Given the nature of the research, we adopted a multiple case study approach that allows the examination of replication logic, a condition in which empirical analyses can be seen as a series of independent experiments that confirm or disconfirm conceptual insights as they emerge.

Case Selection:

A range of techniques was used to establish a shortlist of companies, including: (i) monitoring attendees at field service networking events, (ii) participating in forums and networking on LinkedIn, (iii) reviewing articles in professional periodicals and magazines, and (iv) web searches for businesses that have associations with advanced service-type contracts. During the process, extra care was taken to: (i) focus on manufacturers (note that services business can also offer forms of advanced services), (ii) achieve a broad view of transformation by covering a range of servitization maturity levels, and (iii) avoid selection of competing companies since this would inhibit willingness to participate.

Shortlisted companies were then invited to participate in this study. The participating companies had to agree to: (i) provide access to middle/senior management, (ii) take part in several rounds of interviews, workshops, meetings, etc., and (iii) grant the research team access to their facilities to observe day-to-day operations. Following this process, 14 company cases were identified and engaged.

Data Collection:

This was supported by a data collection protocol based around the research aims and objectives. Accordingly, data was collected principally through semi-structured interviews (both face to face and by telephone) from a range of personnel levels. Interviews directly reflected the research questions, and were designed to guide the conversation flow towards a characterisation of servitization initiatives over time, focusing on process, as well as the contextual forces affecting progress towards increased servitization maturity. At least two researchers were present at each interview, and responses were captured by both audio recording and written notes. Each interview lasted from one to two hours. Overall, the study conducted 62 rounds of interviews, with at least three key stakeholders from each case company, resulting in more than 100 hours of recorded material. Written transcripts were prepared soon after each interview. Triangulation was carried out to verify responses and included supplementary data, such as observation notes, organisational charts, process maps, operating protocols, and crosschecked responses from interviewees.

Data analysis process:

We followed the principles of qualitative data analysis (Miles and Huberman, 1994) to describe, interpret and categorise the data. The key mechanisms for generating meaning from the data were noting patterns, seeing plausibility, clustering, making contrasts/comparisons, and subsuming particulars into the general (Miles and Huberman, 1994). We first performed within-case analysis, starting by organising the data around each of the research questions. We coded the data against the research questions, while simultaneously allowing for new codes and relationships to emerge inductively from the data. In order to ensure reliability and construct validity, the data was coded by two independent researchers and different interpretations of the data (e.g. classification of codes into broader conceptual categories) were discussed vis-à-vis raw data to arrive at a consensual coding. We then performed cross-case analysis by summarising the data from each case and building displays to reveal cross-case patterns and make comparisons. Validity was further enhanced by identifying commonalities across cases, as well as by comparing cases with different levels of progression in servitization over time. Finally, we presented our findings (stages and their timing, and key contextual factors affecting progression and reconstructed pathways) to informants in each case to assess plausibility.