

## ARTICLE

# Creative heritage: Overcoming tensions between innovation and tradition in the luxury industry

Daniel Carvajal Pérez<sup>1,2,3</sup>  | Pascal Le Masson<sup>1</sup>  | Benoit Weil<sup>1</sup>  |  
Axelle Araud<sup>2,3</sup> | Vincent Chaperon<sup>3</sup>

<sup>1</sup>Center of Management Science, Mines ParisTech, France

<sup>2</sup>Research & Development, MHCS, France

<sup>3</sup>MHCS, France

## Correspondence

Daniel Carvajal Pérez, Center of Management Science, Mines ParisTech, France.

Email: dcarvajalperez@moethennessy.com

## Funding information

Association Nationale de la Recherche et de la Technologie; Moët Hennessy Champagne Services; Chaire Théorie et Méthodes de la Conception Innovante - Mines ParisTech

“Marketing” and “design” teams often experience conflicts when cooperating on innovation projects. In luxury industries, these difficulties are exacerbated by a tension between *innovation* and *tradition*, which, in turn, causes a loss of originality and operational efficiency. Based on three case studies of a luxury champagne house, we provide evidence of the existence of a type of cognitive resource—a *creative heritage*—that can help marketing and design teams in luxury organizations manage these tensions, address destructive and creative tensions, and, hence, gain originality that is coherent with tradition and operational efficiency.

## KEYWORDS

creative heritage, design, innovation, marketing, tradition

## 1 | INTRODUCTION

“Marketing” and “design” teams may face difficulties collaborating in innovation projects due to several barriers that exist between both functions (Beverland, 2005b; Griffin & Hauser, 1996) as well as the epistemic differences underlying their respective practices (Henseler, 2015). In domains where innovation must be respectful of brand tradition, as in luxury industries (Bastien & Kapferer, 2012; Chevalier & Mazzalovo, 2012), difficulties in cooperation are exacerbated by the different approaches to innovation and tradition taken by the marketing and design functions.

In luxury industries, heritage plays a critical role in the brand's identity. It creates consumer appeal (Clais, 2002; Hudson, 2011; Urde, Greyser, & Balmer, 2007), contributes to brand and product differentiation (Briot & De Lassus, 2014), and is associated with brand authenticity and reliability (Beverland, 2005a, 2006). Thus, marketing and design teams *must* cooperate. They must innovate while respecting tradition in order to satisfy luxury customers avid for novelty and surprise (Kapferer & Bastien, 2009; Poulsson & Kale, 2004; Stegemann, 2011).

Nonetheless, on the one hand, marketing—the function in charge of managing profitable customer relationships, creating value for customers, and capturing value from customers (Kotler & Armstrong, 2011)—is responsible for preserving brand tradition by

assuring consistency in the manner the brand communicates (Kapferer, 2008). It must guarantee a coherence between new products and the existing brand identity (Chevalier & Mazzalovo, 2012). On the other hand, design is the function of “making sense of things” (Krippendorff, 1989; Verganti, 2008)—that is, “making something, distinguishing it by a sign, giving it significance, designating its relationship to other things, owners, users or goods” (Krippendorff, 1989). Its principal function is to introduce originality and disrupt the brand's status quo by creating new meanings (Verganti, 2008) and revisiting an object's identity (Le Masson, Weil, & Hatchuel, 2017).

Therefore, marketing and design use tradition in a decoupled manner, which can have negative consequences for either innovation or tradition. For instance, designers can use brand identity (Lacerda, 2008) as a resource at the beginning of design processes and propose new designs that challenge the current status of tradition. In this case, innovation kills tradition. In contrast, marketing can use tradition in the form of brand identity as a validation criterion for evaluating new designs proposed by designers (Spiggle, Nguyen, & Caravella, 2012; Veg-Sala & Roux, 2014). Thus, marketing may be tempted to reject innovative designs as they constitute a threat to brand tradition. In this case, tradition kills innovation.

Hence, in luxury industries, a sensitive tension exists between innovation and tradition; this tension is at the origin of further

cognitive and organizational tensions that can have deleterious effects on innovation projects. Most commonly, such effects include a brand yielding new products and services with low originality as well as losses in operational efficiency. Thus, finding new ways to help marketing and design teams manage such tensions is of paramount importance should an organization seek to promote fertile cross-functional cooperation.

Recent research shows that by sharing explicit knowledge in the form of shared knowledge bases (Cohendet, Grandadam, Simon, & Capdevila, 2014), languages, and mental models (Lenfle & Söderlund, 2018; Madhavan & Grover, 1998; Mohammed & Dumville, 2001), teams comprising members from different functions can resolve the tensions they encounter during innovation projects (Carlile, 2004; Lenfle & Söderlund, 2018). However, should all tensions be resolved? Indeed, besides destructive tensions, some tensions can favor creativity (Arrighi, Le Masson, & Weil, 2015). Are there some tensions that should be resolved while others are maintained and protected? Formalizing and sharing common cognitive resources do not guarantee marketing and design teams the capacity to avoid making compromises between innovation and tradition.

Thus, the objective of this study is to answer the following question: How can a cognitive resource help marketing and design teams in luxury industries manage the tension between innovation and tradition, resolve destructive and creative tensions, and contribute to originality and operational efficiency?

We argue that there exists a cognitive resource—a “creative heritage”—that by giving teams both a language of the “known” and the “unknown” to describe brand tradition, can help marketing and design teams in luxury industries reach a compromise between innovation and tradition, and, hence, gain originality that is coherent with tradition as well as improve operational efficiency. To support our claim, we present three innovative projects, by a team of marketers and designers from the same luxury champagne house, suffering from the innovation–tradition tension and, hence, exhibiting low originality and operational efficiency in innovative design projects. We show how the formalization and sharing of a creative heritage helped the project team resolve creative and destructive tensions. In turn, the team reach a compromise between innovation and tradition. It, thus, gained in originality and operational efficiency.

The paper proceeds as follows: First, we present an overview of the difficulties that marketing and design cross-functional teams encounter during innovation projects. We show that common strategies for overcoming these tensions force teams to make a compromise between innovation and tradition. Second, we sketch the effects of introducing a creative heritage to a cross-functional team working on innovative projects in luxury industries. Then, we describe how the formalization of the brand creative heritage had an impact based on three case studies from a luxury champagne house. Finally, we discuss our results with respect to the extant literature and, consequently, present some conclusions and implications for researchers and managers.

## 2 | LITERATURE REVIEW AND THEORETICAL PROPOSITION

### 2.1 | Literature review

#### 2.1.1 | Innovation and tradition: A source of cognitive and organizational tensions

Innovation is classically defined as introducing into the market new inventions or significantly improved products (Maclaurin, 1953), or finding new and better ways to introduce products into the market (OECD, 2015). However, recently, innovation is defined as a design process that requires conceptual and knowledge expansions, and that results in the revision of an object's identity (Le Masson, Hatchuel, & Weil, 2006).

In luxury industries, innovations take the form of design processes that manifest into new products, services, and experiences, but also new organizational processes, such as novel marketing strategies. In certain scenarios, innovation is visible to customers, as in the case of haute couture and luxury cars, which are luxury objects associated with high levels of creativity (Roberts & Armitage, 2015). At other times, innovation is visible only from the inside of organizations, as some luxury objects are attractive to customers precisely because they remain unchanged or uncreative, hence exhibiting low levels of creativity (Roberts & Armitage, 2015). Even in this case, innovation can appear in the background.

