



Exploring the Relationship Between Business Strategy and Project Management Tools and Techniques: A Case Study in the Marketing Industry

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ABSTRACT

Project management tools and techniques (PMTT) have been understudied in marketing. This research explored PMTT alignment with business strategy in a marketing agency via a qualitative case study. Data collection involved a focus group, questionnaires, and interviews examining how PMTT influence schedules, quality, budgets, and clients. Analysis revealed selection and use of PMTT is driven by strategic emphasis on agility, cost-efficiency, and client needs. Findings confirmed PMTT's role in meeting timelines and budgets while ensuring quality. A proposed matrix connects PMTT with strategy. Though a single case, the study provides templates to match PM toolkits to business strategy. Further research can build on the strategic and contingency insights regarding adaptable PMTT use. Overall, findings advance practical relevance through strategy-linked PMTT customization suited to this project-focused creative context.

Keywords: Marketing Project Management, Project Management Tools and Techniques, Project Contingency Theory, Thematic Analysis

JEL Classifications: L21, M10, M31

1. INTRODUCTION

Project management has long been employed in a variety of business contexts (Mir and Pinnington, 2014). Yet, there has been no formal study of its effects on business projects within unconventional areas like marketing (Levin et al., 2019). Marketing agencies take on the role of designing and executing marketing campaigns for their clients, operating within a project-oriented setting. Each campaign, or project, requires the coordination of various resources, including personnel and budget, and adherence to specific deadlines. Project management provides essential planning instruments that improve project workflows and, consequently, bolster the success of the marketing agency.

Most research in the client-agency dynamic emphasizes creativity, often overlooking the influence of project management tools and

techniques (PMTT) on the performance of a project (Labahn and Kohli, 1997). Arens (1999) recognized that the performance of agencies could be improved by effectively employing established project management strategies. Ensuring a campaign remains within budget, adheres to the schedule, and aligns with the strategy introduces extra layers of complexity, necessitating effective organization and management (Jones et al., 2018). Since marketing agencies are graded by their clients on their ability to meet project expectations on time, scope, and budget, evaluating how project management practices may be improved is critical.

2. LITERATURE REVIEW

Literature on the management of marketing projects bears little on the principles of project management. Studies on the effectiveness

of PMTT span industries such as telecommunications, construction, engineering, government, IT, and fashion (Agoi, 2020; Ekanayake and Weligamage, 2021; Kumar, 2022; Marcella and Rowley, 2015; Murphy and Ledwith, 2007; Petro and Gardiner, 2016; Sidney et al., 2016). PMTT refers to structured methods or practices employed to generate specific deliverables in project management (Milosevic and Iewwongcharoen, 2004). In the field, project managers and their teams have access to a wide array of PMTT. The key inquiries here are: “Which PMTT should be employed to enhance project performance, and when is the ideal time for a project manager or team member to utilize these tools and techniques?” This research looks at the contingent perspectives of project managers at a small marketing agency in the United States, evaluating factors that influence their use of PMTT and how they perceive PMTT to align with business strategy.

To lead successful projects, project managers use several tools and techniques to help them navigate project activities along the project life cycle. Several studies have suggested that the proper use of PMTT impacts the success of a project (Cash and Fox, 1992; Milosevic et al., 2001; Patanakul et al., 2010). Despite the widespread use of PMTT by project managers, research into how PMTT aligns with a firm’s business strategy remains insufficiently explored. Better understanding of this alignment could lead to more efficient project management practices and improved strategic outcomes for businesses. This study utilizes a qualitative case study approach to explore how PMTT are perceived to align with business strategy, offering a potential way for project managers and organizational leaders to map strategy to tactical project execution in a systematic fashion.

Efforts to formally establish and systematize project management methods started in the 1950s within the defense, engineering, and construction sectors (Kwak, 2003). Today, in fields involving innovative technological and scientific advancements, project management continues to be regarded as a crucial instrument. In recent decades, the concept of “projectification” has gained prominence in various sectors, where projects are increasingly viewed as vital for executing strategic goals (Soderlund and Maylor, 2012; Winter et al., 2006). Project management has evolved from being a subset of engineering to becoming the prevalent framework for strategy implementation (Winter et al., 2006). This research’s goal is to explore the extent to which PMTT might be effectively applied across projects in the marketing industry through a case study investigation of a small marketing agency. Based on the findings of the research and in line with the specific vocation and requirements of the industry, a prioritization of PMTT was conducted, particularly focusing on how a firm’s business strategy influences the use of PMTT.

