



**E-Business management assessment: framework proposal  
through case study analysis**

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## **E-Business management assessment: framework proposal through case study analysis**

### **Abstract**

**Purpose** – This paper proposes an e-Business assessment framework for organizations that aim to enhance the effectiveness of their online presence and maximise the benefits that result from it. The framework is based on three main pillars derived from academic literature research: e-marketing strategies, CRM strategies, and business model strategies.

**Design/methodology/approach** – This paper reviews literature from e-Marketing, CRM and business model strategies, leading to the generation of a e-Business assessment framework. Secondly it takes 19 case studies and analysis them using Atlas.TI, through qualitative content analysis, to validate that framework.

**Findings** – Pragmatic advice for practitioners derives from research results considering that this framework enables managers to characterise the company in terms of its e-Business approach, making it possible to determine the level of depth of competitive online strategies. Lessons for an improved e-Business approach can be derived from this paper.

**Originality/value** – This study proposes a novel e-Business framework to assist organizations that want to have an on-line presence. Its original since it is comprised of the factors identified in a literature review that contribute to define and scope that on-line presence. The framework is then validated through the collection of 19 case studies of companies that have this on-line presence, validating the theoretical findings.

**Keywords** e-Business, Online presence, CRM, e-Marketing, Business models, strategy, framework, case studies, qualitative content analysis

**Paper type:** Research paper

### **1. Introduction**

Nowadays it is possible to affirm that internet influenced a set of cultural, economic and social changes, mainly in the beginnings of 21<sup>st</sup> century. The clientes comes as the focus of the attention from the business activities and they are the target of the entrepreneurial strategies, with a incresead use of internet as interface for e-business.

The traditional marketing, considered as a way for identify the needs of the individuals and society, allows the exchange between costumers and enterprises to create value and welfare to the costumers (Kotler et al, 2016).

Nevertheless, attending to the marketing dynamics and global evolution, marketing change in the last years, and diversify their approach, tools and tecniques applied. In this context, the modern marketing tools found on the Information and Communication Tecnologies (ICT) the integration of business strategies ans models to allow improvements in the competitiveness.

This paper aims to propose an e-Business assessment framework for organizations wanting to have an effective online presence and related benefits. To achieve these aims, we analyze 19 selected case studies as examples of E-businesses in depth.

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3 The present paper is structured as follows. First, we shed light on the nature of E-businesses  
4 based on the academic literature, covering the topics of e-Marketing, CRM strategies and  
5 Business Models. Secondly, based on the literature, we propose an analytical framework for  
6 assessing this kind of businesses. Third, we explain the method of collecting and analyzing the  
7 data, reaching a framework based on the case studies analysed. Finally we we conclude with a  
8 discussion on the findings and some suggestions for further research.  
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## 11 **2. E-marketing**

12  
13 The new digital economy supported by the internet and Information and Communication  
14 Technologies (ICT), introduced a large range of marketing tools, which nowadays, have  
15 become more available and affordable for any company, including smaller firms. Marketing,  
16 by nature, should be a creative and adaptive discipline and management tool that is incessantly  
17 regenerating itself (Brownlie et al., 1994). The internet and ICTs induce the appearance of new  
18 concepts, and genuine transformation is taking place in relationship marketing (Sheth and  
19 Parvatiyar, 1995; Tzokas and Saren, 1997). Recent studies propose that organizations can  
20 develop customer acquisition and retention by incorporating ICTs into their marketing  
21 practices to foster rich interactions with their customers (Coviello et al., 2001; Brodie et al.,  
22 2007; Olomu et al, 2016).  
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26 E-Marketing capability represents a firm's competence in using the internet and other  
27 information technologies to facilitate rich interactions with customers (Trainor et al., 2011;  
28 Markoski & Janeska, 2018). According to Brodie et al. (2007), e- Marketing technologies  
29 extend beyond internet-based advertising and communications to include technologies  
30 supporting several marketing functions including customer relationship management (CRM),  
31 sales activity, customer support, marketing research and planning (Brady et al., 2002), hence,  
32 most companies have found that online presence is essential to satisfy customers through all  
33 possible means (Sheikh et al, 2018).  
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37 E-Marketing has the capability to create value (Trainor et al., 2011), by providing a close  
38 association to a company's business processes, providing the customers with direct access to  
39 the firm's resources and also to create value by allowing employees to develop their focus on  
40 the customer by synchronizing activities and information throughout the organization (Trainor  
41 et al, 2011; Markoski & Janeska, 2018). Valuable, outside information can be integrated with  
42 other customer records to improve overall sales productivity and organizational efficiency  
43 (Kim and Jae, 2007). Furthermore, this valuable customer information can be used by  
44 marketers looking to better understand their customers expressed and latent needs to develop a  
45 real market orientation (Slater & Narver, 1999; Marino & Lo Presti, 2018). Trainor et al. (2011)  
46 conceptualized e-marketing capability as a multidimensional construct comprising three  
47 critical and complementary resources: Firstly, the authors consider IT resources as the  
48 deployment of technology infrastructure supporting e-Marketing initiatives. Secondly, human  
49 resources represent any managerial support for technological initiatives and an organizational  
50 culture that embraces and promotes these initiatives. Finally, the business resource dimension  
51 captures the extent to which the technology is strategically integrated throughout the  
52 organization.  
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### 56 **2.1 E-marketing strategies**

