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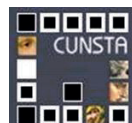
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Outsourcing corporate heritage marketing in the omnichannel context: a process perspective of a small winery

Pier Franco Luigi Fraboni*, Andrea Sabatini**, Valerio Temperini***

Abstract

The pandemic crisis and the disruptive impact of digitalisation have led firms to undertake the omnichannel continuum to meet new customers' needs for a seamless purchasing experience. A frictionless customer journey requires coherent marketing initiatives across channels. Small firms, which usually lack human and financial resources, are approaching the omnichannel paradigm through outsourcing. As a result, small businesses that recognise the importance of corporate heritage marketing (CHM) in their overall mar-

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§§ 2, 3, 5.1 and 5.2 are to be attributed to Pier Franco Luigi Fraboni; § 4 is to be attributed to Valerio Temperini; §§ 1 and 6 are to be attributed to Andrea Sabatini.

keting strategies face challenges in maintaining the consistency of CHM initiatives across their partners' channels. Hence, the present study proposes a case study methodology to unfold how small firms develop consistent CHM initiatives in the omnichannel partners' channels. The findings suggest that small companies should open their CHM process to omnichannel partners to develop consistent CHM initiatives among partners' channels.

La digitalizzazione e la crisi pandemica hanno indotto numerose aziende ad intraprendere il continuum omnicanale per soddisfare le nuove esigenze dei clienti. Predisporre percorsi di acquisto fluidi, integrati e sinergici implica lo sviluppo di iniziative di marketing coerenti tra i vari canali. Le piccole imprese, che solitamente non dispongono di adeguate risorse umane e finanziarie, ricorrono all'outsourcing per approcciarsi a tale paradigma. Di conseguenza, le piccole realtà che riconoscono al proprio corporate heritage marketing (CHM) un ruolo di primo piano, si ritrovano di fronte alla sfida di mantenere la coerenza delle proprie iniziative di CHM anche nei canali dei loro partner omnicanale. Il presente studio si propone di approfondire la suddetta tematica attraverso la metodologia dello studio di caso. I risultati evidenziano che le piccole imprese dovrebbero aprire il loro processo di CHM ai partner omnicanale per sviluppare iniziative di CHM coerenti anche nei loro canali.

1. *Introduction*

Along with the disruptive effects of digitalisation, the pandemic crisis has significantly altered consumers' behaviour¹. Customers are searching for seamless purchase journeys, without frictions, switching from one firm's touchpoint to another, according to the new imperative paradigm: omnichannel marketing². This approach can be defined as the synergetic management of the firm's channel and customer touchpoints to create an integrated customer journey to maximise customer experience across channels and manage channels' performance. Today's customers use different combinations of channels simultaneously, as they are interchangeable at each stage of the purchase journey. For example, a consumer can view a product through the company website, search in a third platform for other offers (competitors or others), try the product in the off-line company store, purchase it through the firm's e-commerce and opt for a kerb-delivery. In this sense, companies are challenged to preside over all possible customer touchpoints to successfully compete in the business scenario.

The firm's transition from a multichannel to an omnichannel marketing approach remains unclear. The concern of major management literature is focused on the importance of channel integration in the omnichannel context

¹ Kannan, Kulkarni 2021; Pencarelli *et al.* 2020; Piotrowicz, Cuthbertson 2014.

² Neslin 2022; Verhoef *et al.* 2015.

to ease the transition and experience of the customers³. The general guideline conveys consistent marketing initiatives among the several channels adopted⁴. Channel integration is a challenging task, especially if the firm does not have control over all channels in use. Indeed, small and medium-sized enterprises (SMEs), that usually lack human and financial resources, resort to outsourcing to undertake omnichannel adoption⁵. Therefore, SMEs increasingly involve omnichannel partners in conveying consistent marketing activities in their channels. The engagement of partners to develop marketing activities is a further challenge for SMEs that goes under the name of inconsistency.

Nevertheless, the literature recognises that inconsistency of the messages across the channels might have a positive effect⁶ when planned. Those activities might become problematic and unmanageable when not planned. The marketing planning pitfall is especially relevant for small firms that recognise their corporate heritage marketing (CHM) as having a major role in their overall marketing strategy. CHM is a strategic choice of a firm that wants to enhance its corporate heritage to create a relational fulcrum with its customers and stakeholders. CHM generates a sense of belonging to the company creating emotional ties that customers are searching for in the postmodern market, since they seek values that communicate certainty in a world of uncertainty⁷. According to the literature, inconsistency might majorly impact the firms that have established key values, due to their long and visible existence in the marketplace⁸. Therefore, firms that recognise CHM as central should pay particular attention to the consistency of the marketing activities across the channels. To the best of our knowledge, no studies have analysed how small firms manage to transmit coherent CHM initiatives among channels in an omnichannel context achieved through outsourcing. The study aims to extend the previous knowledge in the CHM literature, by adding a new perspective on the omnichannel partners' role, defining when and which partner should be involved in the firm's CHM process to ensure that CHM activities are consistently transmitted across channels. Therefore, the present study attempts to fill this research gap by answering the following research question: how do small firms develop consistent CHM initiatives in the omnichannel partners' channel?

The study adopted a pivotal case study methodology to answer the research question and discover relevant concepts for further studies⁹. A small winery was selected to illustrate the research topic, as it represents an emblematic case to ex-

³ Neslin 2022; Temperini *et al.* 2022.

⁴ Berman, Thelen 2018; Bezes 2013.

⁵ Mahnke *et al.* 2005.

⁶ Gasparin *et al.* 2022.

⁷ Balmer 2013; Riviezzo *et al.* 2021.

⁸ Sjödin, Törn 2006.

⁹ Yin 2009.

plore and belongs to a field where heritage plays a major role in communicating value and legitimacy. Primary and secondary data have been collected and then analysed according to the systematic combining approach¹⁰.

The findings highlight that small firms should involve partners in the CHM omnichannel process to develop consistent CHM initiatives. SMEs might achieve better results in the omnichannel context through outsourcing to external partners. In detail, partners for omnichannel might foresee, for example, that third-party e-commerce should be involved in identifying heritage factors, stakeholder analysis, the definition of narrative objectives, identification of the target audience, and the coordinated management of the heritage marketing mix phases. Meanwhile, the social media agency must be entangled only in the coordinated management of the heritage marketing mix as it emerged from the specific case. Additionally, the findings suggest that SME's CHM phases unfold blurred and boundaryless¹¹. Furthermore, the study suggests that omnichannel partners might act as cultural and executive intermediaries for SMEs. These findings extend the previous knowledge in the CHM literature by adding a new perspective on the omnichannel partners' role, defining when and which partner must be involved in the firm's CHM process. Also, the paper aims to contribute to the omnichannel literature, adding confirmatory evidence to previous studies. Finally, the study presents relevant implications for the management of small firms on how to undertake the omnichannel continuum and to manage the CHM initiative consistency among channels in an omnichannel context achieved through outsourcing.

The manuscript is organised as follows: the literature background is discussed in the second section, the methodology in the third section, the findings are presented in the fourth section, and the main theoretical and managerial implications are discussed in the fifth section. Conclusions, study limitations, and potential future research paths are presented in the final paragraph.

2. *Literature background*

2.1. *Corporate heritage marketing: definition and process*

Social and economic globalisation has caused customers to feel a sense of emptiness, leading them to increasingly look for authenticity and traditional values¹². Unsurprisingly, one of the major trends in postmodern consumption

¹⁰ Dubois, Gadde 2002.

¹¹ Riviezzo *et al.* 2021.