2.1. Project Contingency Theory

Contingency theory is a broad field that can take various forms within the business world. The application of contingency theory in project management has been dubbed project contingency theory (PCT) (Howell et al., 2010; Turner and Miterev, 2019). Project management literature commonly adopts a universal approach towards PMTT usage, although there are recommendations for a more situation-specific application of these tools and

techniques. Additionally, this literature often lacks evidence on which PMTT effectively contribute to a project’s success under different project conditions. In a bibliometric overview of PCT in project management research, Hanisch and Wald (2012) found that construction projects were the dominant project type studied through the lens of PCT, followed by research and development and information technology projects. This reveals an opportunity for research in other industries wherein insight into PCT could benefit project management practices. Further, Patanakul et al. (2010) assert that a more qualitative-oriented evaluation of PCT could help researchers and practitioners assess the chains of cause and effect between contingencies and projects. Understanding what contingent factors contribute to PMTT use can help project leaders become more knowledgeable about reacting to various project situations.

Project managers apply generally accepted standards, methodologies, and PMTT to their projects. However, the question regarding the extent of their usage and their relationship to project and organizational performance is still needed to be answered (Dildar et al., 2014). Further, according to Besner and Hobbs (2006), the practice of project management is a crucial strategic resource for organizations, and it should be developed by incorporating tools and techniques into regular practice. This study examines the perceived application of PMTT within a small marketing firm. It focuses on investigating the current utilization of PMTT by professionals, with the goal of further exploring the relationship between PMTT usage and business strategy.

The contingency approach to using PMTT is based on the idea that a project’s specific circumstances affect the choice and application of PMTT, determining which tools and techniques are appropriate and the timing of their use. Shenhar and Dvir (2007) highlight in their research that various types of projects should employ different sets of tools and techniques. In other words, the situational factors that impact a project will influence the different PMTT used by project leaders. The situational factors that have impact on project performance are limitless (Crawford et al., 2006). However, to limit this study to a feasible scope, the situational factor that will be of interest is business strategy.

The application of contingency theory in project management encompasses various aspects. These include the classification of projects based on their impact, both minor and major (Blake, 1978), the categorization of innovation types in businesses (Steele, 1975), and the differentiation of product development project types (Wheelwright and Clark, 1992). It also extends to identifying suitable leadership styles for project and functional managers during organizational changes (Turner et al., 2009), customizing project procedures according to specific contexts (Payne and Turner, 1999), and determining leadership styles based on the type of project (Müller and Turner, 2007). Furthermore, it involves linking the selection of appropriate management methods to the type of project, which is crucial for project success (Shenhar and Dvir, 1996; Boehm and Turner, 2004). Related to PMTT usage, situational factors like the project life cycle (Patanakul et al., 2010), think approaches (Bérubé and Gauthier, 2017; Marcella and Rowley, 2015), and project management methodology (García-Escribano et al., 2022) have been examined for how they impact

PMTT usage. However, there is a research gap in understanding how business strategy influences PMTT usage by project leaders.

This study strives to enhance the understanding available to small businesses as they attempt to incorporate project management strategies that are both efficient and advantageous within their distinct operational contexts. To achieve this aim, PCT offers a suitable perspective due to its foundational premise that there is not a universal, optimal solution to organizing a company and that the effectiveness of organizational structures varies across different conditions (Joslin and Müller, 2015). Through qualitative methods, this study seeks to build rich data surrounding how business strategy influences and strategically aligns with PMTT use.

2.2. The Influence of Business Strategy on Project Management

Definitions of business strategy emphasize managing competition effectively (Tse and Olsen, 1999) through the development of competitive advantages (Hamel and Prahalad, 1989). As organizations aim for growth and maturity, the efficiency and repeatability of project execution gain greater significance. This is because organizational leaders seek consistent achievement of business outcomes. Porter (1980) asserted that for an organization to maintain a sustainable competitive advantage, it needs to consistently strengthen its selected strategies. Consequently, it is essential for project managers to be equipped with appropriate tools that align with and support the business strategy.

Literature on aligning project management with business strategy has been explored through various viewpoints. Srivannaboon and Milosevic (2006) explored the linkage between business strategy and project selection and Turner and Simister (2000) suggest that business strategy has strong linkage to project portfolio management. The existing literature frequently references functional strategies like research and development (R&D), production, human resources, and information technology, using these as key variables to assess alignment with business strategy. This study extends the scope by exploring the linkage between business strategy and project execution in the marketing industry, thereby addressing a notable gap and adding a new dimension to the understanding of strategic interactions in a creatively driven and market-responsive sector.

One of the reasons business strategy and project strategy alignment has become a focal point for some organizations is that companies must develop and implement innovative business strategies to remain competitive, and in doing so, projects have become the vehicle for implementing strategy initiatives (Zolfaghari et al., 2020). As organizations grow and mature, project execution and repeatability of results become increasingly important for consistency in achieving business results (Milosevic, 2003). In short, companies need to ensure that project strategy aligns with the overarching business strategies they support. Project leaders need to be familiar with the fundamentals of their firm's business strategy to succeed with project execution.

