Project Marketing Implementation and Its Link with Project Management and Project Portfolio Management

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ABSTRACT:

This paper intends to propose a research attempting to contribute new knowledge to the field of project marketing and find a home in the realm of enterprise level management. We will discuss different worldviews adopted toward the field of project marketing. The first perspective corresponds to the approach taken by the group of project marketers and the second is that of the project managers. This paper will illustrate these differences as the recent developments in project management suggest a new way of thinking. This new approach recommends considering project management as a process instead of only a set of managerial actions. We will describe the nature of the purpose of both the worldviews and how they influence the definition of project and project marketing.

Furthermore, the paper proposes a methodology to improve the understanding of project marketing and to contribute to the existing body of knowledge concerning the intersection and/or the interaction between marketing and project management.

INTRODUCTION:

From a marketer's perspective, project marketing relates to the various marketing activities that take place prior to winning a contract. It deals with marketing of large and complex projects such as the construction of buildings and power stations [1]. Project Marketing works closely with clients to identify and develop opportunities of projects; it focuses on the long-term consequences of these projects on a specific customer's business. This field of study is customer and stakeholder based and the actors involved could be internal or external to the organization. Project marketing, however, is a concept in development and seems not to be really practiced into the industry today. With such minimal awareness, researchers face challenges in relating this theoretical field to real live applications. Organizations require projects to be characterized by a higher degree of market orientation. To ensure the understanding of project marketing and to establish its significance in the industrial sector today, we must re-think and re-define project management as a process [2]. Recent studies in project management have broadened the way of looking at this field by incorporating customer based approach

moving closer to the worldview adopted by project marketing [3].

Also, organizations today are beginning to appreciate the need for strategic portfolio definition process that includes project portfolio management as one of their strategic initiatives [4]. If we study project marketing and its implementation in the practical world, we will begin to notice how both the worlds of project marketing and project portfolio management overlap in their concepts and practices. The aim of this research is to understand the two worlds from a practitioner's perspective. Hence we will realize that there is a need to add a practical dimension to the current worldview adopted by the researchers in project marketing.

According to this set of project marketing researchers, project marketing is the broader term that includes project management thus stating that project marketing re-targets the project in the wider context of project business. On the other hand, project managers describe project management as a process and highlight project marketing as a project management task. They believe that project marketing is one of the roles of a project manager. Therefore, we can notice the different worldviews toward project marketing.

In the next section, we will attempt to understand project marketing by these two schools of thought.

THEORETICAL FRAMEWORK:

1. Project Marketing by Project Marketing Researchers

Let us begin this section by defining marketing in the broad sense. We know that marketing, marketing methods and practices have been described and defined by several associations and bodies of knowledge. Generally speaking, marketing is the promotion and selling of products and services. It is everything that you do to reach and persuade prospects. The Chartered Institute of Marketing stated that marketing is the management process responsible for identifying, anticipating and satisfying customer requirements profitability. Additionally, Philip Kotler defines marketing as 'satisfying needs and wants through an exchange process.' [5]

Generally speaking, marketing is not about providing products or services. It is essentially about providing changing benefits to the changing needs and demands of the customer. 'Marketing is a project function and a set of processes for creating, communicating, and delivering value to customers and for managing customer relationships in ways that benefits the project and its stakeholders.' American Marketing Association describes marketing as the activity, set of institutions, and processes for creating, communicating, delivering and exchanging offerings that have value for customers, clients, partners, and society at large.

The group of project marketing researchers ([2], [4], [6], [7], [8], [9], [10]) claims that while project management deals with organizational and management issues, project marketing deals with sales and marketing issues of projects. They define a project strictly from the marketing perspective stating that project is a complex transaction covering a package of products, services and works, specifically designed to create capital assets that produce benefits for a buyer over an extended period of time [2]. They emphasize that the project concept must be re-defined to include the activities from the very early pre-project phase to the

very late post-project phase. These broader time frames have diverse origins [4]:

a. Customer based approach to project management

b. Supply chain management

c. Project strategic orientation

This definition forms the basis of their worldview toward project marketing. Project marketing focused on customer based approach helps build and maintain long-lasting relationships with key clients and stakeholders avoiding short term opportunism. Project marketing also builds and maintains relationships between two projects with key customers and stakeholders. Hence, project marketing is supported by the following key elements [4]:

