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# Client management in the project domain: towards conceptual integration using cross-disciplinary research

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#### ABSTRACT

Client management by the delivery organisation is under-researched across the project domain. Reviewing the literature positions client management (CM) as an important topic for improving performance. Three dominant theoretical strands are identified. One strand is based in the disciplines of marketing and organisational behaviour. It is largely located in the delivery firm. The second strand primarily locates CM as part of project marketing. This strand is rooted in operational management and has become positioned tactically as a subset of project management largely at the front-end. A lesser third strand views CM from the project management delivery perspective. The analysis demonstrates the theory-driven lenses employed by the different research strands produce a fragmented picture that limits current understanding. Hence there is a need for conceptual integration. The analysis argues for cross-disciplinary research to induce integration, commencing with the current intersections to create a strategic platform for generating new knowledge.

#### 1. Introduction

The development of project management knowledge has given minimal attention to how clients are managed. Client management (CM) is a supplier capability that conceptually involves improving performance. This is pursued through understanding and meeting client policy and business needs in addition to the project needs stated in the design, specification and contract terms. The CM aim is achieved through improving the service experience and project content with a secondary aim of securing future projects. To address this, we pose the research question to what extent does the current theorisation and conceptualisation of client management support a shared understanding and support performance improvement? CM aims to improve performance delivery and improve the service experience, enhance the value and outcomes in closer alignment to both the general and specific needs and expectations of clients. The extent to which this is achieved strategically from the firm and tactically on the projects is evaluated. Client needs vary and to align responses in practice requires a systematic approach vertically from the firm and on projects as well as horizontally across projects and along project lifecycles. For academia to support practice a similarly systematic theoretical approach is necessary. This review evaluates the extent to which an integrated theoretical and conceptual approach exists.

Needs and expectations at the project front-end are fulfilled through project outputs, outcomes, value and impact (Zwikael & Huemann, 2023). Fulfilment requires attention to improving the performance impact across project management (Merrow, 2011; Morris, 2013). It improves the understanding of value needed (e.g. Hjelmbrekke & Klakegg, 2013), which is summed up as "a new quest for business benefits from the functionality and perceived user value". Value therefore extends beyond improving the project content to include the service experience. Further improvement requires new mindsets and competencies (Björnfot et al., 2013:435). This picture embodies a recognition of the complementary need to manage clients as well as projects. Minimal attention is currently given to supply-side CM, that is contractors and suppliers managing their clients to more closely align and enhance performance.

We identify three research strands across the literature – project marketing, firm-centric and project management in delivery – which are theoretically and conceptually fragmented from each other. Hence there is a need for theoretical integration between the three research strands and across project-based organisations at the firm and project management levels in order to improve project performance.

A predominantly project-centric view of CM is brought forward by, for example, Hadjikhani (1996) and Cova and Salle (2005). This

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research strand is termed project marketing. Marketing provides the disciplinary focus and the project front-end is the project management focus. It largely overlooks project execution. Davis and Pharro (2003), Meng (2012) and others in a lesser strand view CM through the lenses of relationship management and project management in delivery. There is also the firm-centric view brought forward by, for example Preece and his colleagues (e.g. 2015), Smyth (2015) and Razmdoost and his colleagues (e.g. 2016). These have indirectly been competing strands in terms of the theoretical lens, which affects the empirical focus, and gives rise to fragmented research and a lack of shared understanding. This research conducts a CM literature review to examine the scope for theoretical integration between the three research strands and across project-based organisations at the firm and project management levels.

Integration starts to build a strategic platform and opportunities for generating innovative conceptual contributions (Alegre et al., 2023). Integration offers what Zerjav and his colleagues (2023) term prospects. A prospect is more fundamental than identifying research gaps. Research gaps are confined to plugging small areas of conceptual concern and marginally pushing out the current knowledge envelope. Within this approach theoretical and conceptual boundaries are seldom bridged (von Danwitz, 2018). This minimal approach has been called mining (Zerjav et al., 2023). Integration involves prospecting for new knowledge and in project management involves cross-disciplinary research. The review to prospect cross-disciplinary research to support integration elevates strategic client management and tactical client management as important conceptual categories to enable more in-depth understanding of the current literature and to enable greater clarity for developing future research. In sum, it will bring forward ten prospects to inform an agenda for CM conceptualisation and empirical examination.

The research proceeds by considering the background, addressing the methodology and methods prior to analysing the literature review findings. A discussion and the conclusion follow.

# 2. Background

The objective of the section is to provide an overview of the literature and the overall fragmentation. Some knowledge of the literature is typically present prior to commencing the review and indeed helps identify the need for a review.

Early CM research focused to a large extent on IT (e.g. Hadjikhani, 1996) and then construction (e.g. Preece et al., 2003). Some sectoral diversification followed. The scant research has largely been conducted by a handful of authors, mainly from marketing perspectives. Research has diversified, including recent theses and conference papers arising from a range of authors (e.g. Gu, 2024; Li & Xia, 2024; Suonpää, 2019).

Part of the CM research background is the call made by Davis and Pharro (2003) that the relationship manager needs to act as a functional integrator and to be the next phase for effective project management. This call is based upon the management of relationships between project teams with clients. The call has not been answered across project management research. This either means that theory is misplaced, or CM research still needs to fully prospect the field.

Although the literature conceptually defines CM in terms of improving performance with repeat business as a consequential benefit, practice has tended to reverse the position: the main CM motive becomes securing increased repeat business, and performance improvements are relegated to a secondary or minimal role.

CM owes its theoretical roots to the management discipline, especially marketing theory and organisational behaviour. The specific CM roots emanate from retail customer relationship management (Grönroos, 2009) and in business-to-business service settings with key account management (KAM) (McDonald et al., 1997; Nätti et al., 2006). In projects, selling occurs first and then the project is executed – the reverse of mainstream marketing theorisation. CM research in the project domain, emerging from marketing theory (Hadjkhani, 1996),

has a strategic role in marketing strategies to select key clients and projects (e.g. Tikkanen et al., 2007). Yet the strategic and tactical service selling have become somewhat fragmented across CM research. From a management school perspective, service selling aligns with tactical operations management. This path led to project marketing and in some analyses led to CM as part of project marketing being merged with rather than complementing project management (Cova & Salle, 2005).

Project marketing offers a project-centric path and contrasts with project management being conceived as part of marketing, as noted by for example Turner and Lecoeuvre (2017). Concerning CM specifically, some activities occur prior to and separately from any project, especially when selecting key clients and building new client relationships to qualify for future consideration. Marketing and project management are conceptually distinct, yet cross-disciplinary integration is possible without conflating two disciplines. CM conceptually and functionally intersects with marketing and project management in the project domain from the firm, in project front-end and to execution.

A separate firm-centred CM strand of research arose, paradoxically from within the project domain and particularly from construction research (e.g. Smyth, 2000). This body of research recognised the strategic role of relationship management in project-based firms and reached forwards to the project front-end where effective CM can help shape delivery and improve performance (Pryke & Smyth, 2006), helping to induce client-orientated project organisations (Dulaimi, 2005; Preece et al., 2003; Razmdoost & Mills, 2016). This CM strand is driven by strategy within the project firm, what Winch (2014) calls the permanent organisation on the supply side, in contrast to the temporary organising for projects. Firm-centric CM empirically overlaps with CM in project marketing at the project front-end, although the conceptual lens remains distinct in each research strand.

A further slender research strand focuses upon project execution (e.g. Liu et al., 2014; Meng, 2012). It claims to improve performance and yield benefits for clients (Karvinen & Bennett, 2006; Pinto & Rouhiainen, 2002; Yang & Zhang, 2018). In this research there is a grey area. Managing clients as an intrinsic part of project management, for example cost, quality and changes to the project, could be said not to require CM as a distinctive function. On the other hand, there is CM that concerns, for example, decision-making that goes beyond project criteria around budget and other factors with a view to positioning delivery to secure repeat business and providing feedback to the firm level. Here some CM-related project decisions are sanctioned at firm level. The project execution lens pays little attention to the marketing dimension of CM in the firm.

The three strands have different foci: i) the firm-centric view of CM as part of marketing, which extends into the project front-end and cursorily into project execution, ii) CM as part of project marketing which primarily focuses on the project front-end with limited reference to the firm as a project-based organisation and execution, iii) and CM within project execution to improve project performance. There is a need for each research strand to fully recognise the role of the other and to integrate CM theorisation for research and practice.