¹² Napolitano *et al.* 2018.

is the impetuous return to the past¹³. Heritage and history are constructs capable of creating lasting emotional ties between products/brands and customers/stakeholders¹⁴. Hence, firms strategically develop CHM initiatives to address this need¹⁵. Indeed, heritage can be described as an anchor that offers security in a world of uncertainty, because it encompasses social meaning that expresses the identity of an organisation, its territory, and social group¹⁶.

In this respect, CHM can be defined as the strategic choice of companies aiming to enhance their heritage to generate a relational *fulcrum* with customers and strengthen the ties with internal and external stakeholders¹⁷. CHM activities aim to guarantee a firm's soundness, authenticity, and credibility. It can also build trust and is a potential source of competitive advantage¹⁸. Moreover, corporate heritage has been used to justify strategic options, enhance organisational identity, and gain legitimacy in business contexts¹⁹.

Corporate heritage describes the corporate traits that remain constant over time. In detail, Balmer²⁰ defined corporate heritage identity as a firm's identity trait that has endured for at least three generations or at least 50 years. Contrary to the idea of history, heritage is entangled with the present and the future since the past is valued by today's and tomorrow's internal and external stakeholders²¹. The last two concepts highlight how corporate heritage involves simultaneous stability and change. Indeed, the relative invariance meaning developed by Balmer²² should be adopted by firms to maintain the same meaning in their corporate heritage communication traits over time. Additionally, the same corporate heritage traits are infused with multiple-role identities. Hence, different stakeholder groups may show divergent heritage interpretations and a sense of identification²³. Consequently, heritage is subject to change, transformation, and reinterpretation over time. Recent studies have pointed out that corporate heritage elements could also be imagined, contrived, or borrowed from other contexts, providing new opportunities for young firms to exploit this strategic resource²⁴. However, as pointed out by Urde, heritage itself does not create value but only the opportunity to do so²⁵. Because managing CHM development is

¹³ Sarup 2022.

¹⁴ Misiura 2006.

¹⁵ Balmer, Burghausen 2019.

¹⁶ Riviezzo *et al.* 2021.

¹⁷ Balmer 2013; Riviezzo *et al.* 2021.

¹⁸ Balmer 2011; Blombäck, Brunninge 2013; Riviezzo *et al.* 2015; Smith, Simeone 2017.

¹⁹ Gioia *et al.* 2002; Suddaby 2016; Zundel *et al.* 2016.

²⁰ Balmer 2011.

²¹ Urde *et al.* 2007.

²² Balmer 2011.

²³ *Ibidem.*

²⁴ Weatherbee, Sears 2021.

²⁵ Urde *et al.* 2007.

challenging, moreover for SMEs, Riviezzo and colleagues proposed a strategic process for developing CHM that allows firms to fully exploit heritage value through planned actions²⁶. The authors described their CHM model as an iterative process composed of four phases which often overlap (Fig. 1).



Fig. 1. The corporate heritage marketing process (Source: our elaboration from Riviezzo *et al.* 2021)

The first phase is auditing, which consists in the critical process of identifying heritage factors. Nevertheless, not all of the firm's past can become heritage. Key heritage themes should be chosen after a careful assessment of historical occurrences that must be deemed desirable by various corporate stakeholders²⁷. The narrative objectives and target audience for CHM activities are defined during the visioning phase. The firm must identify why and to whom these stories will be conveyed, revealing the appeal's deep motivations²⁸. During this phase, the role of CHM is established in the company's broader marketing strategy. In the managing phase, internal and external stakeholders are surveying and reassembling the material and immaterial traits of the heritage factors identified in the previous phase. In addition, the firm must identify the organisational structure responsible for gathering, preserving, and creating value through heritage assets²⁹. The availability or scarcity of a firm's resources (e.g., human and financial) influences the organisational and operational model chosen for managing CHM activities³⁰. Once the managerial and organisational aspects have been defined, the firm is ready to unfold CHM activities according to the

²⁶ Riviezzo *et al.* 2021.

²⁷ Napolitano, Riviezzo 2019.

²⁸ Burghausen, Balmer 2014.

²⁹ Burghausen, Balmer 2015.

³⁰ Riviezzo *et al.* 2016.

strategic choices made in the previous phases. CHM can be conveyed through words, images (such as company biographies and social media accounts), goods, brands, locations (such as museums and archives), events, celebrations, and relationships³¹. Controlling, the last phase of the CHM process, involves monitoring the results concerning the designed objectives and the predisposition of corrective actions. In this phase, selecting the appropriate key performance indicators is crucial. It is worth noting that heritage has the potential to become a latent firm asset which needs careful and calculated action to be fully exploited. The process described above should not be considered universal: each company must conduct the CHM process according to the specific context in which it is involved³². However, CHM involves elements (such as stories, anecdotes, and images, among others) which can be conveyed through different tools and channels as long as the main core of the message is preserved. According to Sjödin and Törn, companies that have communicated values linked to a long history and prominent presence in the market, like those communicated through CHM initiatives, must pay closer attention to the consistency of the messages because incongruence can have a more relevant impact on the consumer perception and evaluation of the company than in other firms³³. This effect is plausible considering that CHM conveys values that act as anchors in the messy postmodern markets. Therefore, if customers perceive firms' information which is discordant with the values they have associated with the company, they will experience confusion and feel betrayed³⁴. SMEs' ability to deploy consistent CHM initiatives is now challenged by the omnichannel paradigm, which is often achieved by resorting to outsourcing, given SMEs' lack of human and financial resources. However, outsourcing might cause SMEs to lose control over the coherence of the CHM activities, since they are also transmitted through the partners' channel. Involving omnichannel partners in developing consistent CHM initiatives across the channel is a new challenge for SMEs that needs to be properly investigated, which is the aim of the present study.

2.1. *Omnichannel approach: definition, opportunities, and challenges*

Omnichannel marketing has recently become a prominent topic in marketing management literature. The impact of digital transformation and the pandemic has caused dramatic changes in consumer shopping behaviour toward a seamless purchasing experience³⁵. Verhoef and colleagues define omnichannel

³¹ Garofano *et al.* 2020.

³² Riviezzo *et al.* 2021.

³³ Sjödin, Törn 2006.

³⁴ Orth *et al.* 2019.

³⁵ Kannan, Kulkarni 2021; Piotrowicz, Cuthbertson 2014.

marketing as «the synergetic management of the numerous available channels and customer touchpoints, in such a way that customer experience across channels and the performance over channels is optimised»³⁶.

Omnichannel marketing seeks to align the different channels and touchpoints completely, blurring the distinction between physical and online channels. Omnichannel marketing has broadened the scope of channels and valorised customer retail brand interactions³⁷. However, omnichannel marketing should be viewed as a point of arrival of the channel-level integration continuum, which starts with multichannel marketing and continues with cross-channel marketing³⁸. To ensure readers' clarity, it is worth outlining that multichannel marketing refers to a siloed strategy that regards channels as independent entities, while cross-channel marketing aims to move and integrate channels and touchpoints. Hence, in line with existing literature, omnichannel adoption involves steps, levels, and categories along the omnichannel continuum³⁹. Figure 2 summarises the difference between multichannel, cross-channel and omnichannel marketing by re-elaborating the Berman and Thelen framework⁴⁰. The figure also outlines the continuum from multichannel to omnichannel marketing. Although several scholars have contributed to the omnichannel literature, the process for a successful transition from a multichannel to an omnichannel approach remains a challenging topic⁴¹.