In any case, in luxury industries, innovation projects must yield new objects that are original and coherent with brand tradition; this is because tradition plays a paramount role in brand identity. It creates consumer appeal (Hudson, 2011; Urde et al., 2007), contributes to brand and product differentiation, and is associated with brand authenticity and reliability (Beverland, 2005b, 2006). We adopt the definition of tradition proposed by Messeni Petruzzelli and Savino (2012). That is, tradition is a stock of knowledge, competencies, materials, manufacturing processes, signs, values, and beliefs pertaining to the past (Messeni Petruzzelli & Savino, 2012).

Thus, respecting tradition is critical to the design of new luxury products, services, and experiences. For this reason, luxury brands are often placed under the responsibility of creative individuals (Roberts & Armitage, 2015) such as the *chef de caves* of champagne houses or the *noses* of perfume houses. These creative individuals are guardians of the brand identity and designers of the brand future. As part of an organization, they do not work alone, but with teams (Roberts & Armitage, 2015)—often from marketing and design functions—that should be capable of understanding and sharing the brand tradition. However, marketing and design functions have opposite responsibilities with respect to tradition, and these can hinder their capacity to cooperate in innovation projects. They suffer from a tension between innovation and tradition that is responsible for several cognitive and organizational tensions.

A cognitive tension arises when knowledge embedded in heritage becomes both a motor and an obstacle to creativity: On one hand, knowledge can hinder individuals' and organizations' creativity, as it

can force designers to use already-known solutions and hinder the exploration of new knowledge (Audia & Goncalo, 2007; Jansson & Smith, 1991; Leonard-Barton, 1992). On the other hand, the same knowledge and tradition that “fixes” designers can help them accomplish meaningful innovations because these individuals and organizations reinterpret and recombine old knowledge and tradition to create new products and value (De Massis, Frattini, Kotlar, Messeni Petruzzelli, & Wright, 2016; Holmquist, Magnusson, & Livholts, 2019; Kogut & Zander, 1992).

Moreover, organizational tensions arise when knowledge barriers between the design and marketing functions are caused by differences in teaching and personal experiences (Griffin & Hauser, 1996), in vocabulary and word meanings (Carlile, 2004; Griffin & Hauser, 1996), and in mental models developed during the practice of a particular function (Edmondson & Nembhard, 2009). These knowledge barriers can provoke discrepancies in the comprehension of the organizational and project objectives. In the resulting scenario, one function faces difficulties in understanding the other function's goals, methods, and practice (Griffin & Hauser, 1996). This conflict might lead to teams taking for granted mental models that are difficult to transcend and that hinder the ability to understand the other function's point of view (Edmondson & Nembhard, 2009).

Additionally, different functions have different organizational responsibilities and task priorities (Griffin & Hauser, 1996). They often have functional success measures that do not support cooperation as well as a lack of top management that rewards cooperation (Edmondson & Nembhard, 2009; Griffin & Hauser, 1996). Furthermore, innovative projects most often exhibit fuzzy objectives (Lenfle, Le Masson, & Weil, 2016) that may hinder the ability of cross-functional teams to cooperate (Edmondson & Nembhard, 2009; Holland, Gaston, & Gomes, 2000). As a consequence, by provoking cognitive and organizational tensions, the innovation–tradition tension can negatively affect innovation projects, that is, lead to low operational efficiency and originality.

Low originality can be caused by fixation effects that make designers privilege easily accessible design alternatives. They exhibit a difficulty to converge when original paths are explored, to understand concepts proposed by other functions, and to define organizational and project objectives and translate them into objects (products, services, and experiences).

Low operational efficiency—such as nonadherence to project schedules, arrested project development, a veto on project results, or overcost—can arise when a team struggles to make sense of project objectives, has coordination difficulties, does not effectively divide labor when the object's architecture is ill defined, or experiences difficulties progressing forward under unknown conditions.

### 2.1.2 | Common strategies for overcoming tensions and consequences thereof

The literature provides several possible strategies to cope with tensions—for example, providing team members with good conditions

for creative work (Amabile, 1988); providing methods for innovative design that help team members identify and eliminate fixation effects (Hatchuel, Le Masson, & Weil, 2011; Le Masson et al., 2017); adjusting the team structure and composition to include flexible project managers and members, which could facilitate better access to resources and knowledge (Atuahene-Gima, 2003; Cohendet & Simon, 2007; McDermott & O'Connor, 2002; Sheremata, 2000); managing interfaces of the project team with the rest of the organization through project champions and sponsors (McDermott & O'Connor, 2002); or even adapting project management processes and practices such as temporally pacing the projects with milestones and facilitating knowledge-sharing through direct and regular contact among project members (Atuahene-Gima, 2003; Sheremata, 2000).

However, most of the time, the above strategies have two drawbacks: First, they do not address the innovation–tradition tension. Instead, they force teams to make a choice between innovation or tradition. Hence, project teams gain in originality, but at the price of considerable organizational tension; or they gain in operational efficiency, but at the expense of originality.

Second, they do not differentiate between destructive or creative tensions in the project. Indeed, even if some of the cognitive and organizational tensions can have deleterious effects, such as a lack of shared organizational objectives, or differences in language use that provoke misunderstandings over the project's management (Carlile, 2004), some of the tensions can instead favor creativity, such as cognitive tensions provoked by design constraints (Arrighi et al., 2015). Thus, alternative strategies allowing teams to address the innovation–tradition tension and manage destructive and creative tensions need further investigation.

Recent research suggests that a better understanding of the relationship between tradition and innovation can help marketing and design cooperate in fertile innovative projects. Scholars acknowledge that sharing explicit knowledge in the form of shared knowledge bases (Cohendet et al., 2014), languages, and mental models (Lenfle & Söderlund, 2018; Madhavan & Grover, 1998; Mohammed & Dumville, 2001) is key for creating new knowledge and succeeding in coordinating cross-functional teams during innovation projects.

Hence, externalization—that is, the process of transforming tacit knowledge into explicit knowledge (Nonaka & Takeuchi, 1995)—can positively affect cross-functional cooperation during innovation projects. Through externalization, disparate knowledge bodies can be reconciliated, differentiated knowledge integrated, and strong concepts crystallized during the design process of new products (Nonaka & Takeuchi, 1995). Furthermore, the exteriorization of knowledge can help individuals be aware of existing knowledge gaps (Hall & Andriani, 2002).

However, in the same manner that a town recognized for possessing a heritage is not necessarily able to innovate to attract new consumers (Mota, Guerreiro, & Pinto, 2017), formalizing and sharing common cognitive resources does not guarantee that cross-functional teams can manage the tensions confronting them.

## 2.2 | Theoretical proposition: A creative heritage to surpass the innovation–tradition tension

To help cross-functional teams manage the innovation–tradition tension and resolve destructive and creative tensions, shared cognitive resources should synthesize both the properties of creation and tradition in what we term “creative heritage.” That is, a form of tradition that acts as a cognitive resource for creation and enables the creation of new objects that, in turn, enrich tradition itself.

Recent advances in design theories invite us to view design as a process that uses languages of the known and unknown to bring to life still unknown objects (Le Masson et al., 2017). This way, designers can attain different levels of generativity, such as knowing how to reproduce existing objects, recombine existing knowledge, introduce new knowledge into a codified design process, and create new languages of the unknown to recreate languages of the known (Carvajal Pérez, Araud, Chaperon, Le Masson, & Weil, 2018). Thus, we expect a creative heritage to describe a language of the known and a language of the unknown.

