

Managing global customer relationships in diversified project-based firms

Elina Pernu

Department of Marketing, Faculty of Economics and Business Administration, University of
Oulu, P.O. Box 4600, 90014 University of Oulu, Finland
elina.pernu@oulu.fi

Abstract

This paper examines the challenges of managing global customer relationships in diversified multi-project organization. The present study employs a single case study setting with three embedded units of analysis and qualitative empirical data to create further understanding on the phenomenon. The primary empirical data consists of several interviews with the mining technology company. The interviewed persons represent the experts of each customer inside the case company. As a result, different kinds of challenges of global customer relationship management in project business organizations are categorized.

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Introduction

As organizations become more global, the need to deeply understand customers and carry on a meaningful dialog with them is increasing (Young & Javalgi, 2007). Multinational customers demand global based contracts, prices and products instead of just country based services (Harvey, Myers & Novicevic, 2003; Montgomery & Yip, 2000). Still, one of the major issues concerning the management of customer relationships is the reconciliation of the need for global coordination and control with local needs of customers in the face of increased levels of organizational complexity and cultural diversity (Luo, 2001; Luo 2002; Millman, 1996; Wilson & Weilbaker, 2004).

The organizational complexity inherent in global customer relationship management requires a balance between local responsiveness and global integration. That is why strategic approaches and organizational structures must be reoriented to address local as well as global issues (Bartlett & Ghoshal, 1998; Millman and Wilson, 1998; Prahalad & Doz, 1987; Wilson & Weilbaker, 2004). In management of customer relationships, the reconciliation of the need for global coordination and control with local needs of customers is especially important. Also the increased levels of organizational complexity and cultural diversity create additional challenges. The changing patterns of global procurement initiatives and increasing demands for a uniform global price and product/service offering are helping suppliers to realize that if they are unable to serve customers globally, then they are unlikely to continue to serve them at a national level (Wilson & Weilbaker, 2004). These trends require multinational companies to adopt global customer relationship management programs (Harvey Myers & Novicevic, 2003; Yip & Madsen, 1996).

Managing global customers is a challenging task in itself (see e.g. Birkinshaw, Toulan & Arnold, 2001) and implementing it in a project organization creates additional challenges. The nature of project organizations is fractured (Hellström & Wikström, 2005; Skaates, Tikkanen & Lindblom, 2002). How to organize a coherent customer interface in a dispersed project business organization remains a challenge. Projects in this multicultural context are global and involve numerous of different business units inside the project organization. Projects are also discontinuous (see e.g. Hellström & Wikström, 2005; Skaates, Tikkanen & Lindblom, 2002) and together these issues multiply the challenges in global customer relationship management.

This paper focuses on the challenges of managing global customer relationships and aims to answer the question: What are the key challenges of managing the dynamic global customer relationships in dispersed project business organizations? In this research, the challenges are

divided into internal, external and relationship challenges. The present study combines research on global account management and on global multi-project organizations. Even though global customer relationship management is an important strategic issue, it has received only limited research interest (see Birkinshaw, Toulan & Arnold, 2001; Hui Shi, Zou & Cavusgil, 2004). Neither has the management of multi-project firms, i.e. multiple project management inside a single firm or the relationships between projects in that specific firm (Söderlund, 2004), been extensively studied. The present study employs a single case study setting with three embedded units of analysis and qualitative empirical data to create further understanding on the global customer relationship management in dispersed project organizations. The case company is a provider of process technologies for the mining and metals industry. The management of customer relationships of the case company will be analyzed through its three, selected, global customer relationships. The primary empirical data consists of several interviews with the mining technology company. The interviewed persons represent the experts of each customer inside the case company. As a result, different kinds of challenges of global customer relationship management in project business organizations over the development of the relationship are categorized. In the end, some general guidelines for global customer relationship management are suggested.

Theoretical Base

Global customer relationship management

When doing business, companies are engaged in exchange relations and some of those relationships can be developed into more close and long-lasting relationships. These relationships have complex inter-firm contact patterns and the contact structures inside organization involve several organizational levels (Holm, Johansson & Thilenius, 1995).

One way of coordinating these contacts and handling global customer relationships consistently is to introduce a global account or global customer relationship management programs. Global customers and global customer relationship management have only recently tried to define extensively (Wilson & Weilbaker, 2004). According to the definition by Wilson & Weilbaker (2004), global customers operate internationally, have strategic importance to the supplier, expected to be serviced and supplied consistently worldwide (see also Yip & Madsen, 1996) and are beginning to buy on coordinated basis or at least select vendors centrally. Global customer relationship management in turn is a process which helps a company to meet its customers' global and local needs (Wilson & Weilbaker, 2004). The ultimate goal is to build a strong relationship to secure the long-term loyalty of a global customer (Wilson & Weilbaker, 2004; Yip & Madsen, 1996).

