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USER GUIDE

The Periodic Table of Marketing Strategy

How to Use the Interactive Periodic Tables

The Core Table, the 18 Family Deep Dives, and the four interactive research tools — search, filtering, cell pop-ups, the Research Advisor, the Theoretical Bridge, the Frontier Agenda, and Stream Traffic.

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G. Tomas M. Hult, PhD

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Why this site is different

The Periodic Table of Marketing Strategy is a human-curated map of the field: a Core Table of 109 cells and 18 Family Deep Dives, 869 cells in all, drawn from 899 verified scholarly works. Every construct is placed by family (column), era (row), thematic block, and influence tier, and every cell is tied to anchor works with links to the original publications. Open positions mark where the field has not yet arrived.

> *The AI is the engine; the Periodic Table is the map.*
>
> General-purpose AI answers from statistical memory of whatever dominates its training data. It can name plausible constructs and cite works that are misattributed or do not exist, and it cannot say where a construct sits in the field's structure. The research tools on this site work the other way around: two use AI only to search the curated 869-cell framework and check every answer against it before it reaches the screen, and two use no AI at all, reading directly from the curated data.

The four Research tools on the Resources page

The Resources page opens with eight cards. The first row holds the four research tools; the second row holds the User Guide, the Logo, Articles & Publications, and Presentations. Click a card to open it in the workspace below; only one card is open at a time, and the Research Advisor is open when the page loads. Each card has its own web address (for example /resources#frontier-agenda), so a link opens the page with that tool already selected.

Search all 19 tables

The Resources search covers all 869 cells in the Core Table and all 18 Family Deep Dives, including open positions. Search constructs, authors, families, or eras. Results appear automatically after the third character and a brief pause; words beginning with the typed letters rank ahead of matches inside words. For example, narv finds Narver and orie finds Market Orientation. Each result shows the cell code and name, its table and family, and what matched. Click a result to open its cell, or press Enter to open the first result. Escape or the clear-search button clears the search. This is keyword search, not AI.

When no cell matches

A no-match note offers two choices. Ask the Research Advisor opens the Advisor with your search words already filled in; run it to find five conceptually relevant cells, even when your terminology is not in the tables. Position this construct opens the positioning window with the name already filled in; assign a family, era, and block to compare the proposed position with existing cells, neighbors, and an open position. Neither choice adds a new cell to the atlas. A keyword miss does not establish that the underlying idea is absent.

Choosing the right tool

If you want to…	Use	AI?
place your own question or abstract in the field	Research Advisor	Yes, checked

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connect two constructs or literatures	Theoretical Bridge	Yes, checked
find an unstudied gap to work on	Frontier Agenda	No
see which families borrow from which	Stream Traffic	No

RESEARCH ADVISOR

Where does my research fit?

Purpose

Locates a research question inside the field's structure. Instead of a list of loosely related papers, you get the specific cells, across the Core Table and all 18 Family Deep Dives, that your work builds on and speaks to.

How to use it

- Type a research question, or paste a short abstract (up to about 150 words; a live word counter shows the length). Or click one of the sample questions to see how it works.
- Press the button to run it. Scanning all 869 cells usually takes under a minute, occasionally up to two.
- Sharper input gives sharper output: name the outcome, the mechanism, and the context (for example, B2B platforms or emerging markets).

RESEARCH ADVISOR (continued)

What you get

- 1 · Recommended cells. Exactly five cells, each labeled Primary / Focal fit (the constructs your study is about) or Theoretical backdrop (the constructs that frame it), with a one-sentence reason and a link that opens the cell in its table.
- Frontier opportunity. Shown only when your question genuinely intersects one of the open positions; it explains the gap and links to it. It is never forced, so its absence is also informative.
- 2 · Synthesis. Two paragraphs that read the five cells together, grounded in the cells' curated descriptions.
- Likely managerial implications. One paragraph on the decisions, resource choices, or organizational choices the answered question would likely inform. It is a suggestion to evaluate, not a finding.
- 3 · References. The combined, linked anchor works of the five cells, ready for a literature review.
- Save this research brief. Export a branded PDF (question, cells, synthesis, managerial implications, frontier note, references) or a Markdown file.

RESEARCH ADVISOR (continued)

Reading the result

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• Focal versus backdrop: the Advisor always marks two or three cells “Primary / Focal fit”: the constructs your question is directly about, where its answer lies. The other two or three are “Theoretical backdrop”: mechanisms, conditions, or neighboring theory that frame the question, often from other families. The split reflects closeness to your question, not research quality; start with the focal cells, use backdrop cells for your theory section, and expect roles to swap when the question is rephrased.

