Co-creating educational consumer journeys: A sensemaking perspective

Michael B. Beverland[1] · Pınar Cankurtaran[2] · Pietro Micheli[3] · Sarah JS Wilner[4]

Abstract
To date, customer education has been framed in terms of one-way information provision, at odds with much of the literature on meaning co-creation. Drawing on an ethnography of a specialty coffee purveyor, we show how staff and consumers co-create educational consumer journeys through the deployment of seven practices: auditing, realignment, marrying competing logics, negotiating scripts, evangelizing, expanding collective knowledge, and impression management. These practices require staff and consumers to enact three different educational roles (educator, student, and peer), which are necessary for the co-creation and extension of consumer journeys. The roles, practices and the journeys themselves emerge iteratively through sensebreaking, sensegiving, and sensemaking processes among staff, consumers and the servicescape. Our findings frame customer education as a dynamic process in which meaning is co-created between participants. Furthermore, the cues and touchpoints needed for meaning-making shift as power relations between participants change. Managerially, these findings highlight the potential of co-created educational consumer journeys to expand established market categories.

Keywords Consumer journeys · Customer education · Co-creation · Sensemaking · Practice theory

✉ Michael B. Beverland
  m.beverland@sussex.ac.uk

  Pınar Cankurtaran
  p.cankurtaran@tudelft.nl

  Pietro Micheli
  Pietro.micheli@wbs.ac.uk

  Sarah JS Wilner
  swilner@wlu.ca

[1] Department of Strategy & Marketing, University of Sussex Business School and Copenhagen Business School, Falmer BN1 9SL, UK

[2] Faculty of Industrial Design and Engineering, Delft University of Technology, Landbergstraat 15, Delft 2628 CE, Netherlands

[3] Operations Group, Warwick Business School, University of Warwick, Coventry CV4 7AL, UK

[4] Lazaridis School of Business & Economics, Wilfrid Laurier University, 75 University Avenue West, Ontario N2L 3C5, Canada

Introduction

The study of collaborative forms of consumption has provided important insights into how enhancing customer knowledge can lead to improved marketing performance outcomes such as loyalty and competitive positioning (Martineau & Arsel, 2017; Muñiz & O'Guinn, 2001; Schau et al., 2009). Customer education is a critical means by which firms and service staff engage with customers to improve their knowledge and skill (Eisingerich & Bell, 2008). However, studies on customer education focus on unidirectional information provision by staff to customers (Bell et al., 2017), and assume relatively simple, smooth customer journeys at odds with research on co-creation (Nakata et al., 2019; Schau & Akaka, 2021) and the stickier nature of journeys undertaken by empowered consumers over time (Akaka & Schau, 2019; Siebert et al., 2020).

Despite the increasing interest in how consumer journeys are created and shaped over time, research on co-creating educational journeys is sparse (Steils, 2021). Journeys are a useful lens for understanding the implementation of educational strategies over time as they encompass the service touchpoints, roles and practices that enable knowledge

co-creation and use (Becker & Jaakkola, 2020; Hamilton & Price, 2019). However, very little is known about how consumers and providers establish and enact the schema necessary to enable knowledge co-creation (Becker & Jaakkola, 2020; Schau & Akaka, 2021; Thomas et al., 2020). Furthermore, education strategies are often atypical in many categories as marketers view empowering customers as potentially harmful to their competitive position out of fear that knowledgeable customers will switch (Bell et al., 2017; Bell & Eisingerich, 2007).

In this longitudinal study, we draw on the process of sensemaking to understand how meaning is enacted by marketplace participants (Rosa et al., 1999; Rosa & Spanjol, 2005; Sujan & Bettman, 1989), providing insight into how to create journeys that flourish. To this end, we explore customer education in the context of an emerging artisan economy in which strategic specialists (i.e., firms that focus on a narrow target) innovate practices to reinvigorate saturated markets (Dolbec et al., 2022). We do this through an extended ethnography of a specialist "third wave" coffee innovator who sought to emphasize provenance, diversity of flavor, and expert-driven production methods at a time when the market had converged around a dominant, chain-driven, mass-production model. In such a context, education can represent knowledge innovation in a category where a shared schema—defined as "a collection of basic knowledge about a concept…that serves as a guide to perception, interpretation, imagination or problem solving" (APA Dictionary of Psychology, n.d.)—already exists (Rosa et al., 1999). Therefore, proposing new journey scripts requires accommodation or adaptations to pre-existing schemas, which can result in confusion and dissatisfaction (Otnes et al., 2012; Schau et al., 2007).

We focus our investigation on educational consumer journeys, highlighting the meaning-making practices enacted by participants. Meaning is understood as the cognitive and emotional significance of a concept, and scholars of cognitive development have noted that "sociocultural contexts (including their deliberately organized routines and practices…) play decisive roles" in meaning-making and learning (van Oers 2008, p. 4). Practices are defined as "a routinized type of behavior which consists of several elements, interconnected to one another: forms of bodily activities, forms of mental activities, things and their use, a background knowledge in the form of understanding, know-how, states of emotion and motivational knowledge" (Reckwitz, 2002, p. 249). Practices can be enacted individually or collectively and involve different levels including social norms (such as category-level service scripts), individual and shared schema—visions of how things ought to be—and the enactment of the performance itself (Thomas et al., 2020). By undertaking a longitudinal study, we explore the

dynamics of educational consumer journeys (Hamilton & Price, 2019) and highlight the shifting role and effectiveness of relevant touchpoints (Becker & Jaakkola, 2020; Nakata et al., 2019). To this end, we focus on the experiences and practices of both consumers and producers (including those of employees) that enable or frustrate journey creation and extension and are required for education to occur. We choose specialty coffee as a context because it is one sector—along with food and drink, butchery, and hairdressing, among others (Ocejo, 2017)—that has seen the emergence of strategic specialists emphasizing education (or more precisely, re-education) against a competitive background defined by efficient, smooth journeys (Schau & Akaka, 2021; Siebert et al., 2020). Although the coffee sector is characterized by established routines and tight scripting (cf. Rosa & Spanjol, 2005), it is experiencing schema expansion from new entrants focused on educating customers about new tastes, new processes, and new experiences (Dolbec et al., 2022). Specifically, we ask: *What practices enable the co-creation of meaning and value for consumers during educational journeys?*

Our findings reveal that educational consumer journeys require dynamic negotiation between the desires of producers and the expectations embedded in consumers' category schema. Accordingly, we find that careful servicescape design and the deployment of seven practices (*auditing, realignment, marrying competing logics, negotiating scripts, evangelizing, expanding collective knowledge*, and *impression management*) give rise to, and reinforce, three participant roles (*educator*, *student*, *peer*) which enable the co-creation and sustenance of journeys. Importantly, these practices and roles emerge within an iterative process of sensemaking that enables the development of the new schema necessary for each consumer to embark on an educational journey that can be both extensive and dynamic. The practices identified in this study involve negotiation, iteration, innovation, role performances, and shifting power relations. Tracking shifts in knowledge and expectations is therefore essential to both co-create journeys and, where desired by the customer, extend them in personalized ways.

Theoretical framework

Sensemaking in educational consumer journeys

Sensemaking has its origins in social constructionism and to date has been used primarily to understand crises, change processes, role identity, innovation, and creativity in organizations (Weick, 1995). Sensemaking is defined as "a process, prompted by violated expectations, that involves attending to and bracketing cues in the environment,

creating intersubjective meaning through cycles of interpretation and action, and thereby enacting a more ordered environment from which further cues can be drawn" (Maitlis & Christianson, 2014, p. 67). It is "rooted in usage conditions and the choices available" (Rosa et al., 1999, p. 65) and can resolve disruptive ambiguity (Weick et al., 2005), and is thus critical to the creation of category meaning. Drawing on sensemaking, Rosa et al. (1999) argue that consumers and producers enact markets through a process of interaction and convergence around the meaning of stimuli, behavior, and expectations. These activities lead to the creation of schemas that subsequently guide behavior and, much like a service script or "the predetermined, stereotyped sequences of actions that define a well-known situation" (Schank & Abelson, 1977, p. 41), define roles and relations among participants (Schau et al., 2007).

Sensemaking and the related concepts of *sensebreaking* and *sensegiving* offer insight in addressing our research question. Disruptions to schemas characterize the first phase of sensemaking—sensebreaking—and can alter both the environment and the roles enacted in it, resulting in a need for sensegiving devices such as storytelling to rebuild consensus (Rosa et al., 1999). Sensegiving communicates the rituals and routines which express, and help consumers to make sense of, new values and which "provide constituents material to recognize how to behave" (Press & Arnould, 2011, p. 651). In so doing, sensegiving guides the construction of new mental models in line with the preferred organizational reality (Gioia & Chittipeddi, 1991). Together, the concepts of sensemaking, sensebreaking and sensegiving enable us to illuminate a dialectic process in which education serves to challenge customers' schemas and provides new opportunities for resource integration and value extraction (Hibbert et al., 2012).

Prior research highlights that sensemaking engenders learning and enables the adoption of new practices (Maitlis & Christianson, 2014), while reflexivity—defined as awareness of one's identity role in a context—is central to consumer journeys (Akaka & Schau, 2019). Sensemaking also illuminates the co-constitutive nature of customer education; as Maitlis and Christianson (2014, p. 66) argue, "meaning is negotiated, contested and mutually co-constructed." Despite its importance, research on customer education appears to overlook the interdependence of producers and consumers in the process. Customer education is often defined from the provider's point of view as the "process of informing, explaining, and demonstrating core concepts to customers" (Bell et al., 2017, p. 307), a perspective that relegates consumers to the role of passive recipient. Measures of customer education ask consumers to rate the extent to which providers keep customers well-informed, explain core concepts, and give all the information needed to make informed decisions (Bell & Eisingerich, 2007; Eisingerich & Bell, 2008). For example, in a context related to our study (food), respondents were asked to rate the effectiveness of the delivered sensory and procedural ("how to cook") knowledge (Steils, 2021). Any active role for customers tends to be reduced to "iterative testing," i.e., confirming that they have understood the information provided (Bell & Eisingerich, 2007).

Considering studies of collaborative consumption, this one-sided perspective offers an impoverished view of customer education (Akaka & Schau, 2019). For example, work on brand community identifies that education involves processes akin to sensemaking (Muñiz & O'Guinn, 2001). It also highlights the various educational practices used by insiders to help newcomers deepen their engagement in the focal activities of the community (Schau et al., 2009). However, little is known about how the actions of providers and customers influence their respective experiences; how existing beliefs and attitudes regarding change affect interactions; and the role of unexpected experiences in the learning process.

In this study, we frame customer education as a consumer journey involving the co-creation of meaning by all participants. Schau and Akaka (2021, p. 10) call for a shift from firm-controlled customer journeys to what they term "consumption journeys" which "recognize consumers' active participation in value creation through the enactment of practices." Similarly, Becker and Jaakkola (2020) contend that firms can only influence rather than control consumer journeys, calling for more research on the practices used to create shared meaning between consumers and service staff. In this sense, education can be an effective way to create new niches into established market categories (Sujan & Bettman, 1989) that expand consumer practices (Dolbec et al., 2022) and enhance value (Bell et al., 2017). Customer education can also help firms move journeys from a predictable and streamlined process to a more effortful, unpredictable, "sticky" one (Siebert et al., 2020) enabling more excitement or engagement among customers. Stickiness makes journeys more valuable as consumers can deepen their engagement in focal activities, deploy knowledge, and demand more individualized approaches, resulting in the changing effectiveness of stimuli over time (Becker & Jaakkola, 2020).

