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## **Teaching marketing via case study: Proposal for a reproducible grid of presentation of cases**

### **ABSTRACT**

The article aims to describe one of the "tools" deployed within the framework of our doctoral research: beyond a better apprehension of the case and unrolled thesis, this grid has been proved to be a first result of the step. The fitting of the elements, indeed enabled us to invest the ground, to explore the phenomena and bonds with an aim of coherent and objective exploitation of the results, but also in a preoccupation of operational application. This grid of presentation of cases can easily be used by students for instance within the framework of marketing research and / or situational analysis of companies before launching a new product.

*Key words:* case study, marketing, project marketing, reproducibility of research

### **INTRODUCTION**

The aim of our research had to clarify the marketing of project in its environments and its complexity, to better include/understand the phenomena related to this activity and, in particular, the actions favourable with the process of marketing of project, and with its development, within the sector of the Business to Business. Undertaken work, in particular thanks to interviews, is based especially on the analysis of three cases of companies; it is characterized by a progressive and iterative construction, with constant outward journeys and returns between the empirical one and the theoretical one (Dubois and Gadde, 2002).

It is not a question here to clarify the marketing of project but to relate how an *orchestration* of standard and/or key elements in the analysis of projects, can allow the *reproducibility* of research, in any study relating to the activity of project. Our step fits moreover in the current of research in favour of the contingent approach<sup>1</sup>: the individual history of each company, their environment, their characteristics..., take the step on supreme configurations. But especially, the companies concerned with the research topic are organized "by project", and/or testify to an "activity of project". Thus, in accordance with the object of this research, in fact less the companies (whatever is typology) matter that the cases of project in company and situation of Business to Business.

### **Interest of the case study**

Since the reproducible grid was conceived within the framework of the case study, it is advisable for the precondition to wonder about the interest of the case study for the

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<sup>1</sup> Godet (1991, p. 228) defines the contingency as "what can not be, or can be differently, i.e. the necessary opposite of ` necessary `". During years 1960, the general consensus of the contingency was based on the idea that there is not strategy or organization better than an other, but that the performance depends on an adjustment between the organisational model, strategic control and the environment (Lawrence and Lorsch, 1967).

analysis and the follow-up of projects and of the associated actions of marketing. Let us note in preamble that a case study, more than one method, is an empirical mode of investigation: it is an access mode to the ground; it is thus constitutive of the method (that it is of qualitative or quantitative essence or combining the two) (Yin, 1989; Stake, 1994). In fact the case study corresponds to the place where the method is spread. Our research concentrated in fact on some sites (those of the companies for which certain situations of projects are analyzed and if necessary, those their customers): mother companies and subsidiaries, and the corresponding contexts of research constitute the case study because the case study, must be considered "within its real context" especially "when borders between phenomenon and context are not clearly obvious and for which multiple data sources are used" (Yin, 2002; 1989). The case study is thus adapted with the approaches concerning research on the organizations, on the modes of management, the operation of the companies (Insenhardt, 1989). It also suits to our objective of research.

In addition, the fact of being an access mode implies on the one hand, the respect of certain principles (such as the intelligence shared between questioned and the researcher, the systematic recording of the interviews, the events, the analyzed documents, etc.). And, as well, it confers the property of depth of analysis which allows a wealth of information. It is indeed a question of endeavouring not to neglect any aspect (Macintosh, 1994; Stake, 1994) but also to allow a certain comparison (Yin, 1989) between the situations of projects, sites, characteristics of the companies, results relating to the projects and the actions marketing related, etc.

Moreover it is advisable to propose an additional interest at the method of the cases study: case study supports the participation of the interviewed actors, with the process of research. Indeed, the questioned protagonists often ask for a return on their "contribution" and, in any investigation, the researcher needs the justified participation of the actors questioned and observed<sup>2</sup>.

Besides this aspect is supplemented by the fact that the case studies are used to help with the knowledge of a group of people or an individual or of the organization, "in a structural context often determinant". And it proves in fact that the context, the contingency were essential factors of the situations studied within the framework of our research. But, in addition to the context, the case study still makes it possible to integrate other dimensions, like the chronology, and to better apprehend causalities, therefore "to locate how the configurations are formed and become deformed in the course of time in the context" (Wacheux, 1996). Indeed the wealth of the collected data is only possible thanks to "longitudinal studies": the time passed through the researcher within companies is a paramount criterion of the longitudinal study (see in particular Stake, 1994; Kimberly, 1976; Glaser & Strauss, 1967).

It corresponds well to our objective of identification and analysis of organisational and inter organizational processes<sup>3</sup>. The analysis of the projects and the research of the actions of marketing carried out throughout a project (in an implicit way or not) and the

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<sup>2</sup> Beside Wacheux, 1996, speaks on this subject about a « fundamental ethical position ».

<sup>3</sup> See notably Kimberly (1976).

various corresponding interviews (either with the starting of a project, or whereas the project is in hand or, completed) are spread out in time<sup>4</sup> and make it possible to have more deepened knowledge of the analyzed organizations, and evolutions of the processes.

Finally the case study, not only, facilitates more "in-depth comprehension of processes and results of each case", but also it makes it possible "to test (and not just to develop) hypothesis" (Miles and Huberman, 2003).