Global customer relationship management is not a new phenomenon. New development is, however, the emergence of it as one of the major strategic issues confronting multinational, globally acting companies (Wilson & Weilbaker, 2004). There has been a growth in cooperative global arrangements between suppliers and customers, since more and more customers are requiring their suppliers to serve their global needs. Suppliers see these global customer relationship management programs as a way to develop long-term relationships with key global customers and through that hinder competitive inroads. (Harvey, Myers & Novicevic, 2003.)

Global customer relationship management has multidimensional effects on firm's performance and it should be viewed beyond profitability to include such performance

dimensions as customer retention, share and revenues (Harvey, Myers & Novicevic, 2003). The foreign subunits of multinational must be differentiated enough to encounter successfully cultures, markets and business practices in each location (Luo, 2001). However, there is a need for a structure that ensures that this flexibility provides maximum contribution to corporate performance (Luo, 2001). Cooperation between different units, locations and projects is needed (Evaristo & van Fenema, 1999). In global customer relationship management the aspects of local responsiveness and global integration need to be taken into account.

Global, multi-project organization

Nowadays in a global business environment the project operations are one of the dominating modes of international business (Skaates, Tikkanen & Lindblom, 2002; Skaates & Tikkanen, 2003). Project business is often defined around its common characteristics and challenges. Typically they are described through DUC (discontinuity, uniqueness and complexity) framework. For example, Tikkanen, Kujala and Arto (2007) describe the central features of project business as the uniqueness of individual projects, the complexity of the business network and project offering, the discontinuity of demand and relationships between projects as well as the significant amount of financial commitment of parties involved. Projects are usually characterized with a high rate of uncertainty, because they involve marketing of an idea rather than a finished product (Welch, 2005). The nature of project organizations is fractured (Hellström & Wikström, 2005; Skaates, Tikkanen & Lindblom, 2002). Project organization in this context is a multinational company in which also the projects are global and involve multiple different business units inside the project organization.

Today's business environment is quite dynamic and project-orientated business management can be seen as one approach to manage this turbulent business (Suikki, Tronstedt & Haapasalo, 2006). When talking about project business and managing the projects, traditionally the discussion has concentrated on managing single, individual projects (i.e. project management) and has had stronger technical emphasis (see Alajoutsijärvi et al., 2008; Söderlund, 2004). This research concentrates on multi-project firms which can be defined as multiple project management inside a single firm and especially to the relationships between projects in that specific firm (Söderlund, 2004). The level of research differs in research of multi-projects and project management. In research of multi-project organizations, typically the used perspective has been on executive level management (Alajoutsijärvi et al., 2008).

Globalization requires global management and business processes as well as cooperation of organizational teams on an international scale. This requires intensive cooperation between organizations, projects and professionals. The cooperation between different sites around the world enables organizations to benefit from differences of time zones. Coordination of multiple locations demands for coordination of activities. Multinational corporations can also take advantage of local competence and leverage this knowledge on a global scale. Global projects make the realization of those benefits possible and that way increase the corporate performance. (Evaristo & van Fenema, 1999.)

Internal organizing of multinational corporations

Coherent worldwide management in global multi-project organizations requires extensive interunit coordination and integration (Ghoshal, Korine & Szulanski, 1994). As mentioned before, these global multi-project organizations can also be characterized as multinational

corporations. Multinational corporations are complex multidimensional entities (Gupta & Govindarajan, 2000) and can be identified as a network of subsidiaries where knowledge and competencies are accumulated from different parts of the world to achieve a competitive advantage (Holm & Sharma, 2006). Birkinshaw and Hood (1998) define subsidiary simply as a value-adding entity in a host country. According to Holm, Johansson and Thilenius (1995) it has been said that to properly understand the dynamics of MNC, there is a reason to study the operations of its different units. It is good to notice that in most corporations there is an internal competition of these business activities; the subsidiaries can compete both from existing and new businesses and responsibilities (Birkinshaw & Hood, 1998).