• Run two or three phrasings of the same question. Cells that recur are your stable core; cells that change are worth a closer look. Why it is more than AI: the AI may only choose among cells that exist in the framework; any id it returns that does not match a real cell is discarded before display, and every reference shown is a verified anchor work, not a generated citation. Check the suggestions against the original works before citing them.

THEORETICAL BRIDGE

How do two research streams connect?

Purpose

Builds a defensible theoretical path between two constructs that may sit far apart, in different families, eras, or tables. It is designed for integrative papers, for justifying an unusual combination of literatures, and for spotting the weakest link in an argument.

How to use it

• In From cell and To cell, type a construct name, cell code, or family and pick from the list. Any two of the 869 cells work, in the same table or across tables.

• Optionally add context (for example, in B2B platform markets) to steer the path toward your setting.

• Shortcut: every cell pop-up in the tables has a bridge link that opens this tool with that cell already filled in as the starting point.

• Tracing a path usually takes under a minute, occasionally up to two.

THEORETICAL BRIDGE (continued)

What you get

• 1 · The path. One to five intermediate cells, only as many as the theory requires, shown in order from start to end. Each step gives a reason for the move and links to the cell.

• 2 · What the bridge reveals. Two paragraphs interpreting the path, with the least-researched link named in a highlighted box: the step with the thinnest evidence and therefore the most promising place for new work.

• Likely managerial implications. One paragraph on what executives would likely do differently once the two streams are connected, drawing on the start and end cells' curated implications. A proposal, not a finding.

• 3 · References. The combined anchor works of every cell on the path.

• Export a branded PDF bridge brief or a Markdown file.

THEORETICAL BRIDGE (continued)

Reading the result

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- A short path means the streams are already close; a long path through several families signals an integrative contribution.
- Paths that pass through an open position point to a bridge the field has not yet built.
- Try reversing the start and end cells, or adding context: a different route can reveal an alternative mechanism. Why it is more than AI: the path runs only through real cells, respects their thematic blocks and eras, and cites their verified anchor works. Bridges are proposals to evaluate, not findings.

FRONTIER AGENDA

Where is the field heading next?

Purpose

Gathers every open position, the predicted 2020s research frontiers across the Core Table and the 18 Family Deep Dives, into one browsable research agenda: 141 positions in all.

How to use it

- Filter by macro-theme. Seven theme buttons group the positions; each button's count is the number of positions where that theme is the main one.
- Search all positions by keyword or code (for example, privacy, platform, or D10).
- Open a position to read its description, its parent cells (the constructs it grows out of, each linked), and, for the eleven Core Table positions (O1–O11), their research questions with a link to the position in the Core Table.

Cross-family siblings

Each position lists related positions in other families: the same frontier seen from another literature. Siblings show which bodies of work a multi-perspective paper should cite together. Click a sibling to jump to it.

Export

Export a branded PDF frontier brief or a Markdown file of the selected position and its siblings.

FRONTIER AGENDA (continued)

Using it for research

- Doctoral students: pick a theme, read the positions, and follow parent cells back to their anchor works to build a dissertation literature map.
- Faculty: use sibling clusters to frame special issues, symposia, or cross-disciplinary teams.
- Combine tools: take a position's parent cell into the Theoretical Bridge, or test a frontier idea in the Research Advisor. No AI involved: positions, themes, and siblings are curated editorial groupings (Version 1.0) and appear instantly. The themes will date fastest and will be revised over time.

STREAM TRAFFIC

How do the 18 families feed one another?

Purpose

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Shows how marketing strategy's 18 families trade ideas. It spans both the Core Table and all 18 Family Deep Dives and reads two layers of evidence: curated construct links (a construct in one family built on constructs from another) and shared anchor works (the same landmark publication anchors cells in two families). The stat bar

- Construct links: the 414 documented links, split into directed and mutual.
- Top exporters / Top importers: the families that most often feed, or draw on, others.
- Corpus: the scope behind the tool: 717 populated positions of 869 (98 Core Table plus 619 deep-dive constructs; the rest are open positions), the anchor works they rest on, and how many of those works are shared across families. Family Trade Inspector Pick a family to see its trade balance and its connected families, ranked by volume. Click a connected family to list each link: the cell, its direction and era, what it draws on, and a one-line reason. Flow Grid An 18 × 18 grid with one square per pair of families; the number is the count of construct links between them, and darker squares mean more traffic. Click a filled square to open that pair. Under each pair, Shared foundations lists the anchor works the two families have in common and the cells each one anchors.