## **Principles for presentation**

### *Methods of construction of the descriptive card of the cases*

The objective of this part is to present the various studied situations of projects in a coherent and convenient way for, initially, facilitating the reading, comprehension of the cases and the stakes, as well as the apprehension of the complementarity of the analyzed objects. Besides this complementarity announces a comparative analysis from a temporal point of view on the one hand, in particular on the level of the phases of project marketing and cycle of life of the project and, on the other hand, a space point of view with, for example, the description of contextual specificities (see, for example, Wacheux, 1996). And, secondly, to allow a "generalization" which is necessary to any study in scientific matter (Yin, 2002).

For that a *reproducible and generic grid* relevant (with respect to the complexity of the activity of the project) is proposed; this grid in particular makes it possible to clearly release the contexts, the methods and the different natures of the companies, their environments and projects studied.

The grid was built thanks to outward journeys and returns between the reading of the analyses of contents, a second reading of the interviews retranscribed and the literature; in particular literature devoted to the project, the mode of evaluation of the projects and the presentation of the cases. Thus, practically in all the talks, the interviewed people organized their remarks according to certain classes, in a spontaneous way. The statement of their classes confronted with the authors specialized in the project and/or the case studies, made it possible to point out nine classes whose detail is given further. Indeed it seemed important to consider as classes, the elements, the criteria located through interviews, and revealed at the time of the analysis of contents, then to confront them with those which correspond more to the presentations of cases and projects adopted by the authors, but also with their appreciation by the authors and specialists of the project.

The following paragraphs present the result of this work. Indeed we develop the corresponding classes, with explanations on the choice of the class, which is considered not only as one entrance point, but also as a result of the analysis. They are the classes: 'sector, company, trade and environment'; 'customer and others protagonists'; 'typology

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<sup>4</sup> Bryman (1989) speaks about « temporal validity ».

of the project'; 'description of the project'; ` objective and delivers'; 'description by protagonists'; ` organization of the project'; ` cycle of life of the project'; ` period of the project covered by the research'.

Attached, annexe 1 corresponds to the model of the descriptive grid of the cases, gathering the nine classes. And the annexe 2 is an example of grid duly filled, corresponding to a company C. This work has the main aim of constructing a synthetic and convenient representation of each context of studied project and company.

### *Nine classes for the presentation of the cases and projects*

#### **a) Class : 'Sector, company, trade and environment'**

A project, some is the universe considered and in particular in Business to Business, cannot be studied without reference to the company in which it is developed and carried out (Michel, Salle, Valla, 2000). And a company cannot be analyzed without reference to its *sector* (Kotler, 2003); the sector being regarded as the whole of the economic activities of comparable nature. Since the study invests the Business to Business, and in particular of Small and Medium Enterprise (SME) covering industry and services, the descriptive card corresponding to each studied project, will specify the economic activities of the companies concerned.

The typology of the industrial sectors, traditionally pointed out, is as follows (Quélenec, 1997):

- Agro-alimentary
- Building / Public works
- Materials (of construction)
- Energy
- Chemistry
- Pharmaceutical Industry
- Rubber – Plastic
- Metals
- Mechanics
- Automotive
- Material and switchgear
- Electronics
- Paper
- Textile (ou Textile – Clothing)
- Various (example: Printing works, Press, Edition, Wood, Leather. And a conglomerate of various industries "whose economic weight is weak" (o.p. Cit.) such as jewellery, cycles)

As for the sector of the services, it is characterized by its "diversity" (Lovelock, Lapert, 1996) and relates to "the fields such as air transport, the banking operations, the insurances, telecommunications, the chains of hotel, the transport and fret, [... ], the

restaurants, the laundries, the taxis, the opticians, the hairdressers and of many services between firms".

However according to the specialists, and in particular Dayan (2002), "the sector is not valid any more as criterion to characterize the company" because of the technological developments (materials of substitution, technologies and "transversal" techniques), because of the tendency increasing to diversification, and "the existence of the industrial channels". This is why - in the same way that Dayan proposes it -, the *trade* (strategic business unit) of the company is also specified within the descriptive grid proposed.

And this, with a vision of concept of business which includes two components (Dayan, 2002): a technical component (of which the conditions of success are in particular related to "synergy between multiple techniques" - example: aeronautics, car - or "the alliance of research and a key process" - example: chemistry) and a component "management of the market" (thanks to the control of marketing, in particular on the level of the detection of the needs, the control of the provisioning, etc). A company can of course have several SBU.

Moreover, the projects are presented here in their *environments* and respective *contexts* because every company interacts with the environment which is taken part to the construction of the identity of the company (Hatch, 2000). Thus, for example, people interviewed often are inclined to start their interview about the project by the description of its context and/or environment.

Moreover, and in accordance with the ecosystem project/firm/context, "the Environment and its sub system Context do not exist in oneself, but only in dialectical relationship to the Firm, the Operation and the Project" (Declerck, Debourse, Declerck, 1997). Consequently, in accordance with our problem identification, the company, its sector and its trade, are presented within the grid in relation to their environment and context. More especially as the socio-economic environment evolving, these characteristics can be different from one period to another: for example, sometimes the characteristics of the environment correspond to the moment of the idea of project, sometimes they correspond to the period after the project's achievement.

With regard to the example of descriptive card proposed in last part of the article (case C), the characteristics of the environment indicated correspond to those which were perceived by the people interviewed at the time of the idea of project (and who are often expressed as being one of the determinants of the idea of the project).