CM conceptually supports project management to ensure aligned delivery with client and other stakeholder needs (Davis & Pharro, 2003). In practice, some project managers still primarily focus upon the iron triangle – time, cost, quality – giving less focus to client needs and expectations (Atkinson, 1999; Ireland, 1992; Othman, 2015). Both theory and practice have evolved over the last decades. The third PMBoK edition proposed developing project charters, which can include CM (Brown, 2005). The seventh PMBoK edition offers a broader and more comprehensive approach, including delivering value. This links to the service-dominant logic (Vargo & Lusch, 2016) and shows the first signs for potential integration in CM research in the project domain (e.g. Cova & Salle, 2008; Jalkala et al., 2010; Razmdoost & Mills, 2016). This research tends to focus on co-creation practices conducted through informal collaboration rather than systematic organising with clients (Fuentes et al., 2019) and for projects (e.g. Deep et al., 2021).

The early CM research focused on projects delivered *in-house*, especially in IT, and recent research has focused more upon *outsourced* projects, especially in construction (Gemino et al., 2007; Webber & Torti, 2004). It is claimed that CM is more challenging when projects are outsourced (Bowman & Narayandas, 2004). Outsourced providers put in more effort to meet client and user needs (Voss & Kock, 2013). Boundary spanning poses challenges across loosely coupled organisations (Dubois & Gadde, 2002). CM can provide a recoupling capability, but recoupling is dependent upon management organising emanating from both the firm and project. Further, CM benefits (Lau et al., 2015; Rajiv et al., 2020) depend upon managing variable client approaches due to their sector, structure (Preece et al., 2003), and implementation approach on projects (Preece et al., 2015; Yong & Pheng, 2008).

Clients perceive projects as potential economic, social and policy solutions to meet those needs. Clients decide whether they can manage the skills and risks in-house or need to outsource projects. Research comparing CM effectiveness for in-house and outsourced delivery is scant. For in-house projects, CM supports delivery (Laryea & Watermeyer, 2020; Swärd, 2016; Zhang et al., 2015, Lingard et al., 2009). CM either starts with the project front-end influencing project strategies to address needs and expectations (Morris, 2013) and is involved with capture management (Winch et al., 2022) or starts in the project team in the execution stage. The scope of CM is considerably broadened for

outsourced projects. The current CM literature predominantly focuses upon outsourced projects because marketing and selling by the delivery organisation offers a conceptual starting point (e.g. Hadjikhani, 1996; Smyth, 2015).

Practice invokes a variety of configurations. Variable configurations cover theory and practice rendering it is difficult to be certain whether any generalisations arising from prior research are valid; claims need to be verified through a conceptually and functionally integrated approach in future research.

# 3. Methodology and methods

Developing *prospects* is more fundamental than identifying research gaps. Zerjav and his colleagues refer to finding research gaps as *mining*, which is about pushing out the current research envelope of knowledge rather than generating new knowledge. The project domain involves cross-disciplinary research, yet theoretical and conceptual boundaries are seldom bridged (von Danwitz, 2018). New knowledge can be generated through cross-disciplinary and integrated research.

This literature review is positioned as an integrative approach (Elsbach & Van Knippenberg, 2020). For CM in practice to improve their responses to diverse client needs and expectations (cf. Lau et al., 2015; Rajiv et al., 2020), a consistent and systematic approach in the firms and

Table 1
The dominant CM authors and research strands.

Authors	The Firm	Project Front-end		Project Execution
	Predominantly Firm-centric Strategic Client Management Research	Client Management in the Firm to Support and Develop Programmes and Projects	Client Management in Project Marketing	Execution-based Client Management
Smyth and colleagues (e.g. 2000; 2016)		ly and some later work covers CM ecially regarding repeat business from	Not conceptually applicable	Little impact
Smyth and colleagues (2015, 2019, 2021):	Spanning two sub-headings, later and recent work additionally covers organising, systems and capabilities		Not conceptually applicable	Little detailed CM impact
Preece (e.g. 2003; 2015)	Spanning two sub-headings, business development and relationship management		Not conceptually applicable	Some impact
Voss (2012; 2013)	Portfolio management regarding client needs	Some impact	No impact	No impact
Tikkanen et al. (2007)	Portfolio management and client needs	Some impact	Little impact	No impact
Hadjikhani (1996)	Not conceptually applicable	Not conceptually applicable	Developing project marketing in IT	Managing the sleeping relationship between client projects
Cova and colleagues (e.g. 1997)	Not conceptually applicable	Not conceptually applicable	Early work inferring CM system selling and network relationships at the front end	No impact
Cova and Salle (e.g. 2005; 2011)	Not conceptually applicable	Not conceptually applicable	Building on networks, project shaping conceptually within project management	No impact
Cova and Salle (e.g. 2008)	Not conceptually applicable	Not conceptually applicable	The start of later work linking project marketing with value co-creation with mainly implicit CM	Little impact
Skaates and colleagues (2002)	Not conceptually applicable	Not conceptually applicable	Client relationship building within project marketing	No impact
Lecoeuvre-Soudain and Deshayes (2006)	Not conceptually applicable	Not conceptually applicable	Early work linking project marking with project management	No impact
Turner and Lecoeuvre (e.g. 2017)	Not conceptually applicable	Not conceptually applicable	Organisational recognition, yet focus upon project marketing and co-creation	Some impact
Razmdoost and colleagues (e.g. 2016; K. 2019)	with implicit CM	creation and the service experience	Not conceptually applicable	Little impact
Fuentes and colleagues (2019)	with implicit CM	creation and the service experience	Not conceptually applicable	Some impact
Webber and colleagues (2004a,b)	Little impact via feedback	Little impact via feedback	Not conceptually applicable	CM through key account management and building clien trust and loyalty
Meng (e.g. 2012)	Not conceptually applicable	Not conceptually applicable	Not conceptually applicable	CM through relationship management to improve performance
Davis and Pharro (2003)	Not conceptually applicable	Not conceptually applicable	Not conceptually applicable	Key account management and relationship management as part of CM

among project teams is needed in practice (Smyth & Fitch, 2009). For theory to have an effective impact on practice an integrated approach is needed in research to support practice. Theoretical integration challenges key assumptions in the current framing of CM across the current research strands. A critical analysis is employed, and a narrative synthesis is provided from the existing literature (Popay et al., 2006; Rousseau et al., 2008), which provides the basis for identifying cross-functional and cross-disciplinary prospects (Zerjav et al., 2023). Cross-disciplinary research facilitates a more integrative approach to CM that spans across the current chosen theoretical lenses and the current firm and project-centric divides. Below the integrative level, a semi-systematic approach is employed (Leiringer & Zhang, 2021; Snyder, 2019; cf. Petticrew & Roberts, 2006) to help tease out the authors with most impact and classify them according to their theoretical lens and place them along the lines of strategic management and project lifecycles (Table 1). This involves selectivity, that is, not claiming to cover every paper (cf. Alvesson & Sandberg, 2020). We have selected the authors having greatest impact. Then, other authors strongly contributing to CM are to be found in the Appendix (Table 4). The tables provide a basis to subsequently explore the intersections in the literature (Sabini et al., 2019), which provides places to commence integration. We have not attempted to review papers that refer to CM with little additional or no additional contribution, or those mentioning CM in passing with few details or explanation.

Overall, a thematic interpretative analysis is employed along the lines of political economy (e.g. Bhaskar, 2010; Sayer, 2000) or the methods in action research (Erro-Garcés & Alfaro-Tanco, 2020) using a weight of evidence approach (Lakatos, 1970). The methodology, specifically drawing upon critical realism (Sayer, 2000; Smyth & Morris, 2007), covers both agency (e.g. Harré, 1979), in this case management agency, and structure of the varied organisational context (e.g. Bhaskar, 2008). The analysis of the literature identifies explanatory patterns across CM research and singular issues that are potentially significant in producing CM structures and processes (Sayer, 2000). The patterns and issues found in each conceptual strand of CM research demonstrate that research tends to be structured into the confines of the theoretical lenses applied.

A normative element that directly and indirectly appears in some literature is considered epistemologically and methodologically

legitimate. In social sciences, theory development frequently points towards where improvements can be made, for example capability development (Sayer, 2012), which is relevant to CM. Normative elements are commonplace, for example in grounded theory (e.g. Ackerly et al., 2024), engaged and action research (e.g. Babüroglu & Ravn, 1992) as well as critical realism (Bhaskar, 2010; Sayer, 2012, 2000). Indeed, even positivist deductive approaches embody a normative approach in hypothesis formulation, even if this is not always recognised (Bhaskar, 2013).