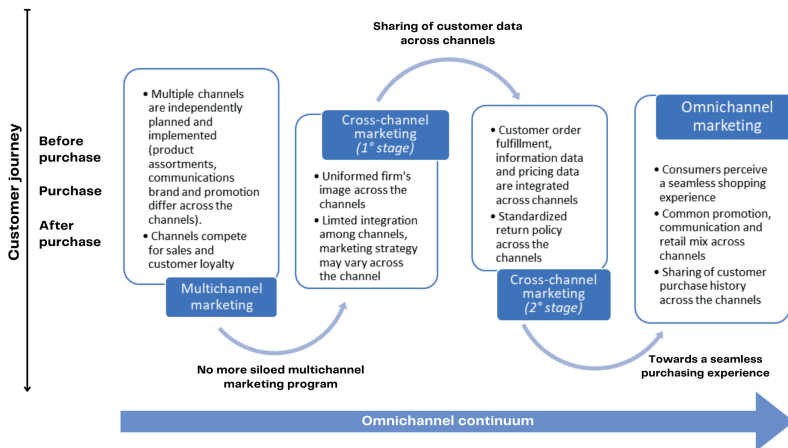


Fig. 2. Differences between multichannel, cross-channel and omnichannel marketing (Source: our elaboration from Berman, Thelen 2018)

³⁶ Verhoef *et al.* 2015, p. 176.

³⁷ Picot-Coupey *et al.* 2016; Verhoef *et al.* 2015.

³⁸ Huré *et al.* 2017.

³⁹ Beck, Rygl 2015; Berman, Thelen 2018; Cao, Li 2015; Strang 2013.

⁴⁰ Berman, Thelen 2018.

⁴¹ Banerjee 2019.

The increasing interest in the omnichannel marketing paradigm is justified by multiple opportunities owing to its adoption. Channel integration increases customer loyalty, trust perception, higher conversion rates, and cross-selling opportunities⁴². Additional results associated with omnichannel marketing strategies indicate that greater offline-online channel integration increases a firm's competitive position⁴³. Moreover, when consumers perceive congruence between a firm's online and offline presence, the company improves its credibility, appeal, and customer retention⁴⁴. Unfortunately, seamless channel integration presents several challenges⁴⁵. Indeed, adopting an omnichannel approach may require a change in the business model and cause organisational and managerial challenges⁴⁶. Furthermore, the blurring of channels poses marketing problems concerning the coordination of the marketing mix across channels⁴⁷.

To provide a seamless customer journey among channels, firms must grant consistency in content, design, assortment, and product information, representing omnichannel research's general guidelines⁴⁸. In the omnichannel paradigm, consistency refers to the company's communication and retail mix coherence at every possible point of contact with customers (touchpoints) within and across the firm's channels⁴⁹. For instance, consistency arises when customers find coherent information on social media and on a website or when product information is the same in the retailer's online and offline stores.

Additionally, firms must manage connectivity to ensure integration during customer journeys. Following the omnichannel logic, connectivity is described as the possibility for customers to switch from one touchpoint to another effortlessly and without friction⁵⁰. For example, customers perceive connectivity when they start a purchase in a firm's app and complete the transaction on a partner's website without repeating the same procedures or providing personal information that has already been provided. Connectivity raises technological, informational, and financial challenges because firms must invest human and financial resources to grant seamless channel integration⁵¹. Consequently, firms are asked to decide whether to internally develop and manage digital technology or to resort to outsourcing⁵²; especially given that in the early stages of new

⁴² Cao, Li 2015; Cocco, Demoulin 2022; Payne, Frow 2004; Sopadjieva *et al.* 2017.

⁴³ Herhausen *et al.* 2015.

⁴⁴ Bezes 2013; Gao *et al.* 2021.

⁴⁵ Picot-Coupey *et al.* 2016.

⁴⁶ Cao, Li 2015; Verhoef *et al.* 2015.

⁴⁷ Berman, Thelen 2018; Van Baal 2014.

⁴⁸ Berman, Thelen 2018; Hossain *et al.* 2019; Huré *et al.* 2017; Lemon, Verhoef 2016; Neslin 2022; Verhoef *et al.* 2015.

⁴⁹ Gasparin *et al.* 2022.

⁵⁰ *Ibidem.*

⁵¹ Cui *et al.* 2021; Lewis *et al.* 2014; Picot-Coupey *et al.* 2016.

⁵² Mahnke *et al.* 2005.

channel integration, the latter generates a low proportion of the overall firm's sales⁵³. Outsourcing allows SMEs to proceed flexibly in the omnichannel continuum through a "trial-and-error" approach. The "trial-and-error" approach is an iterative learning process through which firms try different organisational actions, detect the results, and correct the errors introducing the necessary corrections to achieve the desired outcome⁵⁴. In this sense, SMEs may use a "trial-and-error" approach to outsource digital technologies development at first; then, the ongoing evaluation of the results forces these companies to consider which activities to continue to outsource and which to insource, granting the companies high flexibility. In addition, SMEs outsource digital activities (such as e-commerce) to reduce costs, improve digital management quality, reduce market time, and focus on core activities⁵⁵.

In conclusion, consistency and connectivity constitute the concepts of integration quality and effective customer journey design, that are imperative in the omnichannel strategy⁵⁶. Consistency has been challenged, as the debate on this topic is still flourishing. However, even though Gasparin and colleagues found that inconsistent or disjointed journeys do not necessarily harm the customer experience within the omnichannel paradigm⁵⁷, extant literature agrees that the company is required to maintain consistency over time across several communication channels. A further main challenge for the firm remains to keep the customer within the brand ecosystem, reinforcing lock-in effects⁵⁸. Firms must be aware that there is no optimal omnichannel configuration; therefore, they should locate themselves along the omnichannel continuum according to their objectives⁵⁹.

3. Methodology

3.1. Case study

Since no studies have analysed how small firms manage CHM within the omnichannel paradigm, a single explorative, pivotal and longitudinal case study of a small winery has been considered an appropriate method to in-

⁵³ Lewis *et al.* 2014.

⁵⁴ Sosna *et al.* 2010.

⁵⁵ Mahnke *et al.* 2005; Pentina, Hasty 2009.

⁵⁶ Kuehnl *et al.* 2019; Shen *et al.* 2018.

⁵⁷ Gasparin *et al.* 2022.

⁵⁸ Neslin 2022; Picot-Coupey *et al.* 2016; Verhoef *et al.* 2015.

⁵⁹ Neslin 2022.

investigate the issue⁶⁰. A case study is considered a suitable methodology when research and theory on a topic are in their early stages⁶¹. In the omnichannel context, CHM develops hidden patterns that need to be investigated within their real-world context⁶²; this calls for case study methodology, especially when the boundaries between the phenomenon and the context are not evident, and the researcher has little or no control over them⁶³. Moreover, a case study is considered an appropriate method when “how” research questions are posed⁶⁴. This study adopts a processual perspective since CHM unfolds over time within the omnichannel continuum⁶⁵. Data were analysed abductively using the systematic combining approach⁶⁶.

3.2. Case selection and research settings

To select the case study, we proceeded as follows. The use of heritage differs among companies, products, and sectors⁶⁷; hence, we decided to investigate one field where the impact of heritage is recognised as high. Consequently, we selected the wine sector based on the relevant literature findings⁶⁸. Following the same logic, we decided to select small wineries run by families since the historical interactions between the family, the company and the cultural context have proven to be fundamental for family business survival over time⁶⁹. Following the research question, the selected small winery must have approached the omnichannel continuum, relying on omnichannel partners, and recognised that its CHM plays a prominent role in the overall firm’s marketing strategy. Finally, since we wanted to explore the topic in depth, according to Yin⁷⁰, we privileged the firm that allowed us access and geographical proximity. Hence, we selected the case of the small winery *Vini Valmusone* (Marche Region, Italy), because it conforms to all the criteria mentioned above.

⁶⁰ Easton 1995; Eisenhardt 1989; Voss 2010; Yin 2009.

⁶¹ Yin 2009.

⁶² Aaboen *et al.* 2012.

⁶³ Yin 2009.

⁶⁴ *Ibidem.*

⁶⁵ Langley 1999; Pettigrew 1997.

⁶⁶ Dubois, Gadde 2002.