### **b) Class : 'Customer and others protagonists'**

If the environment exists only in relation to the company and the project analyzed, conversely, the projects can be apprehended completely only in their socio-economic environment, in which groups of actors, of protagonists, of stakeholders interact. Indeed, the interaction between stakeholders is very important. Thus this interaction leads the

researchers "to focus their attention on the attitudes and the individual behaviours of the actors concerned as much as with their consequences" (Michel, Salle and Valla, 2000).

The object of this class is to try to explain the protagonists and their actions (essence and consequences of the actions) at the same time on the functional register that on other registers (human, social, etc). Beyond the functional approach, the concept of actor exceeds this only positioning to raise questions of behaviour, social position, competences, roles, etc. This approach of the protagonist through these various poles (see in particular Crozier and Friedberg, 1996; Friedberg, 1993) permitted the realization of a cartography of the "going with" regarding to a situation of project, with four poles: multi-position, multi-competence, multi-role, multi-behaviour (Lecoeuvre, 2005, based on Deshayes, 2000).

However, if the determining actors for the project and its future seem to be the customer and the supplier, other essential actions for the life and the course of the project are coming from other protagonists (for example: an adviser, a competitor, etc.) (Cleland, 1988).

Indeed the number of participants in a project is often important: few companies today can assume a project of large-scale alone; these companies often work in a strategic context of co-operation. Some protagonists of the project are considered as "market actors" (Cova, Salle, 2003; Cova, Ghauri, and Salle, 2002); they influence the project and its future, in the sense that they take part in its development, its realization (and in the same way besides, they take part in the development of the firm whose continuity often depends on the success of its projects): for example, representatives or agents, suppliers, partners of the firm, organizations of control, banks...

But other types of actors have also an influence on the project. Indeed they can influence its technical and financial development (influence on the choice of the partners, of the suppliers, etc), its characteristics (influence on the departments of research and development for example); these actors are "non-market actors" (Cova, Salle, 2003; Cova, Ghauri and Salle, 2002): for example, political protagonists (see the example of the subway of Medellin, analysed by Dessinges, 1990), various associations, special interest groups or lobbies. The lobbies<sup>5</sup> are in fact groups or people "of influence", who maintain close connections between people, decision makers in general; "professionals" which "can convince that particular interests also concern the general interest" (Cheyvialle, Ducros, 2003). Thus these actors require a particular follow-up, and companies must develop strong relationships with them. Indeed the lobbying is "a set of countervailing

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<sup>5</sup> Pluchart (2002) proposes the following classification: "political lobby" (international, national or local personalities, from the country of the potential supplier or that of the client); "industrial and commercial lobby" (Embassies, the Chamber of Commerce, Trade unions... and/or industrial and intermediaries, implied in the project or interested by the repercussions of this one); "financial lobby" (public, para public and private financial organizations having direct and indirect interests in the project); "lobbies of the users, of associations (in particular of environmental protection), and of the trade unions of defence of professionals and/or policies".

powers" which can make it possible to new ideas "to circulate" (Adler, 2004), or on the contrary, to be slowed down, even rejected.

Finally we cannot neglect the internal protagonists within the company: those which allow the transformation of the idea of project into a project, those which allow its development, its evolution, its realization (technicians, the commercial ones, General Management, operators, R&D people, the project team, the project leader, etc). However some can be negative stakeholders: they do not adhere to the project, do not integrate it (and sometimes even "simulate adhesion for better slowing down"). Even within the project team, coordination and agreement between the various members must be perfect for a perfect integration of the members and a correct operation making it possible to make succeed the project under the best conditions (Nicolas, 2003). Indeed the motivation of the team and an adequate communication for clear objectives, remain the principal keys of the success of a project ("Critical Success Factors" in Pinto, Rouhiainen, 2001).

Consequently, the protagonists of a project are stakeholders whose irruption and logics of intervention are not a priori completely foreseeable. More especially as each "internal and external" stakeholder has "his own objective". This reinforces the idea that a project is "an open system", where the medium, the market intervene, where actors outside companies and project are not always well identified, etc. Beyond, the interventions, steps and objectives of a certain protagonist before the concretization of an idea into a project, are not inevitably the same ones during the project, or at the end of this project. The positioning (and the point of view) of the protagonists can evolve according to the advancement of the project and to the corresponding phases of marketing steps which are associated to the project. Thus, their identification, their management, the attention to be carried to them for better understanding and to anticipate their influences and decisions, require particular actions in particular related to the field of marketing (studies and analyses, communication actions, relational actions, negotiations...). In other words, as long as the company has not understood who the key stakeholders are, and which their potential of influence and impact is, it is impossible to progress effectively in the project (Pinto, Rouhiainen, 2001).

To finish on this part, we can consider a different positioning of the protagonists, according to their direct influence or not on the project, its obtaining, its progress and its achievement. Indeed protagonists can be intra-project (for example, the team of the project), others of the same company can be extra-project and have nevertheless influence on the project (the CIO, Chiefs of the other departments...). Moreover, while being external of the company in which the project proceeds, a protagonist can also influence the project, be implied directly, or indirectly in the project. For example the Person in charge for the project (or the follow-up of the project) at the customer is a protagonist "integrated" into the project: he is thus a protagonist intra-project but extra-company (from the point of view of the supplier which carries out the project). Or the competitors are extra-company protagonists, who had an influence on the project, at a financial and/or technological level, even if they are not directly implied in the project;



they are in consequence extra-company and extra-project protagonists. We can summarize these situations of protagonists' positioning in the following table:

*Positioning of the protagonists regarding to a situation of project in Business to Business sector*

PROTAGONISTS INTRA - COMPANY	PROTAGONISTS EXTRA - COMPANY
-Protagonists <u>intra-project</u> (project team)	-Protagonists <u>intra – project</u> (clients, suppliers, decision makers, stakeholders...)
- Protagonists <u>extra-project</u> (Chiefs of other departments...)	-Protagonists <u>extra-project</u> (banks, consultants, competitors...)

