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MELVIN T. COPELAND

Probably as much as any single individual, Melvin T. Copeland gave shape and direction to Marketing as it is taught in schools and colleges throughout the United States today. In the development at Harvard, others were associated during the early days of the Business School—particularly Dean Edwin E. Gay, Mr. Arch W. Shaw, and Professor Paul T. Cherington—but it was Copeland who evolved the characteristic structure of the Harvard Marketing course, with its emphasis on the consumer as the central focus, its pre-eminent concern with dynamic rather than static aspects, and its organization along the lines of business management functions rather than physical tasks or economic functions.

In this last connection, it may be remarked that Copeland, though trained as an economist, struck boldly away from economic theory as a basis for Marketing. Throughout his career he has always held to the view that marketing has more to contribute to economic theory than economic theory has to contribute to marketing. It is consistent with this thinking that Copeland in 1924 in his Principles of Merchandising tried to lay some foundation stones for marketing theory in his formulation of consumer buying habits and consumer buying motives. He has long since recognized that some of these early generalizations were premature, but it cannot be denied that they pointed toward the type of exploration of marketing theory that is in full swing today.

Intimately connected with the evolution of the marketing course during the formative period of the Harvard Business School were two other activities in which Copeland was likewise the central figure, namely, the studies of retail and wholesale operating costs and the development of the case method of instruction.

The pioneer endeavor of its kind anywhere in the world was the undertaking of the newly established Bureau of Business Research in 1911 to find out the costs of running shoe stores. Copeland himself has commented as follows on the significance of this initial project:

The whole field of distribution costs was virgin territory for study. A start could have been made almost anywhere, but instead of spending time in a canvass of where to begin, the retail shoe trade was picked, more or less arbitrarily, for the opening wedge.

That administrative decision had broad significance not only for the development of research at the Harvard Business School but also for business research in general and for other types of research as well. Instead of starting out to study the whole field of distribution costs at one time or even to try to cover the entire retail field, the undertaking was narrowed down to one trade. It did not matter greatly which trade was selected. The important thing was to limit
the study to a sufficiently narrow area to
have a chance of obtaining some significant
data within a reasonable period of time.
That was the first application of a principle
which has continued for over forty years to
be followed in the School's research activi-
ties—namely, what later came to be called
the "pedestrian" or "step-by-step" approach.
It is a slow process and requires great pa-
tience, but the results of using that ap-
proach are likely to be more lasting than
those of an omnibus type of research.1

Copeland was not the first Director of
the Bureau of Business Research. (That
was Dr. Selden O. Martin.) But when
the Bureau's second venture—a study of
retail grocery store costs—was launched
in 1914, Copeland was given responsibil-
ity for this project; and in 1916 he became
Director of the Bureau. With the re-
sumption of research following the close
of World War I, Copeland vigorously
led the Bureau during its period of
greatest activity, up to the middle 1920's.
The importance of such collection of dis-
tribution cost data as a means of pro-
viding a factual foundation for the study
of marketing, as well as other business
subjects, was rapidly perceived; and Bu-
reaus of Business Research soon became
part of the organization of many schools
of business.

Even as early as 1920, however, Cope-
land's own interest had begun to move
toward what he regarded as an even
more important experiment than the dis-
tribution cost studies. That experiment
was the case method of instruction, a de-
velopment that had been incubating at
Harvard ever since the opening of the
Business School in 1908. Copeland has
sketched the sequence of events that led
to the publication of the first case book,
his Problems in Marketing, in 1920:

In 1912 Dean Gay made the move

1 From a forthcoming history of the Harvard Busi-
ness School on which Copeland is now engaged.

whereby one section of the course in Com-
mmercial Organization (later renamed Mar-
keting) came to be conducted on a discus-
sion basis. The situations discussed were
ones presented, for the most part, in rather
general terms in the books and articles as-
signed to the students to read, or derived
from such assignments. Those situations
were not cases, in the later sense, but there
was continuous discussion. Progress was
made, nevertheless, even though it was slow.
From the crude start in 1912 an outline of
the subject was developed and material
gradually was assembled which made possi-
ble the publication of the first business case

The editor of that first Marketing case
book was favored by certain circumstances.
In the first place, over the preceding seven
years he had hammered out what seemed to
him to be a systematic outline of his subject.
Hence his task was to find or conceive real-
istic situations which would illustrate each
of the main points in the outline. In the
second place, he had been accumulating a
file of problem situations which had come
to his attention through the contacts of the
Bureau of Business Research, through other
contacts with businessmen, and through ar-
ticles and reports published in various busi-
ness magazines, government reports, and so
on. In the third place, the editor had had
the experience of conducting classes in Mar-
keting, Business Statistics, and European
Trade by the discussion method for five
years from 1912 to 1917 and in the special
session in 1919. He had learned some points
on what is conducive to a lively and profit-
able discussion in the classroom.

Although by present standards many of
the cases in the 1920 Problems in Mar-
keting book were sketchy and fragment-
tary, this case book proved from the start
to be an effective teaching instrument;
and three subsequent editions following
rapidly in the next ten years exhibited
marked improvement in the quality and
range of the case material.

Strictly in the area of marketing, Cope-
land's contribution culminated in this period. As his own words intimate, it was essentially a contribution growing out of a union of the three activities in the formative period of the Harvard Business School which all revolved around him as the central actor, namely, the creation of the Marketing course, the studies of retail and wholesale operating costs, and the development of the case method of instruction.

At least equal in importance with his contribution to Marketing is Copeland's contribution to education generally in his profound influence on the case method. Following the publication of *Problems in Marketing* in 1920, Dean Donham moved vigorously to effect the conversion of the entire curriculum to the case method, and as the most practical means of obtaining case material quickly he centralized the collection of cases in the Bureau of Business Research under Copeland's direction. Thus, in this formative period of case development, Copeland's ideas were profoundly influential in shaping the techniques both of writing and of using cases. Although case collection was decentralized in 1926, the Copeland tradition of case writing and case teaching continued to be powerful for a long time. In recent years there have been many new developments of importance in the writing and use of cases, but it still remains true that the basic foundation was laid in the period when Copeland's influence was dominant.

Aside from the marketing books already alluded to, Copeland's publications have ranged over several other fields: cotton textile manufacturing and merchandising, statistics, raw commodity prices, and the functions of directors and business executives. Also, in this busy multiplicity of academic work, he found time for useful public service, notably as Executive Secretary of the Conservation Division of the War Industries Board in World War I and as Chairman of the Massachusetts Committee on Post-War Readjustment during World War II. Other activities, which have continued into retirement, include business consulting on marketing and administrative problems and a Trusteeship of Bowdoin College.

At 72, "Doc" Copeland is still vigorous, both mentally and physically, and his contributions are by no means ended. But whatever the future holds, his greatest contribution will be the men that he has developed. Such educators as President Malott of Cornell, President Baker of Ohio University, Dean Richard Donham at Northwestern, Dean Culliton at Notre Dame, and Dean David, recently retired from Harvard, all in one sense or another have been Doc Copeland's "boys," as have such members of the Harvard Business School Faculty as Neil Borden, Edmund Learned, George Albert Smith, and the late Charles Gragg. Through these and others whom he trained and inspired, as well as by his own particular accomplishments, Melvin T. Copeland has made a lasting imprint on both business school and college education in the United States.

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