The methods follow the flow advocated by Denyer and Tranfield (2009) and Moher et al. (2009) and are replicated in project management (e.g. Scott-Young et al., 2019; Stingl & Geraldi, 2017). In Fig. 1, the lefthand side shows the procedural stages applied to the cited articles, to which is added the main steps applied that align with critical realism on the righthand side. The articles were then screened using two search strings (Daniel et al., 2022). The first screen covers the literature in management journals and leading project management journals, surfacing through Scopus and other search tools. The purpose of the second screen is to identify additional articles using keyword searches through Google Scholar. In sum, the substantive authors addressing CM provide the basis for prospecting CM in and for the project domain.

The initial research themes derived from prior literature knowledge were derived from the differences between marketing in the firm and project marketing. The themes were strategy for CM at the firm level, tactical project-based CM responses, organising CM for performance improvement and the co-creation of value. These were to be abductively revised through the review process.

Given the differing theoretical and functional foci across the research strands, having an encompassing yet clear definition of CM is far from straightforward. Authors most usually used the terms client, customer or client relationship when referring to CM. Client management (CM) is the term employed in this research. Some literature refers to management of providers by the client or owner as client management. This literature is ineligible because the research is focusing on management of the client by the supplier or contractor. Some literature considered CM as part of supply chain management (e.g. Papadopoulos et al., 2016) and relational contracting (Bygballe et al., 2010). A portion of this literature was omitted where CM was implicitly seen as synonymous with relational contracting and collaborative practices, which may include CM yet

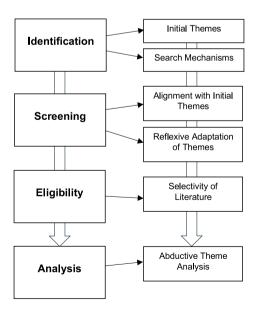


Fig. 1. Systematic flow of the literature review and analysis process.

frequently excludes it too. Further, some collaborative practices can be purely self-interested and fail to consider the client viewpoint. Some other literature was indirect in its approach to CM. For example, a large proportion of the service-dominant logic literature on co-created value says little about how and to what extent clients are proactively managed as part of co-creation, especially for the service experience. Finally, while the marketing literature regularly refers to CM, not all of it of it does. Turner and Lecoeuvre (2017), for example, consider all the organisations, including client side where they note that clients are more effective than contractors or suppliers at managing across the organisational boundary.

There is general appreciation that CM requires organising internally in order to improve performance for clients (e.g. Lau et al., 2015; Rajiv et al., 2020; Smyth & Fitch, 2009). The variance of sectors and clients across the project domain render it impossible to have automatic prescriptive CM responses (e.g. Cova & Hoskins, 1997; Cova & Salle, 2006; Smyth, 2015). The same applies to the uniqueness and temporal stringencies of projects (e.g. Cova & Salle, 2011; cf. Bakker et al., 2016; Geraldi et al., 2011; Winch et al., 2022). Internal capabilities and programme-level processes are needed to tailor responses to client needs and contexts as well as induce CM consistency (e.g. Smyth et al., 2019).

Considering the alignment of the literature based around the initial themes, lacking was clarity around any intersections and specific linkage towards integration. Conceptual integration has a reflexive relationship with examining the extent of integration in practice. Coordination in practice requires processes, first from the firm, through the project frontend and along the delivery project lifecycle, and second in the hierarchies of firms and projects. A third theme emerged around the coordination mechanisms, namely capabilities and competencies, that is, support systems. The themes and coding are set out in Table 2 and provided the basis for the final selectivity of the literature for generating the findings and analysis.

#### 3.1. Review findings and analysis

Currently there are two main theoretical research strands, project marketing and firm-centric CM, plus the smaller strand at the project execution stage. As noted overall, scant research has been conducted on CM, which has led to a limited number of authors having significant impact. Those having impact are set out in Table 1 with the remainder reviewed tabulated in Table 4 in the Appendix.

The articles that are marketing-based and firm-centric are strategic in formulation. In practice there is some systematic implementation of strategies among senior management and business development managers:

- a) Selecting clients at portfolio level
- b) Targeting clients with whom to build relationships
- c) Qualifying for bidding

**Table 2**Abductively derived themes and codes.

Themes	Coding
Horizontal CM coordination	Formally coordinated boundary spanning in the firm Formal coordination along project lifecycles Informal networking across organisational boundaries Informal behaviour among individuals and teams
Vertical CM coordination	Formal Systems in the firm hierarchy Formal systems at the firm-project interface Formal systems within project management
Mechanisms for coordination	Capability development CM as a capability CRM IT systems Other capabilities, especially knowledge management Competencies

d) Aligning capabilities against the needs and expectations of clients at programme level and liaising with bid management to shape and secure projects at the project front-end (e.g. Preece et al., 2003; Smyth, 2000, 2015).

Conceptually CM should reach into project execution to ensure that delivery is aligned with general client needs and expectations, as well as project specific ones that are enhanced through co-creation. In practice the implementation of strategies is rarely systematic, and a great deal relies on individuals taking responsibility (Smyth et al., 2019). Conceptually the main aim is to improve performance for client benefit. Empirical research confirms the prime motivation tends to be securing work. This is a major factor explaining why research effort into linking marketing and CM research to performance improvement and linking the project front-end to execution is minimal, except through normative conceptualisation. Predominantly firm-centric CM has put effort into conceptually linking the firm and front-end through systems for managing client relationships (Aarseth, 2014; Smyth, 2015; cf. Pryke & Smyth, 2006).

Project marketing is largely project-centric in focus. Cova and Salle (2005) take a cross-disciplinary management approach in conceptually merging project marketing with project management along six lines:

- i) Temporary project organising in the transaction (see also Bakker et al., 2016; Geraldi et al., 2011; Winch, 2010)
- ii) The specificity of each project (cf. Martinsuo & Geraldi, 2020)
- iii) The project cycle from the opportunity immediately prior to and during the project front-end
- iv) The resources needed to enhance and maintain relationships on and between projects (cf. Hadjikhani, 1996)
- v) Managing the network or "milieu" of internal and external stakeholders
- vi) What might currently be expressed as the co-creation of organising and content.

Although CM implicitly contributes to the first two, it directly relates to the remainder.

The six areas are conceptually important to and strategic in project management, that is in operational terms. However, these areas are not strategic in terms of the management field (cf. Leiringer & Zhang, 2021) in selecting marketing strategy, selecting the clients to develop business-to-business relationships prior to any project or the coordination of capability development across projects, including CM. Further it is not always clear across the project marketing literature what is conducted at firm and project levels, which is probably due to the marketing focus upon the front-end. There are a few exceptions (e.g. Jalkala et al., 2010; Tikkanen et al., 2007). Overall this topic overlaps with the firm-centric approach, yet this has not led to conceptual integration. Nor does CM in project marketing engage with execution. Project marketing has little to say on how senior managers strategically link CM with project delivery performance improvement and productivity or how project managers engage with CM. Some other authors have recognised these execution issues (e.g. Meng, 2012; Preece et al., 2015; Sezer and Bröchner, 2019), yet detail and attempts at integration are absent.

Project marketing addresses CM via relationship building, although this is conceived on a project-by-project basis. Networks are important for projects (Dubois & Gadde, 2002; Lundin et al., 2015; Sydow & Braun, 2018) for generating new knowledge in the project domain (Ahola, 2018). Project marketing was an early pioneer in considering networking (e.g. Cova & Hoskins, 1997; Cova & Salle, 2006; Cova et al., 1996). Both networking (Cova & Hoskins, 1997; Cova & Salle, 2006; Cova et al., 1996; Lecoeuvre-Soudain et al., 2009) and project shaping in project marketing (e.g. Cova & Salle 2011) are strategic for each project yet are tactical from the firm perspective. Firm level CM strategy as to how marketing feeds into portfolio management to iteratively refine client selection and programme management and inform capability

development is absent.

Strategically Voss (2012) linked CM to project portfolio management and largely offers structural solutions (Voss, 2012). Voss (2012) divided clients into project portfolios to manage their needs and performance and Tikkanen et al. (2007) posed a customer relationship portfolio as one of several portfolios. In contrast, recent research in construction finds portfolio management involves selecting key clients (e.g. Killen et al., 2023) with construction contractors dividing their business into project types and procurement routes (Smyth & Wu, 2021). Comparative sectoral research is needed from project and firm perspectives.