⁶⁷ Oertel, Thommes 2015.

⁶⁸ Beverland 2005; Cerquetti *et al.* 2022; Voronov *et al.* 2013.

⁶⁹ Blombäck, Brunninge 2013.

⁷⁰ Yin 2009.

3.3. Data collection

Primary data were obtained through a series of semi-structured interviews⁷¹ with the CEO of *Vini Valmusone*, the CEO of the web agency responsible for the online presence of the winery and the CEO of the e-commerce platform that deals with the online sales (Tab. 1). Further primary data have been gathered through field notes, site visits, and direct participation in several meetings of the entrepreneurs' association, of which the company is part. Moreover, secondary data (from the firm's website and social media channels) have been collected to validate, deepen, confirm and add more details to the emerging findings obtained through the abductive analysis of the primary data⁷². The data collection phase was considered to be completed when multiple sources of evidence converged on the same findings and the "evolving framework" suited to the "evolving case"; this was considered an optimal indicator of theoretical saturation⁷³.

<i>Date</i>	<i>Informant</i>	<i>Record's form</i>	<i>Lengths (mins)</i>
18/02/2021	Participation in the meeting of the entrepreneurs' association in which the winery is involved	Note	60
27/07/2021	CEO of the winery	Notes	95
31/08/2021	CEO of the winery	Audio	20
15/06/2022	CEO of the winery	Audio and notes	45
18/07/2022	CEO of the winery	Audio and notes	18
03/11/2022	Participation in the meeting of the entrepreneurs' association in which the winery is involved	Audio and notes	58
12/12/2022	CEO of the winery	Audio and notes	30
13/12/2022	CEO of the web agency	Audio and notes	40
18/01/2023	CEO of the e-commerce platform	Audio and notes	37
18/01/2023	CEO of the winery	Audio and notes	5
19/01/2023	CEO of the e-commerce platform	Audio and notes	38
20/01/2023	CEO of the winery	Audio and notes	33

Tab. 1. An overview of the data collected (Source: our elaboration)

3.4. Data analysis

The systematic combining approach is nonlinear and aims to match theory to reality. It is a process in which the theoretical framework, empirical field-

⁷¹ Kvale 2012.

⁷² Patton 2014.

⁷³ Dubois, Gadde 2002; Yin 2009.

work, and case analysis evolve simultaneously, and it is more suitable for theory development than theory generation. This method includes a frequent overlap between data analysis and data collection, leading researchers to cycle back and forth from theory to data. It is an abductive approach because it encompasses deductive and inductive applications. The deductive approach is embodied by the predisposition of an analytic framework for analysing and interpreting the case to maintain intellectual control over data overload⁷⁴. The framework is formed by what Strauss and Corbin⁷⁵ called “technical literature”. The inductive approach is performed by developing concepts from data used to develop the analytical framework and the theoretical background in parallel. The systematic combining data analysis method ends when the evolving framework suits the evolving case, and the theory development matches the empirical world⁷⁶. Hence, for our data analysis, we proceeded as follows. The first step involved the definition of the analytical framework (Fig. 3). Since our aim was to analyse how small firms manage CHM initiatives within an omnichannel context achieved through outsourcing, we decided to adopt the CHM process described by Riviezzo and colleagues, by integrating it with the presence of the omnichannel partners, exploiting a visual mapping strategy⁷⁷.

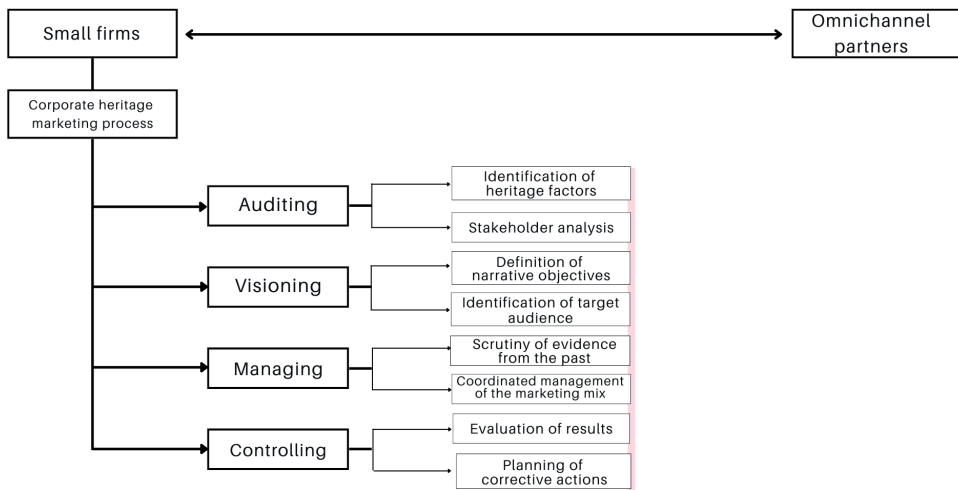


Fig. 3. The first analytical framework developed (Source: our elaboration from Riviezzo *et al.* 2021)

⁷⁴ Weick 2015.

⁷⁵ Strauss, Corbin 1998.

⁷⁶ Dubois, Gadde 2002.

⁷⁷ Miles, Huberman 1994; Riviezzo *et al.* 2021.

In this context, we defined omnichannel partners as those actors involved in helping firms develop an omnichannel distribution (e.g., digital technology providers, web agencies, and logistics providers). Upon analysing the case study and the real context, it emerged that small firms facing a lack of human and financial resources are approaching the omnichannel continuum, resorting to outsourcing services. In this scenario, one of the main concerns was maintaining coherence among CHM initiatives' channels. This concern has led our research team to go back to omnichannel literature and analyse the topic related to the consistency of marketing initiatives among channels. The new concepts acquired were the impetus to develop the analytical framework, introducing a dotted line that links omnichannel partners to the subphases of the CHM process. The framework aimed to discover in which sub-phases small firms involve omnichannel partners to develop CHM initiatives consistent among the several channels (Fig. 4).

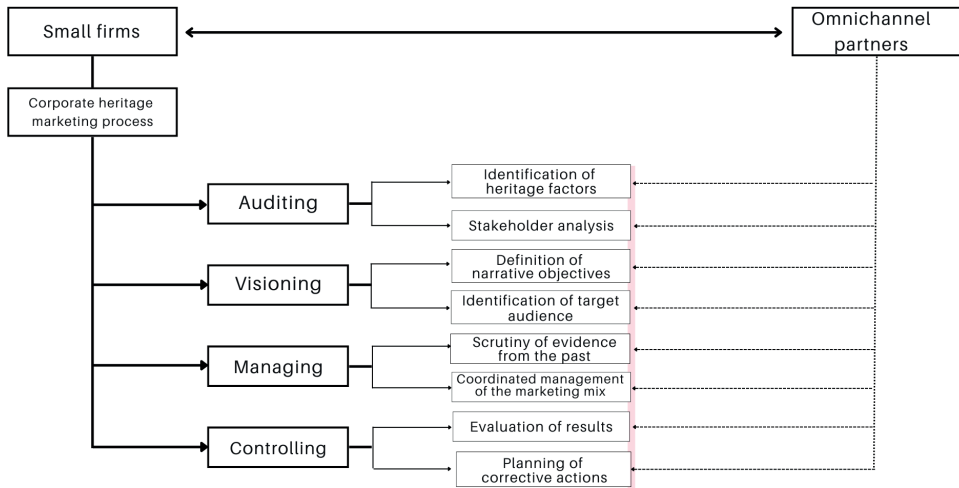


Fig. 4. A new analytical framework the study develops based on new theoretical concepts (Source: our elaboration from Riviezzo *et al.* 2021)

Once the research team approved the framework obtained, primary and secondary data were coded following the preconception of the analytical framework developed while concentrating on what emerged from the data. Data analysis was performed autonomously by each research team member, and the results were compared to validate the main findings. This process verified the subphases in which the omnichannel partners were involved in developing the small firm corporate heritage initiative. Meanwhile, additional findings emerged from pure inductive data analysis that triggered the search for complementary theoretical concepts. Therefore, data collection

was contextual to data analysis, leading the framework to evolve, along with the findings obtained from the case study. Simultaneously, the findings obtained enriched the theory background. When the “evolving framework” matched with the “evolving case”, the data analysis was considered complete⁷⁸.