Additionally, the integration of business and project strategies is crucial for ensuring that project outcomes effectively contribute

to organizational objectives. This alignment is fundamental as it allows a business to concentrate all its efforts towards fulfilling its purpose, thus increasing the likelihood of project success (Meskendahl, 2010). Milosevic (2003) suggests a model wherein PMTT usage is strategically aligned with business strategy. Milosevic asserts that there is a more significant opportunity for project managers to think critically about their use of PMTT related to their specific project context and their firm's business strategy. Each PMTT can be included in a collection of tools that make up the project leader's project management (PM) toolbox, a toolbox of PMTT that works alongside business objectives. A simple example of this would be a firm that has a cost-savings business strategy and complementing PMTT that reinforce project cost control. The PM Toolbox does not have a one-size-fits-all nature, but rather the design of the PM toolbox maps logically with the business strategy. This study explores how project managers and executives at a small marketing agency perceive the relationship between business strategy and PMTT usage.

An in-depth comprehension of an organization's business strategy is crucial. Lacking this fundamental knowledge during the PM toolbox creation process can result in misdirection and uncertainty regarding the achievement of intended objectives. In short, aligning the PM toolbox approach with an organization's business strategy can support project leaders in understanding the broad terms of what categories of PMTT to select. Incorporating PCT into this analysis offers a framework to evaluate the composition of the PM toolbox effectively. It allows for a tailored approach, recognizing that the selection of PMTT should vary based on specific project requirements and organizational contexts. This application of PCT ensures that the PM toolbox is not only aligned with the business strategy, but also adaptable to a variety of organizational sizes and industries.

3. METHODOLOGY

This research explored the perceived use of PMTT by project leaders at a small marketing agency. The research takes on the form of an exploratory study drawing on qualitative data, where the views of individuals leading projects in the marketing industry were obtained in order to explore the relationship between PMTT usage and business strategy. The research strategy for this exploratory study was selected to be a single case study approach, as suggested by Yin (2018). According to this method, the cases chosen must fulfill certain selection criteria. For this research, the unit of analysis is the organization, the small marketing agency, which met two selection criteria: 1- manage projects; 2- have been in business for a minimum of 4 years. Gilmore et al. (2001) argue that organizations operating for <3 years are unstable and do not accurately reflect the true nature of businesses. Therefore, the agency needed to be operational for a minimum of 3 years. The objective of this research is to study the perceived relationship between business strategy and PMTT usage in the marketing industry.

It is also recognized that the single case study approach has been subject to various criticisms, commonly including concerns about methodological rigor, researcher subjectivity, and the external

validity or generalizability of the findings. This is why this study employs triangulation. Carter et al. (2014) notes four types of triangulations: Method, investigator, theory, and data source triangulation. This research focuses on method and data source triangulation. Method triangulation is accomplished through a focus group, questionnaire, and interviews. Source triangulation is accomplished through collecting data from various types of project leaders, specifically the firm’s project managers, account managers, department leaders, and executive leadership.

Focus group, questionnaire, and interview questions probed for factors about business strategy that influenced PMTT usage and PMTT’s perceived effect on project performance. These interviews helped acquire explanations of the project leaders’ real-world experience with PMTT and how they were being applied to their projects. More specifically, the focus group, questionnaire, and follow-up interviews contained questions on the following:

- Individual’s opinions about the firm’s business strategy and how it is perceived to influence PMTT usage across the project life cycle
- Individual’s examples and stories for how business strategy impacted PMTT use on their projects
- Individual’s suggestions for improvement on connecting business strategy and PMTT use
- Individual’s opinions on challenges encountered in aligning PMTT use with business strategy and how these challenges are addressed
- Individual’s suggestions for how PMTT could be better standardized and aligned across the organization.

An email and letter of intent to do research was sent to a small marketing agency inviting them to participate in the study. After many follow-ups, the agency accepted to participate to this study. A focus group of 4 individuals was conducted along with a total of 12 questionnaires and 6 follow-up interviews within this agency. Project managers, account managers, functional department leaders, and executive leadership were interviewed. Turnbull and Wheeler (2016) argue that the role of the agency’s account manager, customer success manager, or client strategist required the same skills and knowledge as a traditional project manager. In other words, it is not just the project manager who enacts project management principles, tools, and techniques in an agency environment, which is why account managers, department leaders, and executive leaders were included in this research. The focus group lasted 60 minutes. Questionnaires were distributed virtually before interviews were conducted. Interviews lasted between 45 and 60 min. The focus group and interviews were recorded, then transcribed. Each participant was identified by a letter and number in order to preserve the anonymity of the participants.