Since local organizational units are more aware of the local dynamics and conditions, their opinions need to be considered when finding an optimal balance between global integration and local responsiveness (Luo, 2001). MNCs can benefit both from location-specific advantages and competitive advantages if they allow foreign subsidiaries to have the necessary flexibility to adapt to their particular environment and also maintain a system of integration and internalization. Local responsiveness often originates from the complexity, dynamic market conditions as well as of the sociopolitical and macroeconomic host country environments. By maintaining the necessary local responsiveness, subsidiary initiative and the proactive pursuit of new business opportunities can be maximized in a consistent manner with the MNE's strategic goals. (Andersson, Forsgren, & Holm, 2002, Luo, 2001.)

The development of MNCs is based on the development of its different units. Different subsidiaries develop in different and inconsistent directions, which create the need for headquarters coordination of these developments (Holm, Johansson & Thilenius, 1995). To be able to control these developments, MNC requires knowledge of the subsidiary networks (Andersson, Forsgren, & Holm, 2002). According to Birkinshaw et al. (2002) the issue how to structure and manage the relationship between headquarters and its foreign subsidiaries remains challenging. The coordination within the MNC includes controlling and coordinating the headquarters-subsidiary relationship. This relationship is never a simple one. Subsidiary's desire for autonomy is challenged by the headquarters preference to control and where subsidiary is interested its local business; the headquarters is concerned with the overall profitability.

The challenges of customer relationship management

In this research the MNC in project business is described as dispersed project organization as a result of typical features in project business. Dealing with the numerous multinational units causes a lot of challenges to MNC. Previous research has concentrated substantially on the aforementioned headquarter-subsidiary coordination dilemma. However, researching these internal dynamics is not sufficient; more understanding of these dynamics in relation to customer is needed. MNC consists of multiple different units and understanding different challenges caused by the nature of the multinational company and project business is needed. These challenges discussed in this paper are divided into internal, external and relationship challenges and further described in the following figure (figure 1).

In this research, it is seen that the common features of project business, such as discontinuity, create challenges on the customer relationship level. Global environment of multinational corporations and dealing with different cultures creates external challenges for the organization. By coordinating the relationship of different subsidiaries as well as headquarter - subsidiary relationship, the organization tries to manage its internal challenges.

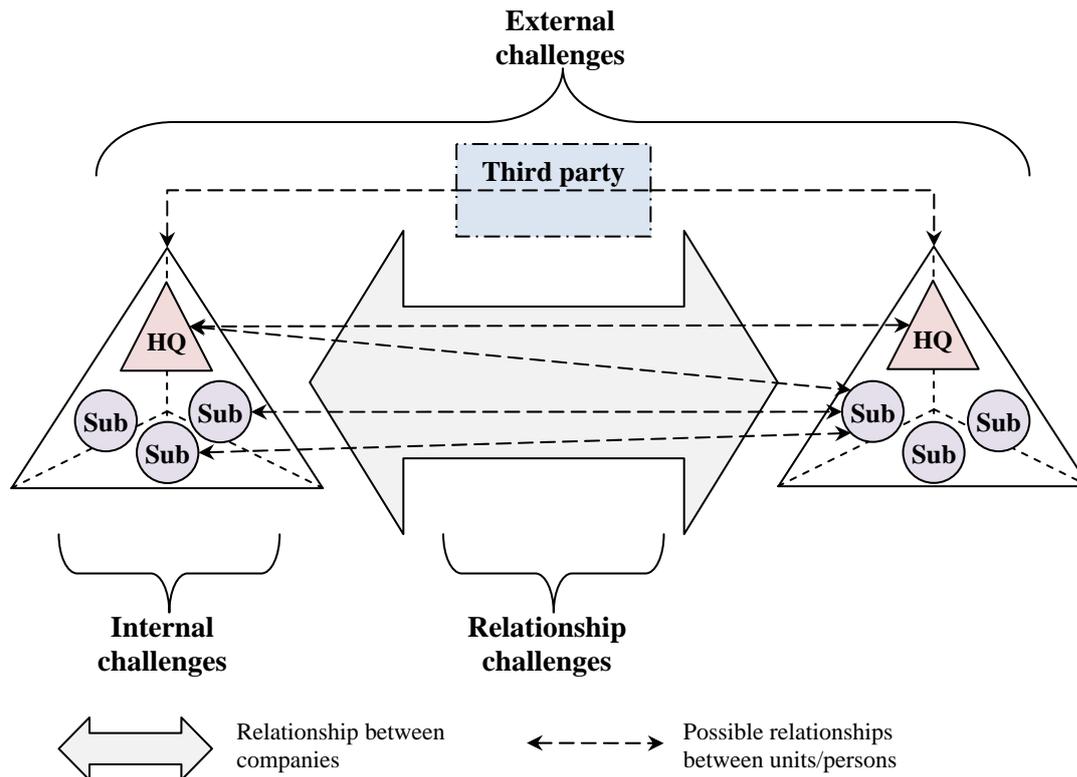


Figure 1. Different kinds of challenges of global customer relationships in project business organizations.