The approach applied here enables understanding of how consumer journeys are co-created and how specific practices influence the process for mutual value creation (for consumers *and* firms). Prior research has shown that customer education, by providing novelty amid existing knowledge structures, can help create new forms of value in stagnant markets (Dolbec et al., 2022; Rosa et al., 1999; Sujan & Bettman, 1989) and can enable new entrants to undermine

incumbents (Hoch & Deighton, 1989). Furthermore, despite being framed in terms of one-way information provision, customer education research is fraught with contradictions, as education is also often described both as a partnership (Bell & Eisingerich, 2007) and as an essential ingredient for customer centricity and co-creation (Bell et al., 2017). In examining educational consumer journeys from a sensemaking perspective, we can explore the practices used by staff and customers to stimulate interest in new forms of value and sustain it over time, thereby contributing to the understanding of journey design, management and innovation (Akaka & Schau, 2019; Becker & Jaakkola, 2020; Schau & Akaka, 2021).

Method

Research context: Third-wave specialist coffee in the UK

A six-year ethnographic study was conducted to address our research question. The research site is a globally recognized category innovator based in the United Kingdom, anonymized as "Specialty Co." An ethnographic design was deemed appropriate, as the aim was to capture in situ the practices enacted by both frontline staff and customers to co-create novel consumer journeys, and the means by which a sensemaking process occurred through interactions between both parties (Hamilton & Price, 2019). The UK is a relevant context for such inquiry as, according to the British Coffee Association (n.d.), almost 16 per cent of the UK population visit a coffee shop at least once a day. In addition, changes in the UK coffee sector reflect the introduction of novel practices by craft specialists in the form of a more education-driven approach (Dolbec et al., 2022).

According to Manzo (2010, p. 143), the "first wave" of coffee consumption took place from the 1950s to the early 1990s and was typified by the consumption of instant and mass-drip coffee, while the "second wave" was characterized by the emergence and popularity of branded chains such as Starbucks (USA), and Costa and Café Nero (UK). The "third wave" began in the 2000s and was driven by small independent stores or minichains, which celebrated the diversity of flavor arising from single-origin coffees and sought to expand the range of experiences possible within the category (Dolbec et al., 2022). Second-wave brands offer a mass-appeal, customer-driven experience using a standard set of practices. They use an in-house blend to ensure consistency (i.e., predictability), offer a wide range of coffee styles (e.g., espresso, Americano, flat white) brewed to meet customers' preferences, and often complement the beverage offering with café-styled food, encouraging longer stays as

part of a "third place" (i.e., a social space outside of home and work) strategy. In contrast, third-wave specialists take a product-centered strategy: they tend to reject blends in favor of seasonally available single-origin coffees, restrict the ways in which certain coffees can be produced (usually only serving filter coffee with no additions), reject so-called "impure" products such as mochaccino (coffee with chocolate added) and Americano (espresso diluted with hot water), and use an expert-driven model to counter customer preferences for hotter drinks, milk, sugar, and other flavorings. Third-wave producers also place greater emphasis on coffee appreciation, often limiting the range of food available and rejecting the third-place model through policies, such as bans on laptop use or seating arrangements that work against large groups, that discourage lengthy stays.

Although Specialty Co. aligns with the "craft specialist" approach to coffee identified by Dolbec et al. (2022), the founders desired to expand coffee appreciation beyond a small segment of connoisseurs. Specialty Co. was founded in December 2009 by owners David and Paige, both of whom had previous barista experience, in a mid-sized UK city with a high proportion of middle to upper-middle-class residents. At the time of Specialty Co.'s establishment, the city was dominated by large second wave chains and had just one independent store. Specialty Co.'s store concept was particularly unusual at the time because it placed primary emphasis on the unique qualities of each coffee's *terroir* (a concept which holds that taste or flavor of a product is characteristic of the unique combination of the geography, climate, growing and processing practices from which it was derived). The initial store could accommodate around 10 customers and had only three staff, including the owners. After a year, David and Paige moved to larger premises with space for 50 customers and employed a team of 10 staff.

Data collection

Data were collected in three phases as part of a longitudinal research design. Initial exposure to the site occurred when the lead author first encountered Specialty Co. in 2010, soon after it had opened. During an initial eight-month period, the lead author became acquainted with the owners and regulars, spending an average of two hours per day in store (during the busy 8 − 10am period). The theoretical focus on the co-creation of shared meaning emerged at that time, following observation of a shift by the owners from replicating existing independent store scripts to focusing on educating customers on how each individual coffee could be best experienced.

The second phase of the research involved a more formal two-and-a-half-year ethnography within the store. During this time, the lead author spent on average 15 h a week

in the store, including peak hours, seated near the ordering area to observe service encounters. The researcher kept field notes, engaged with customers and service staff, and fully participated in the service system as a "regular" of the café. During this period, ethnographic inquiry extended to visits of other regions' specialty coffee shops and industry immersion (e.g., reading specialty literature and blogs and taking coffee tasting and preparation courses).

The final phase involved less immersion over a two-year period (albeit still five times a week), twice-weekly observations in a second store opened by the owners that extended the script into a coffee/craft beer concept and conducting a more formal set of interviews with former and current staff (n = 8), customers (n = 21), and both owners (n = 2) (see Web Appendix A). Throughout the latter two phases, the authors conducted regular member checks of emerging insights and themes. Finally, reviews on Tripadvisor (the dominant review platform during data collection) were analyzed to provide further insights.

Semi-structured interviews were on average one-hour long, with some extending to over three hours. Interviews with the owners focused on the evolving concept of the store, key challenges, and staff management. Interviews with staff focused on prior work experience, induction into Specialty Co.'s business and ethos, critical customer incidents, and reflections on practice. Particular attention was devoted to a shift in the staff's core role from making the coffee to taking orders. When staff were tasked with making coffee, they had almost no customer interaction; when they took on the role of the server responsible for taking orders, they played the vital role in communicating Specialty Co.'s approach to consumers. This shift was so important that failure to effectively embrace this customer-facing role resulted in dismissal. Interviews with customers focused on prior expectations of service encounters at coffee shops, their experience at Specialty Co., and their post-exposure expectations in terms of coffee service encounters more generally. Informants were all regulars. Interviewing those who rejected the store's approach was more difficult as many were transient (i.e., day tourists), or did not make their feelings known during their encounter, although many were reflected in Tripadvisor reviews. In addition, some in situ conversations with locals who were not positively disposed towards Specialty Co. were recorded in field notes.

Data analysis

Transcripts total 403 pages, supplemented by over 220 pages of observational notes including those taken during ethnographic interviews. All authors were familiar with the general empirical context and relevant academic literatures and worked collaboratively to analyze the data consistent with the principles of grounded theory such as iterative coding, memo writing, constant comparison, tacking back and forth between the literature, relating emerging theory and data, and a desire for theoretical saturation (Otnes et al., 2012). Particular attention was paid to the use and changes in ritualistic language, emotionally charged interactions between customers and service staff, and the owners. Revisions to the desired service journey were observed during regular debrief sessions among the owner, senior staff, and the serving team. Interpretations were subjected to member checks with key informants, and initial coding by the lead author was discussed and validated by the other authors through discussion.

To triangulate initial findings, Tripadvisor reviews were examined as a source of additional information regarding consumers' experience of Specialty Co. At the time of writing, Specialty Co. had 668 reviews, a Tripadvisor "Certificate of Excellence" and was ranked first for coffee in its locale. After removing a small number of non-English language reviews, two reviews about the store training courses and two reviews of the other shop of Specialty Co.'s owners, a total of 647 reviews were coded by the authors, using iterative comparison and discussion to validate categorization. Of the 647 reviews examined, 107 consisted of short reviews that did not include any references to the sensemaking constructs of interest (of these, 99 were generic positive reviews indicating the reviewer's enjoyment of the visit, five were neutral in tone or suggested a mixed opinion on the shop's offerings, and three described a negative experience at a specific visit, such as the reviewer's seat being taken by another customer). We coded these as "generic reviews" and subjected them to no further analysis, focusing instead on the remaining 540 reviews (504 positive, 28 neutral/mixed and eight negative). Drawing on the sensemaking literature, we paid particular attention to descriptions of uncertainty or discomfort, unexpected experiences, attitudes regarding change, the role of service environment cues, the actions of both staff and customers, beliefs the reviewer appeared to have about the café's target customers, and its market positioning. The final coding scheme is reported in Web Appendix B, with supportive passages provided in Web Appendix C.

Findings

We find that journey creation and extension entail an ongoing cycle of sensebreaking, sensegiving and sensemaking whereby (1) schema accommodation is necessary, (2) such accommodation requires participants to embody appropriate roles, (3) each role is generated by seven practices that reflect and are generative of meaning, and (4) this meaning enables the enactment of successful educational consumer

journeys. The seven practices (*auditing*, *realignment*, *marrying competing logics*, *negotiating scripts*, *evangelizing*, *expanding collective knowledge*, *impression management*) are spread out over three phases (*designing*, *activating*, and *extending*) of the consumer journey. These practices give rise to—and reinforce—the roles necessary for journey co-creation and, where desired, extension (Akaka & Schau, 2019). Figure 1 summarizes the journey co-creation process. Throughout the process, changing power dynamics (reflected in role relations such as designer-tester, educator-student, and peer-to-peer) between staff and customers occur. Power shifts also result in changes in how and to what extent staff and customers co-create the journey, directly or indirectly. For example, while responsibility for designing the journey lies primarily with the owners and servers, customer input indirectly shapes servicescape decisions (as indicated by the dotted lines in the *Designing the Journey* phase of Fig. 1). As the journey unfolds, the shift towards peer-to-peer power relations result in more direct impact of customer input, with staff playing a secondary role by supporting a community of practice that champions Specialty Co.'s educational approach within and beyond the immediate consumption context. It is important to note the iterative nature of the journey co-creation process as evidenced, for example, in staff's decision to change the servicescape in the light of customer responses.

For many customers, staying within the first two phases is enough. In these cases, customers had made sense of Specialty Co.'s approach but were content with a smooth customer journey focused on enjoying the best possible coffee. For these customers the journey ends there. However, for others, journeys became integrated into identities (Akaka &

Schau, 2019), resulting in extended journeys characterized by greater stickiness and schema adjustment. This triggers a third phase where customers desire to explore coffee education in more depth. These customers saw themselves as peers, reflecting both a rebalancing of power between them and the servers and more active engagement in co-creation. Such "expert" customers also played a more direct role in shaping how the owners and servers approached new design and scripting choices.

Due to space constraints, we draw on exemplar interviews (and supportive observational and secondary data) to substantiate our findings (further data are provided in Web Appendix D). Our findings are structured following the three phases of the journey: *designing*, *activating*, and *extending*. Table 1 summarizes the findings, providing each practice's definition, result and exemplar quotations.