1. A marketing process in three phases: independent of any project/ pre-tender/ tender preparation.

2. The existence of three pertinent levels of analysis and decision: milieu/ client/project.

3. The management of business and non business actors.

4. The management of a supplier's rational position and functional position

5. Risk or uncertainty as the driver of behavior of the actors

6. Solution as a means to create value for the customer.

Further, efficient project marketing must consider all the three periods of project marketing as stated by the first key element of the practice. Suppliers, therefore, must be involved in all the three phases of the project [4]. We must also study the three distinguishing features of project marketing [4]:

D – The discontinuity of demand for projects

U – The uniqueness of each project in technical, financial, and socio-political terms

C – The complexity of each individual project in terms of the number of actors involved throughout the supply process.

Project marketing researchers ([2], [4], [6], [7], [8], [9], [10]) consider overcoming demand-related discontinuity to be one of the major strategic problem in project marketing. After any project has been completed, a so-called 'sleeping relationship' begins where there is a possibility of future need for improvements or replacements regarding the project or the requirement of certain expertise possessed by the selling firm. This dormant phase is important in not only identifying project opportunities but also building and sustaining relationships between the buyer and the seller. This phase of discontinuity is very important as relationships here are maintained by social and informational exchange throughout the phase and affect future business [4].

Therefore, [8] extended the three phases of project marketing ([2], [4]) to a four phased process using case studies to demonstrate the complexity and dynamicity of project and project marketing process (correspondent Fig. 2).
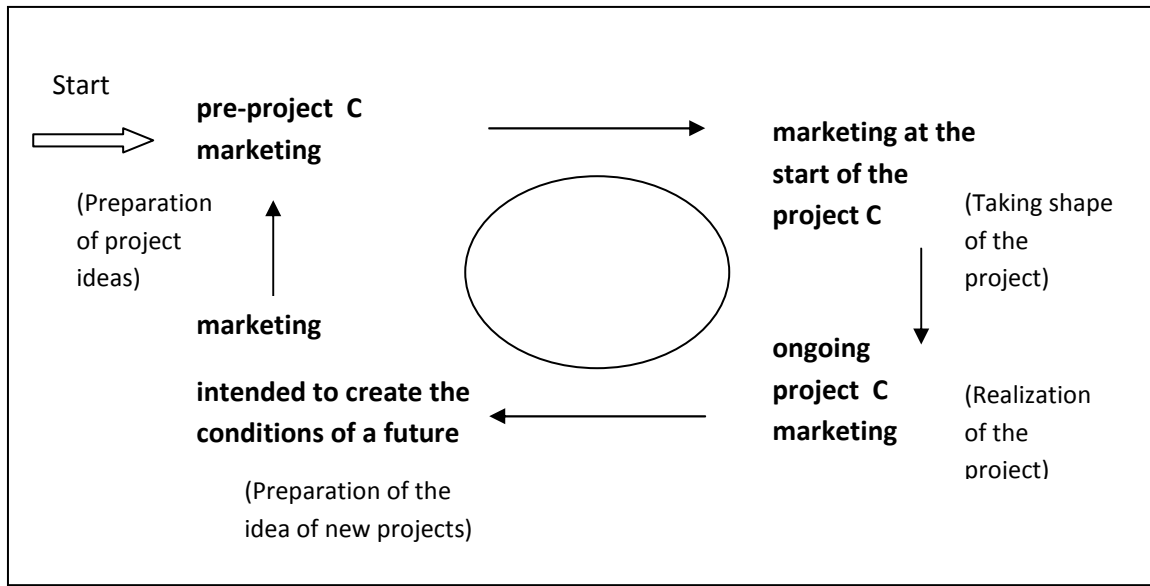
Fig 2: Phases in the Project Marketing Process

These phases are as follows:

1. Pre-project marketing: At this phase, project does not exist yet, but the supplier anticipates rules and action range (competitors, market, etc.), identifies targets and keeps in touch with the client.

2. Marketing at the start of the project: Supplier starts with a co-construction of rules beside and within the network of influential relationships

3. Ongoing Project Marketing: The supplier, client, and subcontractors proceed with re-negotiation, modifications, follow-up, and meetings following one another with constant relationship exchanges until the end of the project.