However this positioning of the protagonists is more complex, if we consider the various phases of the project life. Indeed, for example, how to consider the principal competitor retained in the shorts list - at the sides of the supplier who finally will have obtained the contract -, whereas the project is not started yet? Its implication is very strong for the project (in particular at the moment of the negotiation): normally protagonist extra-company, should we say that he is also at this period, a protagonist intra-project?

Consequently, the positioning of the protagonists regarding to the situation of project seems to evolve according to the moment of the life of the project as well (without omitting the fact that in the dynamics of the realization of a project, some stakeholders appear, some disappear, even some are desired when others become undesirable, etc).

**c) Class : ‘Typology of the projects’ :**

Several typologies of project exist, based on different essences, and the stake of these typologies is usually to obtain a definition of the concept of project. But, to take into account of the idea generally transmitted by the people interviewed during our investigation, we have used Lock’s work (2003) to represent the projects in the descriptive cards.

Indeed Lock "classifies"<sup>6</sup> the projects in four categories, in which the characteristics specific to the actors and their implications are taken into account (example: "contractors"). But also the dynamics of the projects in terms of evolution towards a manufacture by several companies and the inherent complexity are taken into account; and even the ontological level (the nature of the things)<sup>7</sup> is considered, in particular by the separation between "manufacturing projects" and "research projects". The categories

<sup>6</sup> Author uses the term « classification ».

<sup>7</sup> See the following point (d) where the functional, ontological and genetic poles are taken into account.

chosen for the typology of the projects, and within the particular framework of description, are thus the following ones:

"1 - Civil engineering, construction, petrochemical, mining and quarrying"; this category includes the projects which are in general very important (civil engineering, platforms offshore...), and require large investments in capital; that often implies several contractors and specialists within a consortium or in a joint venture.

"2 - Manufacturing projects» which mainly aim the manufacture of a system, a boat, a plane, equipment... They can be manufactured by only one company (for example: part of a machine, hardware) or by a whole of companies (for example: plane, vehicle). The last case relates to the most complex projects, often associating international firms.

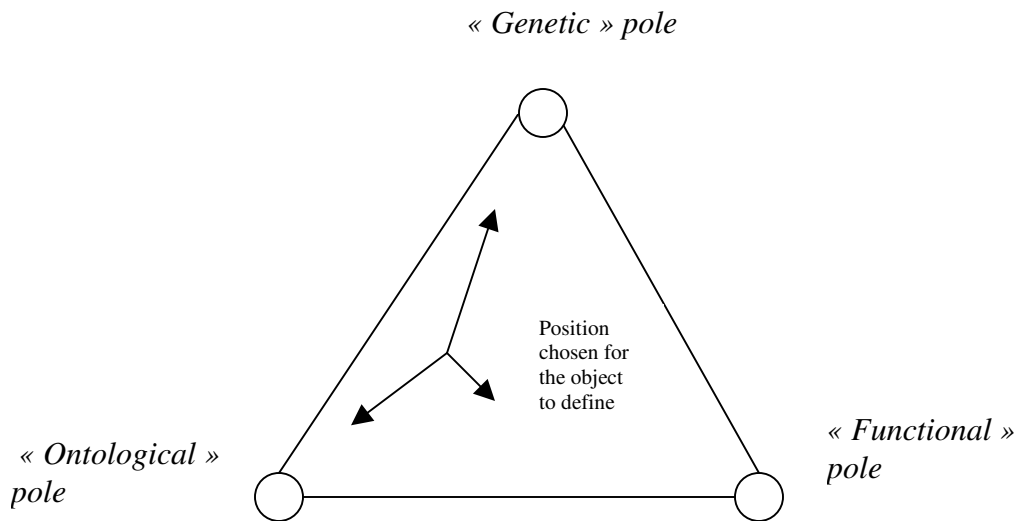
"3 - Management projects "which can relate to all the companies, whatever their size and their branch of industry (including associations and companies with no lucrative goal): delocalization, development of a new information processing system, reorganization of the company, launching of a marketing plan...

« 4 – Research projects » which can be spread out over several years and require strong investments without implying automatically a practical result. They are often at the origin of the projects indicated in the preceding classes.

In the context of the research undertaken in project marketing, it proved besides that the prevalent categories were the "manufacturing projects" and "management projects" (projects related to management and the organization).