Designing the journey: Auditing and realignment

Initially, David and Paige were struck by the potential for coffee to have a unique *terroir*. In his first interview, David described his first experience of specialty coffee as laced with skepticism before being "completely blown away" and immediately seeing that "coffee as a richly diverse product could represent an interesting idea people could engage with." Interestingly, the staff with prior experience of the category working for second-wave chains became instant converts to the emphasis on single origin coffee, believing the product would speak for itself, in terms of both consumer experience and consumers valuing diversity and provenance (in contrast, staff with no prior experience in coffee had a slightly easier path to realizing the need for education).
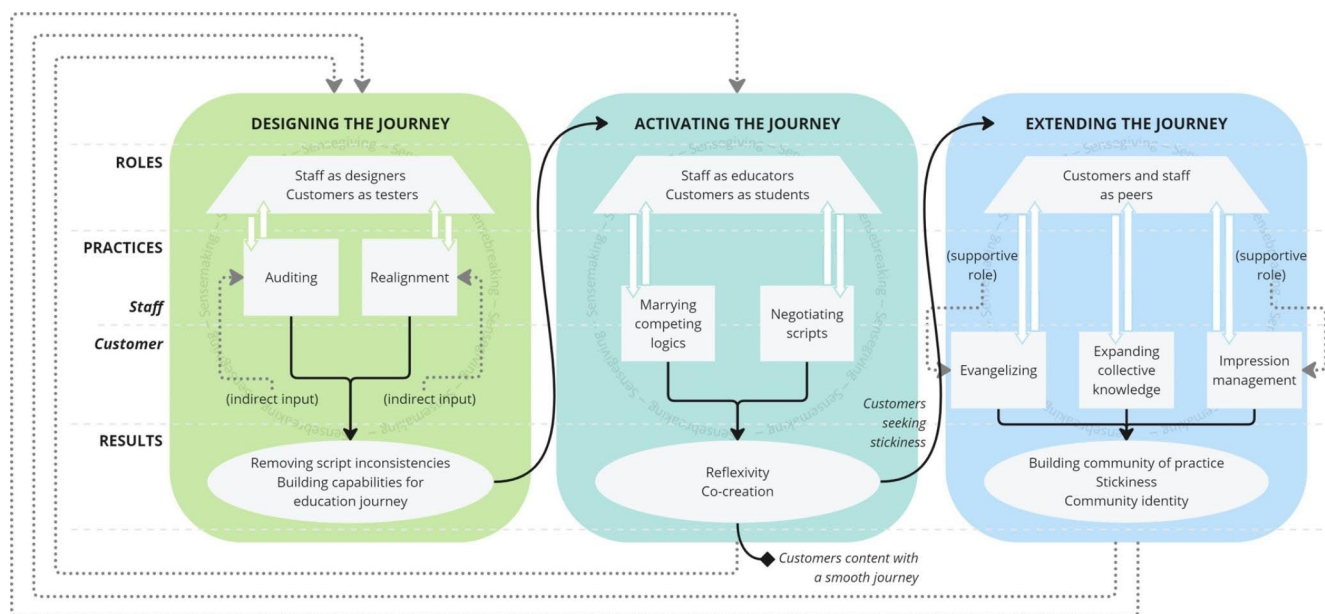

Fig. 1 The process of co-creating shared meaning

Table 1 Summary of findings

Practices	Definition	Result	Supportive data
Designing the journey:			
Auditing: practices, roles, objects	Building an inventory and assessing its consistency with desired journey	Removing script inconsistencies	"A lot of people put sugar in coffee, because a lot of coffee is quite bitter. And so people go and do that in a specialty espresso and it starts to taste like sour orange squash. It was a customer who said to me once when they said oh this tastes really sour and I said, 'you put sugar in it?' and they said 'yes'. And then I said, 'try another shot on the house', and they're like, 'Wow, that's amazing. Why didn't you tell me that it wouldn't work with sugar?' And I was like that's a really good point." (David, owner)
Realignment: practices, roles, objects	Removing, adding, and tightening connections between servicescape and desired journey	Building capabilities for the educational journey	"When I first came here, I found it quite intimidating. I had no idea what the [menu] board was saying. I'm used to walking into a café and the boards always have the same thing on them, they have all the drinks and the prices. So, when you look up at a board, you would intuitively think: "I already know what it's going to be." […] I had to relearn how to understand what they were selling." (Francis, customer)
Activating the journey:			
Marrying competing logics	Combining an expert ethos with a customer focus	Reflexivity	"When someone asks something, rather than saying 'yeah sure you can have that', you try and get someone's interest, which is completely non-traditional because you're saying 'I'm going to tell you something' or look at me I'm going to draw attention to myself. Whereas the role of the server in most situations is to not be there. Saying 'I would recommend that you try this', it's a really big step to take as it's very hard not to say, 'yes' to customers." (Jackie, staff)
			"You're almost like the tour guide for the experience. I think the word experience is important because it takes it apart from, oh, it's just a cup of coffee. It's more than that; it's a cup of coffee with the experience and the knowledge of the staff." (Maude, staff)
			"You have to go there and kind of play it a bit naïve and a bit ignorant but be prepared to learn and while specialty shops dictate what I can have, they actually put the power in the consumer's hands again in the sense that, if you walk into the shop prepared to try something special, you have to be prepared to learn about something." (Hannah, customer)
			[I: What made the transition easier?] "Just listening to how David and Paige explain it. You think oh, yeah, actually, I can get that, I can see where you're going with that, things like that. It was more like relearning coffee and all the things that can change and what coffee can do or has an effect, all those things, that you probably don't appreciate when you just have a normal cup." (Charles, customer)
Negotiating scripts	Aligning the educational script to users	Co-creation	"You're the most successful server here if you're always going off script. The script is good because you need somewhere to start. Then the idea is that the script becomes so common to you that you can ad lib. It's almost like a comedy show where they've got the sketch written out, but you decide where you're going with it. … So in every single situation you have a better customer interaction if you treat them completely individually, react to the way that they're reacting, and don't restrict yourself. It's like a really weird broad script in which there's definitely a wrong and a right way to approach everything, but you couldn't possibly have it all written out because it would be way too complex." (Brandt, staff)
			"Approaching customers on a one-on-one basis and this idea of looking at an individual and seeing what they need and kind of assessing every transaction, person to person. It's a really difficult skill to achieve. That conversation - the fact that the conversation never really ends is fantastic, because you keep on developing your skill." (Donny, staff)
			Ethnographic note (15/3/2015): Today David is pushing a Brazilian coffee to the more experimental regulars. This is unusual, in so far as Brazilian coffees are typically the go to for servers when dealing with new customers. David's recommendation is greeted with skepticism by these regulars, including myself, but he urges us to try the coffee, regaling us with how some Brazilian growers have embraced new varieties and processes, and new regions are opening up. It makes me reflect on when I was learning about wine and how as a nascent expert the "ABC" or "anything but Chardonnay or Cabernet" became a tool to indicate status, but also a process one moved through before realizing that there was still much to discover in these varietals.
Extending the journey:			

Table 1 (continued)

Practices	Definition	Result	Supportive data
Evangelizing	Championing the educational approach within and beyond the focal provider	Building community of practice	"I was in a place called [name] and they had an unusual looking machine, so I wanted to talk to them about it and they had four different types of filter coffee they were making and I stood up and the waiter said, it's table service and I was like, well I'm going to go talk to your barista, I don't give a shit if it's table service… I walked over and they were all hesitant to speak about their product and it's like they didn't know. I don't understand how you don't know what you're working with." (Emma, customer)
Expanding collective knowledge	Providing new resources to servers and other like-minded customers	Stickiness	"It's useful for us as well. I find that when I teach someone something else it makes it much more concrete in my mind. I find we do pass on what we learn; so how to deal with certain customers, how to give advice on things like sugar or Americanos, that kind of thing. Our little coping things." (Maude, staff)
Impression management	Signaling membership and engaging in collective performances	Community identity	"There's a lot of people watching, watching the staff, how they cope with it. You know for a fact that some of these people think this is completely mad and they'll never come back again, or they don't even stay. So, it's almost like: 'well, are you going to join this club, are you going to actually associate with what's going on here?'" (Ian, customer) "The slight thing I do find myself now is, if I'm sat upstairs and someone comes in for the first time and they say, "I just want a strong coffee," I make a face, like, "oh, wrong thing to say." You just think that person has no idea. They've either come into the coffee shop because someone says there's great coffee, thinking it means coffee as in coming out of Starbucks or Costa or something like that. I think that's how I see it." (Mikhalia, customer)

This product-centric belief saw David and Paige design their initial store like standard independent cafés, using signifiers of origin such as burlap sacks of coffee beans as wall displays and a menu framed by styles of coffee production (espresso, flat white, Americano etc.). Furthermore, the service model was originally embedded in the second-wave coffee-chain service script with a focus on giving customers what they wanted in terms of product range, additions of milk and sugar, and honoring requests for "extra hot" drinks. The sole difference was that consumers could choose from a regular house blend and two single-origin coffees that were changed weekly, all of which were described on a board in terms of flavor notes.

While this approach created a small group of converts, the feedback the owners received from customers was inconsistent with their own expectations for their offering:

Paige: The filters with milks, the espressos with sugar, people would return them all the time. Then we tasted them, and we were like, 'this is awful.' It occurred to us that this isn't even close to representative of this kind of [specialty] coffee because [for] all the flat whites we were making, all the espresso shots and black filters, you would get 'that was great, thank you so much.' But for all those non-pure styles of drinks, we could see a huge problem and we would have to do something radical.

Paige's recounting of the dissonance she experienced after the consumer feedback points to the kind of reflexivity that can trigger and enable responsive action, setting the foundation for educational consumer journeys to take place.

Customers, experiencing inconsistencies between Specialty Co.'s espoused desires and actual practices, provided input into David and Paige's own meaning-making practices (in this case, how to signal the need for customers' schema accommodation). In this cycle of sensebreaking, sensegiving, and sensemaking, a servicescape that would enable further journey co-creation emerged through two practices: *auditing* and *realignment* (see Table 1). The servicescape was designed to trigger a journey through touchpoints that signaled the need for schema accommodation (i.e., in response to sensebreaking) and then provided customers with cues that enabled them to make sense of and derive value from the journey (i.e., through processes of sensegiving and sensemaking) (see Web Appendix B). Although the core elements of servicescape design were developed during the first six months of operation, changes evolved over time, reflecting both indirect and direct customer input (since data collection finished, Specialty Co.'s practices have been normalized in other third-wave operations).

The customer confusion described by Paige, reflective of disruptive ambiguity (Weick et al., 2005), triggered an accommodation process, whereby the owners sought to understand the nature of the problem and craft an atypical category schema (Sujan & Bettman, 1989) that would trigger the sensebreaking and sensegiving necessary for further journey co-creation. This involved an audit of practices, material objects and staff roles to identify those that were (in)consistent with Specialty Co.'s strategic intent. In the small shop, initial changes focused on removing many mainstays

of second wave coffee shops: coffee prepared from a blend of different beans, sugar (which Paige described as "like taking candy off a baby literally, just outrage"), and drinks such as Americano, mochaccino, and hot chocolate. These removals were done to disrupt expectations and signal the need for schema accommodation, which, as Sujan and Bettman (1989, p. 455) explain, occurs "when a new mental schema is created, or the present schema undergoes substantial modification to interpret a new concept." The result ranged from customers simply being confused to some being angry, yet each deletion was deliberately designed to stimulate further inquiry. In David's words, the aim was to "move away from a comfort product; the person has to be interested in exploration."

To be productive, sensebreaking must be followed by sensegiving (Maitlis & Christianson, 2014). Thus, the disruptive shifts also required servers to engage in co-creation with customers, not only by explaining the reasoning behind disrupting expectations (see David's passage in Table 1), but also rethinking their own role identities. For example:

> David: When you walk into the shop, it doesn't look like a coffee shop. The menu with espresso, flat white, cappuccino was replaced with [information on] the coffee's provenance and some flavor notes. … You have a menu that doesn't really make sense, so you've broken expectation now. But what you need to do is fill it, because otherwise the customer is just uncomfortable. So, then it becomes about hosting. We realized that we had to have full time staff only who would develop a lot of knowledge, and we wanted them to not be servers, but to be hosts and there's a significant difference: a server waits to be told by the customer what they'd like, a host does a very different job.