4. Marketing intended to create the conditions of a future project: Based on the process master of ongoing project, this correspond to the 'possible periods in which there are no projects" and to International Project Marketing's studies about "sleeping relationships" and enables to manage discontinuity in project business in preparing future projects.

We note here that the research conducted up until now in the field of project marketing has been for the majority qualitative in nature. We will now explore this discipline from the perspective of project managers.

2. Project Marketing by Project Managers

This group (IPMA, PMBok, PRINCE 2, [1], [3], [11], [12]) considers project management to be a process and project as a social construction. Let us highlight the different definitions of a project as viewed by all these different sources of knowledge. A project is defined as a temporary organization for the performance of a relatively unique, short to medium, strategically important process of medium or large scope ([11], [12]). IPMA describes a project as a time and cost constrained operation to realise a set of defined deliverables (the scope to fulfil the project's objectives) up to quality standards and requirements. Comparatively, PRINCE 2 describes project as a management environment that is created for the purpose of

delivering one or more business products according to a specified business case. And, PMBok describes a project as a temporary endeavor undertaken to create a unique product, service, or result. If we try to analyze the different definitions, we will notice that project is depicted as a temporary organization, as an operation, a management environment and a temporary endeavor by all the different sources of knowledge. This forms the perception of project managers.

In all the definitions of a project, we can notice the increased significance of project management in the society today. Now, we are in a project-oriented society where projects are goal-determined tasks and perceived as organizations ([1], [3], [11], [12]).

Hence, they have a different way of perceiving project marketing. They believe that project marketing process will ensure appropriate management attention and minimize conflicts in the project and in the relationships with relevant environments. According to this group, project marketing can be defined as project-related communication with relevant project environments. The basis for the field of marketing can be found in the project environment analysis and development of the project culture. They emphasize on the importance of understanding project environment analysis, organizational and project culture. They identify key components of project marketing as: negotiating the fuzzy front end, structuring the project solution, managing stakeholder relationships, interrelationships of marketing and project management and marketing in the project based firm ([1], [3]).

Fig 3: Project Marketing Process
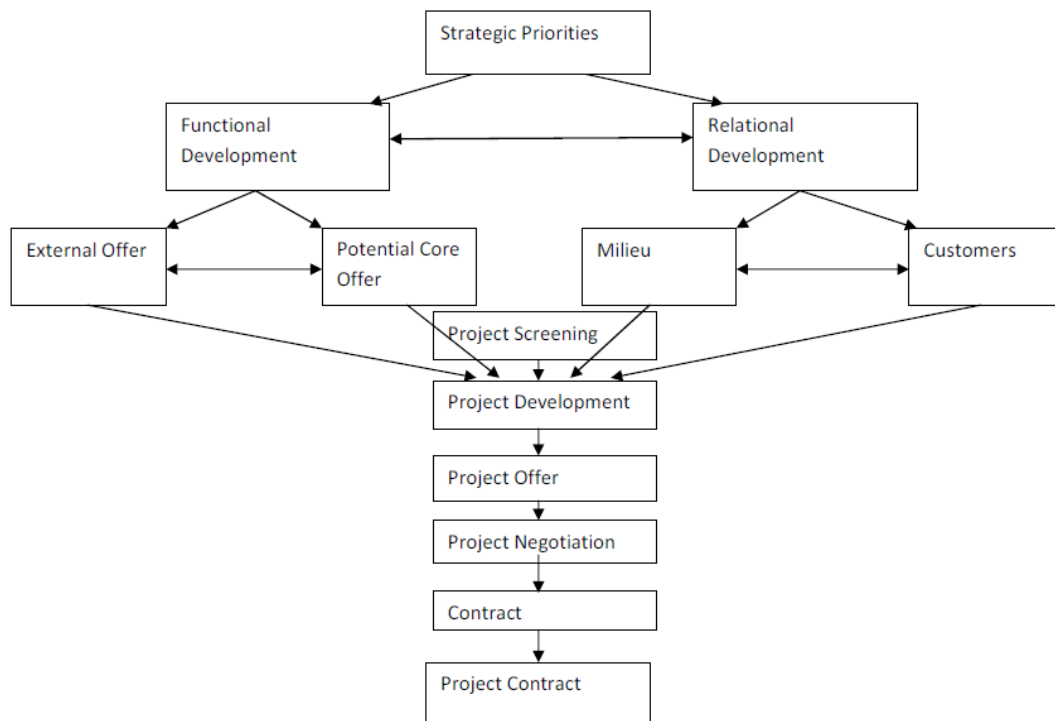
3. Two Different Perspectives on Project Marketing Process