The CM strand focused upon project execution does not employ marketing theory. It looks at CM from the project management perspective for a specific project. It centres around action and decision-making (Meng, 2012), and more recently the co-creation of value (Liu et al., 2014). The tendency for projects to be transactionally cost driven can challenge client needs and compromise the solutions and capital (or policy) value of a project for a client (Shumilin et al., 2021). CM offers a balancing mechanism. In addition, the CM role informing project feedback for strategic refinement and capability development at firm level is generally lacking (Smyth et al., 2019).

There are points of conceptual intersection between the theoretical research strands (Sabini et al., 2019). Relationship management is a common thread between the firm-centric and both project-centric approaches (e.g. Aarseth, 2014; Cova & Salle, 2006; Meng, 2012; Smyth, 2015). Project marketing implicitly relies upon informal relationship building; it fails to demonstrate how any formal organising is undertaken, which is largely explained by the project focus. The firm-centric approach addresses formal systems in a normative way and shows the gap between theory and practice with little explanation for the underlying reasons. Theoretically integration to offer a more rounded and explanatory approach, using relationship management is needed and offers scope for future research.

The co-creation of value in the service-dominant logic (Vargo & Lusch, 2016) provides theoretical opportunities for theoretical intersection. CM is implicitly present across co-creation research along project lifecycles (e.g. Fuentes et al., 2019; Razmdoost et al., 2016). Yet co-creation research is also fragmented between the firm (e.g. Smyth, 2015), the front-end (e.g. Cova & Salle, 2008) and projects (e.g. Liu et al., 2014). It is far from clear across the research how co-creation is generated and what the role of CM is in support. How it is informally induced bottom-up by project teams or developed systematically from the firms to support project management is similarly unclear. Interestingly there is more explicit research on the co-destruction of value (Mills & Razmdoost, 2016; Smyth & Lecoeuvre, 2015), showing how actors destroy potentially valuable outcomes. Co-destruction would seem to be functionally integrated (Smyth & Lecoeuvre, 2015; Wang et al., 2021; cf. Lumivalo et al., 2024). Decision-making embodies types of behaviour and provides a further point of conceptual integration. Decision-making processes, including non-decision making and non-organising (Addyman & Smyth, 2023), offer means for analysis of CM organising at all project cycle stages. The lack of CM consideration conceptually in co-creation and the functional integration in co-destruction are both driven by resource availability.

The reviewed literature shows considerable empirical knowledge gaps. Examples differing individual client approaches and sectoral knowledge (cf. Preece et al., 2003). Sectoral coverage has grown, yet comparative research remains rare, as does CM comparison between in-house sourcing and outsourced projects. Most CM studies mainly focus on CM for outsourced projects, including this review. Collecting data from the firm level, the project front-end and execution in equal measures, including comparative studies, offers potential to induce or abductively develop new conceptual understanding across organisations and project stages.

There are capabilities and competencies to support CM, such as knowledge transfer (e.g. Hetemi et al., 2022; Savolainen & Ahonen 2015; Suonpää et al., 2019). CM is also a capability that requires

resources for development. Singla et al. (2022) state that CM is intrinsic to project performance through the ability to understand client requirements, accommodating delivery changes and problem-solving. CM relies upon individual and informal behaviour to support collaborative practices and relational contracting (Singla et al., 2022; see also Klakegg et al., 2020; Eriksson et al., 2008). However, relational capabilities are broad and include CM, although research into collaborative practices has given CM scant attention (Ashill et al., 2020; Croom, 2001; Croom & Batchelor, 1997). CM is broader than collaborative practices as it reaches into firm strategy. Formal processes, such as behavioural programmes and relationship management systems, are firm-based capabilities from the organisational behaviour and marketing subdisciplines in the management field. They are applied on a selective basis to support CM (Smyth, 2015). The capability literature does not clarify how CM capabilities emerge and are embedded. The megaproject literature infers operational emergence (Hobday, 2000; Sandhu & Gunasekaran, 2004; Söderlund & Sydow, 2019) where project duration gives time to embed practices at project level. The firm-project interface is overlooked supply-side in these studies.

The temporary nature of projects constrains embedding emergent capabilities during delivery (Bakker et al., 2016). Resourcing and embedding CM-related capabilities helps overcome some temporal vagaries of projects as both client and contractor are permanent organisations (cf. Winch & Leiringer, 2016). Capabilities help satisfy motivations for adopting effective CM by securing work through repeat business and enhancing reputation to secure referrals, as well as improving performance to benefit clients. Despite the win-win reasoning for systematic CM adoption, there is tension between development and short-term financial management. Finance management has a continuing resource role in supporting CM and related capabilities (Smyth et al., 2019). According to Shumilin et al. (2021) CM contributes to client capital accumulation and their service provision capabilities. CM conceptually engages with project managers, commercial managers and those in other roles, yet the literature demonstrates little management support at the firm-project interface (Turkulainen et al., 2013).

Finance management as a key management function in project-based firms is scarcely researched across the project domain. Typically, the project-centric research approach is limited to allocating project finance and risk as the primary topics (Brealey et al., 1996; Burtonshaw-Gunn, 2009). Gruneberg and Ive (2000) provide a rare study that considers the role of financial principles, but it excludes the functional operations of finance departments and managers. Two studies consider the interface with marketing. Hempelmann and Engelen (2014) consider the role of finance in cross-functional product development teams. The study contributes to cross-functional integration and implicitly CM. Smyth and Lecoeuvre (2015) consider decision-making concerning the return on marketing investment for projects. Finance management unrealistically demand certainty of returns to avoid making long-term commitments towards projects or performance despite that fact that finance managers do not demand certainty themselves when setting budgets for the firms or projects.

Resource constraints are part of transactional business models, whereas CM can contribute to transformative models (Smyth et al., 2019). Leadership can help coordination and can be important (Zimmerer & Yasin, 1998), but leaders cannot manage the totality of CM; leadership itself requires coordination. CM roles help span functions and disciplines, such as commercial management (Turkulainen et al., 2013). Commercial managers monitor costs and compare costs against project budgets, but purely project-centric decisions can affect the ability to secure future work from a CM perspective. Although Lowe and Leiringer (2005) undertook an early study, which they followed up with two edited books, few authors directly addressed commercial management (Lowe, 2013; Lowe & Leiringer, 2006). This work certainly overlooked the impact on CM. Some researchers include marketing and business development in the definition of commercial management (Dalcher, 2018). Merger and subordination prevail over attempts of

integration. CM in the firm and on projects goes beyond business development, bid management; it spans other roles such as finance and commercial management to ensure client orientation and effective CM (e.g. Chambers et al., 2009; Cova et al., 2002; Smyth & Fitch, 2009) and requires further attention.

In some organisations a dedicated CM coordinator is identified, the key account manager (KAM). There are different models in the project domain (Wilkinson, 2006). They can be senior managers (Smyth & Wu, 2021), business development managers (Smyth & Fitch, 2009), or relationship managers or project managers focusing primarily on execution (Davis & Pharro, 2003; Mills & Razmdoost, 2016). Without systematic relationship management processes, the literature shows business development managers do not necessarily span boundaries with tactical considerations for execution (Smyth & Fitch, 2009) and execution-based KAMs in project teams tend to be predominantly tactical (Smyth, 2000; Smyth et al., 2019), hence do not reach back to strategic considerations (Mills & Razmdoost, 2016). KAMs at project level can influence early contractor involvement and collaborative working can help harness other capabilities for delivery (cf. Ishtiaque et al., 2024; Klakegg et al., 2020; Rahman & Alhassan, 2012). The introduction of KAMs has not always succeeded. One international contractor failed to understand the necessary management support for the KAM role. A second attempt lacked programme management resources, hence KAMs were fighting for resources from finance management (Smyth et al., 2019).

KAMs require support from other team and senior staff members. They require effective coordination across actors that have contact with client staff and their representatives (Smyth & Fitch, 2009). Coordination is both vertical with senior management and horizontal with project team members with KAMs acting as the prime point of contact. IT systems, such as CRM software, provide a valuable coordination mechanism. However, CRM software is frequently perceived as synonymous with CM (Zablah et al., 2004). Negley (2022) drew attention for the need to critically evaluate CRM platforms such as Salesforce©. Project-based organisations require human CM processes to render CRM effective, such as those offered by relationship management (Smyth, 2015). Such systems are lacking in project organising with the result that theorisation is largely normative. There is some evidence for effective relationship management (Möller & Törrönen, 2003; Ruuska et al., 2013), but where relationship management systems and social media platforms are in place there are low levels of engagement and use may not have been fully thought through by management (Ojelabi et al., 2018; Smyth, 2015). The consequence is that there is considerable reliance upon rhetoric from managers and KAMs, and reliance upon individuals taking responsibility through informal behaviour to pursue collaboration and CM (Smyth et al., 2019). Indeed, some project managers shun management guidance towards a client orientation (Chambers et al., 2009; Wells & Smyth, 2011). CRM and relationship management systems pose resourcing and senior management challenges. This brings into question the validity of 'normative' theorisation in the project domain, in particular the firm and project business models for delivery which are predominantly transactional rather than transformative in improving performance (Smyth, 2023).