David's passage reflects not only his desire to signal the need for schema accommodation to customers through touchpoint design choices (such as the menu board that describes flavor notes, see Web Appendix E), but also the use of that design to trigger a new consumer journey. Tripadvisor passages confirm that sensebreaking did occur, with numerous references to the ways in which the store's design—including the non-category-related name, lack of food, and aesthetic sparseness—suggested the unexpected in relation to the usual café schema (Web Appendix B, "Sensebreaking triggers"). Interviews and observations of customers slowing down (see Francis' passage in Table 1), doing mental double takes, showing signs of confusion and/or looking for familiar cues suggests the atmospheric design had its intended effect. Changes in atmospherics undermined customer expectations of category norms, which created a sense of being unsettled, and often resulted in expressions of uncertainty or confusion (Web Appendix B, "Sensebreaking consequences"). However, as well as serving to destabilize, they also signaled to customers the need for schema accommodation and eventual role shift (to student).

David and Paige's process reflects an iterative approach to sensemaking that is co-creative (Weick et al., 2005). In redesigning the servicescape, they made sense of initial customer disappointment by realizing that adhering to typical sector schema made sensemaking of their new practices difficult for customers. Instead, a servicescape that signaled to customers the necessity of schema accommodation or modification (Sujan & Bettman, 1989) was needed. The auditing and realignment practices resulted in the owners removing design elements that were not conducive to sensebreaking and sensegiving. Over time, these cues would continually be adjusted in line with shifts in customer input and the normalization of third-wave practices as a new model of service within the category. However, while the servicescape aspects of the journey represented a critical basis for shaping server and customer interactions, further reflexivity by both parties was necessary for consumer journeys to begin in earnest.

Activating the journey: Marrying competing logics and negotiating scripts

Once manifestations of existing schema—such as menus featuring abundant beverage and food options, sugar, milk, and other signals of customers' authority in determining the design of their service experience—were re-aligned, staff members and customers had to embody new, appropriate role identities for their revised journeys to begin. This required the co-creation of a shared mental model that would enable staff and customers to enter a mutually beneficial journey. For both customers and staff, two practices were initiated: *marrying competing logics* and *negotiating scripts*. Marrying competing logics enabled servers to embody the shift from "server" to what we label as "educator" in Fig. 1 (see Maude and Donny's passages in Table 1). The same practice saw customers give up some sovereignty and enter what we call the "student" role that was necessary for a satisfying journey to begin (Fig. 1). We evidence the shift in roles further with quotes from the Tripadvisor reviews (and Hannah and Glen's passages below) that contained advice to other customers on the need to adopt a repertoire of new roles, including "learners" and "nascent connoisseurs," while also framing baristas as "experts" and "teachers" (Web Appendix B, "New role expectations"). The second practice, script negotiation, flowed from and reinforced these new roles. Servers needed to move beyond mere knowledge provision and focus on sensegiving. Getting this right led customers

to (1) engage in script negotiation through the provision of preferences and (2) be receptive to shifts in power relations.

Servers become educators Although the move to an educator-student relationship is suggestive of shifts in power relations, server authority required customer receptivity to be effective. In addition, as with any effective educator, servers had to deploy knowledge in a way that enabled customers to engage in sensemaking through learning. This resulted in the need to find a balance between competing logics: too much product-centricity and expertise led to accusations of "being lectured to" (observed in situ and common to Tripadvisor complaints), while simply surrendering to customer demands would reinforce a non-educational journey. In marrying competing logics, servers faced unique challenges in embodying the educator role, due to their own received rigid knowledge structures (Rosa et al., 1999). Those with previous experience in service tended to fall back on a more passive, subservient approach to service (see Jackie, Table 1). Brandt, for example, had been in service jobs since his teenage years, from food and beverage roles to retail. At the time of the interview, he had just successfully passed his probationary period (he subsequently went on to be a shift manager for several years). He explained:

> Brandt: I was expecting to slip into [the role] easily because I thought I know about the product. I've watched people learn how to serve here but it's just not like that at all … The biggest obstacle was talking to people and not being scared of what was happening. I *wasn't* comfortable being confident and taking control. David wants someone who takes control of an easy transaction to, in the case of businessmen who challenge the philosophy but don't listen, someone who can dominate and make them walk away having listened to you. That requires a character trait that you develop or you put on. It's like acting.

Brandt's description of the process as a form of acting captures the range of skills needed to engage with and attempt to educate customers with varying levels of interest and receptivity. Hannah's passage in Table 1 illustrates the similar need for customers to act differently to enable co-creation with servers to happen. Moreover, Brandt's passage reveals the genuine struggles many servers experienced in their shift to the educator role, in which they needed to diagnose customers' sensemaking problems, interpret core cues to engage in sensegiving, and do so on a customer-by-customer basis. In the case of the disinterested customer, the challenge became how to align their preferences with what Specialty Co. could deliver. When customers were more open to the new approach, greater degrees of co-creation

were possible. Thus, for servers, the educational process highlights the complexity of managing a multivocal process where schema accommodation entailed embodying a mix of expertise, control, authority and professionalism to trigger journeys that offered consumers' desired levels of stickiness. That is, some journeys developed from sticky to smooth as the consumer made sense of the educational offer but desired to deploy that knowledge to choose a coffee best aligned to their existing preferences. Other journeys constantly oscillated between smooth and sticky as more consumers progressively sought deeper levels of engagement with the category including continually challenging their own preferences. Accordingly, regardless of the type of client and journey required, Brandt learned to engage in a role suggestive of authority and expertise tempered with respect, rather than subservience to customer expectations.

To ease them into the educational role, probationary staff began by covering early morning shifts (8–10 am), because that usually meant attending to regular customers who were familiar with Specialty Co.'s approach. As they progressed in their own learning about the shop's service concept, staff then proceeded to managing customer encounters at the till during the busy 10–11am period, which involved groups of tourists or others less familiar with Specialty Co.'s approach. During this time, probationers were monitored by experienced staff and allowed to make mistakes (unless they were struggling in a very difficult encounter). Each encounter was followed by an in situ debrief in the form of experienced staff asking questions that trigger reflexivity, such as "how do you think that went?", "could it have been different, better?" and "what could you have done to make it more effective for the customer?" For example (ethnographic note 3/7/2014), when a probationary member of staff (Donny) acquiesced to a customer's demands for the sugar dispenser, David was quick to gently reprimand him: "Don't let customers just have sugar without first reminding them that the coffees are extra sweet, and they should first try it before they add anything." This kind of coaching introduced an intensity into the service role that resembled an apprenticeship process whereby aspiring craftspeople are molded into skilled artisans (Campbell, 2005).

Interestingly, those with prior coffee service expertise could also struggle to make the necessary transition to the role of consumer educator. An exemplar is found in Geoffrey, who was so enamored with the Specialty Co. concept that he struggled to understand why customers would not be open to a more expansive view of coffee. His self-described tendency of "giving up on customers" not only earned the ire of David and Paige, but was also experienced by customers as pretentiousness, with the shop's script viewed as an unnecessary "lecture" (the opposite of sensegiving through "passion without pretense," see Web Appendix B). Geoffrey,

who eventually became a beloved shop manager (and later opened his own third-wave coffee store), described his transformation towards embodying the customer educator role:

> [Interviewer: Can you describe those difficulties?]
> Geoffrey: The fact that people hadn't really thought about coffee in a specialist way meant that people would ask why it would taste different with the milk. I'd be like, 'because there's milk in it.' There's a nicer way to put it. I had come here to seek experience, and people who hadn't done that I didn't really appreciate, I didn't really want them here. I was sort of appalled at their ignorance… Something like sugar in an espresso, something people have had for years with Italian coffees, it's difficult to say that we recommend our coffees without sugar. Immediately in the customer's mind they think 'Oh, pretentious wanker,' when the reality of the message is more nuanced, that the sugar makes the coffees taste acidic and sharp.

Geoffrey's passage reflects a common experience among servers in businesses that have adopted more of an artisanal approach to well-established categories (Ocejo, 2017), insofar as they expect customers to defer to their expertise and be intrinsically interested in exploring new experiences within a familiar domain. Like Brandt, Geoffrey needed to embody an educational role, but in his case, doing so was more about being empathetic—in his words, "fair"—to customers, neither pandering to their preferences nor seeing them as uncultured, disinterested parties undeserving of further engagement. Marrying competing logics enabled servers to engage in the second practice of negotiating scripts, which was central to co-creating educational consumer journeys. However, for that to work, customers also had to embody an educational role, that of the "student", through marrying competing logics.

Customers become students Throughout data collection we gained extensive insight into consumer experiences at Specialty Co. When confronted with the outcomes of realignment or server role changes whereby previously held schemas defined by customer-centricity were disrupted, most consumers faced initial periods of uncertainty, discomfort, and frustration, typical of those experiencing sensebreaking. In our sample of reviews on Tripadvisor, for example, we noted 39 passages in which it was clear that the disruption of pre-existing scripts was not appreciated and was resisted (Web Appendix B, "Response to sensebreaking"). Hannah and Charles, two regulars, explain how to successfully approach the initial encounter (see Table 1). Both descriptions contain evidence that a consumer sovereignty

logic is being decentered and replaced with a learning logic with a student–educator relationship at its center. Hannah describes how one needs to be open-minded, initially giving up power to learn about coffee, while Charles acknowledges his novice role, recounting his appreciation for David and Paige for teaching him what coffee could be. Another regular, Glen, who eventually worked with David on a variety of projects that drew on his chemistry background (including a championship-winning barista routine, a book, and a crowd-funded product innovation), describes becoming a student:

> Glen: I had to relearn how to understand what they were selling, and then after I kind of embraced the idea of something a little bit more technical, because I can appreciate technical sides of things. … People usually will use the words like, "I had a good coffee," "I had a bad coffee" and typically attribute that to either the machine or the guy behind the machine and not anything more than that. So, I thought I knew something, but I didn't really. In [my hometown] I could identify naïvely what was and was not a good coffee, but the definition of good was not well defined because I had no idea what I was looking for.

Glen's passage describes how sensebreaking involves the realization that there are discrepancies between a current situation and one's previous worldview. In comparison, sensemaking involves knitting cues together to form a coherent schema (Bingham & Kahl, 2013). For example, regular customer Richard describes his embrace of the student role at Specialty Co. by comparing his experience to a friend's:

> Richard: A great friend of mine, he always drinks espresso, and he likes it hot. The first time he went to [Specialty Co.] he had to send it back because it wasn't hot enough and they were very begrudging about it. He can't see why I'd want to go to that place. For me, I haven't asked for anything in particular because I'm interested in their advice because I recognize they've got a certain expertise that I haven't.

Tripadvisor reviews contained numerous references to role orientations to help other customers make sense of Specialty Co.'s approach and avoid the situation that Richard's friend found himself in. These included advising visitors to "be prepared," "understand what you are getting into" and metaphors suggestive of different roles and journeys, referring to Specialty Co. as a "cathedral" or "mecca" of coffee, and parallels with similar classes of products such as wine and tea. Finally, the store's coffee was often described as "real" and "proper," and production practices were referred to as "intelligent," a "new way," a "science experiment,"

or "the creation of artists" (Web Appendix B, "New mental models").