The data analysis procedures utilize Braun and Clarke’s (2006) six-step thematic analysis. Thematic analysis allows for the identification of patterns within the data. It helped identify common patterns regarding how business strategy influenced the use of PMTT. The thematic analysis identifies and organizes relevant themes and subthemes through which the researcher can explore associated meanings. In other words, thematic analysis can make sense of apparently unconnected materials. Qualitative

data was analyzed using Quirkos, a computer-assisted qualitative data analysis software (CAQDAS). CAQDAS makes qualitative research quicker and more reliable by offering tools to keep, sort out, and examine data, helping to create diverse understandings (Bazeley and Jackson, 2013). The application of CAQDAS provides a systematic approach to data analysis, contributing to the accuracy and efficiency of thematic interpretation.

4. RESULTS AND ANALYSIS

Using Braun and Clarke’s thematic analysis process, the focus group, questionnaires, and interviews were all individually analyzed. Table 1 provides a summary of the data collection tools, participants, and amount of data produced. For this study, 4 executive leaders of OX volunteered to participate in the focus group. All 4 participants answered all questions asked in the discussion. 12 participants volunteered to participate in the questionnaire. Of the 12 participants, all 12 questionnaires were filled out completely. Finally, 6 participants volunteered to participate in the follow-up interviews. All 6 participants answered all questions asked in the interview. The data collected in this study yielded a 100% response rate from the participants. Fincham (2008) recommends a target response rate of 60%, considering rates above this as favorable. Fincham also states that the opposite of the achieved response rate can introduce sample bias. In this study, the 100% response rate not only aligns with Fincham’s standards but also eliminates any representation bias.

The first two steps of the analysis involved developing 20 codes and five final themes from the data. The preliminary themes were initially examined within their respective groups before being assessed collectively for their final refinement. Both Braun and Clarke (2006) as well as Maguire and Delahunt (2017) highlight that this phase entails evaluating the initial themes in the context of the research questions. Subsequent modifications and enhancements were then carried out to guarantee alignment with the complete data set. Table 2 provides an overview the codes, a short description, and the frequency of each code.

Following the completion of the initial coding for the three data collection tools, the codes were examined for patterns and shared attributes. The research question for this study guided the thematic development as the questions helped determine what was and was not relevant in the data clusters. An initial round of theming produced a total of six themes. A first round of theming does not often produce final thematic mappings, however. Thus, each initial theme was treated as a “candidate theme” allowing the researcher to discard themes and explore new possibilities as needed (Braun and

Table 1: Summary of data collection tools

Focus group	Questionnaire	Interviews
4 Participants	12 Participants	6 Participants
COO, CFO, executive project management director, executive account director	5 Project Managers, 5 Client Strategists, 2 Functional Department Leaders	2 Project Managers, 2 Client Strategists, 2 Functional Department Leaders
20 pages of transcripts	125 Usable Responses	110 Pages of Transcripts

Clarke, 2006). Final thematic development led to the creation of five final themes. Final themes, outlined in Table 3, were more precise and defined concerning the research question of the study.

4.1. Theme 1: The Influence of Business Strategy on PMTT Usage

The marketing agency articulated their business strategy as agile, client-oriented, and financially focused. The first part of the

business strategy was the focus on being agile. Executive leaders from the focus group described how they aim to empower project leaders with the autonomy and ability to change and adapt the management of their project as they learn what works best. One executive leader described,

Our business strategy enables us to grow into different avenues where we can dip in and test out what kind of projects are

Table 2: Summary of codes

Initial coding name	Frequency	Description of code
Agile business strategy	26	This refers to a business approach or methodology that emphasizes adaptability and flexibility, often inspired by Agile methodologies commonly used in software development.
Benefits of schedule PMTT	49	The advantages or positive outcomes derived from using PMTT designed to manage schedules and timelines.
Client budget	14	Pertains to the financial limits or allocations set by a client for a particular project or task.
Client oriented business strategy	27	Business strategies that prioritize the needs, preferences, and feedback of the client or customer.
Communication PMTT	22	PMTT designed to facilitate communication within teams or between businesses and clients.
Creative and technology	3	Refers to the intersection of creative design, content, or ideas and the PMTT or platforms used to execute or present them.
Definition of quality	23	The parameters or standards set to define what constitutes 'quality' in a given context or industry.
Documentation PMTT	10	PMTT used to create, manage, store, or share documentation.
Financial business strategy	11	A strategy centered around the financial aspects of a business, including revenue generation, cost minimization, and financial growth.
High performer business strategy	20	Strategies focused on achieving peak performance, often related to maximizing efficiency, output, or competitive advantage.
Iron triangle	25	A concept typically used in project management, representing the constraints of scope, time, and cost.
Lagging indicators of quality	10	Metrics or indicators that provide insights into quality after an event or process has occurred.
Outdated PMTT	4	PMTT that are no longer considered current or up-to-date, and may be replaced by newer alternatives.
PMTT challenges	120	Challenges or difficulties encountered when using PMTT.
PMTT cheat sheet	13	A quick reference guide or short document summarizing key aspects or features of PMTT.
Project leader	12	Individual who leads or oversees a project, ensuring it meets its objectives and is completed on time.
Schedule PMTT	94	PMTT used to manage, track, and organize schedules or timelines for projects or tasks.
Stage specific PMTT usage	43	The use of certain PMTT that are particularly suited for specific stages or phases of a project or process.
Strategic focus for predictable outcomes	7	Strategies designed to achieve predictable outcomes or results.
PMTT for quality	50	PMTT designed to monitor, measure, or ensure the quality of processes, products, or services.