STREAM TRAFFIC (continued)

Key terms

- Feeds others (exports): links where a construct that originated in this family was taken up by a construct in another family. A high number marks a source discipline whose ideas travel.
- Draws on others (imports): links where a construct in this family was built on ideas from another family. A high number marks an integrating discipline.
- Mutual: links where the two families developed the idea in reciprocal dialogue, each shaping the other, so neither direction alone describes the flow (shown as a two-way arrow on the site).
- Shared works: anchor publications that ground cells in both families. This is literature overlap, not construct flow: the two families stand on the same foundational books or articles, whether or not a construct migrated between them.

Export

Export a branded PDF stream brief or a Markdown file for the selected family. No AI involved: counts show documented connections and constructs in common, not proof of causal influence, and will change as cells are refined (Version 1.0, October 2026).

None of the four tools proposes hypotheses, models, or study designs; those stay with the researcher.

The tables at a glance

The Core Table organizes 98 constructs into 18 families and seven eras. Row T lists the 18 imported theories that ground the families, and period 7 holds eleven open positions (O1–O11). Each of the 18 Family Deep Dives expands one column into its own sub-table with the same

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features and its own reference list; the Master References page combines them all. The How it works button on every table page opens a short three-step tour.

Using the tables

Clicking cells, theories, and open positions

• Click any cell for its full name, family, era, block, influence tier, description, a Managerial Implications paragraph on what the construct means for practice, and linked anchor works.

• Click an imported theory (T1–T18) for its description, its Managerial Implications paragraph, and the constructs it underpins.

• Click an open position to read the prediction and the research questions it raises.

• From a construct, the foundational-theory link jumps to its theory and back.

Hover highlighting

• Hovering a cell or theory lights up its lineage: the construct, its family column, and the theory beneath.

Search

• Each table search filters that table only. It matches names, symbols, blocks, families, eras, anchor authors, and descriptions. Non-matches dim; press the × to clear.

• When no entries match a search in the Core Table or any of the 18 Family Deep Dives, a short note offers Ask the Research Advisor, which opens Resources with your words already filled in, and Position this construct, which opens that table's positioning window with the name filled in. Run the Advisor for conceptual matches, or choose a family, era, and block in the positioning window. Clear the search or adjust filters to restore entries; use Resources search to check all 19 tables at once.

Filters

• Color blocks: click a legend color (FC, FP, IC, IP, IN, OUT, ENV, TH) to isolate it; combine several.

• Influence tiers: click landmark, major, or emerging in the legend.

• Periods and families: click a row or column heading to isolate it; click again to restore.

• Cumulative eras: show every era up to the one you pick, the growth story of the field.

Shareable views

• Everything on screen is saved in the web address. Press “Copy link to this view”, or use “Pick cells” to build a hand-picked set, e.g. ?q=Hult, ?cells=31,33,48,T3, or ?sel=31.

Save view as image and export references

• “Save view as image” renders the current view as a high-resolution PNG with title, filter description, and reference line.

• “Export references” downloads the anchor works for every visible cell; “Copy references” in a panel copies just that entry.

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Position a construct

- Pick a family, era, and block for your construct to see the cell it would occupy, its neighbors, its grounding theory, and the nearest open position.

Keyboard, fit to screen, and downloads

- With a panel open, arrow keys move through the grid; Escape closes it.
- “Fit to screen” shows all 18 columns on smaller screens; “Full size” restores them. On phones, swipe the table sideways.
- The one-page table PDF, every sub-table PDF, and this guide are on the Resources page and the table pages.

RESEARCH ADVISOR · BUSINESS MODE
Where does my business problem fit?

Purpose

The second entry point of the Research Advisor card on the Resources page. It takes a problem in a manager's own words and returns the same five best-fitting cells, but leads with the likely managerial implications and the questions a management team should ask. The matching engine is unchanged; only the framing and the order of the results differ.

How to use it

- Above the text box, choose Where does my business problem fit? (Where does my research fit? remains the default).
- Describe the problem in plain language, or click one of the four sample problems, for example: “Our retention is falling while satisfaction scores stay flat.”
- Name the symptom, the market, and what has already been tried; sharper input gives sharper cells.

What you get, in this order

- 1 · Likely managerial implications: the decisions, investments, and organizational choices the problem touches.
- 2 · Questions for the management team: five to seven questions, each traceable to one of the five cells.
- 3 · The five cells, explained in plain language, each linking to its table.
- 4 · What the research says, followed by 5 · References: the verified anchor works of the five cells.
- Save the brief as a PDF or Markdown file, labeled Business Problem and including the management-team questions.

Reading the result

Everything is written as “likely” and “would”: the Advisor does not diagnose the business or establish a causal finding. Treat the questions as an agenda for discussion, and check the cited works before relying on them. In an EMBA or executive session, running one class problem in both modes shows how the same cells serve the scholar and the manager.

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