Having experienced sensebreaking through atmospheric cues, we find that customer responses fell into three types: *passive participation* (displays of lack of interest or impatience, such as interrupting servers in mid-explanation to ask that a coffee be chosen for them), *rejection* (angry outbursts invoking their sovereignty in the form of a command such as "just make me a coffee"), and *intrigued participation* (displays of eagerness in participating in the service encounter, such as listening carefully to the server, explaining preferences, and recounting previous experience in the category) (cf. Dong & Sivakumar, 2017). Servers were trained to respond to each, with sensegiving via script negotiation most relevant for the third (the first two were dealt with in a more forceful way, with servers often stating, "I would recommend this coffee for you, OK?"). Just as servers had to learn to become more reflexive about their responses and be ready to become an "educator," script negotiation resulted in a shift for the customers too, requiring them to embody a new role identity—that of the student—and participate more actively to co-create the journey.

In summary, marrying competing logics involved an interplay between sensegiving and sensemaking. While servers sought ways to blend an expert-centric logic with one that ensured customers would embark upon an education-oriented journey, customers had to take a somewhat subservient position to re-learn about coffee. This shift in customer practices and roles was also aided by the script negotiation practices initiated by servers. Through these practices, servers could identify the appropriate sensegiving mechanisms that would empower consumers to embrace the journey that had been devised for them.

Script negotiation Script negotiation emerged from and complemented the practice of marrying competing logics: as staff and customers alike engaged in the reflexivity necessary to adopt a new role, they recognized the need to engage in mutual sensegiving through the collection and provision of cues that would result in the construction and activation of a somewhat personalized journey. Specialty Co. had a standardized server script as part of their welcoming of customers to the store as described in the following ethnographic note:

> (8/6/2012): Paige welcomes customers and asks, "Is this your first time in the store?" Since it is, Paige explains how Specialty Co. is different from other shops, preferring to focus on the unique flavor of individual coffee lots that change with seasonal availability. She then runs through the categories and offerings on the board, looking at the customer the entire

time. The script takes no more than 30 seconds to go through but does not feel rushed. At that point, customers begin to engage, often providing cues in the form of preferred blends or styles, preferred brands, or other cues that are then used by Paige.

However, servers were also trained on how to adapt the script through what Paige refers to as "degrees of dilution." Paige, who often provided service training to the novice staff, describes how even the most experienced baristas struggled with this practice:

> Paige: The first thing you've got to get into staff's heads is what we do and why, so that they can, in varying degrees of dilution, pass it on. It's the varying degrees of dilution that's difficult because we're training people to be savvy, to watch the person in front of them. What did they say? How did they ask for their drink? What's their demeanor? In one sentence you can glean so much information and that's where you step forward. That's why it's tough on till and it's [why] I've had staff members that couldn't be more onboard with it [the product concept], but just can't deliver.

Whereas previous research suggests that sensegiving is primarily top-down or unidirectional (Press & Arnould, 2011), passages such as Paige's above reveal a more adaptive process consistent with mainstream pedagogical philosophies. Furthermore, we note recent clarifications that co-creation is not the same as co-production and therefore does not always require active participation by all involved (Vargo & Lusch, 2016, p. 8). Just as many teachers embrace the concept of "child-centered education" but would be wary of allowing students to determine the curriculum, staff at Specialty Co. want new customers to have a positive experience, but do not assume that the customers themselves are best positioned to determine how they should drink their coffee. Donny's comment in Web Appendix D ("Triggers") echoes a common parental strategy to distract children as a means of coaxing them into a new behavior.

As Paige recounts, while customers were making sense of the new servicescape, staff were gathering clues related to the customers' experience and expectations. Whereas novice and unsuccessful servers simply stuck with the basic training script which outlined Specialty Co.'s point of difference, more successful servers used the service script as a starting point and adapted it for each customer they dealt with (see passages from Donny and Brandt, Table 1). To do so, they attempted to "read" the customer and build a connection between the store's concept and shared frames that could co-create a new schema (Moreau et al., 2001). In so

doing, servers and customers reached "understandings that are close enough … in ways that allow coordinated action" (Maitlis & Christianson, 2014, pp. 66–67).

Although servers strived to bring the owners' concept and attendant service ideals to fruition, they found that, to produce a successful outcome, education had to be anchored to a customer-held frame to enable what Rosa and Spanjol (2005, p. 201) call "analogical transference," which is "the borrowing of structure and meaning from source domains of experience to assist in the interpretation of novel information." One cue was country of origin, with servers often picking up on an antipodean accent or reference that inspired them to adapt the script to relate Specialty Co.'s coffee to the types served in Australia. Other cues included reference to a preferred roast (e.g., dark, French or Italian) or preparation style, allowing the server to quickly suggest comparative options. For example, Vladimir would often anchor his conversation in a stronger-to-lighter continuum as he described the order of the coffees on the menu. Brandt, who found figuring out how to connect to customers "exhilarating," "challenging" and "intellectually engaging," would experiment with new ways to explain the café's ideology. For example, drawing on previous experience in wine service, he would use the concept of *terroir* as a metaphor to explain the significance of "single origin" coffees. Others employed more everyday analogies: Geoffrey's favorite was that of cake mix. He would explain that just as changing ingredients and processes when making a cake would change the flavor, so was it with coffee. These script adaptations functioned as simple sensegiving devices and enabled co-creation to occur, as consumers were offered a personally relevant starting point to a journey.

Despite some initial skepticism, a common observation was that consumers gave servers the benefit of the doubt, and subsequently expressed surprise at how their experience with the coffee had conformed with the server's prediction. Tentatively, these more open customers would begin to increase their engagement with servers, providing insights into their changing preferences, and affirming that sensemaking had occurred by, for example, remarking that specialty coffee offered parallels to wine or tea. It was not unusual for previously uncertain consumers to thank servers as they exited the café and acknowledge that they were "won over." Importantly, roles and scripts were dynamic, even for more experienced regulars. The ethnographic note in Table 1 contains one such example, in which David was introducing further stickiness into the journeys of regulars by asking them to reconsider Brazilian coffee. Brazilian coffee is typically regarded as the preferred industry standard and thus suffers from a kind of reverse snobbery (e.g., emically referred to with derision as "trad") from more experienced customers who had transitioned to what they saw as more nuanced and complex flavors. To get regulars to rethink these default preferences, David would counter reluctance with a stern facial expression or a gentle prompt such as "no, c'mon" that would signal his educator status and the need for a customer to return to student mode.

As the journey took shape and began to extend, we also saw more engaged customers seek out stickiness by adopting a stance that represents a role identity high on skill orientation (Martineau & Arsel, 2017) by appraising the extent of their knowledge. This was reflected in the commonly observed practice of asking servers not to tell them which coffee they were being served. For example:

Mel: I have an Excel sheet [laughs]. The rule for myself is that I'm going to taste [the coffee] first. So, I would tell David, 'Don't tell me what it is, I'm going to taste it.' After I taste it, I write it down, and then I'll go back to see the flavor notes that they suggest and where it is from. The idea is that I want to see over time whether I can taste the provenance. I think at the end of the one year I tasted 98 estates and 20 countries.

This passage illustrates Mel's desire to find out what she may not know; she voluntarily participates (Dong & Sivakumar, 2017) in the role of learner and creates a game that tests her skill and then engages with servers to suggest changes in taste descriptors. A sign of further journey stickiness was customers' use of technical, "in-group" terms when speaking with servers (and signaling to like-minded other customers), such as "dialing in" (baristas' code for setting the daily recipe in terms of grind, weight, and water, for each roast); "potato characteristics" (an undesired flaw common in the otherwise sought-after Rwandan coffee) or when discussing David's most recent blog posts. It was not uncommon for loyalists to extend their educational journey further, either by seeking out like-minded cafés elsewhere when travelling or by bringing their knowledge into their own home, triggering further engagement with staff. For example:

Richard: I got introduced to [Specialty Co.] and started to think more about it and since then I now have a weekly delivery from [brand name]. So, they send me every week a bag of beans which they roasted on a Thursday, I get sent it on the Friday and that will last for the week and then we get a new one and the provenance of the beans that it's come from and how it's been prepared, is all itemized. It's fascinating; you start to appreciate the differences and if you've got a reasonable source of fresh coffee that is different every week it gives you a great opportunity to understand the differences from geography but also from the way

that the beans are prepared, whether they're washed or unwashed or whether they're pulped or not pulped, all that sort of stuff.

Richard's passage reflects his role as a continuous learner who strives to acquire more knowledge. He then deploys this understanding when engaging with servers at Specialty Co. to signal that he shares the same schema and desires more knowledge—not only about what is currently on offer, but also more esoteric information, such as how each of the three available preparation methods might impact flavor. This further reinforces the dynamic nature of role relations within journeys, as customers like Mel and Richard (and the first author, referred to in the Brazilian coffee field note; see "New mental models" in Web Appendix D) switch among student, nascent expert and, as we explain below, peer roles. Furthermore, servers similarly shift their role-driven practices, reflecting changes in power relations as journeys take shape and become more complex or stickier over time.

In summary, marrying competing logics and script negotiation created the reflexivity necessary for staff to develop a role identity that would enable journey activation (Akaka & Schau, 2019). To embrace the educator role, staff needed to consider their expertise in the context of customers' sensemaking needs. In so doing, they deployed sensegiving mechanisms that contained superordinate shared meanings that were also personalized, enabling consumers to embrace Specialty Co.'s logic. Whereas Rosa and Spanjol (2005) identify that initial sensemaking comes from complex stories, we find that co-created journeys start with simple sensegiving devices that subsequently provide the basis for greater complexity to emerge. Critically, we also identify the multivocal nature of these interactions as customers deepen their engagement in their journey (within and outside the confines of Specialty Co.) and begin to offer personalized narrative devices to staff, who then can use this for a new iteration of sensemaking.

As shown in Fig. 1, consumers who had made sense of Specialty Co.'s offer then engaged in two types of journeys: (1) one that was primarily smooth, which involved operating within the parameters of Specialty Co.'s offer (i.e., they understood that coffee was diverse, knew their preferences, and therefore entered into a predictable journey in each encounter) or (2) one that was extended in unique ways where consumers' identity was increasingly connected to further exploration of coffee (and, in some cases, similar emerging categories such as craft beer).

Extending the journey: Evangelizing, expanding collective knowledge, and impression management

Extended journeys were characterized by two significant changes. First, consumer roles shifted from student to peer, with further shifts in power relations between them and the staff. Second, extended journeys saw consumers enter a community of practice, or group of like-minded others (customers and staff) focused on upskilling in an area of personal passion (Wenger et al., 2002). Therefore, these extended consumer journeys are characterized by a high degree of personalization and co-creation (cf. Schau & Akaka, 2021). Journey extension involved three co-creation practices: *evangelizing, expanding collective knowledge*, and *impression management*.

Evangelizing, whereby "members act as altruistic emissaries and ambassadors of good will" (Schau et al., 2009, p. 34), is a practice that co-creates value for the communities that consumers are part of. Importantly, in this case, evangelizing meant consumers championing the educational approach to other consumers. This occurred both in Tripadvisor passages defending Specialty Co.'s approach and pushing back against other reviewers, as well as in face-to-face interactions. Emma's passage in Table 1 provides an example of this, whereby the now more educated customers would seek greater knowledge on technical production issues from servers or owners of other cafés that sold single-origin coffee. Consumers such as Emma draw on deeper levels of knowledge to apply legitimacy litmus tests to judge the sincerity of seemingly like-minded others, while Anna deployed the knowledge she gained from Specialty Co. to engage with the emerging specialist coffee scene in her home country:

> Anna: When I go home [Russia] I look for such shops. If they sort of look remotely like [Specialty Co.], I want to know to what extent they are similar to what they are doing here. If I go to a shop where I've felt that they are really excited about what they're doing, then I'll ask them, 'Oh, have you heard about this?' in a way to sort of try to influence them.