Term internal challenge is used here to describe the challenges caused by the organizing the multiple different divisions and product lines inside the organization. External challenge refers to the features of MNCs; these companies are involved in multiple countries and working with numerous global projects. This setting is a cause for various challenges and affects the overall customer relationship management. Relationship challenges are usually caused by the nature of project business. As mentioned earlier, projects usually are discontinuous by nature, which means that after project completion there might be are “sleeping periods” (Hadjikhani, 1996). Also, the multiple relationships between companies and different units create challenges for the companies.

Methodology: data collection and analysis

In this paper the case study method is applied, whereby qualitative data is used to create understanding of the phenomenon. Case study is chose for the method since it can offer a valuable way of gaining knowledge in a cross-cultural setting (Marschan-Piekkari & Welch 2004, 7-8) and therefore it is also relevant for this research. A case study can be seen both as the process of learning and the product of learning (Ghauri 2004, 109). Qualitative research is also suitable for cross-cultural research since it offers deeper understanding and is less likely to have cultural bias or ethnocentric assumptions than traditional surveys. Also, qualitative research tries to understand the meanings and beliefs behind the action and it can offer answers to complex and tricky problems which are especially typical in international management research (Marschan-Piekkari & Welch 2004, 7-8).

The present study employs a single case study setting with three embedded units of analysis and qualitative empirical data to create further understanding on the global customer

management in dispersed project organizations. In this study the chosen methodology follows abductive research logic (see Perry, 1998), which means that theories and empirical data take turns and together aims to develop the theory of global customer relationships.

The primary empirical data consists of several interviews with the mining technology company (see table 1). The concern management was asked to choose three customers that they felt were interesting and important to them. Chosen companies were big, metal producing concerns that have strategic importance to the case company. Case company already has established relationships with these customers. All the customers have multiple productions units and have project with all the divisions. The interviewed persons represent the experts of each customer inside the different divisions of the case company. Through systematically gathering and analyzing empirical data the aim is to create a holistic understanding of the phenomenon. The primary empirical data consists of interviews done with the mining technology company. Four interviews inside the mining company were made in November 2008 and three more in February 2009. These interviews lasted from one hour to two and a half hours and were all tape-recorded. Together these interviews consist 10 hours and 29 minutes of recording. Two of the interviews concentrated on all of the customer relationships, one with customer A, two with customer B, one with customer C and one with both customers B and C. The themes for these interviews were centered on the history and development of customer relationship, features of the relationship, cooperation between the companies and different units and shared projects.

Table 1. Primary empirical data: interviews

Interviewee	Duration	Concentration
President of Market India	2h 40min	Customer A
President of Division I, North America	1h 23min	Customer B
Managing Director of Division II, North America	1h 29min	Customer B
Vice President, Base Metals, Marketing & Sales	1h 48min	Customer B, C
Managing Director of geographical unit in Mexico	1h 6min	Customer C
Senior Vice President of the Case Company	59min	Customer A, B, C
Senior Manager of Marketing Development	1h 2min	Customer A, B, C

The research is connected to a larger research project, which focused on different aspects of project based business. During the project, 15 other interviews were made within the case company. To ensure as good a fit as possible between reality and the studied aspects, data were also collected from written sources (Easton, 2000). The secondary data included the web-pages of the firm and its customers, brochures, project memos, as well as workshop materials and case-specific seminars. The secondary data was also utilized before the actual interviews to create understanding of the company, its operation logics and its customer relationships. The secondary data was an important supplement to the interview material by creating comprehensive understanding of the context and actual phenomenon. The raw data for the analysis was formed from primary data and different sources of secondary data and it included in total over 300 pages of the verbatim interview transcripts. The word-by-word interview data was then coded based on the conceptual framework and themes arising from the data.