4. Findings

4.1. Case description

Vini Valmusone is a small winery located in the village of Santa Maria Nuova in the province of Ancona (Marche Region, Italy). It was established in 1959 by the owner’s father. The third generation of the family now runs the firm. To be exact, the two sons of the founder manage the winery (one of them is the CEO), while the son of the present CEO is entrusted with handling a specific vineyard. Since the current proprietors took over the company, they started valorising the heritage of the small winery.

I think that a historic company founded in 1959 and continuing to this day has values of seriousness and competence in communication. Being “standing” for all these years means that we have done something good, which is what I try to communicate. [...] While maintaining the worth and authenticity of our products, I want to stay true to the principles that my father advocated. [...] I am building my company’s brand through the history of my company, showing everyone the steps we took to grow with the will to make good products⁷⁹.

First, communication was focused on emphasising the family’s history linked to the winery and the cultural and local context in which it is still located today. Consequently, the firm usually presents itself by reminding customers of its longevity and tracking some records. In detail, during the meetings in the entrepreneurs’ association where the firm is involved, the CEO usually begins by explaining how her love for wine production came about. Hence, she describes her motivation to finish her daily homework early to assist her dad in wine delivery. Then, she usually describes how curious she was about the name customers used to call her father, “the peparo” (the pepper man). This sequence of narration used to present the company is the hook to start describing the history of this nickname linked to family heritage. “The peparo” is the nickname given to her great-grandfather, who used

⁷⁸ Dubois, Gadde 2002.

⁷⁹ CEO of the winery, quotes extracted from an interview.

to go to Perugia to buy pepper at a spice market and resell it in the villages surrounding Santa Maria Nuova. Since then, “the peparo” was a nickname which also characterises their family. This storytelling helps the firm demonstrate its attachment to its terroir and traditions, as declared by the CEO: «I share my roots through the heritage of my family business, and people are more likely to contact me if they recognise themselves. [...] Nicknames were very common in the past; older people recognised us as “the peparo” family until nowadays»⁸⁰.

The CEO often describes how much time she spent in a registry search in the Santa Maria Nuova municipality to confer trustworthiness to “the peparo” story. This corporate heritage trait is not only reserved for storytelling. Indeed, the owners created a product that could valorise that heritage trait.

So, my brother and I concluded that honouring this great-great-grandfather with a vineyard and a label would be appropriate. After searching for the Santa Maria Nuova municipal registry office, I learned that this great-great-grandfather began working as a spice merchant around 1860, as noted in the registry records. Talking with the oenologist, it became clear that the name “peparo” was beautiful, and that this name went well with Syrah, an international grape variety that, when aged in barrels, releases pepper aromas⁸¹.

As a result, they created a wine called *Peparo*, a red wine obtained with Syrah grapes that, if matured in certain conditions, acquires a pepper flavour. At this point, small winery heritage becomes a physical artefact too. CHM is also enhanced through the brand logo, a family coat of arms handed down from generation to generation. History as a resource in small winery marketing is also evident in social media and web communication, where heritage references are frequent (Fig. 5). When there is no connection with the company, historical figures provide quotes. A particular episode enhances the connection between the firm and the heritage theme. During a meeting in the above-mentioned entrepreneurs’ association, the CEO had the opportunity to present a new product, a sparkling wine produced following the ancestral method⁸². During the presentation, the CEO talked about the history of the ancestral method, its discovery, and its survival over time. She did not concentrate on describing flavour, price, or similar aspects. Surprisingly, at the end of the presentation, she used a slide to ask the audience (also composed of buyers and possible customers) to name the new product, choosing between two words that evoke an idea of the past. Moreover, she asked what type of label to use in terms of colour and design and what to write on the back label, reminding the

⁸⁰ CEO of the winery, quotes extracted from an interview.

⁸¹ CEO of the winery, quotes extracted from an interview.

⁸² Ancient procedure of producing sparkling wine by letting the wine naturally re-ferment in the bottle, thanks to the residual sugar remaining after the vinification process.

audience of all the important links between this new product and the ancient production method. Finally, she decided to call this new product *Atòs*, which means ancient. Thus, she involved various firm stakeholders in defining CHM elements. She declared:

because I am more passionate about history, I usually choose the events to tell. I choose them based on what I believe is most important to me, and what I believe will be most interesting to various stakeholders. [...] I want to make the customer understand why I planted a certain vine⁸³.

However, because of the pandemic crisis, the owners felt the urge to digitalise the company and approach omnichannel adoption. The starting point was challenging, as declared by the CEO, because the company's online presence was managed non-effectively, which led the firm to gain a time delay towards competitors. Hence, the owners decided to take control of the situation and revolutionise the firm's online presence. Aware of the difficulties and costs related to managing the firm's online presence, the proprietor concluded by outsourcing these services. As declared by the CEO, «through outsourcing, we are approaching omnichannel. To manage online well, you need the right skills and the right amount of time; it would take one person to do it, but I cannot afford the cost. Everyone, in my opinion, must do their job»⁸⁴.

The small winery aimed to reach a stage in the omnichannel continuum, where there is horizontal integration between online and offline in the search and purchase phases of the customer journey. Consequently, the company concentrated its efforts on its core competencies and approached the omnichannel with a lean structure proceeding with a trial-and-error logic which perdures nowadays. The property hired a web agency to manage its online presence (including website and social media management) and a third-party e-commerce platform for online sales. The two new service providers described the small winery's online presence at the initial stage of development.

Unfortunately, the company was initially not well followed in establishing its digital presence, which caused it to lag behind in terms of marketing investments. [...] Today, it is taking over the entire digital presence. [...] It must proceed through an incremental approach⁸⁵.

⁸³ CEO of the winery, quotes extracted from an interview.

⁸⁴ CEO of the winery, quotes extracted from an interview.

⁸⁵ CEO of the e-commerce platform, quotes extracted from an interview.



Fig. 5. CHM mix adopted by the small winery (Source: our elaboration from Garofano *et al.* 2020)

4.2. The CHM process and the omnichannel partners

In the interest of clarity, the following findings will be presented according to the CHM phases (Fig. 4). Even though the case examined suggests that in the case of SMEs, the phases of the CHM process are hazy and frequently overlap, presenting the findings through the phases allows us to slice the process and analyse the nuances of the involvement of external partners in omnichannel CHM.

4.2.1. Auditing

Since the beginning, the owners have been concerned about the need to coherently communicate CHM initiatives among the several marketing channels yet in use. Concerns emerge as they feel they do not have complete control over them.

The difficulty of maintaining uniformity of message and value proposition is certainly a challenge in our omnichannel adoption plan. [...] For us, customers must find coherent messages among the channels⁸⁶.

⁸⁶ CEO of the winery, quotes extracted from an interview.

Difficulties in consistency were related specifically to the e-commerce platform. The coordination with the social media agency occurred within the small winery's channels, where the company controls it. The CEO of the web agency suggested:

Partners such as distributors and e-commerce have only one goal: sales. Therefore, involving these actors in communicating the corporate heritage should be a key factor in selling the product. Therefore, companies must first work independently to link the story to the product effectively. If this is done correctly, partners will promote the story. Hence, partners only tell the corporate story if they have clear sales returns⁸⁷.