Tripadvisor reviewers provide examples like Anna's, explaining how Specialty Co. expanded their knowledge of coffee and inspired them to learn even more, while also shaping their category expectations and standards (see Web Appendix B, "Modified category-related behaviors"). The internalization of Specialty Co.'s concept led evangelists to deploy their newly found knowledge when visiting other specialist coffee shops. Customers such as Emma noted how they would drop cues into conversations with servers about their city of origin or mention Specialty Co. as an expression

of status and a signal to those in the know to prove their coffee credentials. They would also ask more penetrating questions at other cafés, offer technically sophisticated responses and make thoughtful suggestions of coffees and preparation methods, expecting servers to engage them as peers.

A peer identity also emerged through the practice of *expanding collective knowledge*. This is exemplified by Mel, who integrated Specialty Co.'s approach within her professional studies on product origin and traceability to discuss with David the veracity of sustainability and ethical claims made by the independent coffee sector. In turn, this line of questioning led David to update his own knowledge, exploring topics such as the impact of growing coffee on wildlife, the sustainability of the expansion of coffee farming, and how to authenticate claims of origin. Mel also drew on her cultural background (Chinese-Malay) to engage servers about tasting notes. Her experience revealed the culturally situated nature of flavor profiles and led the Specialty Co. staff to use an expanded range of descriptors, which eventually evolved into a new way of writing tasting notes to be more accessible.

> Mel: I remember being excited about tasting Jackfruit in Ethiopian natural types. I think there were times that I tasted [another flavor type] in the Javanese one as well. Never tasted that in coffee before. *[I: Did you tell those guys?]* Yes … people relate to taste based on what they have tasted before. So, they would write something along the line of stone fruits. Then I said Jackfruit, because in some fruits you have the taste of sour, in some fruit you have the taste of sweetness. Then you have the aroma as well. For me Jackfruit has all the different spectrums of flavors. That's kind of fun. But also sort of having this awareness that we might be tasting the same thing, but we're describing it differently.

As an example of customer-initiated co-creation, Mel's culturally generated insights shaped changes to Specialty Co.'s store design and script behaviors. First, servers used Mel's insights to engage other customers, both in script form and with an expanded set of descriptors on the menu board. Mel's insights also were used by other customers, many of whom were familiar with South-East Asian flavors, to expand their own sensory repertoire. Second, the realization that tasting notes were culturally situated led David to reconsider the value of notes altogether. In a subsequent blog post he announced that Specialty Co. had moved to much simpler notes focusing on dominant flavors, as overly complicated notes often made customers feel incompetent when they could not perceive subtle flavors.

For Mel and others, the development of expertise led to a sustained journey that resulted in a further updating of their schema while simultaneously developing new expectations of the staff. The passages in Table 1 (Maude) and from Anna and Mel indicate that role relationships shifted from student–educator to peer-to-peer, resulting in an expectation that servers would respond in kind. This expectation is also reflective of customers' own embrace of a craft, rather than commercial, logic (Dolbec et al., 2022). Other evidence of the shift in relations and resulting expectations came when we noticed that some customers reported decreasing their patronage of the café when Specialty Co. focused on new business opportunities. The owners' absence from the store as they worked on developing their new venture, coupled with the loss of three early staff, meant that the remaining (and usually less experienced) servers focused more on managing a smooth customer journey than on further developing expertise. As Al describes:

> Al: Those old staff members that seemed to have quite an in-depth knowledge and would talk to me about coffee aren't there anymore. … I don't really think I've learned much in the last six to eight months. There's just a lot younger staff members there at the moment. I think that I definitely experience a kind of one-size-fits-all service in the sense of "yeah, this one is a really good one, you'll like it," but not being told why. Whereas in the past it would have been like my palate would have been better understood. Now I'm not expecting a coffee shop to remember every single coffee every single person has, but there was definitely more of a 'we know that this guy likes this and therefore he might be interested in trying something completely different down the end of the spectrum because we're trying to enhance his relationship to coffee.' I don't experience that anymore.

Al's decrease in patronage is a reminder that, contrary to expectations, the engagement that can initially lead to extended journeys can also lead to a diminishment of commitment.

Finally, *impression management* was a means by which peers signaled their identity. This took many forms and included assessing customers for their potential as community members and welcoming and engaging with new, seemingly like-minded customers (see Ian and Mikhalia's passages in Table 1). Other examples of this practice involved using expert language as described earlier, commenting on David's recent blog posts, watching and discussing coffee-related events including competitions, and engaging with complex ideas such as those covered in David and Glen's blog posts on the science of coffee. For example:

Charles: Just everything about the coffee industry, all the things that go into coffee and what can affect coffee—so obviously some of it is pressure, grind size, all that type of stuff. Water. I could probably recite quite a lot of Glen's talk - not necessarily understanding it all - at least the first time I heard it, when he was testing this, that and the other, and parts per million. But as he's refined that talk, it's not necessarily dumbed down, but it's more relative to the normal people as opposed to scientists. So now when I go to places, I have my Beanhunter app and I go and find coffee or I say to David and Paige 'I'm off to so-and-so, is there anything good?'

As well as deepening one's engagement in the category like Charles describes, other actions often involved defending the café, with regulars submitting Tripadvisor reviews to counter criticisms and signal to like-minded others that Specialty Co. was worthy of visiting (see the passage on "Distinction" in Web Appendix C). Finally, regulars would try and enhance their status by sharing bags of externally sourced beans with Specialty Co. In one case, the first author provided David with a Robusta-Arabica (two species of coffee) blend used by a Singaporean barista as a pathway to shift locals away from more bitter (Robusta) coffee towards a lighter (Arabica) roast. Specialty Co. had a policy of acknowledging status by serving the best of such shared beans as a special "guest coffee" on the menu board. In these cases, the coffee was credited to the customer, providing them with enhanced status among community members. The very best of these were immortalized in a display work developed by David and placed in the seating area at the entrance of the café (see Web Appendix F).

Discussion

This study focuses on educational consumer journeys, adopting a sensemaking perspective to explore how providers and customers co-create meaning. We find that journey creation and extension consist of dynamic and ongoing cycles of sensebreaking, sensegiving and sensemaking. Although previous work highlights the importance of schemas in knowledge innovation or category expansion (Rosa et al., 1999; Rosa & Spanjol, 2005; Sujan & Bettman, 1989), prominence is given to the communication practices of producers, with consumers fulfilling a mainly passive role. In contrast, we show that consumer journeys are co-created, and identify the meaning-making practices that are used by all parties to enable meaning enactment. Specifically, we unpack a set of sensebreaking, sensegiving

and sensemaking dynamics, involving shifts in roles, power relations, and practices.

In doing so, we also challenge and extend previous work in customer education. A successful educational journey is enacted when service context, roles and practices align. Whereas education has been regarded as a one-way activity that is largely done *to* customers (Bell et al., 2017) and that relies on the authority of skilled providers (Ocejo, 2017), we find that it is co-created, dynamic, and potentially empowering. The longitudinal nature of our study reveals the complex and tension-ridden nature of educational consumer journeys. We capture the challenges involved in sensebreaking, sensegiving and sensemaking that occur as staff and customers unlearn old roles and adopt new ones, grapple with new concepts that expand category boundaries, and, where desired, begin to explore new pathways that expand identities and shape the evolution of expectations and commercial practices. As a result, we identify managerial implications arising from the need to cede control to consumers as part of the journey process (Akaka & Schau, 2019) that can be transferred to other contexts in which education, or other knowledge-based innovations, may offer new sources of value for consumers and marketers.

Consumer journeys as practiced sensemaking

In extending research on sensemaking in marketing, we make several contributions to our understanding of consumer journeys. Although previous research has explored sensemaking in the marketing context, the focus has been on how a single individual engages in sensemaking, rather than on how sensemaking occurs through and enables co-creation (see Press & Arnould 2011 for an exception). For example, Rosa and Spanjol (2005) focus on the power of storytelling as a sensemaking device and how the content of stories shifts over time. Reflecting the logic of dominant design in innovation, these authors show how sensemaking stories move from complex to simple over time, as category stakeholders (journalists and marketers) come to a consensus on the nature of the innovation. In contrast, we find that sensemaking stories in co-created journeys are more dynamic, shifting between simple and complex depending on the alignment of context, participants and practices over time. Expressed differently, whereas sensemaking is defined as a socio-cognitive construct, we show that it is also embedded in and emerges through material and social practices deployed by individuals throughout the journey (Akaka & Schau, 2019).

Whereas previous research suggests consumers are receivers of information in the form of top-down sensegiving (Rosa & Spanjol, 2005), we identify seven practices that underpin shifting information asymmetries, power

relations, and identities of staff and consumers. As a result, meaning-making practices involve an iterative cycle of sensebreaking, sensegiving, and sensemaking as each party engages in the reflexivity essential to journey creation and extension (Akaka & Schau, 2019; Schau & Akaka, 2021). This process is often far from smooth and entails iteration, particularly on behalf of servers, to craft simple stories or scripts that enable co-creation, adapt them to fit each consumer, and where desired, add greater complexity to help consumers expand their journeys. It also requires reflexivity regarding role identity and power relations, as servers must shift roles from educator to peer as journeys extend. Even at this stage, stickiness must be introduced to re-trigger sensebreaking and further schema accommodation, and must be done respectfully yet forcefully, as with the example of David trying to overcome customer bias towards Brazilian coffee. Therefore, our contribution lies in extending sensemaking to account for co-creation in consumer journeys, and in unpacking the dynamic nature of an expanded set of meaning-making practices over the length of extended encounters while also accounting for shorter, one-off service interactions.

Consumer journeys involve different sets of relations— staff–customer, staff–staff, and customer–customer as well as the relation of all to the servicescape. In examining the multivocal nature of journey co-creation and extension, we find that customer-to-customer interaction (CCI) plays an important role in the sensemaking process. Although we emphasize CCIs in journey extension primarily through communities of practice, we believe that CCIs have a role to play in the other parts of the journey. For example, Tripadvisor reviews are a customer-generated form of sensegiving that alerts potential customers to the need for schema accommodation. Furthermore, we observed how direct and indirect interactions, including simple vocal expressions of confusion, surprise, joy and anger, played a sensemaking role. For example, whispered comments of "it's unusual" or "not like a normal coffee shop" were common in the store as customers lined up to order. These help not only to confirm that sensebreaking is occurring and that it is a shared experience, but also potentially reflect customers' initial engagement in schema accommodation. Indeed, commonly heard claims affirming different flavors and desirable, if surprising, outcomes may help reduce anxiety among other customers and help ease them into a new journey. Furthermore, engagements with staff and subsequent discussions among friends that coffee is for example "just like wine," help with the journey co-creation process, and often trigger further explorations between customers that lead to further journey extension. Future research should explore these different types of CCIs on journey cocreation, including their impact on the effectiveness of staff and servicescape sensebreaking and sensegiving practices.