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58 An e-marketing strategy should engage the exploitation of the internet capabilities for the  
59 development of an extended internet marketing mix comprising of five dimensions; the  
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1  
2  
3 traditional four Ps, i.e., product, place, price and promotion and the customer relations  
4 dimension which accounts for the new knowledge-based applications enabled by the  
5 interactivity of the Internet (Ainscough & Luckett, 1996; Zhao & Zhu, 2010, Eid & El-Gohary,  
6 2011; Sheikh et al, 2018).

7  
8  
9 The viability, appropriateness and competitiveness of designing e-marketing strategies  
10 according to these five dimensions are widely argued (Sigala, 2002). Evans and Wurster (1999)  
11 suggested that the struggle of competitive advantage on the internet would be along three  
12 dimensions namely reach, richness and affiliation, i.e., efforts to create and maintain long-term  
13 customer relations. O'Connor (1999) stated that electronic distribution strategies should intend  
14 to attain reach, content, interactivity and feedback in order to offer value-added services and  
15 lock-in customers. According to Zott et al. (2000) the personalization of product or  
16 information, and the development of virtual communities produce website "stickiness," a  
17 critical attribute facilitating repeat transactions. In this view, the effectiveness and  
18 competitiveness of the e-marketing strategy is connected to the level of its  
19 sophistication/personalisation, i.e., the exploitation of the transformational capabilities of the  
20 internet. In this context Customer Relationship Management (CRM) strategy with the use of  
21 data mining tools and intelligent agents promises huge online sales and website stickiness  
22 (Sigala, 2002).

### 23 24 25 26 27 **3. CRM strategies**

28 The main goal of the great majority of companies is the acquisition and retention of customers  
29 (Ahuja and Medury, 2010). Hence, managing their relationship with their customers and  
30 investing in CRM strategies becomes an integral part of accomplishing this fundamental  
31 objective, as in the CRM literature, creating a customer orientated culture and structure is the  
32 most important first step (Kim & Lee, 2019). Within an e-Business scenario, it is important to  
33 begin by considering e-CRM strategies. E-CRM stands for the use of generic web based  
34 technologies in CRM. The deployment of e-CRM by companies enables them to use the  
35 internet to manage, store and analyse their clients' data. Also, it provides them with a valuable  
36 channel to communicate with their customers. E-CRM has the advantage of using technology  
37 that is simple to use and implement, and that represents less of a financial burden (Harrigan et  
38 al., 2010). Through e-CRM companies can obtain a better understanding of their clients'  
39 preferences, predict their needs and improve their satisfaction (Chen et al., 2011).

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43 Through social media, consumers can have access to more information about existing products  
44 and they can effortlessly share their opinions on platforms that reach a high number of users.  
45 This means that the companies have less and less control over the information that is available  
46 about the services and products they offer. The proliferation of social media has, thus,  
47 introduced several changes to traditional CRM, leading businesses to adopt social CRM  
48 strategies (Malthouse et al., 2013). Social CRM is a strategy that stimulates the collaboration  
49 and the engagement of the customer. This strategy creates a two-way communication that  
50 increases the company's visibility and accessibility for the client and provides the company  
51 with much needed information about their clients. Social CRM entails creating relevant content  
52 on social media and playing close attention to and addressing what consumers say (Faase et  
53 al., 2011).

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55  
56 Creative content creation drives consumers to participate by posting comments or sharing. The  
57 data that derives from these interactions can be processed and analysed to provide more  
58 information about customers and hence improve the way companies engage with them. Social  
59 media can also be used for collaboration purposes, namely for co-creation. Consequently,  
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3 clients can be valuable assets in terms of product co-creation and service design, so businesses  
4 should search for opportunities to involve the customer in these creative processes. For the  
5 companies, it is particularly important to engage the clients that more actively discuss their  
6 products and services in either a negative or a positive manner (Choudhury & Harrigan, 2014).  
7 The successful deployment of e-CRM procedures leads businesses to establish a base of  
8 satisfied and faithful clients that results into repeat purchases, increased sales and higher profits  
9 (Kimiloglu & Zarali, 2009).  
10  
11

12 The pervasiveness of mobile technology in people's daily routines has been one of the most  
13 relevant drivers of mobile CRM (m-CRM). M-CRM represents a strategy to deal with the  
14 growing mobility of customers and their progressive demand for customised services.  
15 (Unnithan et al., 2007). The concept of m-CRM can be defined as the delivery of CRM via  
16 mobile applications (Rodriguez & Trainor, 2016; Marino & Le Presti, 2018). M-CRM  
17 improves the clients' self-service, it assists sales and constitutes an important communication  
18 medium (Reinhold & Alt, 2009). Moreover, it enables social marketing, widens the access to  
19 pertinent information and enriches customer service (Kaufman et al., 2008).  
20  
21

