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## One master and many end users: Coordination practices in managing a portfolio of public service innovation projects

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### Abstract

Managing a portfolio of interdependent innovation projects requires various forms of coordination. Coordination is important to mitigate risk and control resource utilization, but also to ensure that the end users experience the outcome of various innovation projects as integrated solutions to their needs. Simultaneously achieving control and user focused harmonisation in a project portfolio is not an easy task and may be hindered by organizational structures and coordination practices that focus on the internal division of labour and budgets rather than on taking a user perspective. In our case study in a public service organization we analyse the impact of the presence of one powerful stakeholder and anonymous and invisible end users on practices of coordinating a portfolio of service innovation projects.

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### 1. Introduction

Coordination of project portfolios in the public service sector is complicated by the institutional context. In this article, we investigate coordination practices that allow for creating more integrated services from a user perspective.

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Public and social service domains such as education, healthcare, social benefits, and public transportation have become increasingly deregulated. As a consequence, service organizations in these sectors face challenging financial constraints, especially after the recent economic downturn. Much of their innovation effort is therefore directed at increasing operational efficiency and reducing costs (for a healthcare example see: Christensen et al., 2009).

Users of these services, on the other hand, often need to combine various complementary offerings to satisfy their increasingly complex needs (Gustafsson and Johnson, 2003; Haveri, 2006; Osborne et al., 2013; Van Riel et al., 2013). If the innovation projects used to develop such complementary or interdependent service offerings are not conducted in mutual coordination, their end products are unlikely to fully satisfy user needs. An increase in operational efficiency from the point of view of the provider may thus result in a substantial decrease in service effectiveness for the end user. For example, user convenience might decrease substantially, when five partially overlapping forms must be filled for customers to receive - what is in their eyes - one single, albeit complex, service, such as sickness benefit or child benefit.

In an attempt to better coordinate their innovative efforts, many service organizations have started to organize their innovation projects (hereafter projects) in project portfolios (Cooper et al., 1999). A more recent portfolio approach tries to overcome the focus on internal division of labour and resources that is often present in project management and instead aims for portfolio optimisation from the perspective of users (Osborne et al., 2013).

The portfolio could be considered a service innovation system, in which new service development projects – resulting in new services – mutually depend on each other for the creation of value for organization and users alike (Barile and Polese, 2010; Killen and Kjaer, 2012). Such complementary and interdependent services must be developed in a coordinated manner to optimally create value for end users, as well as the organization.

However, coordinating a project portfolio as an ‘integrated’ system, whilst considering stakeholders with (partially) conflicting interests and objectives – e.g., government and users – is challenging for managers (Chao and Kavadias, 2008; Osborne et al., 2013). Also, existing portfolio decision support tools often focus on risk management and on distributing scarce resources over various projects (Chao and Kavadias 2008; Chao, et al. 2009; Cooper, et al. 2001a), rather than on the need to align the outcomes of various service innovation projects (Killen and Kjaer 2012).

To better understand the challenges and possible solutions for coordinating project portfolios, it helps to acknowledge that project portfolio management is not a purely ‘rational’ process (Gutiérrez and Magnusson, 2014; Martinsuo, 2013). Portfolio decisions are typically based on incomplete information (Dekker, 2012) and many uncertainties (Martinsuo et al., 2014). Empirical studies of project portfolio management have shown that reviewing projects is a matter of collective practices that may be influenced by bounded rationality, personal opinions and power relations in the review team (Kester et al., 2011).

In this article, we adopt a practice theory approach (Nicolini, 2012) to capture these aspects and to investigate how coordination in project portfolios takes place in a public service organization. Our investigation also aims to reveal where current practices are affected by managers’ blind spots (Wägar et al., 2012) obstructing their capability to view and manage a project portfolio from a more integrated perspective (Osborne et al., 2013). We investigate project portfolio management at ServePublic, a project-driven public social service organization, serving around 1,500,000 users in a Western European country. A particular challenge for such organizations is that they often depend on a single powerful stakeholder such as a ministry that provides their financial resources and which has a strong influence on their strategy and policies. If a public service provider is in a monopoly position, its users are not in a position to opt for an alternative provider, and therefore the need to provide integrated services might be less salient for the organization’s members. Our research was therefore guided by the question how the unique context of a single public financing body and many powerless users affect project portfolio coordination practices. How do concerns of both stakeholders appear in how projects are monitored and evaluated, and which forms of organising support the development of integrated project portfolios under such circumstances?

## **2. Theoretical background**

We frame the challenges of creating an integrated project portfolio in terms of the literature on service systems, on project portfolios and on coordination.

### 2.1. Service systems

Service systems are dynamic value co-creation configurations consisting of resources (e.g. people, technology, organizations and shared information) (Maglio and Spohrer, 2008) and “the fundamental basis to understand value co-creation” (Edvardsson et al., 2011, p. 540). Users are no longer a passive audience; they have become active co-creators of value (Bendapudi and Leone, 2003). Integrating users, or a user perspective, in the project portfolio management process can be helpful, as joint value creation is a key success factor (Voss, 2012). Previous research has devoted attention to aspects of service systems such as complexity (Badinelli et al., 2012), service exchange and value co-creation (Bendapudi and Leone, 2003), and combining systems theory and service science (Barile and Polese, 2010; Maglio and Spohrer, 2008). However, the operational use of applying service dominant logic insights (Vargo and Lusch, 2004) in a systematic process of service design warrants further study (Edvardsson et al., 2011). Our approach in this study is to focus on the potentially helpful attempt of managing a project portfolio from a user perspective. Managing the portfolio as a service system and taking into account all resources is a challenging, complex task. Taking a user perspective mindset as a basis for coordinating the project portfolio might be a way to deal with this complexity, and subsequently create integrate services (Van Riel et al., 2013; Voss, 2012).