There are shortfalls regarding other capabilities. Linking CM with other capabilities is conceptually important. CM research has yet to fully address the cross-disciplinary and cross-functional prospect. This applies to knowledge management processes for client knowledge. Similarly, it applies to project knowledge to improve operational performance (e.g. Hetemi et al., 2022; Savolainen & Ahonen, 2015; Suonpää et al., 2019). The project management literature treats the client as initially an external 'stranger' about which contextual knowledge and understanding is needed (Martinsuo & Geraldi, 2020; Vedel & Geraldi, 2020). CM is rarely linked to knowledge management regarding clients and shaping projects.

Current theorisation recognises that effective client relations depend upon effective internal capabilities. Yet the literature shows tensions

between needs from the CM perspective and other perspectives operating in practice. There are reasons for the lack of CM capabilities and capabilities that support CM. The prevailing business model for project suppliers and resultant constrained sources is one. Partial implementation is another. A lack of mature competencies may be influenced by these two factors. An over-reliance upon individuals taking responsibility is implicit, if not explicit, across much of the literature. It may simply be in some case a lack of management strategic awareness and reflexive management thinking as to what is functionally necessary. This is what Alvesson and Spicer (2012) called stupidity-based theory, although we prefer "stupidity or mindless-based thinking". Practice may demonstrate capability shortfalls, yet current theorisation is unhelpful. Theorisation is not supporting CM practice improvement. The execution strand is project management focused, while project marketing tends to insufficiently diagnose functional and disciplinary intersections for adopting, embedding and rolling out CM-related capabilities. Both approaches are project-centric. CM based upon marketing in the firm is systematic yet leaves theorisation as normative by default if not design. A more critical explanatory analysis as to the relevance of theorised CM is needed as well as an analysis of the current barriers to effective capability adoption with the prevailing management and underlying business models of firms and project teams.

CM that is rooted in marketing theory draws upon organisational behaviour for relationship management. CM in project marketing is aligned or merged with project management. The research focus within these two separate strands – firm-centricity and project-centricity – means that the strategic and tactical aspects of CM are either left implicit or mean something different in each conceptual approach. CM firm-centric research considers CM strategy for the organisation and for projects, especially at the front-end. It remains underdeveloped (Webber & Klimoski, 2004). Project-centric research tends to conceive of strategy largely in project terms. Sometimes the project-centric view conflates strategy for the project with firm strategy. Theory can overlook functional details and use the terms such as project-based organisations (PBOs) that can fail to clarify which organisational level is under consideration.

At present strategic client management (SCM) is largely configured normatively in the literature (Aarseth, 2014; Smyth, 2015) or is shown to rely on informal behaviour in practice while tactical client management (TCM) almost totally relies upon individuals taking responsibility and therefore informal behaviour (Smyth et al., 2019). There are a few exceptions showing systematically organised behaviour in practice for SCM (Smyth & Fitch, 2009) and similar attempts for TCM through the introduction of KAMs during delivery (e.g. Smyth et al., 2019). However, these exceptions only serve to highlight the gap between theory and practice, especially in the firm-centric approach. Project marketing and delivery-based approaches to CM are largely reliant yet inexplicit about informally organised behaviour for CM. There is a need to further test the relevance of theory and to be explicit about the processes for relationship building.

The multiple conceptual approaches in use across the literature for theory and practice from marketing and organisational behaviour, operations and project management, as well as finance and commercial management prove the need for conceptual integration using crossdisciplinary research for CM to make strategic and tactical considerations distinct. The two intersect greatest at the project front-end, where SCM will cover matters where the project is strategic from the firm perspective and TCM that is project-centric. The execution strand is largely tactical, although feedback to the firm, for example around aspects of knowledge management or embedding new capabilities from the bottom up, may have strategic implications for refining SCM. While SCM and TCM are conceptually separate, in practice they require effective linkage and mutual support to enable CM at the firm-project execution interface (Turkulainen et al., 2013). Therefore, a future research challenge is to explore SCM and TCM and how both operate in consort.

Table 3 brings forward a selection of the concepts covered in the analysis to show how they relate strategically and tactically across the literature. It is illustrative of the points of conceptual intersection to help facilitate theoretical integration rather than evidence of integration.

CM within the marketing discipline and project management as part of operational management theorisation along with co-creation having sociological underpinnings (Vargo & Lusch, 2016) harbour disciplinary implications., Functions in practice, such as finance and commercial management, and collaborative practices show a number of disciplines are in play. They intersect yet are not always integrated in cross-disciplinary analysis (Sabini et al., 2019). Project marketing tried to merge its theorisation with project management (Cova & Salle, 2006) with the result that CM became conceptually confined to project management (Cova & Salle, 2011; Cova et al., 1996, 2002; Lecoeuvre-Soudain & Deshayes, 2006; Skaates et al., 2002). There are undoubted overlaps, especially between CM in project marketing and firm-based marketing yet integration remains elusive.

Drilling down, research attention has focused on CM

**Table 3**Relating key concepts to strategic and tactical client management research.

Intersecting Concepts in Client	Strategic Client Management	Tactical Client Management
Management		
Relationship Management	Relationship management resourcing to systematically develop CM (Smyth, 2015).	Relationship management to identify clients and networks, and shape projects (e.g. Cova et al., 2002; Jalkala et al., 2010; Skaates et al., 2002).
	Relationship management to select clients in portfolio management (e.g. Killen et al., 2023; Tikkanen et al., 2007; Voss, 2012), and facilitate change management (Artto et al., 2009).	Systems and solution selling in business development and bidding using CM (e.g. Azimont et al., 1998; Cova & Salle, 2006; Davies et al., 2007; Jalkala et al., 2010).
Behavioural Programmes	Training and development, such as behavioural programmes (e.g. Smyth & Fitch, 2009).	Engagement with systems and capabilities to improve performance.
	KAMs for coordination (e.g. Smyth et al., 2019; Wilkinson, 2006).	KAMs for coordination (e.g. Davis & Pharro, 2003; Smyth et al., 2019; Wilkinson, 2006).
	Leadership and KAMs for CM coordination (e.g. Smyth et al., 2019; Zimmerer & Yasin, 1998).	
Systems and Capabilities	Knowledge management capability to include client knowledge and project knowledge for performance improvement (e.g. Smyth et al., 2019)	Feedback project and client knowledge to improve performance (Savolainen & Ahonen, 2015; Smyth et al., 2019; Suonpää et al., 2019).
	Improving performance through CM and supported by other capabilities ( Webber & Klimoski, 2004).	
Client Lifetime Value	Calculating client lifetime value and applying in portfolio management for managing key clients (Smyth & Fitch, 2009).	Monitoring client lifetime value (Li & Xia, 2024; Smyth & Fitch, 2009; Tikkanen et al., 2007).
Value Co-creation	Co-creating value in CM (e.g. Smyth, 2015).	CM in co-creating value in project shaping and delivery

professionalisation of service management to support customers in the firm (Berkovi, 2016), which in the project domain has largely focused upon embedding CM in senior management, business development, bid management and project management (Smyth, 2015; Smyth & Fitch, 2009). Other authors employ a process perspective from the firm function to the project level for value co-creation (Fuentes et al., 2019; Preece et al., 2003; Razmdoost & Mills, 2016). A process approach suggests performance improvement is enabled in practice (e.g. Preece et al., 2003), although scant CM conceptualisation at a detailed level of project execution is provided and practice is thwarted by partial implementation and resource constraints (e.g. Torkildsen et al., 2024). Implementation gaps arise from ineffective strategic decision-making (Smyth & Lecoeuvre, 2015), insufficient capabilities for promoting value co-creation (Fuentes et al., 2019; K. Razmdoost et al., 2019) as well as mindless-based thinking (cf. Alvesson & Spicer, 2012). It appears that benefits largely arise from service providers paying clients more attention to the service experience (e.g. Razmdoost & Mills, 2016) than employing CM to support performance improvement during execution, although shaping projects to induce win-strategies at the front-end appear successful (Cova & Salle, 2011; Fuentes et al., 2019; Smyth & Fitch, 2009). These gaps arise as much from diverse disciplinary research underpinnings as differences between strategic and tactical

An improved service experience is not only dependent upon CM or relational capabilities (Croom & Batchelor, 1997). Improvements also arise from other concepts from diverse disciplines, including trust generation (Khaflan et al., 2007; Sunindijo et al., 2014), procurement management (Sundar, 2012), total quality management (Sui Pheng & Ke-Wei, 1996), and as noted collaboration (e.g. Deep et al., 2021), supply chain management (e.g. Bygballe et al., 2010; Papadopoulos et al., 2016), performance factors for successful execution (Jari & Bhangale, 2013) and organisational learning (Chiponde et al., 2022) as well as other organisational capabilities (e.g. Davies & Brady, 2000). Nonetheless CM can influence and improve all these factors through a cross-disciplinary approach as well as a cross-functional management in the firm (Ashill et al., 2020; Pagano, 2009; Smyth, 2015; cf. Söderlund & Sydow, 2019). Institutional changes in the firm can positively improve interpersonal and hence individual behaviour (Butcher & Sheenan, 2010; Cova et al., 2019). Yet, the unresolved conceptual issues arising from diverse disciplines tend to reinforce fragmentation.