In accordance to the literature review in the areas of project management and project marketing, we point out two different perspectives toward project marketing process. The Project Marketing researchers ([2], [4], [6], [7], [8], [9], [10]) believe that the project marketing process can be described using the three phases 'independent of any project', 'pre-tender', and 'tender preparation.' (Please refer to Figure 3)

Figure 3 ([2], [4]) shows that strategy is the pre-requisite for developing the project marketing process. The 'independent of any project' approach should help emerging projects to be detected among the customers. The marketing approach here is defined as the approach of anticipation. The next stage is the pre-tender stage where project screening should take into consideration project characteristics and strategic intent. Once the project has been screened and requirements reviewed, we enter into the project development phase. The tender preparation phase begins with the bid to tender with negotiation and contract phases following soon after ([2], [4]).

According to this school of thought, the first goal of project marketing process is to win the contract. But project marketing is a continuous process that occurs during the realization and project follow up phases. The follow up phase that occurs after the project has been delivered is very crucial since this determines customer satisfaction, key account development, and its success will reduce the discontinuity of project activities ([2], [4], [6], [7], [8], [9], [10]).

On the other hand, the project managers describe project marketing as a project management task and hence believe that project management encompasses

project marketing. Therefore, the model looks different from the process model developed by the first group (marketers). According to this group, project management process aims at achieving effective performance, management of project boundaries, management of relationships of project to project context, reducing project complexity, and management of project dynamics. The fulfillment of these objectives will help to realize project objectives ([1], [3]). Figure 1 illustrates this model.
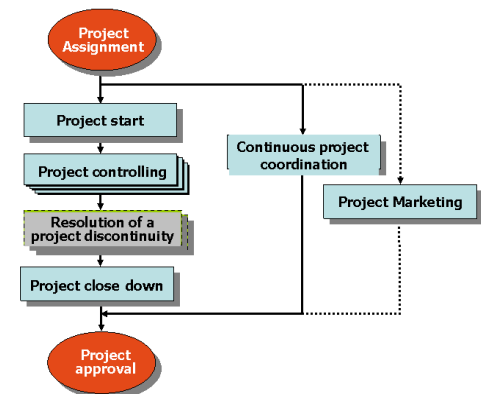
Project Management: Process

Fig 1: Project Management Process

Due to their complexity, dynamics, and uniqueness, projects have a great need to be explained. The objective of project marketing is, therefore, to communicate strategies to the project environments. Project marketing utilizes the instruments of communications policy. All project marketing actions have the primary purpose of building trust, informing and developing consensus with project environment and consequently contributing to integration of all activities. In projects, we can notice the difference between object-oriented marketing activities (such as cost/benefit of the project results) and

process-oriented marketing activities. Project marketing activities should be performed by all members of the project organization. Accomplishing these goals requires a new orientation of the project manager roles and responsibilities. The project managers are now functioning beyond the creation of the project deliverables as they also have marketing responsibilities ([2], [4], [6], [7], [8], [9], [10]).

Figure 1 ([1], [3]) shows that the project management process begins with the project assignment and it ends with project approval. It contains the sub-processes project start, project co-ordination, project controlling, project discontinuity management and project close-down. All these processes are related to one another. Here the following elements must be considered: the project objectives, project scope, project schedule, project resources and the project costs, project organization, project culture and finally the project context ([1], [3]). And project marketing process starts after the project assignment and stops before the project approval phase; according to this figure, project marketing is a part of the project management process.

During the first sub-process or the project start process, the pre-project phase information is transferred top-down along with the agreement of project objectives, project plans, project organizational design, team building information and activities, risk management and analysis, social construction of the project, development plans of project context relationships, initial project marketing, and creation of initial project management documentation ([13], [14]).