A creative heritage should embody a language of the known, a common language to describe existing objects, like existing brand products, services, experiences, and values. This common set of knowledge can mean different things to each of those functions, while helping them to understand each other, and other functions’ constraints. In that sense, a creative heritage should serve as a boundary object that is useful for design: boundary objects are defined as abstract or concrete objects that are shared across several intersecting social worlds and satisfy the informational requirement of each of them (Star & Griesemer, 1989). They are plastic enough to adapt to the constraints of the several parties that employ them, yet robust enough to maintain a common identity across parties. They have different meanings in different social worlds, but their structure is common enough to more than one world to make them a means of translation.

A creative heritage should also contain a language of the unknown that describes desirable yet unsatisfied functions, desirable properties of still nonexistent objects, as well as the limits of knowledge (Roberts, 2018). This would help teams identify the future of tradition and where to concentrate research efforts. A language of the unknown is a means to build action programs—to plan by knowing not only what is possible, but also what is wanted (Hatchuel & Segrestin, 2018). A language of the unknown can be ambiguous, a source of interpretative viability (Benders & Van Veen, 2001). It could provide different courses of action while maintaining a sense of unity (Giroux, 2006). Hence, both marketing and design can recognize different meanings in a language of the unknown, allowing for different interpretations and usages of tradition, but also set a common background for both functions.

According to this literature review, we argue that a creative heritage can help cross-functional teams manage tensions and, hence, gain originality that is coherent with tradition as well as improve operational efficiency by giving teams both a language of the known and the unknown to describe brand tradition. Our

methodology will hence seek to find evidence that supports this proposition.

## 3 | METHODOLOGY

### 3.1 | Research design

We conducted a multiple case study (Yin, 2008) inside a luxury champagne house in which we studied three experiences of project design by a cross-functional team. We will describe our research methodology following the criteria of the Case Study Evaluation Template, developed recently by Goffin, Åhlström, Bianchi, and Richtner (2019), which supports researchers in ameliorating the quality of case study research.

#### 3.1.1 | Theoretical foundation

We decided to adopt a case-based research because the three design projects constituted a unique context (Benbasat, Goldstein, & Mead, 1987) and an opportunity for original research (Barratt, Choi, & Li, 2011) because they come from a domain known to be inaccessible: *the world of luxury*. In the three cases, the project team benefitted from the formalization and sharing of a cognitive resource termed *brand creative heritage*. They offered us an opportunity to build new theory (Eisenhardt, 1989; Eisenhardt & Graebner, 2007) on how knowledge formalization can help marketing and design teams in luxury industries reach a compromise between innovation and tradition.

#### 3.1.2 | Theoretical sampling

We selected three cases of design experiences in which the formalization of a creative heritage allowed us to study two design phases for each case: (1) a design phase before the formalization of the brand creative heritage and (2) a design phase after the formalization of the brand creative heritage. This research design represents an excellent opportunity to study the effects of knowledge on managing the aforementioned tensions because it gives us access to a quasi-experimental setup wherein the organizational context is almost identical for the three case studies and wherein the most important variation concerns the formalization of the brand creative heritage. Furthermore, it gives us access to rare material, as we had the chance to study three projects inside a luxury champagne house from their beginning and during their different phases, including the formalization and sharing of the brand creative heritage.

### 3.2 | Data acquisition

#### 3.2.1 | Data sources, triangulation, and data collection

The data collection process took place before, during, and after the introduction of the brand creative heritage to the projects,

from 2015 until 2018, in the headquarters of the organization in France.

We followed the different actors involved in the projects, carried out by a team comprising members of the winemaking, marketing, communication, heritage, and training functions. This team was also accompanied by several external partners, such as a writer, a design agency A, and a design agency B. We followed the team during the design process of three new brand experiences where the objective was to design physical or digital objects that embodied a part or the whole brand creative heritage. The three cases are described as follows:

*Case 1.* is a project to design a digital application to let the user feel and understand the meaning of the brand wine's vocabulary. It was co-led by two project managers from the marketing and winemaking departments and benefited from the participation of design agency A.

*Case 2.* is a project to design a video that conveys the key characteristics that make the winemaking process of the brand unique. It was led by a project manager from the marketing department and benefited from the participation of design agency B. After the introduction of the brand creative heritage, this project manager was succeeded by a new marketing project manager.

*Case 3.* is a project to design an architectural space that embodies the whole brand creative heritage. It was led by a project manager from the marketing department and benefited from the participation of design agency A. After the formalization of the brand creative heritage, this project manager was succeeded by a new winemaking project manager.

To assure triangulation, the data comprised field observations, meeting transcriptions, and interviews led by the first author, as well as internal documents.

We participated in the meetings of the three projects; some of these meetings were recorded and transcribed by the writer. When recording was not possible, we took field notes concerning the evolution of the projects that were shared among the first, fourth, and fifth authors. Throughout the research process, we shared our insights every two or three months during a research steering committee in which the five authors participated.

Moreover, we had total access to the meeting reports and intermediate objects (briefs, proposals, schemas, and prototypes) of the three projects. We also had total access to internal documents of the brand, such as old experience briefs, description of old experiences, as well as external documents such as press articles and blog articles.

We complemented our data acquisition with 10 semi-structured interviews with the program participants in order to evaluate the existence of tensions as well as the originality and operational efficiency of the projects. The profile of the interviewed persons can be seen in Table 1. We requested the informants to talk about the project objectives and their evolution, as well as the difficulties encountered during

**TABLE 1** Profile of the interviewed informants

Informant	Profile
A	Head of the winemaking team and “chef de cave” of the brand.
B	Head of the research and development department and winemaker of the brand. Project manager of project 1.
C	R&D project manager and winemaker of the brand
D	Marketing director of the brand
E	Marketing brand manager. Project manager of project 1, 2, and 3
F	Marketing brand manager. Project manager of project 2
G	Communications and press relationships manager
H	Head of the heritage team
I	Head of the brand training department
J	Lead designer of design agency A

the life of the projects. We questioned them about the effects of the introduction of the brand creative heritage on the project management as well as inter-departmental cooperation.

### 3.2.2 | Review and validation of evidence

To validate our evidence, we shared our data and insights with the company during a research steering committee that occurred every two or three months. Moreover, we shared our insights and first models with the research academy in innovation and design management thanks to conferences (IPDM 2018, RADMA 2018), as well as with an expert committee that evaluated the doctoral thesis dissertation of the first author.

## 3.3 | Data analysis

### 3.3.1 | Case presentation and case interpretation

In order to analyze the interviews, we recorded and transcribed the interviews and coded the verbatims by using the QDA Miner Lite V2.0.5 Software (Provalis Research).

To evaluate the existence of the innovation–tradition, cognitive, and organizational tensions, we analyzed the briefs of each project and the interview transcriptions in search of quotes that explicitly prompted the team to design new, innovative objects coherent with the brand. We coded those verbatim as “project tensions.” We also studied the composition of the project team as well as the activities of the team members to identify whether they conserved operational roles while participating in the projects.