22 An important benefit of m-CRM is the possibility that companies have of using location-based  
23 data within CRM systems to provide their clients with customised and real-time services. The  
24 opportunities that emerge from using location-based information can create competitive  
25 advantage (Negahban et al., 2016). Band (2011) believes that there are five fundamental  
26 strategies to harness the potential of m-CRM: having an understanding of what are the roles  
27 and needs of the users, defining the goals, determining which CRM strategy to follow, selecting  
28 the appropriate technology and complying with the adequate implementation approach. San-  
29 Martín et al. (2016) argue that companies' technological competence and innovativeness, the  
30 support of the employees and the good management of the clients' data are determinant for  
31 maximising the advantages of m-CRM strategies.  
32  
33

34 There are several approaches to the adoption of CRM tactics. Personalisation, for example, can  
35 be used as a CRM approach by using the client information that is available to businesses to  
36 improve the value of their interactions with their clients. This approach enables companies to  
37 provide customers with content that is suitable to their interests to anticipate their needs  
38 (Jackson, 2007). Finnegan and Currie (2010) propose a multi-layered approach to CRM  
39 implementation that is composed of four layers: culture, process, people and technology.  
40 Rather than accounting for each of these layers separately, this approach considers several  
41 factors within these layers to depict the relations of interdependence among them. Mack et al.  
42 (2005) have also argued that CRM implementation should be inclusive of several variables.  
43 The authors believe that CRM should follow an integrated strategic approach supported by a  
44 customer oriented philosophy that links concept, strategy, technology, processes and  
45 employees.  
46  
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48 CRM value propositions determine the particular and measurable goals that generate value for  
49 all parties in a CRM strategy. By being specific, value propositions have the capacity to suggest  
50 both the benefits and the experiences they offer (IBM, 2004). In order to understand if the value  
51 proposition might lead to a rich client experience, businesses should perform value assessments  
52 to measure the importance that clients place on the several features of a product. The process  
53 of value creation is regarded as an essential element of CRM, since it transforms business and  
54 client strategies into particular statements of value proposition that show the value that will be  
55 delivered to the consumers (Payne & Frow, 2005).  
56  
57

58 In addition, CRM can take advantage of the customer intelligence that derives from CRM  
59 analytics. Equally, CRM activities gather important data about the clients that can later be used  
60

for CRM analytics (Miles, 2012). In the context of social media, a vast amount of data is generated invalidating traditional manual content analysis and demanding automated methods of data analysis that can be assured by social media analytics. The information that derives from social media is a central part of social CRM, hence social media analytics have become a key part of social CRM (Wittwer et al., 2016). According to Shim et al. (2012), the use of data mining techniques for CRM allows businesses to uncover valuable information about their customers. Previous research reports the use of several data mining techniques, such as decision tree, logistic regression, association rule and sequential pattern, to perform several CRM related tasks. The authors used recency, frequency and monetary (RFM) values to distinguish VIP from non-VIP clients and employed data mining techniques to uncover rules and patterns about their clients' behaviour. This information would be then used, for instance, to suggest particular CRM strategies that focus on specific types of clients.

#### 4. Business Model

The business model (BM) is usually developed in the first phase of a firm creation, mainly by startups. However the concept of BM is not yet consensual and several authors have provided different definitions, such as: it is a description (Applegate, 2000; Weill and Vitale, 2001), a statement (Stewart and Zhao, 2000), a representation (Morris et al. 2005; Shafer et al., 2005), an architecture (Timmers, 1998; Dubosson-Torbay et al., 2002), a conceptual tool or model (Osterwalder et al., 2005), a structural template (Amit and Zott, 2001), a method (Afuah and Tucci, 2001) and a pattern (Brousseau & Penard, 2007). On the other hand Zott et al. (2011, p. 1023) argued that the BM "is often studied without an explicit definition of the concept". The same authors revealed that the business model has been employed mainly in trying to address or explain three phenomena: (1) e-business and the use of information technology in organizations; (2) strategic issues, such as value creation, competitive advantage, and firm performance; and (3) innovation and technology management. Attending to the increased importance of designing BMs, there are special issues of prestigious academic journals dedicated to the topic of BM (Baden-Fuller & Morgan, 2010, Ritter and Lettl, 2018).

At the moment, BM Canvas is the most popular tool to develop BMs (Osterwalder et al., 2005). This BM tool presents four dimensions: value, architecture of the relation between firm and exchange partner, what the firm is doing and financial aspects. Canvas provides business practitioners the opportunity to analyze, manage, understand, share, prospect and patent a business better (Osterwalder et al., 2005). Table 1 shows the four dimensions of the BM Canvas and the nine standardized building blocks.

Table 1. Elements of BM Canvas

Elements	BM Canvas
Dimensions	Building Blocks of BM Canvas
Value	Value Proposition
Architecture of the relation between firm and exchange partner	Key Partners, Customer Relationship, Customer Segment, Channels
What the firm is doing	Key Activities, Key Resources
Financial Aspects	Cost Structure, Revenue Streams

Source: Osterwalder et al. (2005)

The total value creation of a business model is the total value for all business stakeholders such as customers, partners and suppliers (Brandenburger & Stuart, 1996). A more recent contribution about value creation considered that value creation and value capture mechanisms

1  
2  
3 take place in a value network where the network partners complement the firm resources (Zott  
4 et al., 2010).