Table 3: Final themes

Themes	Description	Codes found within the theme
Theme 1: The Influence of Business Strategy on PMTT Usage	Examines the strategic integration of PMTT into project lifecycle phases, highlighting the benefits, application challenges, and quality indicators within the scheduling context.	Benefits of Schedule PMTT, Schedule PMTT, Stage Specific Tool Usage, Iron Triangle, Lagging Indicators of Quality, PMTT Challenges
Theme 2: PMTT's Role in Schedule Management	Explores PMTT's effectiveness in defining and maintaining project quality standards, with a focus on documentation practices and the intersection of creativity and technological innovation.	Definition of Quality, PMTT for Quality, Documentation PMTT, Creative and Technology
Theme 3: PMTT's Contribution to Quality Assurance	Investigates how PMTT enhances quality assurance, emphasizing budget alignment and strategic financial planning as essential components of project quality management.	Client Budget, Financial Business Strategy
Theme 4: Financial Considerations with PMTT Usage	Analyzes the financial implications of PMTT deployment, including the facilitation of communication, leadership roles, and the utility of PMTT reference materials.	Communication PMTT, Project Leader, PMTT Cheat Sheet
Theme 5: Client-Centric Approaches with PMTT Usage	Advocates for agile and client-oriented PMTT applications, underscoring strategic planning and the need for adaptable tools to secure predictable, high-quality project outcomes.	Agile Business Strategy, Financial Business Strategy, Client Oriented Business Strategy, High Performer Business Strategy, Strategic Focus for Predictable Outcome, Outdated PMTT

best suited for our growth. For instance, we have been slowly piloting more data analytics projects to see if that is a path of growth for us. We take on small, shorter projects like this and try to learn and pivot quickly.

This notion of being agile was not only agreed upon by executive leaders, but project leaders also noted they will adapt PMTT usage quickly based on team performance and client feedback. In other words, project leaders adopt an agile mindset to course-correct projects with different tools and techniques. One project leader stated,

We start out with common tools like a project schedule or status report for example, but if these tools are not working and there is a better way to do things, then I have never felt that we are not empowered to change course.

The firm's business strategy was also noted to be highly client-oriented. The client-oriented business strategy places the needs, preferences, and feedback of the client at the forefront of all decision-making processes. Such an approach aims to foster long-term relationships by ensuring customer satisfaction, often leading to repeat business and referrals. For example, participant I-2 noted, "Are we helping our clients advance their career path? Are we making them look like rockstars?" 100% of interview respondents noted that PMTT usage is adapted to the specific needs of the client relationship. For instance, participant I-4 described that, "It comes down to preference of the client, think communications, think working styles, what are their communication preferences first and then second, what are ours? Do we need to adapt to theirs?" The firm's business strategy has a distinct focus on the overall success of the client relationship, influencing PMTT usage across the project life cycle.

The final attribute of the firm's business strategy is its financial focus-contributing to the use of PMTT that emphasized cost control on the project's schedule. Specifically, one participant noted that "Financial burn tracking tools were totally new to me when I joined the company, we manage our budget closely." The focus group participants also articulated that the financial measures applied to PMTT usage ladder up to OX's business strategy and goals. One client strategist noted,

What I keep in mind as far as how my work with a client ladders up to business strategy is measurable results. So measurable results at the project level. I feel like that is what feeds up to the leadership because that then is a case study we can use for winning new business.

4.2. Theme 2: PMTT's Role in Schedule Management

Multiple questions were asked about how PMTT are used to manage project schedule. 100% of questionnaire respondents indicated that project management software like Smartsheet, Asana, or Jira were the most effective tools for keeping projects on schedule. Participant Q-9 noted, "Smartsheet is mostly what I use to manage project schedule." Participants also discussed how PMTT used to manage schedules are helping for building transparency with the client-aligning with the firm's client-oriented business strategy. PMTT like the Gantt chart, project

brief, and kickoff meetings were noted to help keep clients on track and increase project agility. One participant noted, "Having the Gantt chart helps as the source of truth for when milestones and deliverables are due, these tools allow for a somewhat quick and easy way to look at where we should be versus where we are."