To evaluate originality, we searched internal documents and on the internet for the existence of digital applications, videos, and architectural spaces previously designed by the brand and by other luxury brands. We searched for similarities and differences between the properties of intermediary objects designed by the cross-functional

team and objects of the luxury domain in terms of content, structure, and functionality. We believe this is an appropriate method to measure originality as it allows us to produce a baseline of the ideas that have already been implemented. It also allows us to identify if the ideas and intermediary objects produced during the project are different from this baseline. Furthermore, we evaluated the coherence of the intermediary objects with the brand by identifying quotes in the interview transcriptions and our field notes focusing on the degree of adaptation of the intermediary objects with the brand requirements and expectations. We coded those quotes as “object coherence.”

To evaluate the operational efficiency of the projects, we identified whether the projects suffered from deadline extensions, delays, or arrests and whether brand experts accepted the projects' results. We also scanned the interview transcriptions in search of verbatim statements highlighting difficulties in obtaining resources, regarding delays, or dealing with the budget. We coded those quotes as “difficulties in project convergence.” We also searched for quotes about facilitators of project advancement. We coded those quotes as “project facilitators.” As the three projects were part of the same program, the verbatim statements are aggregated at the program level.

Finally, to characterize whether changes in originality and operational efficiency observed before and after the transmission of the brand creative heritage were caused by the brand creative heritage itself, we searched for explicit references to the brand creative heritage mobilization during the design process after its introduction. We attributed the status of “language of the known” to elements having a logical status, describing categories of objects (products, experiences), properties of objects designed by the brand, personalities, stories, and myths. We attributed the status of “language of the unknown” to elements not possessing a logical status and expressing desirable unknowns, such as vision statements, desirable but not satisfied object's properties, general principles that should be satisfied when a new wine is created, or when a new experience is designed. Furthermore, we compared the content of the cognitive resources mobilized before and after introducing the brand creative heritage and searched for relationships between new design paths and the brand creative heritage content.

## 4 | RESULTS

### 4.1 | Low originality and operational efficiency before the introduction of brand creative heritage

Before the formalization of the brand creative heritage, project teams were prompted to design an experience that was innovative, but still embedded in the brand's identity. For example, the architectural space (case ) was supposed to “*reveal the singularity of [the brand] through a creative and innovative project*” and “*convey the richness, deepness and complexity of [the brand]*”. Also, the video brief (case ) stated that it was necessary to “*avoid pitfalls*” in the final video like doing a “*video for experts*” or an “*expected video*.” This suggests that the program

team experienced the innovation–tradition tension and a cognitive tension at the same time.

Furthermore, before the formalization of the brand creative heritage, the team composition and its member roles suggest the team experienced organizational tension. Indeed, the program team was a cross-functional team comprising mainly members of the winemaking and marketing departments. Besides dedicating time to the program and the design of the three experiences, team members conserved their own operational roles inside the organizations. Thus, they had to assure the projects' advancement and the continuity of their daily responsibilities. Moreover, the program and the three projects possessed an exceptional nature, as they were different from all other development projects that were carried out by the organization and, hence, were in competition for resources.

#### 4.1.1 | Originality

At the end of the first design phase, before the formalization of the brand creative heritage, the project teams designed the following three intermediary objects: (1) a graphical sketch of a tasting notes data visualization, (2) a video of the harvest, and (3) a three-dimensional representation of an architectural space to embody the brand creative heritage.

In the three cases, the first intermediary objects possessed low originality and low coherence with the brand. Indeed, program team members referred to the intermediary objects as not having enough “*[brand] spirit*,” not being enough “*[brand] proprietary*,” or resembling an information system more than a brand experiential object (Table 2).

Furthermore, in each case, the first intermediary objects resembled past objects designed either by the brand or by other luxury brands (Table 3). For example, the intermediary object designed in case transposed the time sequence of the harvest process to the sequential scenes of the video. This mode of audiovisual representation for the harvest has already been exploited by at least 12 other champagne brands.

#### 4.1.2 | Operational efficiency

Before the formalization of the brand creative heritage, the project teams found themselves with projects that got stuck:

- The digital application project was put into standby for almost six months. The team decided to temporarily stop the design of the application as presented in the graphical sketch.
- The team made a first version of the harvest video. However, top management and brand experts invited the program team to redesign it to better consider the identity of the brand.
- The program team delayed the deadline for the design of the architectural space several times. Finally, they decided not to continue with the design of the architectural space in the form originally proposed.

**TABLE 2** Coherence between intermediary objects and brand identity according to project team members

Project	Verbatim
Digital application	"[...] [design agency A] proposed to us this first app—but to answer your question, was it not in the spirit [of the brand]? Well, yes, because the idea is not to do data visualization. What was the idea? To arrive at something that is sensorial and emotional. We are not here to do some mathematics nor to show something complex in a flat manner. [...] We are not here to do something complicated; we are here for ... The idea is to represent a meaning. The idea is not to represent knowing ... Data visualization allows to understand. The idea is not to understand. The idea is to show that there is complexity, but that it is organized—and complex yet organized is harmony."
Harvest video	"I find that this video—if you change the final logo, it could be a video from [Brand 1] or [Brand 2]. It could be a video from any other champagne house ..."
Architectural space	"This was the point I saw as the weakest of this approach; it was a point that led us to think about the [architectural space] as isolated spaces and unconnected. You know, it was an absolutely Cartesian partition of the knowledge that was being analyzed or acquired, but that did not allow to string together this knowledge beyond its structure. Even if it is a good approach to think about an information system to store data, when telling a story, there was no ... I think that, at this moment, there was no guiding thread that linked what was being stored in each one of the dimensions of the matrix. So, I think that the inconvenient with this possibility was that it was quite programmatic, in the most abstract sense of the word."

## 4.2 | Gain in originality and operational efficiency after the introduction of brand creative heritage

For the formalization of the brand creative heritage, the program team, accompanied by design agency A and a writer, carried out several sessions of sharing tacit knowledge with brand experts, and inventoried the explicit knowledge of the brand (such as written brand stories and created objects). This helped team members gain knowledge of the brand; it gave them some explicit knowledge representations:

- The "brand creative heritage map": A textual and graphical description of the brand creative heritage that defines the seven most important *knowledge elements* of the brand as well as the relationships that exist among those knowledge elements.
- The "source text" and "source schema": A textual and graphical description of two of the knowledge elements of the brand creative heritage: the "aesthetic ideal" and the "winemaking" knowledge elements. (As the program is still ongoing, the other five knowledge element representations are yet to be formalized.)

After the formalization and sharing of the brand creative heritage, the teams restarted the projects and designed three new intermediary objects: (1) a first version of an aesthetic ideal digital application, (2) a detailed structure for a winemaking video, and (3) a three-dimensional

**TABLE 3** Similarities of designed intermediary objects with objects created in the past by luxury brands

Project	Description of similarities
Digital application	First intermediary object was similar to a past object designed by the brand.
Harvest video	First intermediary object transposed the harvest time sequence into the sequences of a video. At least 12 other champagne houses have already designed similar videos.
Architectural space	Primary function of the intermediary object has already been explored by at least seven other luxury houses.

representation of a "brand studio" to share and transform the brand creative heritage.

### 4.2.1 | Originality

The new intermediary objects were more adapted to the brand expectations, as expressed by team members in Table 4 for two of the studied cases. Furthermore, even if the primary functionality of the aesthetic ideal digital application (case ) shares a similarity with an application designed by a distilled beverage brand, the content and the structure of the three intermediary objects designed after the transmission of the brand creative heritage was different from that of objects designed by other brands or by the brand itself. This suggests that, after the transmission of the brand creative heritage, the projects gained in originality (Table 5).