#### **d) Class : 'Description of the project'**

Le Moigne (1990) insists on the fact that the definition of an object is done by triangulation: the "functional, physiological" definition (what the object makes; the behaviour...), the "ontological, analytical" definition (what the object is; the nature of the things...), and the "genetic" definition, "historical, genealogical" (what the object becomes; its dynamics...). Consequently the description of the project will have to take these three levels into account of, in accordance to the following sketch:



*Inspired from Le Moigne (1990, fig. 2.6, p. 64 : « the definition of an object is made by triangulation »*

For the activities of project, the three following poles of categorization are identified:

- the *functional pole*, in which, in particular, the behavior of the actors is analyzed (what the actor makes); the sociologists contributed in this direction to a theorization of the project by proposing four levels: withdrawal or the absence of personal project, the individual project, the collective project, the organizational project (Touraine, 1973). Thus this pole defines the level of implication of the actors with respect to the project.
- the *ontological pole*, which attaches a privileged importance to the nature of the things. Also when Boutinet (2001) lists: the project of orientation, of formation, care, research, development, space installation..., he classifies the projects according to their nature.
- the *genetic pole*, which particularly takes into account the dynamics, the evolution of the projects (and its future - Le Moigne, 1990). Thus when Declerck, Debourse and Declerck, (1997) approach the "dynamics of the ecosystem Project", they are more in the genetic register. More especially as this "energy" evolution in space and time "takes into account the elements of control, statistical instability, order and disorder at the same time in their physical, organizational and psychological aspects" (o.p. cit.).

And these poles cannot be excluded in the analysis from a project; indeed, for example, when the genetic pole privileges the non repetitiveness of their acts, it considers also the behaviour of the actors; and the behaviour is pointed out by the functional pole. In the same way, to analyse the nature of the projects of orientation, research, or formation, the realities built by the individuals, the actors must be also taken into consideration.

However, knowing that certain protagonists can have different points of view, this class will be made only of one brief description of the project, a lighting of the project, to allow to the reader a better integration of the situations of project.

Thus, after the preceding classes, it is advisable to specify the project, to say "what it is", "what it makes" and "what it becomes" (Le Moigne, 1990) and also to understand the project's positioning compared to Lock's categories (2003, see point c). Therefore this part will consider the principal facts, and will announce the few particular tracks which could be developed later on.

### **e) Class 'objectives and deliverables'**

During interviews, the objectives are mainly expressed in terms of times, budget and quality. And it is in particular the measurement of the results in terms of budget reached or exceeded, (delivery)time respected or not, quality in conformity or not, which is expressed by some protagonists to mean that the project is a success or a failure. This is why a new classification in 3 categories of Lock (2003) is here chosen; it corresponds in fact to the "TCQ" traditionally retained by the authors: "the time/cost/quality triangle" (Turner, 1999). More especially as, "all the actors of a project must have perfectly understood the basic balance between the quality of the future product, the cost which one is ready to invest and time that one plans to devote to it" (Génin, 1999).

The corresponding categories of Lock are thus:

- « 1 - Specification, performance and quality »,
- « 2 - budget »,
- « 3 - time to completion ».

These are the deliverables (or outcomes, outputs... ) that the project leader has in general as mission to respect; they are in principle co-defined by the sleeping partners of the projects and the team of the project.

Indeed some authors regret that the measurement of the success of a project is made only around these three classes (Cleland, King, 2001: "completing the project one schedule, staying within the budget, meeting the technical performance specification and/or mission to be performed") and propose to take into account other factors for the definition of the success of a project, such as the satisfaction of the customer, of the project team, and of the users. However, if these criteria are actually raised during talks, they are not retained by the people interviewed, to define the success or the failure of their project.

### **f) Class: 'description of the project by some protagonists'**

The various protagonists of the same project do not have the same vision of the project, of its evolution, of its results and of its own role regarding to this activity. This vision often related to their experience of the project, which, according to people interviewed, is

dependent on their positioning in regard to the deliverables, and not only in regard to the project as a whole. This is why this class is introduced after the description of objectives and deliverables.

The objective of this further class is thus to take an eloquent phenomenon in our analysis into account: the multitude of points of view of the actors. It is besides what makes the richness of any research: the identification of divergences from points of view and/or their unification, and thus to allow different and complementary representations. Indeed many "knowledge, competences and points of view exist in the organizations" (Avenier, 1997).

To emphasize the various points of view and various visions, and knowing that it is not possible to be exhaustive in grids or cards, we will only quote some expressions which are characteristic of the people interviewed and/or observed.

### **g) Class: 'organization of the project'**

This part indicates the organization which is set for the follow-up of the project, in particular the team of the project.

Indeed it is important to refer to it and this for two reasons: firstly the actors interviewed spontaneously evoke the organization of their company, the organization related to the project, and even the evolution of this organization (putting forward the determinants and the consequences of this evolution). And secondly, the literature shows that there are several forms of organization of the projects, in particular linked to the people, to their competences and their behaviours.

Thus a project team will be, as the case may be, mono trade or multi trades (Raynal, 2000). It will be mono enterprise or multi enterprises (in particular in the case of complex projects). It will be national but more often international (Lee and Peggy, 2002) and frequently transcultural, etc.

But, that was underlined before, other protagonists and stakeholders influence the systems of decision, the situations of project, their process and thus the organization (for example in the case of a strategic project, the head office can decide on the person named as project leader in one of its subsidiaries). The behaviours of all these actors and/or stakeholders, their actions and their interactions will influence a type of organization ("humans and organizations", Parvinen, 2003).

The organizations most often pointed out by the authors are: the sequential organization, the convergent engineering ("ingénierie concourante" into French) and the simultaneous engineering ("ingénierie simultanée" into French), and recently developed, the strategy "making way" ("la stratégie chemin faisant" in Avenier, 1997).

The definition of the organization related to the project often depends on "the representation of the process of conception", and of the "development of tools for piloting

of project" (Bossart, Chanchevriev and Leclair, 1997). And as the design and the conception are mainly described by the actors like "a diagram of organization of the tasks", it is possible to represent the types of organization related on the situations of project and on the actors (directly or indirectly) involved, with the following diagrams.