5  
6 There are some specific key elements for creating a BM Canvas. First of all, the value  
7 proposition that is the heart of the canvas (Osterwalder, 2004) designed to serve customers.  
8 According to Osterwalder and Pigneur (2010, p. 22) “the value proposition bundles products  
9 and services that create value for a specific customer segment.”

10  
11 The second key element is the architecture of the relation between the firm and its exchange  
12 partners. Here it should be included:

- 13  
14 - The customer segment, considering that the value proposition is created for specific  
15 customers with specific needs and wants.
- 16  
17 - Channels and customer relationship. The building block channels is defined as “how a  
18 company communicates with and reaches its customer segment to deliver a value  
19 proposition” (Osterwalder & Pigneur, 2010, p. 26) and “the types of relationships a  
20 company establishes with specific customer segments” (Osterwalder & Pigneur, 2010,  
21 p. 28).
- 22  
23 - Key Partners. Firms must require resources outside then key partners are essential. This  
24 building block is “the network of suppliers and partners that make the business model  
25 work” (Osterwalder & Pigneur, 2010, p. 38).

26  
27 The third element is the architecture of what a firm is doing. This is composed by key resources  
28 and key activities: Key resources “describes the most important assets required to make a  
29 business model work” (Osterwalder & Pigneur, 2010, p. 34). Key activities are “the most  
30 important things a company must do to make its business model work” (Osterwalder &  
31 Pigneur, 2010, p. 37).

32  
33 Finally, the last element to create a BM Canvas is the financial aspects such as revenue stream  
34 and cost structure. The revenue streams “represent the cash a company generates from each  
35 customer segment” (Osterwalder & Pigneur, 2010, p. 30). And the cost structure “describes  
36 all costs incurred to operate a business model (Osterwalder & Pigneur, 2010, p. 40).

#### 37 38 39 40 **4.1 Business Model Strategy**

41  
42 The BM strategy explains how a firm creates and maintains value in the long term to sustain  
43 the competitive advantage. Firms can compete through their BMs (Casadesus-Masanell &  
44 Ricart, 2010) and they embody a potential source of competitive advantage (Markides &  
45 Charitou, 2004). Several authors studied the strategy of competition, value capture, and  
46 competitive advantage, where the BM concept appears to center more on cooperation,  
47 partnership, and joint value creation (Magretta, 2002; Mansfield & Fourie, 2004; Mäkinen and  
48 Seppänen, 2007). Additionally, other approaches focus on the BM concept on the value  
49 proposition and emphasise the role of the customer in the value creation (Chesbrough &  
50 Rosenbloom, 2002; Mansfield & Fourie, 2004). Richardson (2008) argued that the BM  
51 explains how the activities of the firm work together to execute its strategy.

52  
53 Casadesus-Masanell and Ricart (2010) view BM as an expression of a firm’s realized strategy.  
54 Teece (2010) studied the importance of BM and examined their connection with business  
55 strategy, innovation management, and economic theory and believed that increased  
56 understanding of the essence of business models should facilitate the understanding of a  
57 diversity of subjects such as market behavior, competition, innovation, strategy, and  
58 competitive advantage.  
59  
60

The numerous research perspectives in strategic management therefore primarily focus on observing, analyzing, classifying, and describing BM (Osterwalder & Pigneur, 2010). Teece (2010) proposes that to enhance the understanding of the essence of BM, the following limits of current research should be addressed: (1) Little research suggests common languages, conceptual frameworks, and visual schemas that could be applied to facilitate both the understanding and the design of BMs. Without a clear conceptualization, the research in strategic management on BMs innovation and competition will remain complex; (2) Concerning the “how-to-build” issue, research primarily focuses on decision making. It barely addresses the process of design thinking, prototyping, and exploring alternative solutions that is so central to the design of strategies and BM (Osterwalder & Pigneur, 2010). Also, just a few authors (Sosna et al., 2010) contemplate the trial-and-error learning process in designing BMs. Recent research focused on the digitalization of the business models as a new trend in this research (Kotarba, 2018; Bouwman et al, 2018; Bressanelli et al, 2018).

## 5. Framework proposal for assessing E-Business

Based on the literature review, Figure 1, presents the framework. The framework is composed of three categories and their correspondent indicators: E-Marketing strategies, measured via Mobile Presence, Marketing Penetration (Sales Volume/Total Sales), Type of E-Marketing Style, Type of E-Marketing Approach (multiple replies possible) and Electronic Means Channel Distribution (compared to traditional sales); Business model strategies, assessed through Business Model Type, Cost structure, Revenue Model, Target market and Resources; and CRM strategies evaluated through eCRM, Social CRM (possible features), Type of CRM approach, Value Proposition and CRM analytics.