### 4.2.2 | Operational efficiency

We observe that after the introduction of the brand creative heritage, the program team succeeded in gaining improved operational efficiency. Indeed, the three projects were resumed, or new projects were started:

- The first version of the aesthetic ideal digital application was designed without major delays.
- The detailed structure for a winemaking video was designed after few iterations. (However, organizational changes at design agency B forced the program team to put this project on stand-by.)
- The three-dimensional representation of a brand studio to transfer and transform the brand creative heritage was designed without major delays. (The project is still in progress.)

## 4.3 | Brand creative heritage responsible for gains in originality and operational efficiency

By comparing the content of the cognitive resources mobilized before and after the formalization of the brand creative heritage, our data

**TABLE 4** Verbatim statements supporting object integrity

Project	Verbatim
Digital application	<i>"I think that having done the [brand creative heritage map] and having named the "aesthetic ideal" ... I do not know if we had the premonition or the intuition of where we wanted to go ... when we asked for the first brief. Anyway, certainly all the work we had done on the [brand creative heritage map]—the identification of the aesthetic ideal inside the concepts of the [brand creative heritage map]—all this certainly contributed to better explain to [design agency A] what we wanted to do. And what we wanted to do is to make available, in an organized manner, a set of information that corresponds to a narrative structure of the aesthetic ideal [a subset of the brand creative heritage map]—to not explain the complexity, but to make [people] feel. We do not seek people to understand everything, but to feel ... to understand the global picture—to understand that there is a meaning. So, yes, I think that even the word "aesthetic ideal" helped us change the path."</i>
Winemaking video	<i>Was this winemaking video bringing out enough of the creation, the harmony, the emotion? Because I think that those are the things that every tool or creation, coming from each process, must make feel ... Yes, it is a winemaking video, but it is [Brand]'s winemaking video, so it has to make one feel the whole [brand creative heritage map] through the winemaking it expresses."</i>

show that the brand creative heritage contributed to a gain in originality and operational efficiency by two mechanisms.

First, the brand creative heritage helped team members overcome destructive tensions by formalizing and sharing a common language of the known. Indeed, before the formalization of the brand creative heritage, a lack of knowledge integration made it difficult for team members to make full sense of the project objectives and communicate among themselves. As expressed by one of the winemakers:

"I think that at the beginning, [design agency A] did not understand very well where we were going. So, I think that—since the beginning, I knew that I did not want what they had proposed to us ... even before doing it."

However, owing to the formalization of the brand creative heritage, the team built a common structure for the brand knowledge in the form of the brand creative heritage map, the source texts, and the source schemas. This enabled them to develop a common understanding of the projects' objectives as well as a shared language, which, in turn, helped define a working methodology. One of the project managers argued that:

"Since we started to crystallize all those things in the [brand creative heritage map], everything became

**TABLE 5** Similarities and differences of designed intermediary objects with objects created in the past by luxury brands

Project	Characteristics
Digital application	Primary function similar to that of a digital application designed by a luxury brand. Content and structure are different from digital applications designed by other luxury brands
Harvest video	Content and structure are different from videos designed by other luxury brands
Architectural space	Functionalities are different from architectural spaces designed by luxury brands. Content and structure are different from architectural spaces designed by other luxury brands.

clearer and more organized. We started to put the same words on the same things, which made everything quite precise. We started to write the things that ... We resumed our approach in a different manner, related to the organization of this new structure. After that, I felt things were logical and clear, because we also started to focus on certain projects that found direct applications."

Thus, the brand creative heritage helped team members realize that their individual representations of the brand were incomplete. They constructed a richer shared representation of the brand explicit knowledge, that is, a language of the known to describe brand tradition. In the words of one of the project managers:

"When we started to look at the key points of the brand, we saw that—maybe—they were missing cohesion among them. It was because many things have never been explained, and so we did not have any definition. Maybe, they were clear in the head of [program team member 1], in the head of [program team member 2], in the head of [program team member 3], but less in the head of [program team member 4] and in my head. So, we realized that due to the lack of definitions, we lost the primary sense of what we wanted to convey."

Second, and most surprisingly, the brand creative heritage helped the team manage the creative tensions, instead of eliminating them, through the construction of a language of the unknown, that is, a common representation of the incomplete facets of brand tradition. For example, knowledge mobilized for the design of the video, before the introduction of the brand creative heritage, mostly comprised knowledge about the harvest and the winemaking process of champagne as well as the gestures that harvesters and winemakers perform during this process. This can be considered common knowledge to all champagne houses. Nonetheless, the formalization of the brand creative heritage highlighted that the winemaking process of the brand was a creative process guided by several philosophical and aesthetic



principles. That is the case, for example, with the “paradox” principle, which defines the existence of a tension between tangible and intangible elements of the brand that must be solved in every design of the brand, whether it is a new champagne or a new experience. In turn, winemakers argue that this language describes objects that do not yet exist—the unknowns of the brand—and guides their gestures and decisions during the winemaking process. This cognitive resource is original and unique to the brand and establishes a creative tension. Thus, owing to the brand creative heritage, the team identified new concepts for designing a winemaking video, which, instead of translating the consecutive steps of the winemaking process into images, represented the idiosyncratic features of the brand's way of making wine, its philosophy, its connections with other knowledge elements of the brand, and the creative process underlying the gestures.

Similarly, the brand creative heritage helped the team identify new concepts for designing an aesthetic ideal digital application (case ), which, instead of showcasing wine tasting comments, represented the idiosyncratic vocabulary that the brand uses to describe existing and future wines (such as the previously presented paradox principle). Moreover, the brand creative heritage helped the team explore a new design path for the brand place (case ) wherein they revisited the primary functionality of the place to be designed in order to design a brand studio. That is, a place where the brand creative heritage is embodied, transmitted, and transformed. Hence, the construction of this language of the unknown contributed to attaining new design paths that enabled the compromise between innovation and tradition, and that have not been explored by any other brand.

These results highlight how mobilization of the brand creative heritage as a resource of the design process of the three studied cases allowed the team to gain originality that was coherent with tradition as well as to improve operational efficiency. It helped them develop a common representation of the brand tradition, identify new original design concepts that enabled the compromise between innovation and tradition, and define the properties of still unknown objects. This invites us to accept our proposition: The transmission of a creative heritage helps cross-functional teams manage the innovation–tradition tension, resolve or manage destructive and creative tensions, and gain originality and operational efficiency *by giving teams a language of the known and the unknown to describe brand tradition*.

## 5 | DISCUSSION AND CONCLUSION

### 5.1 | Findings and discussion

In this study, we investigated the effects of formalizing creative heritage on the way cross-functional teams in luxury industries drive innovation projects. Based on the study of three innovative projects, we were able to show that creative heritage assisted marketing and design in managing the innovation–tradition tension, resolve destructive and creative tensions, and gain originality and operational efficiency. This objective was achieved by (1) solving destructive tensions through the construction of a language of the known and

(2) preserving creative tensions through the formalization of a language of the unknown.

Indeed, the examined marketing and design functions were exposed to destructive tensions, such as a lack of shared understanding of organizational objectives and a lack of common cognitive resources. They were also made to confront creative tensions, as exemplified by the “paradox” principle that must be encoded in every manifestation of the studied brand. Surprisingly, though it is tempting to argue that a creative heritage should solve both tensions, our data suggest that it helps marketing and design members *manage* the innovation–tradition tension by balancing destructive and creative tensions.