*- the sequential organization:*

This "traditional" organization presents a succession of the tasks and a compartmentalization of these tasks ("traditional method", "sequential task - function to function" in Fleming, Koppelman, 1997), i.e. "the course of the project is here sequential" (Loilier, 1999).

The sequential organization corresponds to a "linear structure" (Foulard, 1994) during which the actors intervene in a successive way, as the following diagram 1.1 shows it (indeed the 3 diagrams characteristic of the organizations described here will be represented at the end of this point).

*- Convergent Engineering and simultaneous Engineering*

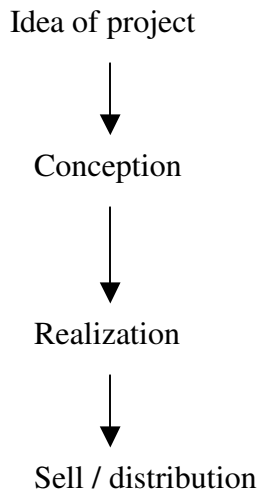
There is here a question mark hanging over the sequential structure and the compartmentalization of the tasks. It is indeed a question of anticipating the most effectively possible the consequences of a phase of the sequential organization by the taking into account of this phase in an upstream phase (to ensure "savings of time over durations already optimized" in Duquenne, Lacoste, 1995, 1999). In consequence, teams, departments work together, even in parallel ("parallel paths" in Fleming and Al, 1997; for example, the studies of the body and the studies of interior trim of a vehicle are carried out in parallel). In this logic, the actors communicate and cooperate (Loilier, 1999; Bossart and Al, 1997). And "the limit of its practical application is often presented as related to the exchange of information between the various actors of the project during its realization" (Voss, Russel, Twigg, 1991).

Also a technical specialist for instance, evolves from the role of making a task of a project to that of an actor of a collective decision-making, where he learns how to decide on a problem which is less compartmentalized than before (Bocquet, Duffau, 1997). In accordance with this "parallel design", all the potential actors are constantly present (Scarf, 1994). See in the following page, the schematization of this organization (Diagram 1.2).

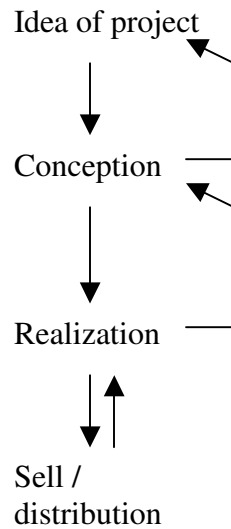
*- the strategy "making way"*

It corresponds to the situations where the milieu is perceived as complex and thus "likely to unforeseen evolutions". In this case a strategy based on the "groping setting of actions deliberated (desired) within emergent situations" is privileged. Thanks to comings and goings and interactions between the project and the actions, "the realization of the intentions and the assimilations of unforeseen actions are combined which make discover new ways" (Avenier, 1997).

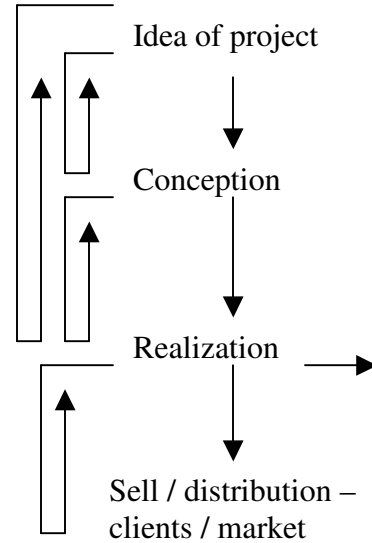
To achieve the description of the class 'organization of the project', the three situations described above have been schematized as follows:



Sketch 1.1  
*Sequential  
organization*



Sketch 1.2  
*Convergent  
Engineering /  
simultaneous  
Engineering*



Sketch 1.3  
*Strategy "making way"*

### **h) Class: 'cycle of life of the project'**

"Writers usually refer to the period that starts with design and planning and ends with handover of the project to its customer" (Lock, 2003). Thus our description will consider the phases of the cycle of life of the project, as described by Declerck, Eymery and Grener (1980): "design, formulation, analyze and evaluation, decision, setting up, reporting, transition at the operational stage, post evaluation". Or, according to the people interviewed, it will consider the "condensed" phases of Boutinet, (1990): "phase of design or definition"; "phase of organization or planning"; "operational phase or carrying out" and "phase of completion or evaluation".

However according to the people interviewed, the project has a life before the project and after the project: thus the cycle of life of the project comprises four phases: before the project or pre-project, upstream of the project, during the project and after the project. Although the authors in general identify three principal phases of marketing of project, namely the phases of pre-project marketing, marketing at the start of the project and on

going project marketing (Cova and Hoskins, 1997; Pluchart 1998), the analysis of interviews show that the period of project marketing starts earlier than the phase of design or definition of the project. And especially it appears that this phase doesn't end with the taking in hand by the customer.

As a result we took into account this phase post project proposed by the people interviewed (within the framework of our research, we could define a fourth phase of project marketing: the phase 'marketing intended to create the conditions of a future project of the next project', during which one prepares the idea of a future collaboration, the future project, on the basis of the control of the project process just carried out, and in particular on the basis of relational and trust developed between the actors during the previous experience; Lecoivre, 2005).