Case study on customer relationships in multi-project organization

The case company is a provider of process technologies for the mining and metals industry. The customer relationship management of the case company is analyzed through its three, selected, global customer relationships (namely customers A, B and C). All of the customers

are senior houses and steady customers to the case company. Customer A is mainly working in India, Zambia and Australia. The relationship with the customer A has started actively in 2003 and the customer has been experiencing high growth and expanding especially rapidly in 2003-2006. Customer B is focused in North and South America, Australia Pacific and Africa. It has had a long, steady relationship with division I (from 1990s) of the case company and it is offering great potential for division II (relationship started in 2006). Customer C is concentrated on South and Central America. The projects with this customer are not massive but they are all the time constant and steady. The Division I has had a relationship with the customer C from 1980s and Division II from 2003.

Since relationships with customers consist of multiple different units and divisions – both on customer’s and supplier’s side – and these relationships are embedded in their own cultural surroundings, the special characteristics of the customer needs to be taken into account when talking about managing global customer relationships in diversified project-based firms. The following table (table 2) categorizes the differences and similarities in three customer relationships.

Table 2. Internal, external and relationship features of customers A, B and C.

Internal feature	Customer A	Customer B	Customer C
Establishment of relationships in different divisions	Relationship created originally through one contact person	Created quite individually for different divisions, but cooperation exists	Contacts originally created through top management
Need to share customer contacts inside the supplier organization	Relationships needed, divisions try to work separately, customer may require KAM	Easy access to the customer, divisions work separately, risk of not sharing the contacts	Divisions can work quite separately, Mexico unit tries to coordinate the contacts
The coordination of the relationship	Finland, from head office (local subsidiary established recently)	Division I: Canada, Division II: Finland, (Greece)	Division I: North America, Division II, III: Mexico
Supplier’s units that work with the customer	Finland, Germany, (in future India also)	Canada, North America, Finland	Finland, Mexico, North America, Germany
Communication between different units and customer	Some units wishes to work independently	Sometimes hiding the information, local office not always informed	Overlaps exist, local office not always informed
Divisions of the supplier involved	All, mainly Division III	50 % Division I, 50 % Division II	All, mainly Division II
Relationship feature	Customer A	Customer B	Customer C
Typical features of the customer organization	Family business, few persons managing the whole company	Global. commercialized company, hierarchical, clear roles	Family business, social responsibility, open, low hierarchy, patriarchal
Revenue logic of the customer	Low production costs, producing metals as cheap as possible, lots of projects	Search for challenging and cheap and mines, where advanced technology needed	Strong focus in Mexico (and South America)
Creating contact with the customer	Title important to get the contact	Easy access to the customer	Quite easy to get contact with the customer
Contact persons inside the customer organization	Relationships critical with key persons, power centered with two brothers	One important key contact for all divisions, but also multilevel contacts	Small organization, founder/manager in a key role
Key account management demanded	Yes	No, but “trusted” person in suppliers organization exists	No, but customer likes to work through local company
The nature of the relationship	Dyad, between supplier and customer organization	Triad, between supplier, engineering office and customer	Dyad, between supplier and customer organization

Use of engineering houses	No	Yes (in theory, direct contact not allowed)	No
Requirement for personal relationships	Enormous dependence on relations, discussions done between persons, not between companies	Less dependent on personal relations, but still important, role of third parties greater	Greater than average dependence on relations, network important, trust based
Relationship maintenance, problem solving	If problems, supplier's contact person is contacted	Phone calls ones a month to ensure that all projects are working	Concern management informed, contact to local office if problems exists
Customer's interest for product development	No special interest for product development, Intention to strategic partnership	Technology, innovation based, intention toward strategic cooperation	Forerunner in Mexico, Wants to be the first doing improvements
External features	Customer A	Customer B	Customer C
The importance of culture	Big, need for cultural sensitivity. Personal relationships essential	Little difficulties when dealing with the cultural issues	Advantage of being an European (when compared to US)
Decision-making of the customer	In India	In Canada	In Mexico

The features listed in the table can cause different challenges to the case company. The management of global customer relationships is itself challenging but implementing it in dispersed multi-project organization multiplies the challenges faced by the company. In this research, the management of global customer relationships is discussed through three different challenges; internal, external and relationship challenges.

As the different divisions can compete with each other and have substitutive technology, internal challenges exist. Also the communication between different units – and even inside one unit – is demanding.

“..many times you are dealing with a customer -- and because it's not involving some other division at this point, you many times can forget to inform the others what has happened -- I don't like the customer to come to me and to say hey I'm talking to [name] about this all the time, we have been having meetings and I say oh, I didn't know that because then the customer says, well what kind of a company are you if you don't know or how important are we as a customer if you don't know?” (Referring to customer B)

When you are dealing with the customer that is relatively easily contacted and accessed, the risk of not sharing own contacts grow as it is with customer B. Customers who are requiring more traditional key account manager are more often dealt with coordinated basis. The risk here lies in the situation, when negotiations fail since the divisions choose to act independently and they do not have enough information on customer or required cultural sensitivity. This kind of independent action is expensive, since big projects are substantially valuable and it can also affect negatively to the whole relationship as well as the ability of the division in question to do business with the as happened with the customer A.