The kickoff meeting was highlighted by 100% of questionnaire respondents. The use of the kickoff meeting aligned with the firm's client-oriented business strategy. In short, the kickoff meeting helps to keep the client aware of how the project's schedule will be communicated over the course of the project life cycle, along with understanding any client preferences for schedule communication early on in the project. One participant noted,

Kickoff meetings help ensure all parties are aware of the scope and schedule of the project, and what they're expected to complete prior to our next check in. This creates an open line of communication and keeps all parties accountable for the work they say that they will complete.

4.3. Theme 3: PMTT's Contribution to Quality Assurance

Questions were also asked about how PMTT influences project quality. Quality plans help clients be more aware of where their attention and approval is needed to keep projects on scope. Participants noted the use of project post-mortem meetings as an important PMTT that enhanced quality and client satisfaction. One participant noted,

Project post-mortems allow the entire team to reflect on how a project went, as well as give suggestions for future improvement on similar projects or with the same client. This is invaluable in improving efficiency, quality, and profitability on future projects.

Quality tools were also talked about in conjunction with the firm's agile business strategy. Participants discussed how quality PMTT were applied to enhance project agility. Specifically one participant described that, "Sharing the quality plan and open questions in our communication tool, Slack, enables us to catch problems quickly, we can change course faster with instant messaging." Moreover, a focus group participant said, "Project management software enables us to maintain momentum because quality reviews do not need formal meetings. We can agree upon solutions asynchronously while work is still being done." Quality PMTT are applied to provide a single source of truth for project success and to reinforce the firm's agile business strategy.

4.4. Theme 4: Financial Considerations with PMTT Usage

Financial considerations concerning PMTT usage were discussed in great detail by all participants. During the focus group, participants talked about how the firm's financial business strategy impacts PMTT usage across the project life cycle. For instance, one executive leader described how some projects require tighter schedule and quality management due to budget constraints – specifically they said, "You will hear finance people talk about commercially acceptable. If someone's willing to spend \$10,000,

you can't deliver a \$100,000 project." Another executive leader said, "We need to consider how we tune our engine to be able to deliver for what the client is paying for, that is the hardest part." It is evident from the data that the firm's financial-driven approach dictates not only how PMTT is used but also the value proposition offered to clients.

Project leaders noted that the project brief was a PMTT that helps shape project quality. In short, project leaders use the project brief to outline budget, milestones, and metrics that capture the agreed-upon definition for project success. One participant noted that, "The project brief is a testament to our firm's unique approach to quality that is defined by financial efficiency and scope adherence." In short, the emphasis of PMTT usage is not solely on the tangible deliverables of the project but also on ensuring the financial alignment of the project.

4.5. Theme 5: Client Centric Approaches with PMTT Usage

As noted, the firm's business strategy places a heavy emphasis on client satisfaction. One project leader noted, "As a company we are super adaptable throughout project phases. If the way we manage the project is not working and the client is not happy, we adjust our approach." Another participant recalled a client experience saying, "We tried to enforce Smartsheet with one client and it just did not work for them. We pivoted to an activity list that was sent via email once a week instead." The flexibility and willingness of project leaders at the firm to pivot tools, based on client feedback, not only ensures that project timelines and scope are adhered to but also that clients feel involved and informed every step of the way.

Participants discussed the notion of a PMTT "cheat sheet" that gets adapted to client requirements. One participant described that, "Every client is different. So, while we might have a cheat sheet and set of tools we pull from to begin with, the actual PMTT get adapted over time." Another participant said, "What we have is a loose list of tools and what they are used for during each stage of a project, but the entire cheat sheet is underscored by the need to adapt to your client and their preferences." While standardized tools provide a starting point, the true essence of the firm's project management lies in its fluidity and readiness to adjust based on client feedback and project requirements. This dynamic approach underpins their commitment to client satisfaction and reflects the company's understanding that every project has its unique demands and nuances.

5. DISCUSSION

Five key themes of strategic alignment, schedule management, quality assurance, financial considerations, and client-centric approaches illuminate critical dimensions of PMTT usage relative to business strategy within an marketing agency environment. This discussion examines how PM toolbox elements can systematically map to overarching organizational goals for enhanced relevance. It also explores customizing PMTT deployment based on contingencies while sustaining financial and operational focus. Findings confirm the influence of competitive positioning on

tool selection and application. Results also showcase PMTT's pivotal roles in managing budgets, timelines, quality, and customer needs to drive project outcomes. By investigating the marketing context, practical insights emerge on constructing cohesive project execution that empower teams, engage customers, and foster competitive advantage.