Overall, CM research developed two dominant lenses, which is supported through the review: the firm-centricity of the management discipline related to marketing and organisational behaviour and the operational-centricity of project marketing (see Table 1). The project execution CM research strand also offers a project-centric lens. CM is currently different according to the conceptual lens employed. The evidence from the review also shows a lack of capability development for CM and in support of it, both top down from the firm and bottom up from projects. How CM is conceived and implemented strategically from the firm and tactically on and across projects is frequently unclear, especially as to what is strategy for the project and what is strategy for the firm. Research attention to linking firm strategy, portfolio and programme management, and the direct management of clients through systems and detailed procedures to secure clients and deliver performance improvement is conceptually limited or absent. In sum a lack of theoretical and conceptual integration through cross-disciplinary research and cross-functional disciplines from the empirical evidence presented in CM research prevails.

## 4. Discussion

If theory is developed, empirically tested in fieldwork and empirical evidence fails to support the theory or concepts, then either the theory is wrong, or management and agency need to change to improve practices on the ground. Given the scant research, it could be argued that it is too early to judge, yet there is sufficient to say it is the lack of integration

(e.g. Cova & Salle, 2008; Liu

Delivering performance

and other CM actions (Liu

et al., 2014; Meng, 2012).

improvement through decision making, co-creation

et al., 2014).

that poses a barrier to knowledge and supporting practice. It is perhaps surprising that recent research upon project governance has omitted CM on the supply-side (see Derakhshan et al., 2019; Müller; 2017; Musawir et al., 2020), including when claiming to rethink governance (Song et al., 2022). It would be expected that good governance includes CM. Ahola et al. (2014) is one exception citing Reve and Levitt (1984) who cover client needs, contracts and relationships. The capability literature omits CM as an important resource in the project domain. Commencing from strategic management as a discipline, Leiringer and Zhang (2021) draw attention to the importance of organisational capabilities for project organising. Yet distinction between those built from the firm and those arising bottom-up on projects are omitted.

Project management has increased in scope, although it still ploughs a narrow path according to Söderlund (2023). The past may guide us, yet his article fails to address CM despite the plea for reflective and historical contributions to improving performance. A cross-disciplinary and cross-functional approach that involves boundary spanning has been advocated for generating new knowledge (Zerjav et al., 2023). This applies to CM to effectively manage the supplier-client interface. The call from Davis and Pharro (2003) for the relationship manager to be the next phase for effective project management has still to be answered.

#### 4.1. Towards knowledge convergence through integration

The tendency across the three identified research strands, covering the firm and project cycle, is to adhere to the chosen lens and merely examine an aspect or conceptual angle within the theoretical lens applied. It protects the territorial lens and merely incrementally contributes to plugging research gaps through what Zerjav et al. (2023) call mining. It avoids prospecting for new knowledge by challenging the lenses or trying to integrate the fragments. It stymies academic progress and fails to help industry improve performance through marketing and specifically CM. The evidence shows that CM adoption is weak, which is largely handled by implicitly accepting the practices as the operational norm (e.g. Cova & Salle, 2006) or explicitly developing normative theorisation (Smyth, 2015). Indeed, the shortfalls sometime have led to a retreat from CM practices (e.g. Smyth et al., 2019). However, practitioners recognise the need for improved commitment and consistency (Smyth & Kusuma, 2015; Smyth et al., 2019). This places the burden on research to verify, improve and integrate theory and conceptualisations.

Theory needs reconsideration, specifically to refine theory and integrate CM in order to improve academic understanding and improve practice performance. Integrating the fragments will begin to challenge the lenses. There is considerable scope for integration and tentative steps have been taken (Turner & Lecoeuvre, 2017), by for example generalised examination at firm level through the project marketing lens (Jalkala et al., 2010; Tikkanen et al., 2007), through operations from the firm viewpoint (e.g. Chambers et al., 2009; Smyth et al., 2019) and applying value co-creation to the firm level (e.g. Razmdoost & Mills, 2016), the front-end (Cova & Salle, 2008) and project delivery (Liu et al., 2014). These steps have not challenged the chosen theoretical lenses. CM is claimed to induce improvements (Lau et al., 2015; Rajiv et al., 2020; Smyth & Fitch, 2009) but little evidence is mobilised to show how this is the case at any detailed level. Comparative evidence is lacking to test theory regarding sectoral and client approaches (Preece et al., 2003) as well as project content (Preece et al., 2015; Yong & Pheng, 2008).

Knowledge convergence requires a shared understanding of CM. Where CM is only implicitly referred to, definitions are omitted. Some perceive CM as part of collaborative practices, such as relational contracting (e.g. Bygballe et al., 2010), or as part of marketing (e.g. Smyth, 2015), and specifically as part of relationship management within project management (e.g. Meng, 2012). Practitioners mainly apply CM to secure work (e.g. Khairuddin & Preece, 2018), while conceptually the primary purpose is to improve performance to benefit clients with a secondary motive that this will yield repeat business (e.g. Pinto & Rouhiainen, 2002).

Convergence needs to recognise the organisational levels of CM from strategy, emanating from supplier strategies, through portfolio and programme management to the project level. This requires further conceptual integration in conjunction with better understanding how practice does and can integrate action. This is currently neglected and can contribute to also better understanding the intersections between firm, project front-end and delivery. A focus on organisational levels links to SCM and TCM from resourcing to embedding processes from a client orientation and to capability and competency development (e.g. Singla et al., 2022).

SCM and TCM operate differently in the hierarchy. Top-down and bottom-up action needs to be conceptually melded conceptually and in practice, for example effective knowledge management as part of CM and part of refining performance on and between projects (Savolainen & Ahonen, 2015; Smyth et al., 2019; Suonpää et al., 2019).

This review has helped establish both tentative and demonstrable causal explanations thorough reflexive analysis, for example the research motivation to keep to conceptual siloes for territorial positioning purposes and the practice motivation to secure work causing the lack of CM-related capability investment to go beyond marginal performance improvement.

#### 4.2. Towards integrating theoretical lenses and conceptual intersections

Sabini et al. (2019) explore conceptual intersections to help overcome research fragmentation, in this case covering the theoretical lenses of the research strands from the firm and along project cycles. Integrating across the boundaries of theorisation also requires detailed analysis that drills down into the details of how CM conceptually operates, for example who undertakes CM roles, how functional and organisational boundaries are spanned, how the CM baton is passed along the project lifecycle and what valuable outcomes in delivery and post-completion arise from CM. One of the current conceptual barriers is that project marketing and the delivery strand focus upon the temporary organisation and project delivery strands while the firm focus is on the permanent organisation. These need to be conceptually integrated.

The fertile intersection for conceptual integration can commence at the project front-end where the firm-centric and project marketing strands share common ground. There is also conceptual scope between project marketing and project delivery at the delivery stage where project marketing can pursue the interactions between project marketing and project management with a view to conceptual integration. This should not argue whether marketing is part of project management or visa versa (cf. Turner & Lecoeuvre, 2017), but more to demonstrate where the detailed intersections are rather than privileging one conceptualisation over another. There is work to build upon for integration where project marketing has considered firm functions with implicit, if not always explicit, implications for CM (e.g. Jalkala et al., 2010; Tikkanen et al., 2007). Similarly, CM in delivery has harnessed relationship management (e.g. Meng, 2012) and co-creation (e.g. Fuentes et al., 2019; Mills & Razmdoost, 2016).