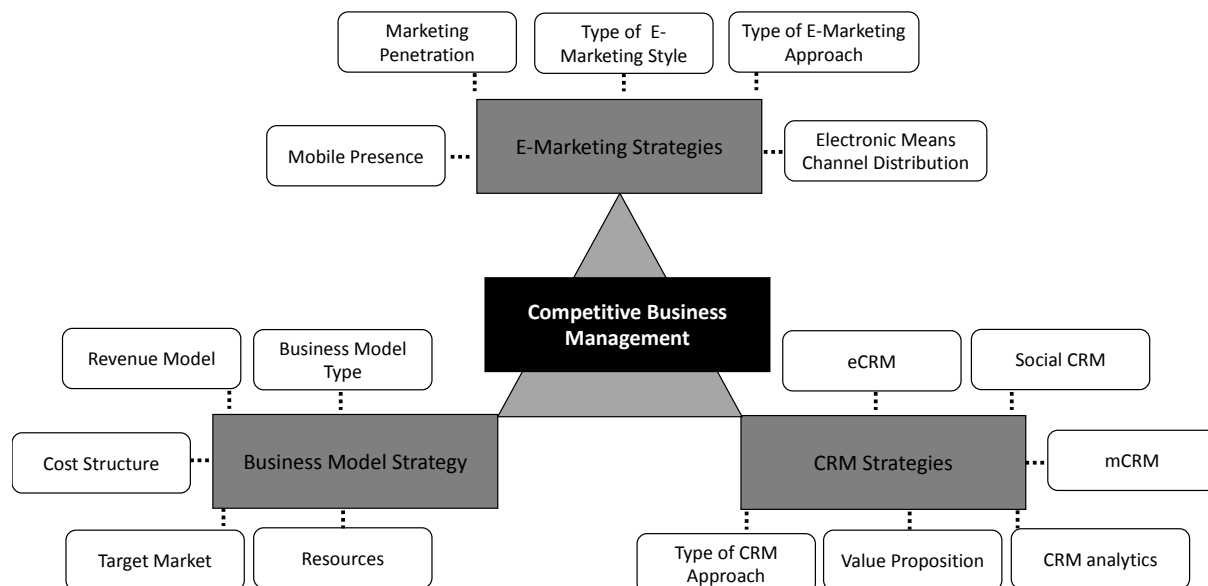


Fig. 1. Framework for Competitive Business Management in e-Business

The E-business framework proposed by the authors (Fig. 1) to characterize competitive business management in e-business allows to propose the following propositions:

**Proposition 1:** *E-Marketing strategies have a positive effect on building a competitive business management.*

**Proposition 2:** *CRM strategies have a positive effect on building a competitive business management.*

**Proposition 3:** *Business Model strategies have a positive effect on building a competitive business management.*

Table 2 presents the coding Agenda, based on the framework proposed.

Table 2. Coding Agenda

Content Themes	Categories	Codes
E-Marketing strategies	Mobile Presence	MP None
		MP Some
		MP Medium
		MP High
	Marketing Penetration (Sales Volume/Total Sales)	MKTP Lower (<40%)
		MKTP Medium (40%-50%)
		MKTP High (>50%)
	Type of E-Marketing Style	Promotion only or mainly of products or services
		Promotion and sale of products or services
	Type of E-Marketing Approach (multiple replies possible)	Web based
App based		
Virtual community (forum/comment style)		
Email based		
Electronic Means Channel Distribution (compared to traditional sales)	No on-line sales	
	Medium on-line Sales (40%-50)	
	High On-line Sales (>50%)	
Business model strategies	Business Model Type	BMM (Manufacturer)
		BMD (Distributor)
		BMR (Retailer)
		BMF (Franchise)
		BMPS (Public Service)
Cost structure	CD (cost driven <sup>1</sup> )	

<sup>1</sup> This business model focuses on minimizing all costs and having no frills. e.g. Low cost airlines

		VD (value driven <sup>2</sup> )
	Revenue Model	HVC (Acquire high value customers)
		SVC (Offer significant value to customers)
		DPHM (Deliver products or services with high margins)
		PCS (Provide for customer satisfaction)
		MMP (Maintain market position)
		FB (Fund the business)
		Target market
	DSO (Demographic/socioeconomic)	
	PSY (Psychographic)	
	BES (Behavioural segmentation)	
	Resources	PHY (Physical)
		FIN (Financial)
		INT (Intellectual)
		HUM (Human)
CRM strategies	eCRM	Low eCRM capabilities (i.e. contact customer through few channels)
		Medium eCRM capabilities (i.e. contact customer through various channels)
		High eCRM capabilities (i.e. contact customer through most of the know channels)
	Social CRM	Low Social Media response from company (in few platforms)
		Medium Social Media response from company (in significant platforms)
		High Social Media response from company (in most platforms)