The formalization and sharing of a language of the known assists both teams in overcoming destructive tensions because it provides members with an extensive understanding of the most important knowledge elements of the brand that can be mobilized during design processes. Moreover, it enriches the consistency of individual, tacit knowledge, which, in turn, helps members gain a more coherent understanding by reconciling partial views of the same tradition. For the examined champagne brand, the identification of important knowledge elements such as the winemaking and aesthetic ideal—as well as the sub-parts comprising each knowledge element, such as the philosophy underlying the gestures of the winemaking process—helped the team identify new properties for objects (an aesthetic ideal digital application and a winemaking video) that were both innovative and representative of the brand.

Interestingly, the effect of formalizing a creative heritage goes beyond simple externalization of tacit knowledge. The formalization and sharing of a language of the unknown assists marketing and design in managing creative tensions, as it contains a description of the possible ruptures in tradition. It thus depicts common unknowns that are shared by both marketing and design members. That is, the creative heritage contains not only knowledge, but also concepts [in the sense of the C–K theory (Hatchuel & Weil, 2009)], desirable unknowns, and ideas for future designs that could be explored and developed, demonstrated or rejected, before being metamorphosed into new objects.

For the studied brand, each of the seven knowledge elements of the brand creative heritage map represent a latent concept for new experiences that make customers feel what the element means for the brand. Similarly, the paradox principle is a language of the unknown that describes a desired property of future objects and experiences. In the same manner, the creative heritage shows to its recipients a variety of knowledge gaps, inviting them to expand their knowledge to fill these gaps. It gives them guidelines for recognizing the value of new knowledge. As these concepts are all related to brand knowledge, they contribute to the coherence of the still-unknown desired objects. For the examined brand, this implies, for example, the exploration of new ways of embodying its creative heritage as well as priming the construction of a language for describing what consumers are expected to feel when living such experiences.

It is this capacity to address the known and the unknown—to think about extant objects as well as those to be designed in

coherence with the brand—that helps marketing and design functions manage the tensions and gain an originality coherent with tradition and improve operational efficiency.

Our findings have three main implications for the literature. First, the notion of creative heritage is an invitation to reconsider the brand identity concept. The marketing literature describes brand identity (Bastien & Kapferer, 2012; Chevalier & Mazzalovo, 2012; Kapferer, 2008) as mostly comprising a language of the known, which is mobilized by marketers for assuring coherence between brand identity and the new objects created by designers. However, by understanding that the creative heritage also comprises a language of the unknown, and that this structure helps teams become more original and operationally efficient, we shed a light on how marketing and design functions can mobilize brand identity to co-design new original—yet coherent with tradition—objects.

Second, we contribute to the literature on knowledge integration in innovation projects by elucidating the properties that common cognitive resources should possess in order to help marketing and design functions renew the brand while staying anchored to tradition. Even if the literature has already identified the construction of shared mental models and shared languages as a paramount resource for cross-functional coordination (Lenfle & Söderlund, 2018; Mohammed & Dumville, 2001), we show that the introduction of a creative heritage aids teams in constructing common languages of the known and the unknown. This facilitates the relationship between both functions through shared objectives, vision, and methodology. This is further exemplified by the formalization of the seven most important knowledge elements for the brand, its relationships, as well as the renewed project concepts borne out of it.

Finally, this study enables us to identify the management of a creative heritage as a new responsibility of the marketing and design functions. Indeed, both functions can be considered responsible for maintaining the organization's creative heritage, if it is already extant. If the creative heritage is missing, or exists but in a precarious form, their role is to build, formalize, and share it. In a sense, marketing and design functions should act as “custodians” (Dacin, Dacin, & Kent, 2018) of the creative heritage.

## 5.2 | Managerial implications

To managers of luxury organizations, where tradition plays a paramount role, our findings suggests that, to strengthen the ties of their design and marketing teams, both functions should work together to formalize, share, and update the creative heritage of their brands. Thus, cross-functional teams should drive projects to explicitly share both the language of the known and the unknown of their brands. By doing this, these teams could identify possible future research projects.

For luxury marketing and design practitioners, the notion of creative heritage is an opportunity to reconsider brand identity. A creative heritage represents a way of identifying desirable properties of future products, services, and experiences. Thus, by formalizing languages of

the known and the unknown to describe their brand heritage, marketing managers could better conduct actions such as releasing new products and creating brand extensions.

## 5.3 | Limitations and future research

Our study has some limitations. First, we constrained ourselves to study the brand as the primary source of a creative heritage. Hence, we did not study the impact of other sources of past knowledge, such as customers, past projects, or technical knowledge. Furthermore, the advancement state of the projects did not allow us to evaluate the reception of the innovative experiences by customers. Thus, further research should explore the impact of managing both the brand creative heritage and other knowledge sources, such as customer knowledge, in the design of innovative objects and its reception by customers.

Second, the projects that emerged from the studied program were all intended to embody a part or the whole brand creative heritage. Thus, to further understand the impact of a creative heritage on a team's originality and operational efficiency, future research should study the design of objects that do not necessarily embody the brand creative heritage as a primary function.

## 5.4 | Conclusion: Creative heritage, a new management concept


In conclusion, we identify a new research object—that we term creative heritage—as a cognitive resource that, when shared by marketing and design teams in collaboration, can enhance the generativity of those who assimilate it. With this concept, we pave the way to a better dialog between the literature in brand management, knowledge management, and design science.

### ACKNOWLEDGEMENTS

We would like to express our gratitude to Association Nationale de la Recherche et de la Technologie (Thèse CIFRE 2015/1362), Moët Hennessy Champagne Services, and Chaire Théorie et Méthodes de la Conception Innovante - Mines ParisTech, that funded first author's doctoral and post-doctoral research. We also thank two anonymous reviewers as well as the journal editors for their precious comments.

### ORCID

Daniel Carvajal Pérez  <https://orcid.org/0000-0002-2957-3844>

Pascal Le Masson  <https://orcid.org/0000-0002-3835-2875>

Benoit Weil  <https://orcid.org/0000-0001-5092-009X>

### REFERENCES

- Amabile, T. M. (1988). A model of creativity and innovation in organizations. *Research in Organizational Behavior*, 10, 123–167.
- Arrighi, P.-A., Le Masson, P., & Weil, B. (2015). Managing radical innovation as an innovative design process: Generative constraints and