What has allowed the firm's corporate heritage to be conveyed coherently in the e-commerce channel seems to be a strengthening relationship between the actors and the openness of the small winery CHM process towards partners. Indeed, the CEO of the e-commerce platform has declared that for the development of CHM initiatives according to an omnichannel approach, it is important that small wineries open the process to their partners.

We need to be much more selective when choosing historical concepts for e-commerce. They must be marketable and strategically placed; they must hook and draw in the customer⁸⁸.

The CEO of the small winery has proven to be fully aware of these aspects. She usually involves her partners in developing CHM initiatives. For example, during the business meeting with the CEO of the e-commerce platform, she usually shares the new CHM initiatives with him, asking him for advice. As she declared, she often accepts his suggestions. Moreover, she is keen on informing him about any new articles that cite the corporate heritage of the small winery because she wants to point out how the firm's heritage could be a means to sell products.

4.2.2. *Visioning*

The e-commerce platform's CEO is convinced so that good broad marketing management is the key to success in the current wine market scenario. He is confident that heritage has paramount importance in the wine trade. The winery CEO agrees with that statement too. However, the CEO of the e-commerce platform pointed out that corporate heritage communication does not have the same effect on all audiences.

I believe that the history of the wine and especially the winery helps to sell the bottle of wine, but not the wine itself. Unfortunately, history is interesting only to the eyes of

⁸⁷ CEO of the web agency, quotes extracted from an interview.

⁸⁸ CEO of the e-commerce platform, quotes extracted from an interview.

passionate customers, while common potential customers are generally looking for wines with the best quality/price ratio. Marketing has to push the product with the story to make it appreciated by a medium-high market segment of people who are passionate about local and authentic products, which is the right target for these types of products and the target we have aimed at with our e-commerce⁸⁹.

As described by the e-commerce platform owner, understanding what content to use in the e-commerce website is difficult because users are now less attentive than ever. So, it becomes fundamental to communicate what the target audience wants to know.

Wineries must learn to be open in the content planning process, both in the narrative objectives and in choosing what to communicate about their story and to whom. [...] You have to communicate to the customer what they are interested in, which is the winning element of communication, but to do this in an omnichannel context, figures like ours have to be involved because if the company does it alone, it does not consider the ecosystem in which it is embedded and consequently obtains fewer benefits⁹⁰.

The e-commerce platform was created to achieve a medium-high segment of consumers interested in typical and historical products.

We started this project with the desire to offer you true gastronomic excellence from small producers and authentic and genuine artisans who, by choice of life, put quality and tradition before financial results⁹¹.

Hence, since the beginning, the CEO has been interested in spreading the small winery's corporate heritage because this activity coincided with their value proposition and target audience needs.

4.2.3. *Managing*

The winery has established coordinated management of corporate heritage initiatives with the web agency between website, social media, and offline activities. The corporate heritage notions expressed on the website are reflected in their social media channels and the company shop via pictures, physical artefacts, and flyers. As described by the CEO of the web agency, this has been a long process because this coordination requires training within the small winery management.

Planning the path to tell your story means entering a storytelling process. Moving from static offline communication to dynamic communication using QR codes requires awareness and culture, and getting businesses to understand this is not easy. We can provide a workforce and manage the operational side, but the information about the company's

⁸⁹ CEO of the e-commerce platform, quotes extracted from an interview.

⁹⁰ CEO of the e-commerce platform, quotes extracted from an interview.

⁹¹ Phrase within the "About us" section of the e-commerce platform.

history must come from the firm; it has to be the entrepreneur's culture and burden. The approach must be incremental to get the process adopted⁹².

Nowadays, the small winery is reinventing all wine labels, introducing a QR code that directs clients to the firm website or the page of the e-commerce platform dedicated to the small winery.

The e-commerce platform has a page dedicated to the small winery presentation. Here, heads up the small winery's corporate heritage logo, which also encompasses the year of foundation to confirm the heritage. Therefore, every consumer who lands on the page will understand how historical the given brand is. Moreover, on the same page, some small winery products are highlighted alongside the family corporate heritage concepts. For example, the *Peparo* bottle is described by resorting to family heritage factors (Fig. 6).

The screenshot displays a product page for 'Vino Syrah Peparo Marche IGT - 2016 - 75cl'. The page layout includes a left sidebar with a category menu, a central product area with a large bottle image and descriptive text, and a right sidebar with detailed product information and a QR code.

Categorie

- Amarene/Visciole, Sughì & Confetture
- Alcoli e Spray Igienezzante
- Birra
- Cioccolateria & Dolciumi
- Crescio & Piatina
- Formaggi
- Idee Regalo
- Liquori & Grappe
- Melagrano BIO
- Melagrano BIO Cosmetica
- Offerta
- Olio delle Marche
- Pasta di Campollone
- Parchetta & Gastronomia
- Salumi
- Tartufo
- Vini dei Castelli di Jesi
- Vini dei Colli Pesaresi

Vini dei Castelli di Jesi

Fondata nel 1959 da Ferruccio Castellani, l'azienda oggi è gestita dalla terza generazione. Il loro fine è la valorizzazione del territorio dove sui 25 ettari di vigneto di proprietà, che curano quotidianamente con attenzione, allevano vitigni autoctoni e internazionali alla ricerca costante della qualità, offrendo vini rossi, bianchi e rosati di altissimo pregio. Le Marche sono uno dei segreti meglio custoditi d'Italia, ricca di colline, campagne, mare, bellezza e tradizione del "Made in Italy". Queste caratteristiche, sommate al microclima esistente creano l'ambiente ideale per i loro vigneti, che ci donano un nettare così pregiato.

L'INESTIMABILE CONOSCENZA

Ordinamento Prodotti per pagina Visualizza 1

Vino Syrah Peparo Marche IGT - 2016 - 75cl
Vini Valmusone

Uve:
100% Syrah

Un vino pregiato. Dal colore rosso intenso con riflessi granati. Al naso dona note speziate di pepe di colori vari, cannella e frutta secca. Il gusto morbido in bocca con un tannino dolce e levigato.

"Abbiamo affidato alle caratteristiche organolettiche spezzate del vitigno Syrah, il compito di ricordare le radici della nostra famiglia che risalgono alla metà dell'800, nella figura di Castellani Domenico detto "Il Peparo", commerciante di spezie, comprese in quel di Perugia e offerte per mercati percorrendo il nostro territorio in sella al suo cavallo."

Servire a 14°/16° "Grande è la fortuna di colui che possiede una buona bottiglia, un buon libro, un buon amico."

MOLIERE

"Peparo" Syrah Marche IGT
Vini Valmusone

Quantità:
-n.1 Bottiglia da 75cl
-n.3 Bottiglie da 75cl (sconto 10%)
-n.6 Bottiglie da 75cl (sconto 15%)

Per ulteriori informazioni sul prodotto consultare l'etichetta nelle foto.

< share f r e s >

Fig. 6. The *Peparo* bottle of wine presentation in the partner's e-commerce platform

The small winery CEO opened the CHM process to the e-commerce platform and seized co-branding opportunities to be transmitted in online channels.

I personally communicate with actors how our wine and family-business heritage should be told and include them in the process. [...] The idea is that since I have no control over how my brands and corporate narrative are presented, my objective is to create initiatives that force the actors I collaborate with to adhere to the messages and values I want to spread coherently⁹³.

Today's e-commerce needs to function well on social media; there is room to develop the brand story and implement co-branding initiatives that are advantageous to both realities. [...] Collaboration with other online and offline realities is especially important for small businesses looking to raise their visibility⁹⁴.

⁹² CEO of the web agency, quotes extracted from an interview.

⁹³ CEO of the winery, quotes extracted from an interview.

⁹⁴ CEO of the e-commerce platform, quotes extracted from an interview.