<sup>2</sup> Less concerned with cost, this business model focuses on creating value for their products and services. e.g. Louis Vuitton

	mCRM (possible features)	Possibility of clients' self-service through mobile devices
		Company usage of location based data
	Type of CRM approach	None or low personalisation focused (few aspects of the company contribute to CRM strategically)
		Medium personalisation focused (several aspects of the company contribute to CRM strategically)
		High personalisation focused (all aspects of the company contribute to CRM strategically)
	Value Proposition	Company with low engagement in value proposition activities
		Company with medium engagement in value proposition activities
		Company with high engagement in value proposition activities
	CRM analytics	Company evidences no or little usage of social media analytics
		Company evidences medium usage of social media analytics
		Company evidences high usage of social media analytics

## 6. Research methodology and data analysis

In the present study, we have employed a qualitative approach based on interview material and secondary data gathered from 19 e-businesses. Purposive sampling, which is commonly used in qualitative studies, was utilized to select relevant cases and informants. It allowed us to identify information-rich typical cases (Patton, 2015). The criteria used to select these cases was their diversity and their differences and the representativeness of various sectors.

To analyze these research propositions, we have abductively analyzed 19 selected case-studies as examples of E-businesses, in depth, exploring their unifying constituents and characteristics. We have followed an abductive process considering that is the type of reasoning whereby one seeks to explain relevant evidence by beginning with some commonly well known facts that are already accepted and then working towards an explanation.

Table 3 present a characterization of the 19 case studies analysed.

Table 3. Characterization of the Entities

Participating Cases	Country/Continent	Number of Employees	Annual Turnover	Number of Clients/Sales	Sector	Business Model Type
<b>Public Services</b>						
INSS Angola	Angola/ Africa	n.a.	n.a.	113.400 enterprises + 113.236 Retired <sup>3</sup>	Public Sector/Services	Distributor Public
Step Ahead e Nova School of Economics and Business	Portugal/ Europe		n.a.	n.a.	Education/Services	Distributor Public
Municipal Water and Sanitation Services of Oeiras and Amadora	Portugal/ Europe	420	53,750 million euros	185.000	Public Municipal Company /Services	Distributor Public
Autoridade Tributária e Aduaneira (AT)	Portugal/ Europe	n.a.	n.a.	10,460 million	Public Service/Services	Distributor Public
<b>Manufacturing</b>						
Resiquímica, Resinas Químicas, SA	Portugal/ Europe	110	49,77 million Euro	n.a	Production of plastic materials/ Manufacturing	Manufacturer
Hager	Germany/ Europe	11.650	1.9 billion euros	n.a.	Producers of Electrical Material/ Manufacturing	Manufacturer
Saborista (Sumol+Compal)	Portugal/ Europe	1379	341.3 million euros	n.a.	Producers of Juice Drinks/ Manufacturing	Manufacturer
Bimby (Vorwerk Portugal)	Portugal/ Europe	105 effective employees + 1117 agents	100 millions euro, Portugal	n.a.	Kitchen robots producers/ Manufacturing	Manufacturer
Siemens	Germany/ Europe	360.000	79.64 billion euro	50 millions person	Electronics and Manufacturing/ Services	Manufacturer
Havaianas (Alpargatas SA)	Brazil/ America	12850	4,126 billion reais	n.a. <sup>4</sup>	Shoes manufacturers/ Manufacturer	Manufacturer
Volkswagen	Germany/ Europe	610.076	213.292	10,3	Automobile	Manufacturer

<sup>3</sup> Based on the information available online

<sup>4</sup> Available in 80 countries

	Europe		billion euros	millions <sup>5</sup>	Manufacturer	
<b>Services</b>						
Sport Lisboa e Benfica SAD	Portugal/ Europe	308	88,377 million euros	157.000	Football Club/Services	Distributor
FON@ZON	Portugal/ Europe	n.a.	n.a.	> 2 million	Telecommunications company/Services	Distributor
Pharol (ex-Portugal Telecom)	Portugal	10.000	284,9 millions euros	10 million	Telecommunications company/Services	Distributor
Booking.com	USA/ America	14.000	13,8 billion dollars	n.a. <sup>6</sup>	Tourism Reservations/ Services	Distributor
Xpand-IT	Portugal/ Europe	> 100	n.a.	> 800 around the world	IT Service provider/Services	Distributor
NDrive	Portugal/ Europe	40	n.a.	n. a. <sup>7</sup>	Web apps/Services	Distributor
Santander Totta	Portugal/ Europe	6.393	303 million euros <sup>8</sup>	422.000 (on-line digital customers)	Banks/Services	Distributor
Barclays	United Kingdom/ Europe	129.400	26.755 million pounds	na	Banks/Services	Distributor
Cartão Continente	Portugal/ Europe	21.383	3.687 million euros	3,5 millions of users (total)	Retail/Services	Distributor
Sanolabor	Slovenia/ Europe	n.a.	n.a.	1,600 customers in Slovenia	Marketing and Distribution of Pharmaceutical Products/Services	Distributor
NETFLIX	USA/ America	3.700	7,16 billion dollars	93.8 million	Entertainment/ Services	Distributor
Quoty (Mediapost)	USA/ America	n.a.	n.a.	n.a.	Marketing/ Services	Distributor
SAMS – Medical Social Assistant Service	Portugal/ Europe	n.a.	n.a.	n.a.	Medicine/ Services	Distributor
APPLE	USA/ America	115,000	215 billion	416 apple store;	Telecommunications and	Distributor

