philosophy of Lean was born as a culture adopted in organizational management, advocating for the minimization of any use of resources that is not strictly functional in creating value for the customer. (Gligor and Golgeci, 2017) To achieve this, Lean reorganizes production processes to construct a direct and linear value chain leading to the customer (Franceschetto et al. 2023c). This philosophy, with its roots in the Japanese automotive industry of the 1970s, has transformed the way organizations approach business management. While the initial focus was on cost reduction, today's market has undergone a profound transformation. Competition is no longer solely based on selling prices but also on service and personalization (Noci, 2019). Despite these significant transformations in the business world, the application of Lean in Marketing has not evolved at the same pace. Surprisingly, despite the pivotal role of Marketing in understanding customer needs and shaping business strategies, the application of Lean in this function has remained limited both in the workplace and in academic circles.

The central core of this manuscript is to bridge this gap in the realm of the Marketing domain. Its primary objective is to develop a comprehensive framework that fully defines the concept of Lean Marketing. This framework aims to make the concept of Lean Marketing understandable not only for Lean specialists but also for those who are not familiar with this philosophy. It will be

accompanied by clear definitions and explanations of its potential and limitations, to demystify this discipline and make it more accessible to all. The second objective of this paper is to promote the adoption of Lean Marketing by those who are new to this methodology. Given its limited application, it would be highly advantageous for Supply Chains and scientifically interesting to reverse this trend. The framework will not only provide clear definitions but will also include specific tools, some related to Lean principles, and others based on "common sense," which can help companies streamline their processes and adopt leaner approaches before investing in specialized consultancy.

To better understand how newcomers interpret and adopt Lean Marketing, the practical part of the paper was conducted through interviews with Marketing managers with no previous experience with Lean concepts. This analysis provides valuable insights into how Lean Marketing can be perceived by an inexperienced audience and how professionals can apply these principles to their processes.

The role of Marketing is to serve as the primary connection between an organization and its customers (Lamberti, 2013). Its primary responsibility is to ensure that the company's offerings align with the perceived value of its target customers. B2B Marketing is distinct from B2C Marketing, mainly thanks to the different characteristics of the offering; as a consequence, what characterizes B2B Marketing is long-term relationships

with clients and a greater emphasis on rational decision-making (Franceschetto et al, 2023b). The Marketing function has evolved in recent years, with decentralized and outsourced activities enabling it to function as a facilitator of relationships between internal and external stakeholders (Lamberti and Pero, 2019). Marketing is also essential for generating and disseminating knowledge about the customer and the industry (Sà et al. 2022).

In recent years, the concept of Lean has undergone significant evolution and enrichment, resulting in the development of various directions and dimensions. Outside companies, this evolution has given rise to the concept of Demand Chain Management (DCM), which represents an evolution of Supply Chain Management with a particular focus on shaping the process from a "pull" from the client perspective (Bai et al., 2020, Catellani et al. 2023)).

Conceptually, the DCM is similar to Lean Supply Chain Management, where the entire flow from raw materials to the final consumer is regarded as an integrated whole, in which the interfaces between companies are seen as a result of the economic arrangements of assets (Tortorella 2017, Amico et al. 2022b).

Mano et al. (2018) conducted a literature review to identify 34 structural and cultural barriers that could impede the successful future implementation of Lean principles in the construction industry.

Azalanzazllay et al. (2022) focused on identifying the readiness factors of Lean Six Sigma specifically for the food manufacturing industry, through a combination of literature review and semi-structured interviews.

Inuwa & Rahim (2020) conducted a study focusing on the factors indicating readiness for implementing Lean practices within Small and Medium Enterprises (SMEs) in Nigeria.

Finally, Cherrafi et al. (2021) developed a framework that included all the necessary characteristics that a company must have to successfully implement green Lean initiatives.