Indeed, between the small winery and e-commerce platform, joint communication has been developed mainly through social media to enhance both businesses reciprocally.

4.2.4. *Controlling*

In the last phase of the analytical framework adopted (Fig. 4), another interesting theme emerged: the difficulties in the control phase. Hence, since the small winery does not have enough resources to maintain control activity, the co-branding activities were important to maintain coherent CHM initiatives among all the channels. The e-commerce platform's CEO, in line with this statement, sees the control phase of the CHM process as a potential issue to manage for the small winery. In fact, in the case of any adjustment in the e-commerce platform, a change in the information content has disadvantages regarding search engine optimisation. Hence, the e-commerce platform CEO was keen to work collaboratively in the previous phase to avoid changes afterwards.

An accordance between goals and well-coordinated management is necessary to tell the winery's story in an online store like ours. However, reviewing the results is a more delicate phase because, despite how good practice may be, if we go back and make changes to our online store, this will hurt our search engine positioning. The search engine redirected the product when the information was changed, which hurt both the product's sales and our e-commerce platform. Therefore, it is preferable to work efficiently first when deciding what to tell and to whom⁹⁵.

5. *Discussion*

5.1. *Theoretical implications*

The first theoretical contribution of the study is the introduction of omnichannel partners in the CHM process, suggesting a new understanding of phases and modalities to involve these actors to convey consistent CHM initiatives across all the channels (Fig. 7). The novel implications emerging from the cases to add to the model developed by Riviezzo and colleagues⁹⁶ are discussed below.

⁹⁵ CEO of the e-commerce platform, quotes extracted from an interview.

⁹⁶ Riviezzo *et al.* 2021.

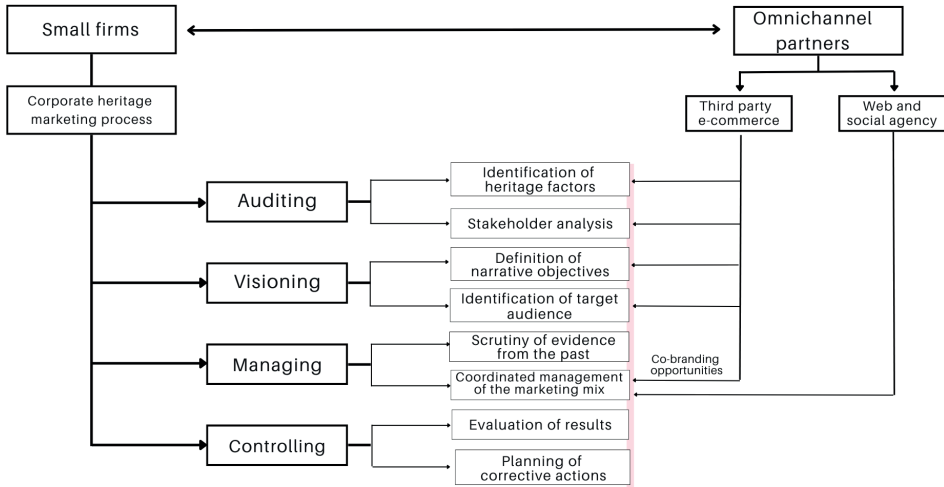


Fig. 7. Omnichannel partner involvement in the CHM process (Source: our elaboration from Riviezzo *et al.* 2021)

Secondly, the study suggests that CHM enhance legitimacy in the business context and communicates authenticity and solidity to customers and stakeholders⁹⁷. To achieve those aims, the small winery has reinterpreted its corporate heritage traits, seizing the opportunity to create value in the present and future⁹⁸. By adopting this logic, the “peparo” story has been reinterpreted, valorising the product story encompassing the small winery’s past, present, and future. In developing CHM initiatives, the CEO of the small winery demonstrated commitment to include the stakeholders’ point of view in selecting the heritage factors to be told, showing adherence to the audit phase⁹⁹. Furthermore, the case suggests that in the case of wine, where history and heritage matter, CHM processes are even more central to supporting the firm development and engagement with (both potential and active) partners and customers. In the case of small firms, the study suggests that adopting CHM practices is possible but only by accepting a lower level of control and embracing the new technologies and approaches (i.e., omnichannel).

Thirdly, the study gathers a novel perspective of how the CHM process unfolds in omnichannel marketing. The study suggests that the small winery reached a position along the omnichannel continuum according to its needs,

⁹⁷ Balmer 2013; Blombäck, Brunninge 2013; Riviezzo *et al.* 2021; Smith, Simeone 2017; Suddaby 2016; Weatherbee 2021.

⁹⁸ Urde *et al.* 2007.

⁹⁹ Riviezzo *et al.* 2021.

which aligns with the study of Neslin¹⁰⁰. One of the major concerns in approaching the omnichannel perspective for the small winery was maintaining the consistency of CHM initiatives among channels (in our case, the e-commerce platform) and over time. The study shows how the small winery's CEO thought coherence is essential in communication, especially when discussing corporate heritage. Coherence suggests how the awareness of the small winery management about communication and heritage plays a role in a valuable CHM process to unfold¹⁰¹. Hence, the study shows adherence to what was expressed by Sjödin and Törn¹⁰². In addition, even though the small winery is a very small reality, it provides a novel perspective on the phases of the CHM process described by Riviezzo and colleagues¹⁰³. The case suggests that in the case of small firms adopting an omnichannel approach, the CHM process's phases are completely blurred, overlapped, recurring and disordered. These aspects are found especially in the auditing and the visioning phase. The study provides these novel perspectives on the CHM omnichannel process in the small winery – and hence for SMEs – as it is not formalised and structured, the CEO does not follow a precise strategy, but the whole process unfolds with emergent decisions and interactions with the external partners involved in during the process.

Fourthly, the study shed new light on the role in the CHM process of external actors to whom the firm outsources many marketing activities. Since the CHM omnichannel process began, the firm approached the omnichannel paradigm, resorting to outsourcing for what concerns online sales and managing the firm's online marketing activities (e.g., website and social media). According to previous contributions, the small winery outsourced these services to maintain a lean cost structure, concentrate on their core competencies, and approach the omnichannel paradigm through trial-and-error logic¹⁰⁴. The coordination of CHM initiatives among channels has been challenging, as described by the CEO of the web agency. The same provided that implementing all the activities requires great efforts and changes to the small winery, which needs time and awareness¹⁰⁵. Also, the study highlights how the omnichannel partners act for the small winery as executive cultural intermediaries. Indeed, the e-commerce CEO and web and social agency increase the small winery's awareness and knowledge about the needs and opportunities to deploy the omnichannel approach effectively. Also, the web and social media agency pushes the small winery to increase its awareness of the need to develop a

¹⁰⁰ Neslin 2022.

¹⁰¹ Bezes 2013.

¹⁰² Sjödin, Törn 2006.

¹⁰³ Riviezzo *et al.* 2021

¹⁰⁴ Mahnke *et al.* 2005; Pentina, Hasty 2009.