<sup>5</sup> 10,3 millions vehicles sold

<sup>6</sup> 1 149 207 Hotels/accommodation in 225 countries and territories

<sup>7</sup> Several million active users in more than 50 countries

<sup>8</sup> Consolidated profit

			dollars	15,89% IOS market share – global; 2,2 m number of available apps in apple app store	Computers Manufacturing/ Services	
AWA (Aeronautical Web Academy)	Portugal/ Europe	n.a.	n.a.	n.a.	Flying courses/Services	Distributor
Warmrental	China (Hong Kong)/ Asia	n.a.	n.a.	n.a.	Tourism/ Services	Distributor
Domino's	USA/ America	260.000	\$2 billion dollars (in digital sales)	1.5 million pizzas each day	Food Chain/Services	Franchise
McDonalds	USA/ America	1.5 million	24.62 billion dollars	69 million customers per day	Food chain/Services	Franchise
Makro Portugal	Holanda/ Europe	1190	258 million euros	>300.000	Cash & Carry Retail/Services	Retailer
Farfetch	Portugal	600	1 billion euros	10 million site visits per month and ships to customers i n almost 190 countries.	On-line sales of clothes and luxury accessories retail/Services	Retailer
Wine.com.br	Brazil/ America	>400	60 million eEuros	300.000	Retail/Services	Retailer
Continente Online	Portugal/ Europe	21.383	3.687 million Euro	150 000	Retail/Services	Retailer
Oriflame	Sweedn/ Europe	7.500	1,211 billion euros	60 countries	Cosmetics / Services	Retailer
Perfumes & Companhia	Portugal/ Europe	53 stores in Portugal	n.a.	n.a.	Cosmetics/ Services	Retailer
Importtrading	Angola/ Africa	270	32.000.0 00 dollars	n.a.	Furniture and Decoration Importers / Services	Retailer
Cartão Universo (Continente)	Portugal/ Europe	21.383	3.687 million euro	n.a.	Retail/Services	Retailer

Source: The authors

Considering the legitimacy and the increasing use of software as a support for the analysis of empirical material in qualitative research (Bandeira-de-Mello, 2006; Maietta, 2008), Atlas.ti software was used as a tool to support analysis and CmapTools as software to support the construction of concept maps.

Fig. 2 is the outcome of the research process, and presents the conceptual framework.