1.1 Lean Marketing

The literature reveals that, aside from its implementation in the production line, Lean has been applied to Logistics, Procurement, and New Product Development (Piercy & Rich, 2009, Franceschetto et al 2023a). Curiously, there has been limited exploration of the application of Lean principles in Marketing departments, despite it being the function that is in the closest proximity to the end customer and, thus, possessing the greatest understanding of what constitutes value for the customer. As Piercy & Rich (2009) affirmed, when one actor in the Supply Chain adopts Lean practices it often encourages other actors to follow suit, leading to a chain-wide improvement. Muralidharan & Raval (2018) contend that Marketing is a discipline recognized for its unstructured work setting and non-scientific approach to decision-making. As a result, it is more challenging to adopt a scientific method when improving it and measuring the outcomes resulting from Marketing efforts.

Schonberger (2008) highlights that Lean management, although primarily associated with operations and waste

reduction, has significant potential in Marketing, Sales, and Distribution by focusing on quick responses to customer demand and cooperation along the Supply Chain.

Piercy & Rich (2009) also examined the issue of the misalignment that often exists between Marketing and Sales. In the author's view, providing resources to a Lean company will inevitably compel the supplier to adopt a Lean approach as well. The application of Lean principles to Marketing is frequently linked to the implementation of Six Sigma strategies. This pairing of Lean and Six Sigma is perceived as two complementary approaches that can be utilized by companies to maximize Marketing efficiency. As posited by different authors, the application of Six Sigma to Marketing has the potential to enhance Marketing's productivity by utilizing a data-driven process improvement approach. This approach can aid Marketing in harnessing its full potential, leading to a more systematic and predictable Marketing system. Muralidharan & Raval (2018) presented an argument for the application of the DMAIC (Define-Measure-Analyze-Improve-Control) cycle in the field of Marketing. This was accompanied by a series of case studies that demonstrated the effectiveness of this approach. Building on this work, Sá et al. (2022) utilized the DMAIC cycle, along with tools such as Customer Relationship Management (CRM) and daily kaizen, to improve the Marketing process and enhance customer relationships. The outcome of this intervention was an improvement in internal communication among departments and a reduction in response time to customers.

Another example of the application of Lean principles in Marketing can be found in the work of Payaro & Papa (2016), who implemented Lean measures in companies using the Plan-Do-Check-Act (PDCA) cycle. Rudnik (2020) made a significant contribution by establishing a connection between Lean principles and the revenue-generating components of the Business Model Canvas, namely the value proposition, customer segmentation, channels, and customer relationships.

To summarise, Lean philosophy emerged as a set of techniques geared towards minimizing waste and enhancing quality. The employee plays a central role in this process, being the individual with the most knowledge of the shop floor (Cigolini et al. 2022). Over time, the concept has evolved to encompass the optimization and streamlining of processes to ensure that all resources expended by a company are channelled toward creating value for the customer (Franceschetto et al. 2022, Amico et al. 2022a).

Although the Lean philosophy has enjoyed widespread success across various sectors and functions, its impact on Marketing has been somewhat limited (Pero and Lamberti, 2013, Cigolini et al. 2021). This can be attributed to the complexity of Marketing, which involves a range of diverse and often difficult-to-measure activities. However, it is worth noting that the principles of Lean philosophy extend beyond shop-floor techniques and can be applied to any field, including Marketing.

Indeed, some scholars have drawn parallels between Lean philosophy and Marketing, suggesting that Lean Marketing is possible to some extent. The mapping of

internal Marketing processes can facilitate their improvement, but the real value of Lean philosophy in the context of Marketing lies in its ability to optimize the entire demand chain. As the first critical step in this chain, Marketing & Sales is well-placed to drive integration between various internal and external stakeholders through the application of Lean principles.

2. The model, aims and objectives

The selected methodology for carrying out the research is the case study, investigated through semi-structured interviews. For the research to be effective and robust, this author has followed the research method proposed in the book “Case Study Research: Design and Methods” (Yin, 2009). This approach is versatile, as it can be employed across various research types, and is composed of six core stages: planning, designing, preparing, collecting, analyzing, and sharing.