Secondly, the project co-ordination process is a continuous process that ensures project performance, existence of sufficient

information for project team members and continuous support for completion of work packages. Project co-ordination occurs throughout the project lifecycle [15].

Next the project controlling analyzes the project status, re-development of the project organization and culture, re-analysis of project objectives and re-design of project context relationships. This sub-process also executes project marketing actions [15].

Furthermore, a project discontinuity can be described as a project crisis, opportunity or phase transition. And, resolving this project discontinuity is another sub-process of project management process since in this phase a crisis, opportunity or the need for transition must be explained and dealt with (Op. Cit., 2002, 2006).

Finally, project close-down process objectives lie in the planning and completion of all the remaining project tasks, project evaluation, dissolving project team, initiation of post-project phase and transfer of the lessons learned to the permanent organization. At this phase, project environment relationships are dissolved and project marketing actions begin to close down ([1], [3]). During this entire process from project assignment to project approval, project marketing is practiced in parallel to project coordination as both project marketing and project coordination are continuous processes. But here there is no mention on project marketing phases between two project activities whereas marketers' group (see previous part) point out this essential phase where notably relationships and communication must be developed to identify project's opportunities and insure a continuous activity of the company.

Thus in our research, we will attempt to illustrate how strategic initiatives such as project marketing and project portfolio

management are linked in an organization. Indeed we would like to establish the significance of implementing both these practices in a project oriented organization. In order to investigate the link between them, we first need to study the key elements of project portfolio management. In the next section, we will attempt to survey these principles.

4. Project Portfolio Management

To understand project portfolio management, we firstly propose to define a project portfolio. A project portfolio is a collection of projects that are carried out in the same business unit sharing the same strategic objectives and the same resource pool. Project portfolio management is concerned with the idea that companies should not only concentrate on managing projects and their specific objectives but also on managing the project as a tight entity with shared objectives. Portfolio management is considered to be a dynamic decision making process with a list of active projects in the business that is constantly updated and revised. In managing a project-based firm, project portfolio management focuses on the potential and risks that project initiatives and projects carry for the success of the future business. Project portfolio management also includes project prioritization, project review, project re-alignment, and project re-prioritization. Additionally, emphasis is given on managing the company's strategic portfolio of projects at an aggregate level [15].

Project portfolio management is a strategic mission driven approach that is concerned with the enterprise as a whole. The portfolio management lifecycle is much more encompassing than the project or program management lifecycle and involves "identifying enterprise opportunities, selecting the projects to help fulfill these opportunities, planning and executing these projects, and continually assessing the benefits of these projects to organizational success."

Regarding the project management lifecycle, continuous monitoring of each project's contribution and alignment to the enterprise goals are a key to successful implementation of a PPM program [16].

The primary objectives of project portfolio management include decision making on maximizing the value of the portfolio, balancing portfolio in many dimensions, and link to strategy that reflects alignment between projects, strategic content and resource allocation intended in the strategy of business. How do we define prioritization and why is it important? Prioritization is the critical link between where we want to be and what we are currently doing. It helps determine the required initiatives and how projects deliver organizational strategy. Project portfolio management forms a quantitative base for removing redundant projects and optimizing available project expenditure to align resources with strategic priorities [17].

Peter Checkland [18] stated that "An organization is a social collectively that arranges itself so that it can pursue declared aims and objectives that individuals could not achieve on their own." Managers are responsible for achieving the corporate goals. Organization theory claims that organizations are "seen as the continually changing product of a human process in which social reality is socially constructed. Organizations are therefore open systems seeking to achieve their corporate objectives" [18]. The tools and techniques that are used to achieve these objectives are a part of the project portfolio management process. Irrespective of the sophistication of the tools of the PPM, the fundamental output of PPM is a prioritized

list of projects. Project prioritization states that the project on top of the list is most important and should be provided with all resources that it needs. Ideally, a strategy focused organization will have a single portfolio that contains all the projects of the organization. However depending on circumstances, there is a possibility of existence of several portfolios of projects. Here, each portfolio would contain projects relating to a specific topic or to a separate functional area of the expertise. A single portfolio, however, is far more complex because it escalates the project optimization from the divisional level to the enterprise level for the benefit of the entire organization [16].