- cumulative sets of rules. *Creativity and Innovation Management*, 24, 373–390. <https://doi.org/10.1111/caim.12135>
- Atuahene-Gima, K. (2003). The effects of centrifugal and centripetal forces on product development speed and quality: How does problem solving matter? *Academy of Management Journal*, 46, 359–373. <https://doi.org/10.5465/30040629>
- Audia, P. G., & Goncalo, J. A. (2007). Past success and creativity over time: A study of inventors in the hard disk drive industry. *Management Science*, 53, 1–15. <https://doi.org/10.1287/mnsc.1060.0593>
- Barratt, M., Choi, T. Y., & Li, M. (2011). Qualitative case studies in operations management: Trends, research outcomes, and future research implications. *Journal of Operations Management*, 29, 329–342. <https://doi.org/10.1016/j.jom.2010.06.002>
- Bastien, V., & Kapferer, J.-N. (2012). *Luxe oblige*. Paris: Eyrolles.
- Benbasat, I., Goldstein, D. K., & Mead, M. (1987). The case research strategy in studies of information systems. *MIS Quarterly*, 11, 369–386. <https://doi.org/10.4135/9781849209687.n5>
- Benders, J., & Van Veen, K. (2001). What's in a fashion? Interpretative viability and management fashions. *Organization*, 8, 33–53. <https://doi.org/10.1177/135050840181003>
- Beverland, M. B. (2005a). Grafting brand authenticity: The case of luxury wines. *Journal of Management Studies*, 42, 1003–1029. <https://doi.org/10.1111/j.1467-6486.2005.00530.x>
- Beverland, M. B. (2005b). Managing the design innovation–brand marketing interface: Resolving the tension between artistic creation and commercial imperatives. *Journal of Product Innovation Management*, 22, 193–207. <https://doi.org/10.1111/j.0737-6782.2005.00114.x>
- Beverland, M. B. (2006). The “real thing”: Branding authenticity in the luxury wine trade. *Journal of Business Research*, 59, 251–258. <https://doi.org/10.1016/j.jbusres.2005.04.007>
- Briot, E., & De Lassus, C. (Eds.) (2014). *Marketing du luxe: Stratégies innovantes et nouvelles pratiques*. Caen, France: Éditions EMS.
- Carlike, P. R. (2004). Transferring, translating, and transforming: An integrative framework for managing knowledge across boundaries. *Organization Science*, 15, 555–568. <https://doi.org/10.1287/orsc.1040.0094>
- Carvajal Pérez, D., Araud, A., Chaperon, V., Le Masson, P., & Weil, B. (2018). Generative heritage: Driving generativity through knowledge structures in creative industries. Lessons from cuisine. *15th International Design Conference*, 1523–1534. Retrieved from <https://hal.archives-ouvertes.fr/hal-01768792>
- Chevalier, M., & Mazzalovo, G. (2012). *Luxury brand management: A world of privilege*. Hoboken, NJ: Wiley.
- Clais, A.-M. (2002). Patrimoine et comportement des marques: actualité d'un paradoxe? *Revue Française Du Marketing*, 187, 83–91.
- Cohendet, P., Grandadam, D., Simon, L., & Capdevila, I. (2014). Epistemic communities, localisation, and the dynamics of knowledge creation. *Journal of Economic Geography*, 14, 929–954. <https://doi.org/10.1093/jeg/lbu018>
- Cohendet, P., & Simon, L. (2007). Playing across the playground: Paradoxes of knowledge creation in the videogame firm. *Journal of Organizational Behavior*, 28, 587–605. <https://doi.org/10.1002/job.460>
- Dacin, M. T., Dacin, P. A., & Kent, D. (2018). Tradition in organizations: A custodianship framework. *Academy of Management Annals*, 13, 342–373. <https://doi.org/10.5465/annals.2016.0122>
- De Massis, A., Frattini, F., Kotlar, J., Messeni Petruzzelli, A., & Wright, M. (2016). Innovation through tradition: Lessons from innovative family businesses and directions for future research. *Academy of Management Perspectives*, 30, 93–116. <https://doi.org/10.5465/amp.2015.0017>
- Edmondson, A., & Nembhard, I. (2009). Product development and learning in project teams: The challenges are the benefits. *Journal of Product Innovation Management*, 26, 123–138. <https://doi.org/10.1111/j.1540-5885.2009.00341.x>
- Eisenhardt, K. M. (1989). Building theories from case study research. *Academy of Management Review*, 14, 532–550. <https://doi.org/10.5465/amr.1989.4308385>
- Eisenhardt, K. M., & Graebner, M. E. (2007). Theory building from cases: Opportunities and challenges. *Academy of Management Journal*, 50, 25–32. <https://doi.org/10.5465/amj.2007.24160888>
- Giroux, H. (2006). “It was such a handy term”: Management fashions and pragmatic ambiguity. *Journal of Management Studies*, 43, 1227–1260. <https://doi.org/10.1111/j.1467-6486.2006.00623.x>
- Goffin, K., Åhlström, P., Bianchi, M., & Richtnér, A. (2019). State-of-the-art: The quality of case study research in innovation management. *Journal of Product Innovation Management*, 36, 586–615. <https://doi.org/10.1111/jpim.12492>
- Griffin, A., & Hauser, J. (1996). Integrating R&D and marketing: A review and analysis of the literature. *Journal of Product Innovation Management*, 13, 191–215. <https://doi.org/10.1111/1540-5885.1330191>
- Hall, R., & Andriani, P. (2002). Managing knowledge for innovation. *Long Range Planning*, 35, 29–48. [https://doi.org/10.1016/S0024-6301\(02\)00019-5](https://doi.org/10.1016/S0024-6301(02)00019-5)
- Hatchuel, A., Le Masson, P., & Weil, B. (2011). Teaching innovative design reasoning: How concept–knowledge theory can help overcome fixation effects. *Artificial Intelligence for Engineering Design, Analysis and Manufacturing*, 25, 77–92. <https://doi.org/10.1017/s089006041000048x>
- Hatchuel, A., & Segrestin, B. (2018). A century old and still visionary: Fayol's innovative theory of management. *European Management Review*, 16, 399–412. <https://doi.org/10.1111/emre.12292>
- Hatchuel, A., & Weil, B. (2009). C-K design theory: An advanced formulation. *Research in Engineering Design*, 19, 181–192. <https://doi.org/10.1007/s00163-008-0043-4>
- Henseler, J. (2015). Is the whole more than the sum of its parts? On the interplay of marketing and design research. Enschede: University of Twente.
- Holland, S., Gaston, K., & Gomes, J. (2000). Critical success factors for cross-functional teamwork in new product development. *International Journal of Management Reviews*, 2, 231–259. <https://doi.org/10.1111/1468-2370.00040>
- Holmquist, A., Magnusson, M., & Livholts, M. (2019). Reinventing tradition: Exploring the creation of new meaning through innovations involving craft-based design. *Creativity and Innovation Management*, 28, 124–137. <https://doi.org/10.1111/caim.12297>
- Hudson, B. T. (2011). Brand heritage and the renaissance of Cunard. *European Journal of Marketing*, 45, 1538–1556. <https://doi.org/10.1108/03090561111151880>
- Jansson, D. G., & Smith, S. M. (1991). Design fixation. *Design Studies*, 12, 3–11. [https://doi.org/10.1016/0142-694X\(91\)90003-F](https://doi.org/10.1016/0142-694X(91)90003-F)
- Kapferer, J.-N. (2008). *The new strategic brand management: Creating and sustaining brand equity long term*. London: Kogan Page.
- Kapferer, J.-N., & Bastien, V. (2009). The specificity of luxury management: Turning marketing upside down. *Journal of Brand Management*, 16, 311–322. <https://doi.org/10.1057/bm.2008.51>
- Kogut, B., & Zander, U. (1992). Knowledge of the firm, combinative capabilities, and the replication of technology. *Organization Science*, 3, 383–397. <https://doi.org/10.1287/orsc.3.3.383>
- Kotler, P., & Armstrong, G. (2011). *Principles of marketing*. Boston, MA: Pearson.
- Krippendorff, K. (1989). On the essential contexts of artifacts or on the proposition that “Design is making sense (of things)”. *Design Issues*, 5 (2), 9–39. <https://doi.org/10.2307/1511512>
- Lacerda, A. (2008). The signs and the corporate identity in contemporary society. Proceedings of the 26th annual ACM international conference on Design of Communication, 2. <https://doi.org/10.1145/1456536.1456601>
- Le Masson, P., Hatchuel, A., & Weil, B. (2006). *Les processus d'innovation*. Paris: Lavoisier.
- Le Masson, P., Weil, B., & Hatchuel, A. (2017). *Design theory*. Cham, Switzerland: Springer Nature.