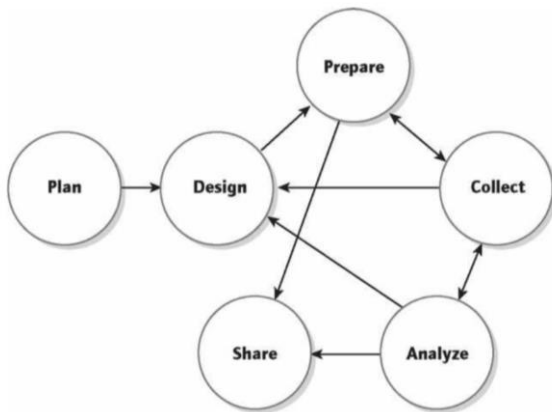


Figure 1: Case study's methodology model (Yin, 2009)

2.1 Plan

This section will present the three key research questions that have emerged from the literature review and subsequent taxonomy. Each question aims to shed light on a distinct aspect of Lean Marketing, ultimately contributing to the development of a comprehensive framework.

- RQ1: What is Lean Marketing?
- RQ2. Are the principles of Lean in line with the interests of Marketing?
- RQ3: What practices are already implemented by companies to pursue these principles?

2.2 Design

The initial decision in this research process pertained to the selection of the unit of analysis, i.e., the specific professional roles to be included in the interview pool. It was determined that Marketing managers from B2B (business-to-business) companies would constitute the appropriate cohort. To conduct well-organized and thorough interviews, mainly two frameworks were employed. The first set of questions is centred on Lean principles and practices, with the reference model being Womak and Jones’ five principles of Lean Thinking (1996).

Figure 2 graphically represents how the research questions and the interview questions derive from the framework selected and relate to each other.

Framework	Research questions	Interview questions
Five principles of Lean Philosophy (Womack and Jones, 1996): - Value - Value chain - Flow - Pull - Perfection	Are the principles of Lean in line with the interests of Marketing and Sales?	On a scale from 1 to 5, how important is for your department the application of this principle? Please justify your answer
	What practices are already implemented by companies to pursue these principles, specifically proto-Lean practices?	Which organizational measures, habits or initiatives exist in your company that are in line with this principle?

Figure 2: Research questions' framework

2.3 Prepare, Collect and Analyze

The study focused on recruiting participants from B2B companies who held positions in Marketing and Sales. We considered various job titles related to these functions as suitable for our interviews, and a more detailed analysis of this selection outcome will be provided in subsequent chapters. We employed several methods to reach out to potential participants. These methods included leveraging personal connections, utilizing University networks, and utilizing LinkedIn.

To prepare for the interviews, we developed two key materials: an interview protocol and a brief attachment. The interview protocol contained essential questions for the interviews and provided examples of Lean practices to guide the conversation effectively. The objective was to ensure that our questions were clear and would lead to valuable and pertinent information during the interviews.

Moving on to the second segment of the interview, we delved into the five principles of Lean as outlined by Womak and Jones (1996). The same structured approach was followed for each of these principles: (i) the interviewer provided a brief explanation of the principle; (ii) the interviewee was asked to rate, on a scale from 1 to 5, how closely they felt the principle aligned with their interests and management style; (iii) the interviewee was encouraged to provide specific examples of how the principle was applied in their department's processes and objectives; (iv) if requested, the researcher offered additional examples of how the principle had been applied in other companies, adding depth to the discussion.

One of the final steps of a case study is the analysis of the data obtained to draw results and considerations regarding the research question. According to Yin (2009) there are four main general analytic strategies: (i) relying on theoretical propositions; (ii) developing a case description; (iii) using both qualitative and quantitative data; (iv) examining rival explanations. In summary, the analysis predominantly involved relying on theoretical propositions for defining Lean Marketing and using both qualitative and quantitative data to explore its practical implications in the context of Marketing and Sales.

3. Results and key findings

In the following section, we will provide a brief analysis of the companies that contributed their knowledge and expertise to the interviews, while maintaining the anonymity of the managers involved, referring to them as int. 1, int. 2, and so on. The most important descriptive variables, such as the type of business (Distributor or Manufacturer), the number of employees, the focus on marketing or sales, and the geographical scope (national or international), are summarized in Figure 3. It is important to note that these five interviews present a heterogeneous mix of these variables, creating a diversified context within which to analyze the adoption of Lean practices.

The choice of managers as interview subjects was motivated by the research's primary focus on Lean organizational practices. Managers are uniquely positioned to provide insights into these practices, as they possess the expertise to not only describe their own responsibilities but also those of their subordinates. Their comprehensive understanding of the workings of their departments allows for a more in-depth exploration of Lean mechanisms and coordination within the organization.