One of the constraints of a project portfolio is the annual budget available to the portfolio. The annual budget must be judiciously efficiently dispersed among authorized projects. Limited portfolio funds prove to be a financial restriction manifesting a shortage of cash flow and resources, during a given time frame. This causes an expansion of the duration of some projects or leads to cancellation of some other projects. Resource allocation is, therefore, a critical component of project portfolio management. Once the project objectives have been identified and accomplished, organization's available resources must be evaluated to meet project demands. These resources may be subject to physical constraints. Therefore, understanding project resources and their availability will help focus effectively on project investment. Beyond project investment, PPM deals with continuous analysis of project portfolio and risk assessment. As we study PPM, we notice that there are costs associated with PPM implementation related to data collection, analysis, documentation, education, and changes by decision-making process [16].

We have already illustrated the significance of PPM implementation. Organizations that decide to implement this strategy intend to invest in increased operational efficiency, improved cost savings, and increased profits. This strategic initiative is at the company level and not the individual project level. An organization must recognize the specific mission of the PPM program such that they can actively participate in the strategic level planning and decision-making. The success of a PPM program can be realized when the company is able to select the right projects and abandon inappropriate projects continuously improving portfolio performance. PPM is also a means to facilitate a standardized approach to project prioritization [19].

Furthermore project prioritization, a key element in PPM, is a key tool in implementing strategy throughout the organization. Strategy is not a stand-alone management process. Each organization's mission dictates why it exists and how the mission must be achieved through the placement of a concrete strategy [19]. Additionally, Project marketing is embedded in the center of a triple environment formed by marketing, project activity and decision making ([2], [4], [6], [7], [8], [9], [10]). Therefore, both project marketing and PPM can be used to translate strategy from the top to the bottom in the organization's hierarchy [19].

In the next section, we will discuss the methodology proposed to investigate the links between project marketing and project portfolio management.

METHODOLOGY:

This section will describe the methodology proposed to complete the study of the project marketing application in the

industry. While seeking explanation of the observed organizational phenomena of project marketing and project portfolio management, we intend to explore the practitioner's perspective. We propose to use a mixed methods approach, i.e. we will proceed with a qualitative method of a multiple case study [20] and then with a survey (questionnaire) in a quantitative orientation ([21], [22]).

We propose to conduct multiple case studies of at least three different organizations representing three different industry segments. The case studies will help investigating the practical implementation [23] of project marketing process. Additionally, the goal of the survey will be to study project marketing and project portfolio management processes practiced by a group of practitioners. We must decide our sampling group in the organization that is the most knowledgeable in the subject of marketing and project portfolio management and can provide accurate information. Here, the unit of analysis will be a group of individuals in the marketing department. Questions related to the field of Project marketing and PPM will be asked to this group. These interviews will be conducted face to face so that we can provide the interviewees with a list of choices from which to select their answer. Face to face interviews will also help the interviewer ask questions based on the answer of the subject under analysis for extreme clarity. The questionnaires will be pre-tested before we start data collection. Pre-testing the questionnaire will ensure that important issues have been addressed and that we are able to learn more about the topics of interest. The pretest results will be used to improve the rough survey design and implementation plan. After the final survey design stage we will begin our data collection, data coding, analysis and final report [24].

The research proposal has been designed with the following research questions taken into consideration:

- What is the level of awareness of the subject of project marketing and how do we explicitly define project marketing?
- What are the real applications of project marketing?
- Is the industry aware of the challenges and objectives of project marketing?
- Does a link exist between project marketing and project portfolio management? Is there any interaction between these two worlds?

The questionnaire appended is based on the above research questions. The further contribution to knowledge on this matter would be the practical implementation of the project marketing process and its link to project portfolio management.

CONCLUSION:

Project marketing researchers ([2], [4], [6], [7], [8], [9], [10]) have highlighted the similarities and differences between project marketing and project management in their journals. They believe that both these disciplines are not completely different and with long-term, strategic and customer oriented approach they overlap each other. They emphasize that the customer focus re-positions project management in the context of developing and sustaining long-lasting relationships with key clients and stakeholders [8].