Research on other value-generating constructs, such as community, play, and skill have noted the journey-like nature of value creation (Muñiz & O'Guinn, 2001; Seregina & Weijo, 2017; Woermann & Rokka, 2015). In each case, for value to be experienced, identity roles must be embodied, often through, sustained effort, learning, and disappointment (Siebert et al., 2020). Although these studies often focus on the subjective experience of embodying each form of value, their findings indicate the practices that can be used to enact such journeys and, critically, to sustain them. In the context of cosplay, for example, Seregina and Weijo (2017) identify how play-based journeys deteriorate, moving from identity-driven consumption to decreased engagement or even exit. In that study, peer-like consumers felt alienated from their play as the effort required to better each cosplay performance increased. In such cases, our findings suggest that journeys might need to be extended in different directions, possibly through embodying an educator (rather than peer) role and engaging with novices. Similarly, marketers of extreme sports could introduce new sources of stickiness that could temporally misalign practices to trigger the mastery of new skills and extend journeys with users (Woermann & Rokka, 2015).

Customer education as a co-created journey

This study goes beyond viewing customer education as mere information provision and instead reveals its potentially critical role in consumer journeys, particularly when existing category schemas are being meaningfully disrupted. We find that both providers and customers benefit from adopting an educational orientation. By assuming new roles to co-create journeys, participants add meaning and innovation to established categories, upskill customers seeking new experiences, and create greater engagement, not only between customers and providers but also within communities of like-minded customers. These powerful outcomes are achieved through a blend of deliberate changes to the servicescape as well as co-creative practices—an iterative approach involving sensebreaking, sensegiving and sensemaking—which eventually lead to changes to server and customer role identities.

Whereas existing research defines customer education in terms of one-way information transfer (Bell et al., 2017), we find that seeking to engage and empower customers through education involves role embodiment, co-creation, and evolving power relations and expectations over time. We contribute to scholarly understanding of both customer education and consumer journeys, showing the arc of how such journeys are designed and managed, as well as how

shifts in engagement impact on the veracity of touchpoints and interactions (Becker & Jaakkola, 2020). We show that customer education involves engaging in practices that prompt new role adoption that are necessary to enact a journey (Akaka & Schau, 2019; Schau & Akaka, 2021). Importantly, the implementation of customer education strategies relies on meaning co-creation, entailing careful attention to alignment across servicescape design, server role, and customer knowledge to enable the development of the shared schema necessary for educational journeys to take place. In adopting the perspective of a journey, we show how education involves sensemaking devices such as stories (Rosa et al., 1999) allowing the consumer to place themselves in the journey being offered (van Laer et al., 2014). Thus, although we identify that some aspects of education are consciously designed, satisfying consumer journeys emerge over time through interactions among participants, practices and context.

There are many educational contexts in which atypical schemas or scripts are deployed which can also benefit from the perspective we offer here. For example, studies of specialist firms in the artisanal economy report staff frustration with unresponsive or disbelieving customers (Ocejo, 2017). Staff typically react by either falling back on typical schemas (e.g., offering a full range of products) or engaging in subterfuge to impose a "better" solution on the customer (Ocejo, 2017). In either case, information has been provided, but no journey has been initiated, leaving customers skeptical, ignorant, or frustrated, while the specialist firm struggles to legitimize its offering. Research on craft specialists identifies the importance of practice expansion to enhance market dynamism and value creation (Dolbec et al., 2022), but represents such practices as largely performative, whereby skilled artisans display their skills to entrance like-minded customers. In this study, we emphasize the ways in which meaning-based journeys must be crafted through practices to enable staff and customers to embody the roles necessary for education and co-creation to occur.

Managerial implications

Creating value through educational journeys Our findings indicate that value can be created in established categories through educational journeys. We show that an educational approach can be vital to firms engaged in a so-called artisanal economy, where an emphasis on craft, origin, and diversity may also require the adoption of an alternative market logic (Dolbec et al., 2022). For example, Ocejo (2017) shows how, in craft-focused service businesses in sectors dominated by generalist chains focused on smooth journeys, staff struggle to educate customers about new possibilities. Considering our findings, this might be indicative of lack

of staff reflexivity, which we have shown is necessary to trigger meaningful educational journeys with customers. As seen in the case of Specialty Co., providers can maintain an expert-driven logic by extending the performative aspects of craft to include working with the material customers provide. The result is a more personalized approach that creates the potential for longer consumer journeys with a larger number of customers.

Our findings also have implications for training and reward structures. Specialty Co. deliberately moved away from a model focused on hiring part-time staff (such as students). While employing transient employees is common in the UK where service is seen as a temporary role mainly for young people, the case of Specialty Co. highlights the benefit of hiring staff whose values are consistent with the organization's identity and image. It is worth noting that Specialty Co. also had a longer probation period (six rather than the three-month standard), paid above the industry average, and encouraged and supported staff to invest in their own knowledge and skill. Owner David often made it clear that the desire was to combine the potential of single-origin coffee with the service ethos and consistency of larger chains, leading to a recruitment brief that ignored previous sector experience in favor of a focus on hospitality.

Our findings suggest that for marketers seeking to engage in educational journeys, an apprenticeship-like approach where newer employees can emulate and get feedback from more experienced staff is essential. Therefore, developing educators in such service settings also requires sharing best practice to make tacit knowledge more explicit. Relatedly, retention of more experienced staff appeared to be vital to retain longstanding customers who could experience a reduction in satisfaction without the consistent educational challenges. Sabbaticals or short-term placements in like-minded companies, which are used in industries such as fine wine and film production, could be deployed to increase retention.

Although we focused on a category disruptor and strategic specialist, our findings have implications for a wider set of firms. Starbucks, for example, has sought to leverage its purchasing power and stave off competitive threats by expanding its offerings to include a range of single-origin coffees in what it terms "reserve" cafés. Although the emphasis is on targeting more knowledgeable customers prepared to pay a premium for better coffee (Dolbec et al., 2022), this approach could be combined with an educational focus that reinforces the brand's historic emphasis on skilled baristas, and on creating brand loyalty through extended journeys, while enhancing its authenticity and status. Although a large chain's business model does not allow for the level of personalization of Specialty Co., established generalists could still benefit from offering educational events and

establishing collaborations with high profile insiders such as David, similar to the championing of like-minded brands by larger specialists such as BrewDog (a Scottish craft brewery with international branches) and Shinola Detroit (founded as a watch maker and now purveyor of a range of goods manufactured with a "craft ethos").

Customer education also occurs within a supportive servicescape. Research suggests that servicescapes can enable participation in activities and absorption of knowledge (Pine & Gilmore, 1999). Specialty Co. was designed to deliberately break sense by stopping consumers from automatically slipping into the dominant category script. However, it was also designed to highlight skilled performances of servers and to provide enough cues that could be used by consumers to make sense of the journey. Seemingly small design decisions, such as the choice of a professional but non-branded uniform resembling the cultural codes of table service at high-end restaurants, the strategic placement of awards, coffee information (e.g., a flavor wheel), and various equipment used to make drinks enabled consumers to quickly recognize the need for schema accommodation and subsequently piece together a new mental model that would help them embody the appropriate role. If the aim is to break with pre-existing schemas focused on smooth journeys, managers would be well advised to design their servicescape with clarity of purpose, including significant use of strategic absences, as well as placement of cues to encourage the cognitive processing that is central to sense-making for educational journeys.

The extended immersion with the service detailed in this study leads us to conclude that in many settings, particularly those with sensory and/or emotional elements, servicescapes need to be designed for pleasurable or joyous experiences that drive consumer journeys forward. In the case of Specialty Co., we noted customers' delight when discussing flavor notes within groups or discovering that espressos were naturally sweet, for example. These "aha!" moments had an important role to play not only in the initial engagement, but also in discovering the long-term benefits and enjoyment of education.

Building and leveraging peer communities This study shows that consumer journeys can be extended through communities of practice (Wenger et al., 2002), thus increasing loyalty. Education is central to many brand-community strategies, often as a means of deepening engagement with the brand by enabling consumers to build and extend skills with like-minded peers (Schau et al., 2009). We emphasize that aside from the benefit of extending their knowledge, consumers also acquire the cultural capital necessary for community membership and enhanced status. Furthermore, we find that certain community practices are more present at

specific points in the "sticky" educational journey (Siebert et al., 2020), with provider-driven practices triggering journeys and interactive practices sustaining them over time.

As noted earlier, we emphasize the shift as customers move from extracting primarily functional value to identity-based value as their engagement in the category deepens (Schau & Akaka, 2021; Siebert et al., 2020). As they extend the journey, consumers begin engaging in practices that enhance their knowledge of coffee, often through grooming (sharing knowledge of taste, like-minded cafés, blogs, other brands) and customizing (Schau et al., 2009), such as when Mel adapted tasting notes to her own cultural context and shared it with others. Practices such as badging (Schau et al., 2009) (e.g., selling coffees discovered by customers as guest products) enable social affirmation of consumers' status and highlight creative ways in which managers can leverage customers' personal education to enhance not only customers' experience but benefit the organization. This is well illustrated by practices such as evangelizing, which help increase community resources while further developing brand reputation.

Educational journeys as cultural innovation Finally, educational journeys represent a form of cultural innovation that can lead to market disruption in saturated categories. Cultural innovation has been offered as an alternative form of value creation for challenger brands and draws on sociological insights to reframe categories in ways that add deeper meaning for consumers (Holt, 2020). However, to date, cultural strategies have focused primarily on mythic storytelling at the brand level, rather than focusing on disrupting the consumer experience. Educational journeys, such as the ones explored here and reflected elsewhere in the growing artisanal economy, provide the mechanism by which cultural innovations can be activated.

Educational journeys, particularly stickier consumer journeys, require work. However, not all consumer work is alike, with a growing stream of research identifying the value that can emerge from meaningful, self-actualizing work (Campbell, 2005). This suggests new ways that category value can be created by marketers. Disrupters could create educational journeys that provide the basis for consumers to reassert sovereignty in their consumption and connect with like-minded others in communities of practice. These journeys are also more likely to foster innovation and challenge category assumptions, as illustrated by the challenging of culturally specific flavor norms described above. For market Goliaths, small-scale disrupters like Specialty Co. represent a vanguard of a potential future mainstream shift in consumer expectations, thus providing larger

generalists an opportunity to differentiate and enhance their journeys by adding stickiness through educational events, special ranges, sub-brands, or partnerships.

Conclusion

Our research reveals that customer education involves engaging in meaning-making practices and embodying specific roles that enact journeys. Instead of simply providing information to customers or targeting a small set of innovators, this study suggests that education can be made to appeal to a broader public, expand value for firms and consumers, and revive markets. Future research into the applicability of these findings in other category contexts and in relation to journeys framed by different value-creating mechanisms (such as play, spirituality, deceleration and so on) should be conducted to expand knowledge of journey co-creation. Furthermore, while we have focused on a strategic specialist, we believe more generalist providers can also offer educational elements to their offering, even if it is in the form of mass-customized stickiness or empowering touchpoints provided by stores, staff, and artificial intelligence. Future research is therefore needed on the schema management practices (and their supportive policies) that enable generalists to add some educational stickiness to otherwise smooth journeys.

Future research could also examine some of the mental processes underpinning the sensemaking practices identified herein. For example, openness to change could help account for different consumer reactions to sensebreaking and sensegiving (Rodas et al., 2021). Openness to change also requires cognitive flexibility or the "mental characteristic that facilitates restructuring, adapting, or appropriately updating mental processes and strategies" (Buechner et al., 2022, p. 267), which we have demonstrated is necessary for combining and receiving different information to enable the co-creation of new scripts and to activate journeys. Cognitive flexibility also relates to learning styles, which, based on our findings, we predict may shift throughout the journey. For example, in activating the journey, servers encouraged consumers to embrace knowledge depth, a process that draws on existing knowledge to learn about similar experiences (e.g., references to notions of terroir in wine or even simple rhetorical devices such as cake mixes). However, once a new mental schema has been embraced, stickiness can be added through knowledge breadth whereby consumers (e.g., David encouraging knowledgeable customers to rethink previous prejudices about Brazilian coffee) and indeed staff (e.g., Mel informing servers of new flavor notes) draw on the new schema to learn about different experiences (Buechner et al., 2022). Examining the moderators

underpinning each learning style, as well as the triggers that enable the shift between them as journeys develop, would provide further insights into journey management.