The selection of B2B companies was driven by several factors. The transactional mechanisms and characteristics of interactions between B2B and B2C (business-to-consumer) enterprises differ significantly. To maintain internal research consistency, it was imperative to focus solely on one of these contexts. B2B businesses were chosen because they typically involve a lower number of client interfaces, fostering closer relationships with clients. This enhanced closeness often results in a higher degree of integration between collaborating companies, which is pertinent to the study of Lean practices.

	Int. 1	Int. 2	Int. 3	Int. 4	Int. 5
Industry	Plastic compound	Food	Soft drinks	Chemicals for food	Food
Function	Distributor	Distributor	Distributor	Producer and distributor	Producer and distributor
N employees	40	200	1200	200	1300
Domestic/International	Domestic	Domestic	International	International	Domestic
Marketing/Sales	Sales	Marketing	Marketing	Sales	Marketing

Figure 3: Companies' main features

For each Lean principle, managers were asked to rate their level of interest in the principle on a scale of 1 to 5, explain why they found it interesting, and describe the tools they were already using to implement that principle. The results of these ratings are summarized in Figure 4.

	Int. 1	Int. 2	Int. 3	Int. 4	Int. 5
Value	5	5	5	5	5
Value chain	3	4	4	5	4
Flow	2	4	2	3	3
Pull	4	5	1	5	3
Perfection	5	5	5	5	5

Figure 4: Companies' evaluation of Lean principles

3.1 Value

Value essentially means whatever a customer is willing to pay for. The value principle revolves around the ability to understand and measure what holds value for the customer. This principle highlights the importance of businesses continually assessing and improving their offerings to ensure they genuinely resonate with their target audience. All the professionals we interviewed unanimously recognized the paramount importance of this principle. They all rated it as 5 out of 5 in terms of its significance for their roles and its practicality. This consensus is not surprising, given that most definitions of marketing and sales emphasize their central roles as the primary points of contact with customers. This theory strongly suggests that the marketing department, being the function closest to the customer, has the primary responsibility of capturing this value. Interviews conducted confirm this assertion. The interviews revealed that managers are enthusiastic and aligned with this principle.

3.2 Value Chain (Value Stream)

The Value Stream principle revolves around mapping and improving the entire process from start to finish to deliver precisely what is valuable to the customer. This entails identifying all the activities and steps involved, from the initial concept to the final delivery, and examining them for efficiency.

By visualizing the value stream, organizations can pinpoint bottlenecks, eliminate redundancies, and weed out tasks that don't add value. The assessment of the Value Stream principle generally reveals a positive perspective, with scores ranging from 3 to 5 and an average of 4. During the interviews, there was considerable enthusiasm among the managers regarding this principle. In recent years, the drive for optimization has been strongly felt. It is unrealistic to assume that business processes consist of superfluous steps that can be eliminated at will.

3.3 Flow

The flow principle is centred on ensuring a smooth and uninterrupted progression of work or products throughout the value stream. It places a strong emphasis on minimizing bottlenecks and the accumulation of inventory. When we examine the concept of flow, we can distinguish its utility for managers when applied to the marketing and sales function from its application across the entire company. In the context of the marketing function, it received a relatively low evaluation, with an average score of 2.8, ranging from 2 to 4. Managers found it challenging to articulate how they implement this principle in their team's daily operations and related practices. Due to the customer-centric orientation required by the Lean philosophy and the proximity of marketing to customers, a particular synergy emerges between marketing and sales and the "flow" principle.