”Here comes the dilemma for us that when the frontline [local office] takes care of the issues there [near customer C] and then from the left comes some guy from the division -- Of course we share the information, but the coordination of the contacts.. I don't know how stupid the customer thinks we are, but at least I would think that if you are contacted from everywhere simultaneously”

Problems also arise when the local office is not informed of the action of other units. In many cases the customer wants to work through local office or has the closest relationship with the local unit. The situation also complicates the creation of a unified way to handle the customer. There might exist multiple contractual arrangements and conditions of sale as well as negotiation practices. Not knowing each other or each others' project is also a challenge. For example in the relationship with customer C, the customer had introduced two supplier's representatives to each other, who were in the city meeting the customer in the same time without knowing from each other.

Relationships with the customer may consist of numerous of, sometimes overlapping, relationships between different units. More demands exist when the relationship changes from dyad to triad, for example when the customer uses engineering offices in projects.

"They [customer B] use in early stages outside, these big engineering offices as help. Right away when it goes like that you have eternal triangle developing. You have customer, you have engineering office and then you have technology supplier. And as technology supplier we would like to be at least in the same position than this big engineering office. Usually these engineering offices act as caretaker for owner or even as a representative of owner, so they really have quite wide rights from the customer."

External challenges are caused by the multinational environment where these companies are involved in. As well as the supplier, each production unit of the customer organization is embedded in its own culture and need to be handled correspondingly.

"When you ask them [customer A] how are we, I think that they would all say today, at least all the managers, that you have a great technique, you are diligent and decent and trustful but still it's really difficult to do business with you. And when they say this I am recognizing that what they mean with these difficulties is that we are lacking what I call cultural sensitivity to understand that you might have to work bit differently with this customer than for example with Chilean or Russian or Mexican or American customer."

Some situations involve multiple challenges, for example in the relationship with customer B. The negotiations of project were done in North America, but the actual project were executed in Africa. Since the organization that negotiated the project is not the same than the organization that implemented the project the internal and external coordination as well as the coordination of relationship need extra attention. In these cases the profit sharing is challenge as well as in the situation where multiple divisions have delivered parts to the project.

The challenges also change in time. For example in relationship with customer A, in the beginning of the relationship, only limited knowledge of customer exists and no personal contacts are created, which means that the relationships challenges are greater. Since the contacts to customer were originally coordinated through one person, the internal challenges are smaller, but because only limited information exists of the cultural environment of the customer are external challenges greater. When the relationship matures, the cooperation increases and extends to other divisions and therefore the internal and relationship challenges may grow as well as the external challenges faced by the new divisions. As the relationship with different divisions becomes more stable, external challenges should diminish. Same happens with the internal and relationship challenges when organization actively strives for internal coordination of its own operations.

Conclusions

The diversity of project business multiplies the diversity of customer relationship. The customer relationship as a whole can consist of multiple different relationships of customer's and supplier's units and these relationships can be overlapping as stated in previous chapter. Even when all the customers are multinationals, they might need to be handled in completely different ways. Depending on a culture and geographical location, customer might need traditional global customer relationship manager or could be easily contacted by any supplier's employee. The role of social relationships varies as well as the need to use engineering offices as intermediaries. The customers may be more active with one division than the other and therefore one division might have plenty of tacit knowledge on how to deal with customer successfully, which is not communicated to others effectively.

In this research it's stated that managing global customers in diversified project-business organization requires considering the different challenges faced by the organization, since it helps to create a wider and more profound understanding of the whole phenomenon by not concentrating only for example on organization's internal issues. The customers' role when dealing with these challenges is also of vast importance. The challenges discussed here are divided into internal, external and relationship challenges, since it is seen that none of the viewpoints alone can sufficiently describe the diversity of managing dynamic global customer relationships in dispersed project business organization. The challenges of the relationships also change in time, depending of the development phase of the relationship. For example, the significance of some challenges may be emphasized in certain phases more than in others.

In addition to these three categories of challenges, it is required to understand the uniqueness of each customer and the embeddedness of each relationship in its own surroundings and development history. The differences and features listed in table 2 affect the way how each customer is handled and how the customer relationship is tried to manage.

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