¹⁰⁵ Picot-Coupey *et al.* 2016; Verhoef *et al.* 2015.

new understanding of the communication process. The omnichannel partners practically perform the activities since they create the corporate heritage communication (in terms of content and publications) spread through the channels. The small winery is called to provide the corporate heritage information; then, the omnichannel partners effectively communicate it. According to the processual perspective presented in Figure 7, the advantages of CHM activities outsourcing might also be seen as disadvantages when considering the loss of control in terms of corporate heritage initiatives among the channels. Our case shows that CHM unfolds consistently among partners' channels if these actors are involved in the CHM omnichannel process. As described by Riviezzo and colleagues¹⁰⁶, in the auditing phase, the firm should identify the main heritage themes to engage the organisation in narratives. This identification must be focused on the stakeholder's perception of elements that distinguish the organisational experience. As it emerged, to convey consistent CHM omnichannel initiatives in the e-commerce platform, the CEO of the e-commerce should be involved in selecting the heritage themes because he must consider what interests his firm's stakeholders. Only if the selected heritage themes are of interest to the e-commerce platform (i.e., its interest in terms of sales support) the CHM initiatives can be communicated consistently. Therefore, the e-commerce CEO interacts with the small winery to enhance the corporate heritage elements across the two actors' channels. In the visioning phase of the CHM omnichannel process, in continuity with the previous one, the e-commerce CEO is focused on letting the small winery understand the opportunity and the necessity of the ecosystem embedded with the omnichannel paradigm. In this sense, the e-commerce CEO helps the small winery identify the target audience and the narrated objectives to maximise the benefits of the CHM initiatives in an omnichannel paradigm. In doing so, the e-commerce CEO dialogues with the small winery CEO to define the content planning process, which aims to identify to whom it will be transmitting CHM activities, why, with the clear motivations of appealing to the selected target audience and with which kind of purpose. Naturally, in the common process, the target audience of the small winery intersects with that of e-commerce. In the managing phase, the web and social agency helps the small winery identify the set of narrative tools to effectively activate the CHM strategy consistent with the objectives and the target audience defined in the previous phase. Moreover, the web and social media agency creates the content, starting from the information the small winery shares. As described by the CEO of the social media agency, sharing the right corporate heritage information should be a task of the small winery. The task is crucial to ensure the correctness of the process. The study suggests that the role of the web and social media agency also un-

¹⁰⁶ Riviezzo *et al.* 2021.

folds in creating awareness and knowledge about the omnichannel approach toward the small winery. Meanwhile, in the managing phase, the e-commerce CEO conveys the small winery CHM initiatives at an operational level, creating the relative content in the e-commerce platform. The small winery CEO is aware of the difficulties in granting consistency in CHM initiatives in the e-commerce platform; for that reason, co-branding activities have been engaged toward the e-commerce CEO. Co-branding activity is a new implication for the process model, describing how the actors co-create content and strategies to effectively promote small firm CHM into third parties' e-commerce and platforms. Finally, the controlling phase sees no intersection with the e-commerce CEO since indirect control is performed by doing well in the previous phases. Because little changes in content in the e-commerce platform will be made as it might become a huge threat to the e-commerce website's search engine positioning, the small winery can faithfully expect to see on the e-commerce the content agreed. Therefore, the two actors should try to work well in the previous phases to avoid changes after. In general, the small winery performs the control phase autonomously in its channel without the help of the web and social media agencies.

Fifthly, the study also provides a novel perspective on the approach of the small winery toward the engagement of omnichannel partners according to the new CHM omnichannel process. The study suggests that small firms might have two opposite approaches toward the engagement of external partners. The study suggests that small firms' approaches can be passive or proactive. The passive approach means that the small winery needs to be engaged by the omnichannel partners and that those partners need to continually prompt the small winery to obtain the right information and material about CHM. The proactive approach, instead, unfolds when the small winery continuously and autonomously engages the omnichannel partners – and constantly looks for new ones – to develop and deploy CHM omnichannel activities. Also, the study suggests that the agency's role in creating a thorough understanding of the omnichannel approach supports the small firm in developing proactive behaviour.

5.2. Practical implications

This study offers several practical implications for small firms. First, the present work indicates that integrating the different marketing and communication channels becomes necessary, especially after the pandemic crisis. Changes in consumer behaviour towards seamless purchasing experience have led firms to concentrate on providing frictionless customer journeys. This study argues that firms must find the configuration on the omnichannel continuum according to their needs and objectives. Moreover, the study posits

that outsourcing could be a viable way to reach an omnichannel approach for small firms that usually lack human and financial resources to approach the omnichannel continuum. Through outsourcing, small firms can concentrate on their core competencies and maintain flexibility and a lean cost structure which are fundamental to approaching the omnichannel path following trial-and-error logic. Channel integration requires the process's coordination efforts that require time and culture, especially for small firms. Therefore, outsourcing could also be a solution to attenuate the significant organisational changes that omnichannel adoption brings. Considering the CHM omnichannel process, the case study confirms the importance of identifying the heritage factors to enhance after adopting the stakeholder's perspective. Therefore, small firms are challenged to find innovative solutions that allow stakeholders to enjoy their CHM process. As emerged from the study, stakeholder engagement becomes fundamental when small firms want to grant coherence to CHM initiatives among partners' channels. Omnichannel partners are keen to convey small firms' CHM initiatives in their channel if these also benefit them.

Consequently, this study implies that small firm relationships strengthen with omnichannel partners to develop common marketing initiatives and improve the firm's culture on the communication process and omnichannel paradigms best practice. In the case of the CHM omnichannel initiatives, small firms are challenged to involve these actors, particularly in the analysis process. When the small firm shares the same narrative objectives and target audience with the omnichannel partners, transmitting the small firm's CHM initiatives without distortion in the omnichannel partners' channels is more favourable. To promote this process, it is important to involve omnichannel partners in identifying the small firm heritage factor and the predisposition of co-branding initiatives.

6. Conclusion, limitations and further studies

The study provides a new perspective on the CHM process by analysing a case adopting an omnichannel marketing approach. The study aims to extend the previous knowledge in the CHM literature by adding a new perspective on the omnichannel partners' role, defining when and which partner should be involved in the firm's CHM process to ensure that CHM activities are transmitted consistently across channels. The study focuses on the role of the small firm's partners in supporting the development of CHM omnichannel initiatives. A longitudinal single case study of a small winery has been deemed useful in achieving those aims. Data have been analysed abductively to develop insightful theoretical and managerial implications. This study contributes to corporate heritage and omnichannel marketing literature by addressing the

research question “how do small firms develop consistent CHM initiatives in the channel of omnichannel partners?”. Theoretically, the manuscript contributes to the literature on CHM and provides new insights on how small firms might adopt and unfold CHM initiatives according to the omnichannel approach, thanks to the support of external partners. Theoretical implications are summarised as follows. First, the study provides a novel perspective on the CHM process model developed by Riviezzo and colleagues¹⁰⁷, by adding the role of external partners and assessing how an omnichannel approach influences the process’s unfolding. Second, the results also show that SMEs’ CHM processes omnichannel stages are hazy and unstructured, different from what has been yet described in the literature. Third, the study suggests how small firms might use CHM and that they should accept a lower control over operations to develop it. The study suggests that small firms’ CHM activities might be aided by external partners, specifically for e-commerce and communication activities. These partners should be involved in the heritage factors identification, stakeholder analysis, target audience definition, objective narrative formulation, and coordinated management of the heritage marketing mix phases. This last phase should be managed in consultation with the web and social media agency. Furthermore, the study suggests that omnichannel partners act as cultural and executive intermediates for SMEs. Finally, the study also sheds light on the approach of small firms toward the engagement of external actors.

Practical implications are also provided, suggesting to the management of small firms an incremental approach to undertake the omnichannel continuum and to strengthen the relationship with omnichannel partners to let them enjoy the firm’s CHM process.

However, the present study is not without limitations. Although qualitative research is increasingly used to offer insights into new and continuing phenomena, it is still context-specific and limited in breadth, because it focuses on a single focal actor. Another limitation can be found in the context of the analysis because different sectors could have different outcomes. Therefore, this is also an opportunity for further studies in other industrial and business sectors. In addition, multiple-case research studies should be performed to map differences in managing CHM in an omnichannel context achieved through outsourcing and to discover more compelling and robust findings. However, the present study enhances relevant lines of enquiry, which must be addressed in further research since the omnichannel paradigm is pervasive, and the challenge for small firms to maintain consistency of CHM initiatives among channels can no longer be postponed.

¹⁰⁷ Riviezzo *et al.* 2021.

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