5.1. PMTT Use and Strategic Alignment

The overarching observation across all five themes emphasizes business strategy as a mediating process that impacts how PMTT are used, confirming findings from Hamdan and Jaafar (2014). PMTT aims to facilitate the effective execution of projects that contribute to an organization's competitive strategy and objectives. Achieving this requires a thorough alignment of PMTT with the firm's business strategy. In short, what business strategy offers project leaders is a set of contingency guidelines, directing them as to what PMTT to use to match specific situations in their projects. For example, as indicated from the data analysis, project leaders apply more cost-control oriented PMTT when project budgets are smaller. This research confirms findings from Milosevic and Iewwongcharoen (2004) who state that project leaders need to select PMTT that is strategically aligned. The priority of the PMTT selection process at the marketing firm centers around cost-control, agility, and client satisfaction. PMTT that fit these roles include the activity list, burn trackers, Gantt chart, kickoff meeting, project brief, project management software, project post-mortem meetings, quality plan, and the statement of work.

It is also recognized in this research that business strategy creates different strategic foci at the project-level for project leaders. In other words, the financial focus of the marketing agency in this study creates a cost-driven strategy at the project-level, which leads to PMTT like burn trackers being heavily used and prioritized. Depending on the strategic focus of the project, different elements will help determine what PMTT should be used (Joslin and Müller, 2015). As Levin et al. (2019) mention, the strategic focus of a project, in an marketing environment, is influenced by both the client's external demands and the agency's internal strategy. For instance, data from this study indicates that project leaders learn and adapt to contingent factors like external client budgets and timelines, without sacrificing financial rigor internally. Project leaders should consider the strategic focus of the project alongside the strategic priorities of the company to determine which PMTT to use on their project.

5.2. Building a PM Toolbox

This research provides a framework for thinking about the use of PMTT within the context of a strategically aligned PM toolbox. Milosevic and Iewwongcharoen (2004) suggest that the customization of a PM toolbox can be organized by project size, family, or type. This research offers a preliminary step to constructing the PM toolbox according to project characteristics by first considering alignment between tactical PMTT execution and overarching strategic alignment. From a practical perspective, organizations can use a qualitative approach similar to this methodology to better understand their firm's organizational strategy and PMTT use to identify alignment gaps.

Better knowledge and understanding about how to use PMTT is imperative for project performance (Dildar et al., 2014). This research found that the PM toolbox used by the marketing agency was loosely organized around cost-control, client satisfaction, and agility. Research participants indicated that PMTT used from the toolbox are tailored to the project type and client relationship. When one PMTT fails, another is used in its place without sacrificing key elements of the firm’s overarching business strategy. Milosevic and Lewwongcharoen (2004) states that part of the strategic alignment exercise of the PM toolbox is to visualize the relationships. To visualize the alignment, Table 4 offers a simplistic matrix of how elements of business strategy align with the nature and tools within a PM toolbox based on the data collected from the marketing agency. Further analysis would be needed to align this toolbox with project sizes, types, and families, but it serves as a solid starting point for project leaders attempting to become familiar with a firm’s project execution tactics. In short, a matrix akin to Table 4 could be developed within other firms by first outlining the core elements of business strategy and then assigning tools that strategically align in nature based on experiences and usage from project leaders.

5.3. Managing Projects for External Customers

The nature of marketing projects was another contingent factor that influenced the connection between business strategy and PMTT usage. Besner and Hobbs (2008) discuss that projects managed for internal customers are executed quite differently than projects for external customers. For marketing agencies, projects have a strong focus on client relationships (Levin et al., 2019). This focus aligned with the perceptions from project leaders at the marketing firm who noted that client satisfaction was a key factor for PMTT usage and for the firm’s business strategy. Besner and Hobbs (2008) note that the most often used tools for external customers are “scope planning, contract management, cost estimating, quality control, and risk management tools.” These PMTT also align with the results found in this study as many research participants noted the importance of adapting communication styles to client preferences while still holding clients accountable to project budgets and deliverables.

This research also confirms the value of the project brief or charter as an instrumental tool for organizations that are executing projects

Table 4: Business strategy and PMTT alignment matrix

PMTT	Company’s core business strategy		
	Cost-control	Client satisfaction	Agile
	Nature of PM Toolbox		
	Cost-driven	Performance-driven	flexibly-driven
Activity List			✓
Burn Tracker	✓		
Gantt Chart	✓		✓
Kickoff Meeting	✓	✓	✓
Project Brief	✓	✓	✓
PM Software			✓
Post-mortems		✓	
Quality Plan		✓	
Statement of Work	✓	✓	

different from one another. Besner and Hobbs (2006) state that the project charter is limited in use in cases where projects are similar because there is no need to redefine and reagree upon a project scope every time. However, projects managed for external customers must be navigated differently since scopes can vary. Agencies are under pressure to deliver high quality results and convince clients of the worth of their services (Budd and Cooper, 2006). Therefore, the business strategy components of cost-control, client satisfaction, and agility that were uncovered in this research align with PMTT that help meet client expectations for performance while keeping projects on budget.