3.4 Pull

The pull principle emphasizes the production of goods or services in direct response to real customer demand rather than pushing products based on long-term forecasts or

production schedules. It promotes the establishment of a responsive system where customer input is rapidly received and processed, thereby preventing waste, excess inventory, and overproduction. Companies that embrace pull principles can align their production closely with actual demand, resulting in cost savings and heightened customer satisfaction. However, the Pull principle, akin to the Flow principle, elicited a spectrum of feedback from the interviewed managers, resulting in ratings ranging from 1 to 5, with an average score of 3.6. This variance in responses can be attributed to the unique characteristics of marketing functions within different organizations and the individual perspectives of the managers. Conversely, some other marketing managers have adopted a more customer-centric approach, aligning themselves closely with the Pull principle to create value for the client. They recognize that the product valued by the client encompasses not only the physical product but also associated services, including the reduction of waiting times. In this context, Marketing's role within the Pull principle revolves around communication, to reduce takt time, which is the time between order and delivery. Regarding the alignment between marketing and the pull principle, significant correspondences did not emerge from the interviews. Concerning the internal management of the function, marketing tends not to accumulate anything in stock or produce ahead of time. In terms of the interface between marketing and Supply Chain, the function's role is to ensure that customer requests are transmitted as quickly as possible to production.

3.5 Perfection

The Perfection principle revolves around the unwavering pursuit of ongoing improvement. Lean organizations recognize that there's always room for enhancing processes, quality, and efficiency. While perfection may never be fully attainable, it remains the ultimate goal. This principle fosters a culture of innovation, problem-solving, and learning from mistakes.

Remarkably, the principle of perfection, like the principle of value, received an average score of 5/5. The following list includes numerous continuous improvement practices, many of which were reiterated throughout multiple interviews.

This demonstrates the unanimous focus on continuous improvement among companies today, even if they may not specifically aim to adhere to the Lean philosophy's standards. Regarding the principle of value stream, the principle of perfection has gained substantial recognition among the interviewed managers.

Many of the methodologies proposed focus on collecting feedback on the success of the process from various stakeholders and sharing it internally within the company, and in some cases, at the organizational level. This is undoubtedly a valid starting point, as it encourages open communication and improvement.

4. Conclusions

In the previous chapter, we established a definition of Lean Marketing. Now, let's focus on the objectives of Lean marketing, which can be summarized in three major

categories: (i) defining and eliminating waste and inefficient processes; (ii) expediting production cycles; and (iii) enhancing the professionalism of individuals.

For a company embarking on a Lean journey, the initial focus should be on cultivating awareness of foundational principles. This includes fostering an understanding of process management, recognizing the value of each individual's contribution, emphasizing the importance of continuous improvement, and promoting seamless integration among all stakeholders.

Applying Lean selectively to certain departments, such as Marketing and Sales, while neglecting its application elsewhere in the organization, is counterintuitive. A successful Lean transformation necessitates a unified mindset of collaboration across all functions, fostering an organizational environment where every facet operates cohesively, resembling a well-oiled Lean machine. The holistic adoption of Lean principles throughout the entire company ensures a synchronized and effective approach, aligning everyone with the overarching philosophy of Lean thinking.

The conditions are in place to elaborate on the final framework, represented in Figure 5 below. The framework depicts Lean Marketing and Sales as a subset or integral part of a Lean organization, with the elaborated definition featured within. At the core of everything lies the Lean philosophy, providing support for the entire framework. On the right side, there are the enablers, which, along with the principles, constitute fundamental inputs for a functioning Lean enterprise.

The two enablers are those indicated by Lowry (2003) and the Lean culture, stemming from the philosophy itself. Regarding the principles, some specifically pertain to Lean marketing and sales, while others apply to the entire enterprise in general. As a conclusion, on the right side of the framework, the defined objectives are presented.

This meticulous organization of the framework aims to ensure a clear understanding of the essential components and their relationships, thereby contributing to the creation of an efficient, Lean-thinking-oriented business environment.

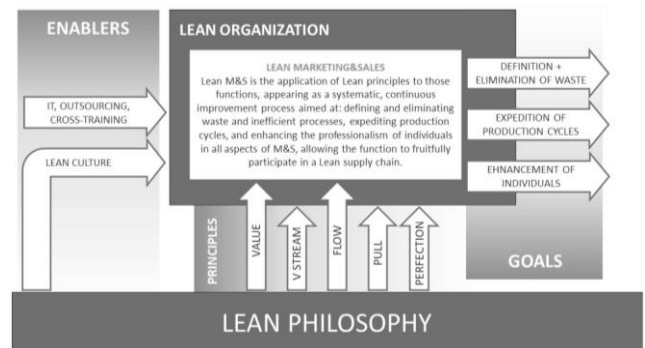


Figure 5: Lean Marketing & Sales' final framework

The Lean philosophy originated as an organizational management culture, aiming to minimize non-functional resource usage and enhance customer value. Rooted in the

1970s Japanese automotive industry, Lean reorganizes production processes for a direct value chain to customers. Initially applied to maximize operational efficiency, particularly in production, Lean's success expanded beyond, influencing various business functions for increased effectiveness.