Cova et al.'s 'milieu' concept is also crucial in illustrating the complexity in

project marketing environment. This group of researchers define milieu as a 'socio-spatial configuration' characterized by interactions between all the players involved in the project. Here, it is essential to highlight that milieu is considered as a "group of territorial agents and economic, socio-cultural, political, and institutional elements having specific organization and regulation patterns, shared rules and norms" ([2], [4]). However, from the perspective of project management projects milieu involves management of uncertainty, conflict management and dispute resolution, performance measurement and value management. These concepts help us link operations at the project and portfolio level to that of the corporate core of an organization [25].

Furthermore, our theoretical framework provides us a new way of perceiving project marketing. This takes into consideration two different approaches, project marketing researcher's approach and project manager's approach. Understanding these different worldviews will help us in our research as we begin our data collection phase. With our research, we propose that project marketing and project portfolio management are both powerful strategic initiatives that help organizations understand their vision and mission. Therefore, it is essential for all organizations to understand these concepts and embed them in their corporate strategy.

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Questionnaire:

Set I Instructions: The following questions refer to your professional and personal background.

Name (Optional):

Age:

Name of the organization (Optional):

Position:

Number of years working in this organization:

Number of years working in this profession:

Set II Instructions: The following questions are about the details of the most recent project that you have worked on.

1. Please mention the industry in which the project was conducted. Choose from the following options: IT/IS, Resources (Agriculture, Mining), Construction, Manufacturing, Automobile, Supply chain management, Aerospace, Education, Retail, Health Services, Human/Social services.

2. Please mention the name of the department you work at.

3. What was the budget of the project?

4. What was the final deliverable of the project?:

5. What was your responsibility and role in the project?:

6. Did you collaborate with a project manager on this project?"

7. How many team members were in this project?

Set III Instructions: These questions refer to your familiarity with project marketing concepts. Please indicate your responses on a scale of 1 to 7.

1 = Strongly Disagree; 4 = Neutral; 7 = Strongly Agree

1. A project is a complex transaction concerning a package of products, services and works, designed specifically to realize in a certain period of time a specific asset for a client.

2. Projects are characterized by discontinuity, uncertainty and complexity.

3. I am familiar with the term "project marketing"

4. Project Marketing is a marketing process integrating marketing to project activity.

5. From a marketing standpoint, project concept involves:

a. Customer based approach to project management; b. Supply chain management; c. Project strategic orientation

6. Project marketing focuses on long-term consequences of the project.

7. Marketing approach in project selling firms is different when the approach is independent of any project compared to when the approach is within a given project.

8. Project management deals with organizational and management issues whereas, project marketing deals with sales and marketing issues of projects.

9. From a strategic perspective, the marketing of a project-based firm focuses on the management of a firm's multiple relationships in a network of business and non-business actors.

Set IV Instructions: These questions refer to your familiarity with project portfolio management concepts. Please indicate your responses on a scale of 1 to 7.

1 = Strongly Disagree; 4 = Neutral; 7 = Strongly Agree

1. As organization's project management philosophies and methodologies mature, concepts of project, program and portfolio merge and expand to the enterprise level.

2. "Managing organization by projects" and "project portfolio management" are identical in meaning.

3. Strategy is at the core of project portfolio management.

4. All strategy-focused organizations implement successful project portfolio management.

5. Project portfolio management deal with only managing independent projects and their specific objectives or does it also manage projects as a tight entity with shared objectives.

6. Project portfolio management's link to strategy reflects alignment between projects, strategic content and resource allocation.

Set V Instructions: The following questions are open ended questions attempting to gauge your perception of project marketing and project portfolio management.

1. Define project marketing.

2. What, in your opinion, is the difference between "marketing" and "project marketing"?

3. What does "project marketing" mean to you as a practitioner in the marketing department of a large firm?

4. What is the scope of the project marketing concept?

5. Did you make any assumptions while answering the questions on both project marketing and project portfolio management? If so, please state them.

6. What do you think is the level of awareness in both the fields of project marketing and project portfolio management? Please explain.

7. Do you consider project portfolio management a tool, practice, process, concept or its own discipline?

8. How important is it to you to understand the differences and similarities between project marketing and project portfolio management? Explain.

9. Have you participated in discussions or yourself thought about differences between project management and project marketing? Explain.

10. Do you consider "project marketing" a theoretical concept? Justify your answer.