The literature shows the project-front end conceptually serves CM the best from the firm and project marketing strands despite the lack of integration at the firm-project execution interface. It also empirically shows there is a lack of management commitment to CM across firms and during execution. Practitioners and experts interviewed across the project domain recognise shortfalls that need to be addressed, which strongly suggests the relevance and value of CM theory and concepts (cf. Smyth & Kusuma, 2015; Smyth et al., 2019) although further verification is needed. This finding also legitimates the normative role for theorisation (cf. Bhaskar, 2010; Sayer, 2012, 2000) to enable greater rigour and integration in future research. Future normative work can also initiate new knowledge for future verification empirically and through influencing practice.

#### 4.3. Towards comparative research

As stated there is a need for comparative research to challenge current generalisations and develop new insights. There are a number of areas of comparison to explore:

- Comparing CM in different sectors, existing research being dominated by IT and construction although seldom in comparative research
- Comparing CM in-house and outsourced projects
- Comparing different clients in terms of variable structures and strategic approaches to their organisations and projects, hence tailored CM at a detailed level from the generic approaches supply side
- Comparing CM in different sized supply side firms.

Comparative work at a detailed level may prove to considerably challenge current conceptualisations, hence stimulating new conceptual knowledge generation.

## 4.4. Client management research prospects

There are a range of *prospects* (cf. Zerjav et al., 2023) that arise from the analysis of the literature and the discussion above. Ten prospects are singled out from the analysis. Each prospect crosses conceptual boundaries of academic disciplines and functions in firms, the firm-project interface and within project teams in order to adopt and maintain CM capabilities and operations. The aim of bringing forward ten prospects is to stimulate a future research agenda.

- 1. The first prospect is for greater integration across CM research, particularly drawing together firm-based CM which involves marketing and organisational behaviour, CM in project marketing within operations management, and hence linked to project management as well as CM in project delivery. Firm and project marketing-based CM intersect at project front-end, especially around the marketing discipline, but also around organisational behaviour. Project delivery, as discussed, behaviourally intersects with relationship management as well as with CM in project marketing can critically explore nuanced alignment and linkage with project management without assuming merger. The findings have shown that functionally as well as conceptually linkage along the firm, project front-end and delivery interfaces is needed to achieve integration and induce new knowledge. The same applies to hierarchical considerations in the levels of CM operation. How this is achieved is to move away from singular lens selection towards a more inclusive and cross-disciplinary research approach. This can stimulate further prospecting around more detailed intersections and linkages. This prospect is further supported by introducing SCM and TCM - see the next prospect.
- 2. This review has shown there is benefit in distinguishing the conceptual categories of SCM and TCM. At a detailed level it will help support Prospect 1 regarding theoretical integration and acknowledgement of the broader scope of CM. It has been shown in the findings and analysis that the meaning of strategy often fails to distinguish strategy of the firm and for the project, indeed conflates the two on occasions. SCM refers to the firm level, TCM to the operational level, including project strategy. The intersections are functionally located i) at firm-project interface, especially the front-end, ii) through the role of KAMs if the role spans all key client activities, and iii) TCM feedback to strategy. The disciples involved include the management for strategy and its implementation, organisational behaviour and project management. Conceptually, new knowledge might arise from undertaking SCM-TCM research, especially comparative studies that might begin to challenge claimed generalisations and current

- conceptual assumptions about CM theorisation. Interactive research with industry, through for example engaged scholarship or action research may also generate new knowledge. SCM-TCM research will support the prospects below, especially integration at the firm-project execution interface through detailed normative conceptualisation.
- 3. As IT and construction sectors have been primary foci and provided most evidence to date, there is a need for extensive comparative sectoral studies to test and refine the theories, and their integration. This builds upon Prospect 2. It especially requires a critical approach for it would be more tempting concerning this prospect to preselect a current lens rather than allow comparative research to challenge conceptions. A grounded theory methodology or critical realism with its abductive method would prove useful approaches to employ provided the aim is not to support what is conceptually known but generate new theoretical contributions. As noted in the discussion section, comparative work can extend beyond sectors to cover different client types and size of clients and projects to which CM is applied.
- 4. Building on the above prospect, comparative research between CM for in-house projects and CM in outsourced providers is needed to contextually test theorisation and tease out differences for conceptualisation and in practice. Boundary spanning exists in both. In-house provision is interdepartmental (with varying disciplinary backgrounds) and outsourced projects involve interorganisational boundary spanning. The context and spanning characteristics will differ as will the extent of loose coupling. Loose coupling may be greatest for outsourced projects between client and provider. CM as an organisational boundary spanning activity plays a potentially important role to enable integration in practice. The strength of the systems and capabilities will be central to the ability to reduce loose coupling effects, not only between client and in-house or external provider but also internal project coordination to delivery performance improvement.
- 5. Cross-disciplinary CM research will span the boundaries of the management fields of strategy, marketing, organisational behaviour and operations management, which pertains here to project management. Hierarchically, strategy conceptually cascades down portfolio management, programme management and project management, but currently is not comprehensively addressed in disciplinary and functional terms. In addition, there are particular functions that directly relate to CM, particularly finance management, business development as selling, bid management, commercial management and project management, on top of which there are cross-functional activities to support and enable effective CM, for example capability development and knowledge management. These cross-disciplinary and crossfunctional dimensions have been somewhat overlooked. Their intersections conceptually and functionally require boundary spanning research to produce a more integrated picture and facilitate new conceptual and functional knowledge generation.
- 6. Cross-disciplinary research is reflected in crossing functional boundaries along the key client-project cycle. Included are the conceptual CM role and actions across business development, bid management, project management and in particular the CM interface management between these functional disciplines (see also Prospect 5). The role of HRM for monitoring CM engagement and training around organisational behaviour are also important, plus there is the dark side of CM that spans into corruption that probably 'taxes' the scope for improvement and has yet to broached.
- 7. Within TCM, project teams have yet to be extensively researched. To date improved TCM appears to be indirect, especially through early contractor involvement, relational contracting and collaborative working. This currently omits or downplays explicit TCM

in research and practice. Further the feedback loops to support future client knowledge, service knowledge and technical knowledge to refine value propositions through CM to improve future performance are overlooked. The intersections for this prospect are therefore with other sub-disciplines and relate to investment, embedding and maintaining effective systems and capabilities.

- 8. The question as to who manages CM is seldom addressed and typically indirect. Is it a separate role with dedicated client managers or KAMs? Should CM grow within other roles, such as C-suite management or senior business development managers or among commercial managers, project managers and dedicated relationship managers in the form of KAMs to coordinate TCM? The call for relationship managers in project management as client managers is clearly correct, but that does not cover all aspects of TCM. Examining who or what other roles are most suited to lead CM and be KAMs requires comparative research by role and discipline. Some roles may be better placed than others or be better suited to particular project stages and contexts. If so, CM leadership teams are needed with coordinated handover procedures as part of the human organisational systems. This could be perceived as a current research gap yet is a prospect because of the cross-disciplinary and cross-functional dimensions that have been overlooked. Further, which disciplines beyond systems theory for relationship management and organisational behaviour remains an open question until more comparative research is undertaken (see Prospects 3-4).
- 9. At present research has theoretically noted that the prime CM purpose is to improve performance. There is a prospect as to what effect different disciplinary and functional CM roles have upon improving performance. At present there is little knowledge on the contributions of CM to improved performance and no knowledge on which conceptual disciplines do and could contribute to performance improvement through CM. Undertaking this research may induce researchers to challenge their perspective as to what can be offered by research for practitioners. There may be further opportunities to extend this normatively to influence future practice and test the new conceptual insights.
- 10. Finally, CM is a concept that potentially offers transformative practice. Currently research in the project domain is dominated by a project-centric approach. This is unsurprising perhaps, but a great deal of research over the last two decades or more has taken a multi-disciplinary approach, not least contributions to the International Journal of Project Management. What CM evidence shows is that a project-centric lens is important but insufficient. A firm-level perspective is necessary to complement the project perspective, which also implies cross-disciplinarity (see Prospect 1). Current firm business models on the supply side are largely transactional, as are budgeting processes for in-house projects. This results in transactional project business models too, potentially setting up tensions with the more transformative purposes of improving performance. There are short-term versus long-term financial trade-offs in such considerations. Evaluation is needed as to the tensions, the extent to which these are contradictory and explain in more detail why CM practice is dominated by securing work, especially repeat business, what capabilities and processes can be incrementally developed within the prevailing business model and to what extent a shift towards a more transformative approach is possible and under what conditions. The prospect particularly brings together the fields of management and finance management to generate new knowledge.