Our study focused on the co-creation of journeys over time. We did not focus on the more micro aspects of the journey, as evident in research on different engagement levels within communities (Martineau & Arsel, 2017). How staff capabilities are nurtured to manage multiple journey types, and how customers could be moved to more involved journeys should be addressed in future studies. For example, what are the signs that someone is ready to shift from a functionally oriented customer journey to a deeper consumer journey? Could servers gain value from using practices associated with small-scale innovations that could trigger just enough stickiness to change the direction of the journey without frustrating or excluding those content with their present smooth journey? Finally, we have identified how extended journeys may potentially regress. The actions providers can take to recover regressed journeys also deserves further research.

Declarations

References

Akaka, M. A., & Schau, H. J. (2019). Value creation in consumption journeys: Recursive reflexivity and practice community. *Journal of the Academy of Marketing Science*, *47*, 499–515. https://doi.org/10.1007/s11747-019-00628-y

American Psychological Association. (n.d.) Schema. In *APA dictionary of psychology*. Retrieved February 12 (2023). from https://dictionary.apa.org/schema

Becker, L., & Jaakkola, E. (2020). Customer experience: Fundamental premises and implications for research. *Journal of the Academy of Marketing Science*, *48*(4), 630–648. https://doi.org/10.1007/s11747-019-00718-x

Bell, S. J., Auh, S., & Eisingerich, A. B. (2017). Unravelling the customer education paradox: When, and how, should firms educate their customers? *Journal of Service Research*, *20*(3), 306–321. https://doi.org/10.1177/1094670517691847

Bell, S. J., & Eisingerich, A. B. (2007). The paradox of customer education: Customer expertise and loyalty in the financial services industry. *European Journal of Marketing*, 41(5/6), 466–486. https://doi.org/10.1108/03090560710737561

Bingham, C. B., & Kahl, S. J. (2013). The process of schema emergence: Assimilation, deconstruction, unitization and the plurality of analogies. *Academy of Management Journal*, 56(1), 14–34. https://doi.org/10.5465/amj.2010.0723

British Coffee Association (n.d.) *Coffee consumption* Retrieved September 19, from https://britishcoffeeassociation.org/coffee-consumption/

Buechner, B. M., Clarkson, J. J., Otto, A. S., & Ainsworth, G. (2022). Political ideology and cultural consumption: The role of flexibility in shaping liberal and conservative preferences for global-local experiences. *Journal of the Association for Consumer Research*, 7(3), 266–276. https://doi.org/10.1086/719582

Campbell, C. (2005). The craft consumer: Culture, craft and consumption in a postmodern society. *Journal of Consumer Culture*, 5(1), 23–42. https://doi.org/10.1177/1469540505049843

Dolbec, P. Y., Arsel, Z., & Aboelenien, A. (2022). A practice perspective on market evolution: How craft and commercial coffee firms expand practices and develop markets. *Journal of Marketing*, 86(6), 50–69. https://doi.org/10.1177/00222429221093624

Dong, B., & Sivakumar, K. (2017). Customer participation in services: Domain, scope, and boundaries. *Journal of the Academy of Marketing Science*, 45(6), 944–965. https://doi.org/10.1007/s11747-017-0524-y

Eisingerich, A. B., & Bell, S. J. (2008). Perceived service quality and customer trust: Does enhancing customers' service knowledge matter? *Journal of Service Research*, 10(3), 256–268. https://doi.org/10.1177/1094670507310769

Gioia, D. A., & Chittipeddi, K. (1991). Sensemaking and sensegiving in strategic change initiation. *Strategic Management Journal*, 12(6), 433–448. https://doi.org/10.1017/cbo9780511618925.010

Hamilton, R., & Price, L. L. (2019). Consumer journeys: Developing consumer-based strategy. *Journal of the Academy of Marketing Science*, 47(2), 187–191. https://doi.org/10.1007/s11747-019-00636-y

Hibbert, S., Winklhofer, H., & Temerak, M. S. (2012). Customers as resource integrators: Toward a model of customer learning. *Journal of Service Research*, 15(3), 247–261. https://doi.org/10.1177/1094670512442805

Hoch, S. J., & Deighton, J. (1989). Managing what consumers learn from experience. *Journal of Marketing*, 53(2), 1–20. https://doi.org/10.1177/002224298905300201

Holt, D. B. (2020). Cultural innovation. *Harvard Business Review*, 98(5), 106–115.

Maitlis, S., & Christianson, M. (2014). Sensemaking in organizations: Taking stock and moving forward. *Academy of Management Annals*, 8(1), 57–125. https://doi.org/10.5465/19416520.2014.873177

Manzo, J. (2010). Coffee, connoisseurship, and an ethnomethodologically-informed sociology of taste. *Human Studies*, 33(2–3), 141–155. https://doi.org/10.1007/s10746-010-9159-4

Martineau, E., & Arsel, Z. (2017). Managing communities of co-creation around consumer engagement styles. *Journal of the Association of Consumer Research*, 2(2), 179–195. https://doi.org/10.1086/691145

Moreau, C. P., Lehmann, D. R., & Markman, A. B. (2001). Entrenched knowledge structures and consumer response to new products. *Journal of Marketing Research*, 38(1), 14–29. https://doi.org/10.1509/jmkr.38.1.14.18836

Muñiz, A. M., & O'Guinn, T. C. (2001). Brand community. *Journal of Consumer Research*, 27(4), 412–432. https://doi.org/10.1086/319618

Ocejo, R. E. (2017). *Masters of craft: Old jobs in the new urban economy*. Princeton University Press. https://doi.org/10.23943/princeton/9780691165493.001.0001

Otnes, C. C., Ilhan, B. E., & Kulkarni, A. (2012). The language of marketplace rituals: Implications for customer experience management. *Journal of Retailing*, 88(3), 367–383. https://doi.org/10.1016/j.jretai.2012.02.002

Nakata, C., Izberk-Bilgin, E., Sharp, L., Spanjol, J., Cui, A. S., Crawford, S. Y., & Xiao, Y. (2019). Chronic illness medication compliance: A liminal and contextual consumer journey. *Journal of the Academy of Marketing Science*, 47(2), 192–215. https://doi.org/10.1007/s11747-018-0618-1

Pine, B. J., & Gilmore, J. H. (1999). *The experience economy: Work is theater and every business a stage*. Harvard Business School Press.

Press, M., & Arnould, E. J. (2011). How does organizational identification form? A consumer behavior perspective. *Journal of Consumer Research*, 38(4), 650–666. https://doi.org/10.1086/660699

Rodas, M. A., John, M. R., & Torelli, C. J. (2021). Building brands for the emerging bicultural market: The appeal of paradox brands. *Journal of Consumer Research*, 48(4), 633–650. https://doi.org/10.1093/jcr/ucab037

Rosa, J. A., Porac, J. E., Runser-Spanjol, J., & Saxon, M. S. (1999). Sociocognitive dynamics in a product market. *Journal of Marketing*, 63(Special Issue), 64–77. https://doi.org/10.1177/00222429990634s108

Rosa, J. A., & Spanjol, J. (2005). Micro-level product-market dynamics: Shared knowledge and its relationship to market development. *Journal of the Academy of Marketing Science*, 33(2), 197–216. https://doi.org/10.1177/0092070304269839

Reckwitz, A. (2002). Toward a theory of social practices: A development in culturalist theorizing. *European Journal of Social Theory*, 5(2), 243–263. https://doi.org/10.1177/13684310222225432

Schank, R. C., & Abelson, R. P. (1977). *Scripts, plans, goals and understanding*. NY: John Wiley & Sons. https://doi.org/10.4324/9780203781036

Schau, H. J., & Akaka, M. A. (2021). From customer journeys to consumption journeys: A consumer culture approach to investigating value creation in practice-embedded consumption. *AMS Review*, 11(1), 9–22. https://doi.org/10.1007/s13162-020-00177-6

Schau, H. J., Dellande, S., & Gilly, M. C. (2007). The impact of code switching on service encounters. *Journal of Retailing*, 83(1), 65–78. https://doi.org/10.1016/j.jretai.2006.10.008

Schau, H. J., Muñiz, A. M., & Arnould, E. J. (2009). How brand community practices create value. *Journal of Marketing*, 73(5), 30–51. https://doi.org/10.1509/jmkg.73.5.30

Seregina, A., & Weijo, H. A. (2017). Play at any cost: How cosplayers produce and sustain their ludic communal consumption experiences. *Journal of Consumer Research*, 44(1), 139–159. https://doi.org/10.1093/jcr/ucw077

Siebert, A., Gopaldas, A., Lindridge, A., & Simões, C. (2020). Customer experience journeys: Loyalty loops versus involvement spirals. *Journal of Marketing*, 84(4), 45–66. https://doi.org/10.1177/0022242920920262

Steils, N. (2021). Using in-store customer education to act upon the negative effects of impulsiveness in relation to unhealthy food consumption. *Journal of Retailing and Consumer Services*, 59, 102375. https://doi.org/10.1016/j.jretconser.2020.102375

Sujan, M., & Bettman, J. R. (1989). The effects of brand positioning strategies on consumers' brand and category perceptions: Some insights from schema research. *Journal of Marketing Research*, XXVI(Nov), 454–467. https://doi.org/10.1177/002224378902600407

Thomas, T. C., Epp, A. M., & Price, L. L. (2020). Journeying together: Aligning retailer and service provider roles with collective

consumer practices. *Journal of Retailing*, *96*(1), 9–24. https://doi.org/10.1016/j.jretai.2019.11.008

Van Laer, T., De Ruyter, K., Visconti, L. M., & Wetzels, M. (2014). The extended transportation-imagery model: A meta-analysis of the antecedents and consequences of consumers' narrative transportation. *Journal of Consumer Research*, *40*(5), 797–817. https://doi.org/10.1086/673383

Van Oers, B. (2008). Learning and learning theory from a cultural-historical point of view. In Van B. Oers, W. Wardekker, E. Elbers, & R. Van der Veer (Eds.), *The transformation of learning: Advances in cultural-historical activity theory* (pp. 3–12). Cambridge University Press. https://doi.org/10.1017/cbo9780511499937.002

Vargo, S. L., & Lusch, R. F. (2016). Institutions and axioms: An extension and update of service-dominant logic. *Journal of the Academy of Marketing Science*, *44*(1), 5–23. https://doi.org/10.1007/s11747-015-0456-3

Weick, K. E. (1995). *Sensemaking in organizations*. Sage.

Weick, K. E., Sutcliffe, K. M., & Obstfeld, D. (2005). Organizing and the process of sensemaking. *Organization Science*, *16*(4), 409–421. https://doi.org/10.1287/orsc.1050.0133

Wenger, E., McDermott, R. A., & Snyder, W. (2002). *Cultivating communities of practice*. Harvard Business School Press.

Woermann, N., & Rokka, J. (2015). Timeflow: How consumption practices shape consumers' temporal experiences. *Journal of Consumer Research*, *41*(6), 1486–1508. https://doi.org/10.1086/680668