- Lenfle, S., Le Masson, P., & Weil, B. (2016). When project management meets design theory: revisiting the Manhattan and Polaris projects to characterize "radical innovation" and its managerial implications. *Creativity and Innovation Management*, 25, 378–395. <https://doi.org/10.1111/caim.12164>
- Lenfle, S., & Söderlund, J. (2018). Large-scale innovative projects as temporary trading zones: Toward an interlanguage theory. *Organization Studies*, 40, 1713–1739. <https://doi.org/10.1177/0170840618789201>
- Leonard-Barton, D. (1992). Core capabilities and core rigidities: A paradox in managing new product development. *Strategic Management Journal*, 13, 111–125. <https://doi.org/10.1002/smj.4250131009>
- Maclaurin, W. R. (1953). The sequence from invention to innovation and its relation to economic growth. *The Quarterly Journal of Economics*, 67, 97–111. <https://doi.org/10.2307/1884150>
- Madhavan, R., & Grover, R. (1998). From embedded knowledge to embodied knowledge: New product development as knowledge management. *Journal of Marketing*, 62(4), 1–12. <https://doi.org/10.1177/002224299806200401>
- McDermott, C. M., & O'Connor, G. C. (2002). Managing radical innovation: An overview of emergent strategy issues. *Journal of Product Innovation Management*, 19, 424–438. <https://doi.org/10.1111/1540-5885.1960424>
- Messeni Petruzzelli, A., & Savino, T. (2012). *When tradition turns into innovation: How firms can create and appropriate value through tradition*. Oxford: Chandos Publishing.
- Mohammed, S., & Dumville, B. C. (2001). Team mental models in a team knowledge framework: Expanding theory and measurement across disciplinary boundaries. *Journal of Organizational Behavior*, 22, 89–106. <https://doi.org/10.1002/job.86>
- Mota, M., Guerreiro, M., & Pinto, P. (2017). The world heritage brand and tourism: An approach to the historic centre of São Luís, Brazil—Heritage tourism marketing. In C. Henriques, M. C. Moreira, & P. Bittencourt César (Eds.), *Tourism and history: World heritage—Case studies of Ibero-American space* (pp. 287–311). Braga, Portugal: Interdisciplinary Centre of Social Sciences (CICS).
- Nonaka, I., & Takeuchi, H. (1995). *The knowledge-creating company*. Oxford: Oxford University Press.
- OECD. (2015). *Frascati Manual 2015*. Paris: OECD Publishing. <https://doi.org/10.1787/9789264239012-en>
- Poulsson, S. H. G., & Kale, S. (2004). The experience economy and commercial experiences. *The Marketing Review*, 4, 267–277. <https://doi.org/10.1362/1469347042223445>
- Roberts, J. (2018). Luxury and ignorance: From "savoir-faire" to the unknown. *Luxury-History Culture Consumption*, 5, 21–41. <https://doi.org/10.1080/20511817.2018.1430884>
- Roberts, J., & Armitage, J. (2015). Luxury and creativity: Exploration, exploitation, or preservation? *Technology Innovation Management Review*, 5(7), 41–49. <https://doi.org/10.22215/timreview913>
- Sheremata, W. A. (2000). Centrifugal and centripetal forces in radical new product development under time pressure. *Academy of Management Journal*, 25, 389–408. <https://doi.org/10.2307/259020>
- Spiggle, S., Nguyen, H. T., & Caravella, M. (2012). More than fit: Brand extension authenticity. *Journal of Marketing Research*, 49, 967–983. <https://doi.org/10.1509/jmr.11.0015>
- Star, S. L., & Griesemer, J. R. (1989). "Translations" and boundary objects: Amateurs and professionals in Berkeley's Museum of Vertebrate Zoology, 1907–39. *Social Studies of Science*, 19, 387–420. <https://doi.org/10.1177/030631289019003001>
- Stegemann, N. (2011). Unique brand extension challenges for luxury brands. *Journal of Business and Economics Research*, 4(10), 57–68. <https://doi.org/10.19030/jber.v4i10.2704>
- Urde, M., Greyser, S. A., & Balmer, J. M. T. (2007). Corporate brands with a heritage. *Journal of Brand Management*, 15, 4–19. <https://doi.org/10.1057/palgrave.bm.2550106>
- Veg-Sala, N., & Roux, E. (2014). A semiotic analysis of the extendibility of luxury brands. *Journal of Product and Brand Management*, 23, 103–113. <https://doi.org/10.1108/jpbm-02-2014-0499>
- Verganti, R. (2008). Design, meaning, and radical innovation: A metamodel and a research agency. *Journal of Product Innovation Management*, 25, 436–456. <https://doi.org/10.1111/j.1540-5885.2008.00313.x>
- Yin, R. K. (2008). *Case study research: Design and methods* (4th ed.). Thousand Oaks: Sage Publications.

## AUTHOR BIOGRAPHIES

**Daniel Carvajal Pérez** is a member of Dom Pérignon's winemaking team and responsible of the "winemaking heritage" at the champagne branch of Moët Hennessy (MHCS). He received his PhD in Management Science from MINES ParisTech - PSL Research University in 2018. His research interests include innovation management, design theories and their implications for wine sciences and bioprocess engineering.

**Pascal Le Masson** is Professor at MINES ParisTech - PSL Research University, Chair of Design Theory and Methods for Innovation (DTMI). He has published *Design Theory* (Springer) and *Strategic Management of Innovation and Design* (Cambridge University Press), both books co-authored with Armand Hatchuel and Benoit Weil. He co-chairs (with Eswaran Subrahmanian, Carnegie Mellon & NIST) the 'Design Theory' Special Interest group of the Design Society and he chairs the 'Innovation' Special Interest Group of the European Academy of Management.

**Benoit Weil** is Professor at MINES ParisTech - PSL Research University, Chair of Design Theory and Methods for Innovation (DTMI). He is deputy Director of the Center of Management Science. He is co-head, with Pascal Le Masson, of the Engineering Design curriculum. He conducts research on design theory and methods for innovation. He has published *Design Theory* (Springer) and *Strategic Management of Innovation and Design* (Cambridge University Press), both co-authored with Armand Hatchuel and Pascal Le Masson.

**Axelle Araud** is winemaker at Dom Pérignon and Research & Development project manager at the champagne branch of Moët Hennessy (MHCS).

**Vincent Chaperon** is the cellar master of Dom Pérignon and head of the Winemaking Department of Moët & Chandon. From 2011 to 2017 he led the Research & Development Department of the champagne branch of Moët Hennessy (MHCS).

**How to cite this article:** Carvajal Pérez D, Le Masson P, Weil B, Araud A, Chaperon V. Creative heritage: Overcoming tensions between innovation and tradition in the luxury industry. *Creat Innov Manag*. 2020;1–12. <https://doi.org/10.1111/caim.12378>