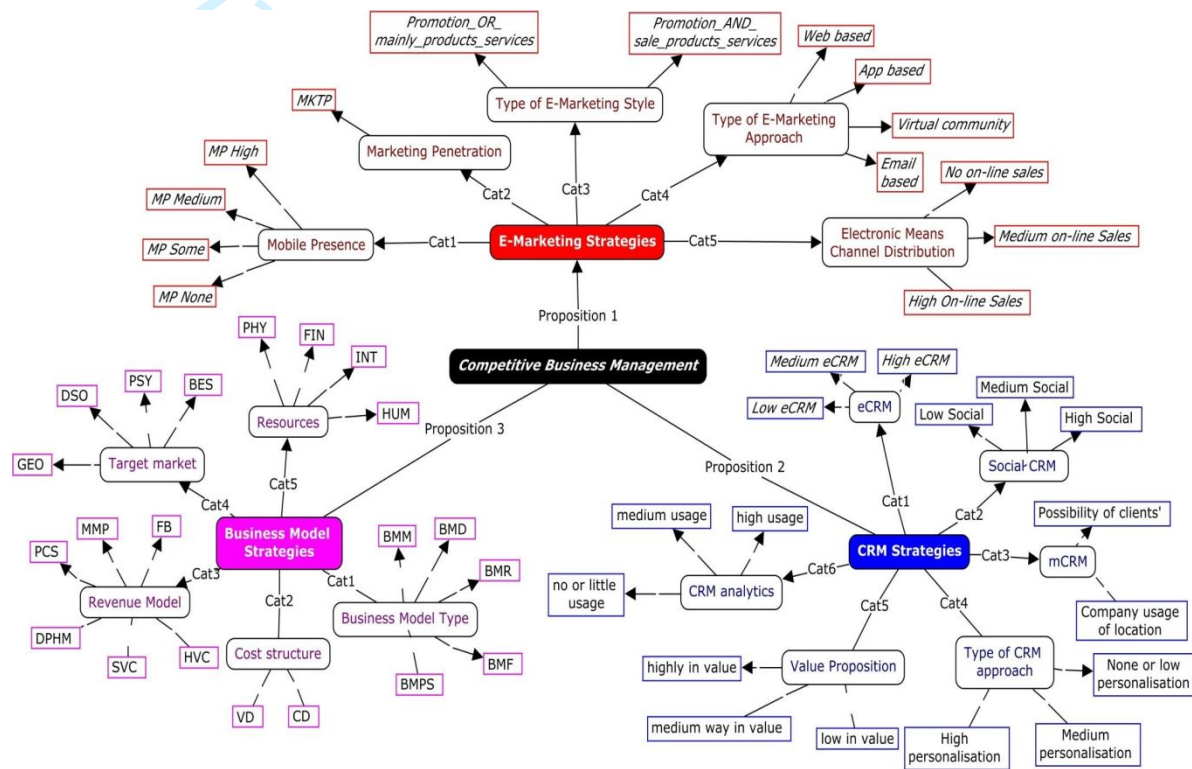


Fig. 2 - E-Business Assessment Framework for Organizations

## 7. Discussion & Conclusion

A global management of the project landscape is necessary to strive for a competitive advantage (Dammer et al., 2006; Elonen & Arto, 2003). Furthermore, companies are facing more challenging customers (Homburg et al., 2002) and are keen on serving customers better. Customer integration and a project portfolio management (PPM) alone are not new research fields. However, the growing importance of both has not yet paved the way to an integration of both approaches. In this study, customer integration is presented as a means to further develop PPM and to better satisfy customer needs. The management of customer relationship portfolios and project portfolios should be brought together (Tikkanen et al., 2007).

A conceptual framework is developed that describes the relationships between customer integration into PPM and portfolio success. The construct of relationship value is introduced

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3 as a central mediator between customer integration into PPM and portfolio success. Customer  
4 integration into PPM is suggested through a connection between the management of the  
5 customer relationship portfolio and PPM. A CRM process serves as a blueprint for the  
6 management of the customer relationship portfolio. This study has several implications for the  
7 research and practice of PPM. It closes the missing link between the growing importance of  
8 PPM and the growing importance of the customer. The study investigates customer integration  
9 on the project portfolio level for the first time. It suggests that the customer portfolio should be  
10 considered in decisions on which projects to prioritize, which projects to be added or taken out  
11 of the portfolio, and how to allocate resources among the projects.  
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15 The conceptual framework that has been developed enhances the rapidly developing body of  
16 knowledge in PPM, and it combines PPM and strategic marketing approaches for a department-  
17 level view on PPM. It describes one connection between business operations and projects,  
18 whereas PPM is the hub between both (Levine, 2005).  
19

20  
21 This study also enhances marketing research by presenting a new application for the strategic  
22 marketing approach CRM in PPM. The potential of customer integration and customer  
23 relationship management has so far only been investigated in the context of existing product  
24 portfolios, not complete project portfolios. The study also suggests a construct for measuring  
25 relationship value, both for the customer and for the respective company. The framework  
26 includes a strong assumption that relationship value completely mediates the relationship  
27 between the customer integration and project portfolio success. This assumption is only  
28 adequate if the measurement of relationship value represents the net value, i.e., if it includes  
29 costs or sacrifices for the integration as well. Otherwise, the direct effect could also be negative.  
30  
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32  
33 The managerial implications of this study are somewhat limited as the conceptual model must  
34 be empirically tested with further collection of exemplars with different characteristics and  
35 correspondent validation. However, some important conclusions can be drawn. On the basis of  
36 the propositions, companies can apply the suggested factors of the model to develop a portfolio  
37 prioritization strategy in accordance with the customer prioritization strategy. The dimensions  
38 of portfolio success serve as benchmark for their PPM (Meskendahl, 2013). In addition,  
39 practitioners are presented with starting points to interconnect customer relationship portfolio  
40 management and project portfolio management. Interfaces between both processes have been  
41 identified. Customer orientation, inter-functional climate and the formalized integration of  
42 marketing and PPM are important aspects for this interconnection. Regarding this study's  
43 limitations, the conceptual model focuses on project portfolios consisting of projects with  
44 external customers. Project portfolios with internal customers, such as IT projects, contain  
45 different characteristics. Future users of IT systems can also be considered to be customers of  
46 IT projects. However, there is no function as the marketing function available to represent these  
47 users in the PPM process. In addition, the derivation of constructs is based on research on R&D  
48 projects. An extension of other types of projects may lead to adjustments of the conceptual  
49 model.  
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52  
53 There are two avenues for future research based on this study: an empirical validation of the  
54 conceptual model and the model's further development. The propositions can be tested within  
55 a quantitative study investigating companies with a project portfolio with a certain number of  
56 simultaneously executed projects. In addition, a multiple-informant design for PPM and  
57 success measures from diverging management levels should be incorporated to obtain a broad  
58 view of customer integration, PPM activities and success as well as to avoid biased results. In  
59 addition, this study can also serve as a starting point of a recurring, longitudinal study in the  
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3 PPM context to better understand modern companies (Söderlund, 2004). The conceptual model  
4 itself can be enhanced by considering other types of projects in the portfolio: projects with  
5 internal customers or users of the project results. Moreover, the relationship portfolio can be  
6 extended to other relationships than customers, e.g., suppliers and other external stakeholders.  
7 Seeing PPM as a hub, the framework can be adjusted to investigate the connection between  
8 projects to other business operations and functions in the company. The model can also be  
9 further developed by adding internal and external moderating factors as well as control and  
10 contextual factors to ensure a statistically profound investigation. Moreover, deviating from  
11 marketing research, customer attributes can be determined to answer the question of which  
12 customers should be considered in PPM.  
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