### **i) Class: 'period of the project covered by the research'**

Research and interviewed carried out relate theoretically to all the cycle of life of the project. However the moment of investigation in the company corresponds to one particular time of this cycle of life.

This moment will be specified in this last class, to make it possible to locate the project in its cycle at the moment of the investigation, (for that we will consider the four phases of Boutinet, 1990; see above). Indeed, although the whole of the cycle is analyzed, for example it may be that the project started before the investigation and that the researcher "intervenes" within the framework of the investigation, only in phase of evaluation of the project. Then researcher, and people interviewed, must find the history and the origin of the project, its chronology, its development, its risks, etc, and this, not only from the memory, but also thanks to documents. The observation of the phenomena by the researcher can be restricted.

Moreover this precision of the moment of the investigation will also make it possible to situate the researcher in regard to the expectations of the protagonists interviewed (indeed, if it there was no research-action in the sense of "intervene-researcher", - in Wacheux, 1996 -, certain protagonists and in particular at the top of the companies, expected at least remarks, new questionings for later actions, notably for a possible improvement of their situation of project (for example, achievement of a project under better conditions, or obtaining a new project).



## **Conclusion**

Beside the scientific interest of the grid here proposed which facilitates the reproducibility of the research and a better apprehension of the problematic, which can help professors to teach marketing and students to develop marketing issues, we also note an interest for professionals. Indeed using such a grid permits the professionals to get reference marks, to check and control results of processes and eventually correct actions. All things considered this grid or card can be used as an internal tool of the company to be more reactive and to capitalize on experiences and knowledge.

Concerning the concepts of project marketing and marketing Business to Business, the reproducible grid of presentation of cases facilitates the actions to foreseen and to be applied during the different phases of the project, and especially at the upstream phases of the project. Furthermore, as the Business to Business sector is very heterogeneous, a classification is necessary to better apprehend the various situations and analyses of any market. Finally, the irreversibility of the decisions, which is characteristic of the project management, can be pointed out by the actors looking at the grid; this can help to follow up and assure a success in project process.

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*ANNEXE 1:*

**Descriptive card (summary of the 9 classes)**

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1. SECTOR, COMPANY, TRADE, ENVIRONMENT
  2. CUSTOMER AND OTHER PROTAGONISTS
  3. TYPOLOGY OF THE PROJECT
  4. DESCRIPTION OF THE PROJECT
  5. OBJECTIVES AND DELIVERABLE
  6. DESCRIPTION BY PROTAGONISTS
  7. ORGANIZATION OF THE PROJECT
  8. CYCLE LIFE OF THE PROJECT
  9. PERIOD OF THE PROJECT COVERED BY RESEARCH
- 

*ANNEXE 2: Example of a card descriptive of the case C*

**CASE C**

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**1 – SECTOR, COMPANY, TRADE, ENVIRONMENT**

**SECTOR:** Company C belongs to the automobile industrial sector

**COMPANY:** At the origin the company C was a subsidiary company of a French manufacturer, and then it became independent during several years. Since 1999, the company belongs to an international group, an important supplier for the equipment suppliers and to the manufacturers. The group, whose head office is Italian, is also present in Germany, in Romania, in Brazil.

The firm C has more than 40 years of existence; it employs 150 people, and its sales turnover is of about 14 million euros.

The group, in which the company is integrated, presents a strategy of positioning on a world level, associated to the determination to work in market of vehicles in which it is not yet present.

In the field of engineering, the competition is very intensive, so the company C shows a will to differ from its competitors.

**TRADE:**

The company C is specialized in the automobile engineering, with two trades:

- Design product - process (body, architecture, equipment, studies, calculations, plans of assembly, CAD - FAO<sup>8</sup>, mechanics, plastic, sheet-iron works...)
- Dimensioning and analyses of the structures (body, mechanics, calculations, research and development...)

**ENVIRONMENT:**

The automobile market presents promising perspectives for the 3 years to come, but remains very competing.

In particular the perspectives are encouraging in the 'Mercosur' zone whose tendencies and expectative reveal potential.

It is necessary to specify here the general tendency of the sector to the development of partnerships with subcontractors, equipment suppliers, even with competitors, to limit the longer-term recruiting and risks.

**2 - CLIENT AND OTHER PROTAGONISTS**

The client is specialized in the development and the manufacture of commercial vehicles. It is a subsidiary company of engineering and production, belonging to a French manufacturer.

It corresponds to the strategy of growth of its group, whose axis of principal development is the 'Mercosur' zone.

The principal in-house identified protagonists (company C) are the members of the team of the project (of which project leaders, drawers, the person in charge for the Engineering and design department; to see further), the top manager, the commercial. And outside of the company, in addition to the client, protagonists are the competitors (of

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<sup>8</sup> Computer-aided design - Manufacture Computer-assisted

which one of them was interviewed). As for the other protagonists (such as the suppliers), they are multicultural and multidisciplinary. They are very numerous and various, and are not always well identified.

### **3 - TYPOLOGY OF THE PROJECT**

The project in question is included in the category "Manufacturing projects", according to the classification of Lock (2003): development and manufacture of a system, upon several companies.

### **4 - DESCRIPTION OF THE PROJECT**

The Company C realizes for the account of its customer (French car manufacturer), the complete development, the engineering of a vehicle, as well as the "total" piloting of the project, including the piloting of the various subcontracting (European and Brazilian companies). The vehicle corresponding will be produced at the Brazilian factory of the manufacturer.