Effectiveness, in the contemporary market characterized by VUCA (volatility, uncertainty, complexity, ambiguity), involves identifying genuine customer value beyond cost reduction. Despite profound business transformations, the application of Lean marketing, notably in marketing and sales, has not kept pace.

This gap persists despite marketing's crucial role in understanding customer needs and shaping strategies, remaining limited in both practical and academic realms.

Despite profound changes in the business landscape, the implementation of Lean marketing, especially in Marketing and Sales, lags behind. Despite Marketing's pivotal role, the adoption of Lean in this sector remains limited, both in practice and academia. This paper aims to address this gap by developing a comprehensive framework for "Lean Marketing."

The central core of this paper is to bridge this gap in the realm of Marketing & Sales (M&S). Its primary objective was to develop a comprehensive framework that fully defines the concept of "Lean M&S." This framework aims to make the concept of Lean M&S understandable not only for Lean specialists but also for those who are not familiar with this philosophy. It has been accompanied by clear definitions and explanations of its potential and limitations, with the aim of demystifying this discipline and making it more accessible to all.

The second objective was to promote the adoption of Lean M&S by those who are new to this methodology. Given its limited application, it would be highly advantageous for supply chains and scientifically interesting to reverse this trend. The framework will not only provide clear definitions but will also include specific tools, some related to Lean principles, and others based on "common sense," which can help companies streamline their processes and adopt Leaner approaches before investing in specialized consultancy.

4.1 Limitations and Future Developments

The present work encounters several limitations that affect the scope and generalizability of the conclusions. These limitations can be categorized into different areas.

Firstly, it should be emphasized that the investigation focused exclusively on certain aspects of the framework. For instance, although certain elements, such as the drivers and limitations of Lean, received in-depth analysis, other parts of the framework could benefit from further practical studies. Expanding the research to additional components of the model could enrich the overall understanding of Lean principles applied to B2B Marketing.

A second limiting factor concerns the size of the statistical sample considered. The research exclusively involved Marketing and Sales managers from a specific country and

B2B companies. Further research could extend participation to other roles within marketing and sales functions or involve different B2B companies. Additionally, comparing the opinions of the interviewed managers with those of companies already adopting the Lean methodology could provide a more comprehensive and in-depth perspective.

It should also be noted that the companies involved in the interviews were not following Lean methodology. Another area of investigation could be to examine whether the considerations emerging from the interviews also hold in business contexts that have embraced the Lean philosophy. This comparison could highlight significant differences or confirm the applicability of the framework even in Lean contexts.

From a methodological perspective, it is important to note that this study is exploratory. Despite the application of a rigorous data collection methodology, the lack of an extensive academic background could limit its completeness. Further research could enrich the study with a more quantitative perspective, providing statistical data to support and enhance the qualitative observations gathered so far.

Another area of potential development concerns the practical validation of the proposed framework. Field-testing the applicability of the material presented in the paper could provide valuable feedback from marketing and sales practitioners. This step forward could contribute to refining the framework based on the needs and challenges encountered in the field.

In conclusion, while acknowledging these limitations, the present work represents a solid starting point for future research in the field of Lean Marketing, stimulating reflections and insights that can further develop the understanding of this emerging field.

This paper presents a foundational exploration into Lean principles in B2B Marketing, uncovering key insights while acknowledging limitations.

The study selectively analyzed aspects of the framework, urging further practical studies to enrich understanding. The limited sample size of marketing and sales managers from a specific context prompts a call for diverse participation to broaden perspectives.

The absence of Lean-adopting companies among participants highlights a need to investigate the framework's applicability in such contexts for comprehensive insights.

In summary, recognizing its limitations, this work propels Lean Marketing research forward, offering valuable insights for academics and practitioners alike, with the potential for refinement through further exploration and application.

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