5.4. The Importance of Schedule and Quality Management

Project leaders at the marketing agency discussed how important PMTT were to the elements of project schedule and quality. Regarding the element of schedule, certain empirical research indicates that the misuse of PMTT for tracking and controlling schedules and budgets may adversely affect the overall performance of a project (Cash and Fox, 1992; Hatfield, 1995). Project leaders at the marketing agency discussed how project management software was a critical PMTT for keeping clients on task and aware of timeline constraints. Project leaders use project management software to create their work breakdown structure (WBS), Gantt chart, and activity list. Connected to empirical evidence, Patanakul et al.’s (2010) research proved that the WBS was a PMTT that increased project success by helping manage project schedules. Patanakul et al.’s work also proved how the scope statement increased project success. Project leaders at the marketing agency mentioned the statement of work as a tool critical for agreeing upon project schedules.

Project leaders also discussed how important PMTT were for managing quality. Nguyen and Nagase (2020) emphasized the significance of quality planning in meeting customer expectations and in the creation of products and processes. They outlined the quality planning process as encompassing the establishment of quality objectives, discerning customer requirements, tailoring product development to these demands, implementing process controls, and assessing quality performance. For project leaders at the marketing agency, project post-mortems were mentioned as a critical PMTT for quality, aligning with research from Patanakul et al. (2010). The use of quality plans was also highlighted as an important PMTT for quality management.

6. CONCLUSION, IMPLICATIONS, LIMITATIONS AND FUTURE RESEARCH

This exploratory single case study offers initial evidence that business strategy significantly directs PMTT selection and usage within a small marketing agency environment. By emphasizing perceived alignment, the research expands comprehension of how competitive positioning and priorities cascade tactically. Creating flexible PMTT toolkits mapped to overarching strategic aims supports project execution. Though limited as a stand-alone case, the themes constructed provide templates translatable across other project contexts. Agencies combining contingency

planning and PM toolbox customization can better empower project teams. Additional embedded, longitudinal, observational, and mixed methods investigations in this domain would fortify and refine understanding of PMTT use in the marketing industry. Nonetheless, the qualitative insights advance strategic PMTT application scholarship amidst calls for greater industry relevance.

The study's findings suggest several policy considerations for organizations and industry regulators. Companies might explore formal policies aligning PMTT with business strategy and consider training programs emphasizing this alignment. Industry associations could evaluate updating standards to incorporate PMTT use mapped to business strategy. Marketing agencies may want to consider policies for transparent client communication about PMTT choices. These considerations highlight the potential value of a strategic approach to PMTT selection and usage, emphasizing alignment between operational practices and business goals in the marketing industry and beyond.

This single case study provides valuable insights into PMTT usage at one marketing agency. However, the research design introduces certain limitations. As Yin (2018) notes, single case approaches raise questions about generalizability of findings. The results reflect perspectives within a narrow organizational context, potentially restricting transferability. In particular, the marketing company was a small firm, and project management approaches may differ in larger agencies. Additionally, the research emphasizes perceptions rather than observed behaviors or tangible project outcomes. Participants reported uses of PMTT may not fully align with actual practices. Reliance on self-reported data means conclusions could miss key influences visible only through direct analysis of PMTT in action. While study rigor addressed these constraints through data and method triangulation, the qualitative approach still relies heavily on subjective participant views. Overall, the findings provide value, but limitations around sample size and self-reported data must be weighed when interpreting implications.

Several promising avenues exist to expand the research on PMTT with business strategy in marketing agencies. First, conducting a similar qualitative study with a larger and more diverse sample of small, medium, and large agencies would explore whether results hold across different organizational contexts. Additionally, an embedded multiple case study could examine PMTT usage and strategy alignment across specific projects within several firms to gather more nuanced data. Furthermore, implementing a longitudinal study evaluating whether enhanced PMTT-strategy alignment improves project outcomes over time would provide crucial insights. Moreover, exploring marketing project managers' actual PMTT usage through direct observations, rather than self-reported data, would further validate findings. Finally, surveying agencies nationally or globally to determine if results generalize widely based on quantitative data around PMTT applications would test wider applicability and confirm how tools empirically impact project performance. In summary, while this exploratory single case study offers initial evidence that business strategy significantly directs PMTT selection and usage, additional embedded, longitudinal, observational, and mixed methods

investigations could fortify and refine understanding of PMTT use suited to marketing agencies.

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