In front of its need for differentiation, the company C draws from this project a competing advantage, which proves to be not only the *complete engineering* of a vehicle, but also the *piloting* of this project of complete development of the model, usually carried out by the client (in general the manufacturer).

Engineering consists - in the studied case -, to conceive, starting from a style, from a design, each part of the external and interior model, on screen and paper: it is then a question of digitizing the style part then the technical part, with feasibility study, structures, calculations, etc... In addition the development required by the client is on a "complete" perimeter, i.e. it is necessary to also envisage the validations at various stages and to carry out the manufacture of the prototypes and the tests (the vehicles are indeed put in situation and destroyed).

As for piloting, it acts for the supplier C, to lead for the account of its customer, the management of quality, the management of the result, and the management of the times of the project. And this, in regard to its own services, those of the partners subcontractors, but also in regard to those of the client, in particular the Brazilian factory which has been chosen for the manufacture of the standard vehicles. This piloting / follow up must be led until the commercial agreement by the client.

This project of engineering and piloting, is regarded as strategic for the whole of the people interviewed (supplier as client).

Upon the departure, the difficulties encountered on the level of the suppliers and local subcontractors (in Brazil) selected in the beginning, cause an important evolution of the project: European companies come to replace the local partners, thus the "barycentre" of the project becomes France and not Brazil anymore. Then the project meets with difficulties and risks of various orders (relational, contractual and organisational aspects, modifications, loss of credibility, difficulties to maintain the dates and to obtain information from the client, from the producer or from the subcontractors; personal investment of the members of the team of the project, etc...).

But finally the project succeeds, in the expected times and quality.

The realization of this project, the control of its process, and the perception of a certain success by the two parts, encourage the actions of the company C for future projects, within the same client as by prospects.

In particular this project, its context, the conditions of its development and the perspectives which it causes, put forward an evolutionary and interactive process of the phases and actions of marketing of project with, in particular, a relational and situational evolution.

### **5 - OBJECTIVES AND DELIVERABLE**

- Validations, prototypes, test results, plans and documentation (data-processing for instance) to transmit to the client (the factory producer): it is the expectative quality;

- A budget to be respected: by the supplier as at the client;

- Delivery date: a development of the vehicle over one period of 30 months, shorter than what is usually carried out at the in-house customer

### **6 - DESCRIPTION BY PROTAGONISTS**

The interviews made it possible to obtain the points of view of the two parts (client and supplier); some examples allow a first lighting:

At the client one privileges especially the execution (technique, conformity) and piloting (usually treated in-house):

Indeed, the Person in charge for the Service Partnership specifies that it is a question for their company "of externalise complete projects, i.e. within a well identified perimeter, and to externalise not only the task, the execution, but also the piloting".

The project C corresponds thus to the realization by the supplier "of the final engineering, of the plans, to be able to carry out parts, specifications, which we call the validations, i.e. to check by calculation or physically on the prototypes that the vehicle thus defined (on something which is rather virtual), [...] is quite in conformity in terms of product, in terms of services, in terms of quality, in terms of reliability".

Whereas people interviewed at the supplier point out the relational aspect, and the difficulties related to this aspect. For example, the French project leader tells: "at the time, when I arrived, the most delicate part in terms of relational and impact, was the acceptance of our Brazilian colleagues, as they had the leadership on this project at the beginning, as somebody from their premises was project leader. And indeed, of only one blow, they were removed from the project and somebody arrived and took the leadership".

And people interviewed enhance the success related to the project, in spite of the risks and difficulties. Thus the Director of the company C concludes: "that was hard [...]. I think that it is considered today like a success. More than thinking: the client expressed in writing that he considers that it is a success".

## **7 - ORGANIZATION OF THE PROJECT**

- At the company supplier C:

At the origin and at the starting of the project, the *team of project* includes:

- The Brazilian project Leader
- 2 or 3 Brazilian "designers"
- The Person in charge for the French Engineering and design department
- 2 French technician people, in binomial, members of the personnel of the company C

Whereas the project started since 1 year, the protagonists of the company C and the mother company decide to replace the project leader (and the Brazilian designers left the group). Then the team includes:

- The French project Leader
- The Person in charge for the Engineering and design department
- 2 technician people in binomial (body)
- 1 technician people (study equipment)
- an Italian people (follow-up of the prototypes)

- At the client company:

As early as the starting of the project, it is decided to create a 'Service Partnership', and the person in charge is based in France.

And they also decided to install the team<sup>9</sup> of the project of the supplier C, within the client factory, and near the office of the Person in charge of the Service Partnership, to facilitate the exchanges and the follow-up

## **8 - CYCLE LIFE OF THE PROJECT**

The starting of the project in question is at the middle of the year 1999 and it finishes in end of the year 2002.

The analysis of the phases of project marketing shows that the phase of pre-project marketing (the project is not started yet) begins before 1998 and the ongoing marketing (phase which corresponds in particular to the development of the project) starts at the beginning of 2000, and finishes in December 2002 by the completion of documentation and its transmission with the client. Then, the marketing intended to create the conditions of a future project continues beyond this period.

## **9 - PERIOD OF THE PROJECT COVERED BY THE RESEARCH**

From November 2002 to February 2004

The project is thus in phase of evaluation.

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<sup>9</sup>the logic of gathering competences (external and interns) often result in the creation of geographical and physical places dedicated.