These ten prospects may not be the only ones. Systems have been addressed through relationship management (Pryke & Smyth, 2006; Smyth, 2015), but not at a detailed level, including non-organising

(Addyman & Smyth, 2023). It may be that this is a substantial research gap that feeds into other prospects, especially in building theory and supporting developments in practice and from extensive comparative empirical evidence. In total the selected prospects are indicative, pointing towards conceptual and functional intersections to demonstrate the potential for generating new knowledge through theoretical integration by employing cross-disciplinary research.

#### 4.5. Limitations

A review is limited by the ability to capture every theme and angle in the research reviewed as well as many nuances. The high-level findings and analysis capture the main theorisation, concepts employed and trends. However, authors can doubtless cite as a counterargument a theme or insight that addresses, however superficially, some aspect or angle and claim there is no current shortfall in their analysis.

The discussion is selective too and the number of prospects does not claim to be exhaustive. Rather the purpose is to stimulate a reconsideration of CM. The critical approach adopted in the paper can end up sounding negative about current CM research, yet authors need to be applauded for the work to date, especially considered the scant attention given to this topic.

#### 5. Conclusion

The literature review aimed to evaluate the current state of play concerning client management. The research aim asked whether current theorisation and conceptualisation of client management supported a shared understanding and supported performance improvement. It was found that CM lacks a shared understanding and performance improvement is marginal where present. This was conducted against a background of two main research strands: i) marketing and organisational behaviour in the firm, ii) project marketing, focusing upon project management and selling, plus iii) the minor CM strand in project delivery. Part of that background had been the call from Davis and Pharro (2003) who posed the relationship or CM manager as the next phase for effective project management. Subsequent research adds the strategic dimension and leads towards the need to explore the intrinsic cross-disciplinary and cross-functional nature of CM.

Two main overall contributions were developed. First is the need to explore CM afresh both more extensively and in depth with a consistent approach by spanning the current research strands to improve theoretical integration and in so doing address the linkages between firm, project front-end and delivery as well as operation hierarchically. Second is the need to explicitly identify two CM categories, namely strategic client management and tactical client management, to enable more indepth understanding of the current literature and to enable greater clarity for developing future research. Pursuing these contributions involves bringing forward potential prospects. Ten are identified, which help inform an agenda for future research to generate new knowledge through an integrated application of CM tenets in a cross-disciplinary context. The totality has aimed to produce a strategic platform to create new knowledge in future research.

## Data availability

The literature review harnesses data is already publicly available and can be accessed through the referenced articles provided in Table 1, the Appendix and the References section.

# CRediT authorship contribution statement

**Hedley Smyth:** Writing – original draft, Conceptualization. **Ole Jonny Klakegs:** Writing – original draft, Conceptualization. **Vegard Knotten:** Writing – original draft.

# Appendix

Table 4

Authors and Citation	Conceptual Contribution for Client Management
Cova and Holstius (1993)	Creating competitive advantage through client relationships
Hadjkhani (1996)	CM over project cycles, especially at the front-end and the sleeping relationship
Cova et al. (1996)	Networking and CM through relationship management
Cova and Hoskins (1997)	Networking and CM through relationship management
Croom and Batchelor (1997)	Improving the client service experience
Azimont et al. (1998)	Strategic solution selling and CM
Smyth (2000)	CM strategy and securing work, especially regarding repeat business from key clients
Croom (2001) Cova et al. (2002)	Improving the client service experience Project marketing at the front-end
Pinto and Rouhiainen (2002)	Building client orientated organisations for performance improvement
Skaates et al. (2002)	Client relationship building within project marketing
Preece et al. (2003)	CM within business development
Park et al. (2003)	Client relationship management
Blismas et al. (2004)	CM for repeat business from client programmes
Sandhu and Gunasekaran (2004)	Aligning value propositions to client in business development
Webber and Klimoski (2004)	CM through building client trust and loyalty to improve project performance
Webber and Torti (2004)	CM through key account management to improve project performance
Cova and Salle (2005)	Merging project marketing with project management
Oulaimi (2005)	Developing client orientated organisations
Γaylor (2005)	CM shortcomings at the front-end
Buttle (1996)	Client satisfaction and managing the service quality
Cova and Salle (2006)	Communications and networking with clients
Karvinen and Bennett (2006)	Client orientation in project delivery to improve performance
Javed et al. (2006)	CM over project cycles
Lecoeurve-Soudain and Deshayes (2006)	CM in networking and project marketing
Wilkinson (2006)	Key account management as part of CM
Cova and Salle (2007) Kujala et al. (2007)	Strategic solution selling, CM and project management
Fikkanen et al. (2007)	Negotiating approach to securing projects Portfolio management
Davies et al. (2007)	Selling strategic solutions to clients
Yong and Pheng (2008)	Organisational culture and implications for CM on projects
Cova and Salle (2008)	Co-creating in client networks
Chambers et al. (2009)	Win strategy development for selected clients
Lecoeuvre-Soudain et al. (2009)	Project management and project marketing
Preece and Khairuddin (2009)	Relationship management in business development
Eriksson et al. (2008)	Collaborative practices in relation to CM
Jalkala et al. (2010)	Integration, strategic solutions selling through shaping projects in project marketing
Butcher and Sheenan (2010)	Behaviour management implications for CM and performance
Cova and Salle (2011)	Shaping projects at the front-end
Wells and Smyth (2011)	Inconsistent CM by project managers
Aarikka-Stenroos and Jaakkola (2012)	Joint problem solving as a co-creation process
Meng (2012)	CM through relationship management to improve performance
Papadopoulos et al. (2016)	Supply chain management contribution to the (client) service experience
Rahman and Alhassan (2012)	Contractor perspective on early contractor involvement
Voss (2012)	Client needs and expectations in the firm and front-end
Voss and Kock (2013)	Client relationship value and portfolio management
Su and Mao (2013)	Clients as 'teachers' for supply-side CM
Furkulainen et al. (2013) Liu et al. (2014)	Managing the selling-execution interface
Lau et al. (2014)	CM through relationship management for value co-creation on projects CM during project execution to deliver benefits
Preece et al. (2015)	Relationship management in business development and for performance improvement in the firm and along the project cyc
Savolainen and Ahonen (2015)	Knowledge management between selling and project execution
Smyth (2015)	CM systems for relationship management and value co-creation for key clients
Smyth and Kusuma (2015)	Integration along the project front-end in marketing
Smyth and Lecoeuvre (2015)	Project decision-making and the co-creation and destruction of value during the front-end
Berkovi (2016)	Client relationships and service management
Mills and Razmdoost (2016)	Co-creation and destruction at programme and project levels
Razmdoost and Mills (2016)	Capabilities for value co-creation as part of CM
Meng and Boyd (2017)	CM through relationship management to improve performance
Turner and Lecoeuvre (2017)	Organisational involvement in project marketing, CM and co-creation
Dalcher (2018)	Commercial management in relation to CM and business development
Khairuddin and Preece (2018)	Relationship management in business development
Yang and Zhang (2018)	Client orientation to improve performance
Cova et al. (2019)	Interpersonal relationship management in the institutional context
1 (0010)	Value co-creation and the service experience along project cycles
Fuentes et al. (2019)	
K. Razmdoost et al. (2019)	Value co-creation and the client service experience
	Value co-creation and the client service experience  Client lifetime value and CM knowledge management capabilities in business development and execution  Briefing at the front-end and implications for CM

(continued on next page)

#### Table 4 (continued)

Authors and Citation	Conceptual Contribution for Client Management	
Suonpää (2019)	Competencies and client knowledge for CM	
Smyth and Wu (2021)	CM in portfolio management in the firm	
Klakegg et al. (2020)	Early contractor involvement at the front-end and collaborative practices with clients	
Rajiv et al. (2020)	Implications of differing client approaches	
Deep et al. (2021)	Collaborative practices to improve the client service experience	
Shumilin et al. (2021)	Client capital accumulation through projects and the contribution to client service provision	
Kang et al. (2022)	Client lifetime value	
Ståhle and Ahola (2022)	Briefing at the front-end and implications for CM	
Killen et al. (2023)	CM in portfolio management in the firm	
Ishtiaque et al. (2024)	Client perspective on early contractor involvement	
Li and Xia (2024)	Client lifetime value and CM	
Wang et al. (2024)	CM contribution to managing time-cost tensions in execution	

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