### 2.2. Project portfolio management

Project portfolio management can be defined as: “a dynamic decision process whereby a business’ list of active projects is constantly updated and revised. In this process, new projects are evaluated, selected and prioritized; existing projects may be accelerated, killed or deprioritized; and resources are allocated and reallocated to active projects” (Cooper et al., 1999, p. 335).

Traditionally, portfolio managers manage the portfolio by considering the individual projects as independent, isolated entities (Killen and Kjaer, 2012). In this view, they more or less exclusively aim to optimize the distribution of scarce resources among projects (Kavadias and Chao, 2007), to limit risk, and to maximize potential profit, or efficiency, in each project (Chao and Kavadias, 2008; Cooper et al., 2001; Girotra et al., 2007). More recently, strategic alignment of the projects was also included as an objective to keep the project portfolio ‘clean’ (i.e., projects too far off the strategy are killed) (Hauser et al., 2006; Kester et al., 2011).

In most instances, project portfolio managers decide which projects are to be included in or excluded from the portfolio and how projects are to be coordinated, which requires dealing with the coherence and interdependencies between the projects. Several factors complicate the project portfolio management process: 1) the increased dynamics of the environment (Calantone et al., 2003) as well as constant portfolio changes (Elonen and Artto, 2003); 2) project overload (Zika-Viktorsson et al., 2006) and information overload (Van Riel et al., 2011) (e.g., by the presence of too much unnecessary or irrelevant information and thus the need to select the necessary information which is a time-consuming activity); 3) insufficient or uncertain information (Van Riel et al., 2011); 4) cross-disciplinary backgrounds of project portfolio managers (Qiu et al., 2009; Talke et al., 2011) (e.g., the members of the team may have different viewpoints that may lead to conflicts of interest); and 5) ambiguous or varying screening criteria (Hammedi et al., 2011) (e.g., ambiguity makes it difficult to properly evaluate and prioritize project proposals).

### 2.3. Coordination

An integrated project portfolio requires coordination between projects on strategic and operational levels. In organization sciences, coordination has long been examined in terms of its formal and designed aspects (Thompson, 1967; Van de Ven et al., 1976). More recently, scholars started to focus on how coordination is actually realized in practice (Okhuysen and Bechky, 2009). Coordination can be defined as a: “temporarily unfolding and contextualized process of input regulation and interaction articulation to realize a collective performance” (Faraj and Xiao, 2006, p. 1157). While coordination is truly about “the integration of organizational work under conditions of task interdependence and uncertainty” (Faraj and Xiao, 2006, p. 1156), this emphasis is rarely made explicit (Okhuysen and Bechky, 2009). Practice approaches have been used to investigate coordination within projects

(e.g., Van Marrewijk et al., 2008) but so far rarely to study coordination across projects in the context of project portfolio management. Our approach in this study is therefore to focus on coordination practices in a setting in which it would be necessary to create an integrated service experience for the user, but where this is not an easy task, given the distance from these users. Illustrating the challenges that project portfolio managers experience helps us to make the blind spots of coordination visible.

### 3. Methods and research design

There is little theory relating to project portfolio management in service innovation. Therefore, we use an inductive method to construct a theoretical framework (Judd et al., 1991), instead of using a deductive method to illustrate extensions of existing theory (Boone, 2000). We use an inductive, in-depth, (embedded) single-case study design, with the practices of project portfolio management as the unit of analysis (Yin, 2003), to explore coordination practices that support or hinder integrated project portfolio management. A case study is appropriate because the boundaries between the phenomenon – project portfolio management – and the context, namely public service environment (organization) are difficult to distinguish (Yin, 2003). Public service organizations are directed and constrained in their service innovation by governmental policy. Political goals drive innovation of services. Besides, in these organizations authority can be situated at the corporate level, while responsibility is situated on lower organizational levels.

#### 3.1. Practice approach

Using a practice approach to study what people actually do has helped us to understand how project portfolio managers coordinate and address the complexity of project portfolio management (Nicolini, 2012; Reckwitz, 2002). We focused on the informal aspects of project portfolio management by studying “the routinized way in which bodies are moved, objects are handled, subjects are treated, things are described and the world is understood” (Reckwitz, 2002, p. 250). The practice approach differs from other case study methods in the very detailed units of analysis and unique way of looking at social interactions, sayings and doings (Nicolini, 2009).

#### 3.2. Case description: *ServePublic*

This study is based on a single case that offers potential to develop new insights into the understudied phenomenon of coordinating towards integrated services in service innovation project portfolio management (Langley and Abdallah, 2011; Yin, 2003). We selected a large Western European public service organization, *ServePublic*<sup>†</sup>, which has the task to provide social and benefit services to citizens. *ServePublic* is a subsidiary of one of the national ministries and is an established player in the public service environment. *ServePublic* depends financially on the ministry, which implies that the ministry is a major stakeholder. The ministry provides two types of budgets for *ServePublic*: project budgets concerning the implementation of legislation and regulations (e.g. the technological preparation for implementing new legislation) and budgets for other projects (e.g. replacements of IT systems). Due to mergers with smaller public service providers, the organizational structure remains oblique to our observation (despite the many detailed organograms which are available on the intranet).

At the time of our study, innovation at *ServePublic* was driven by two motives. First, the ministry forced substantial changes in organizational structure through a cost cutting exercise. *ServePublic* faced the challenge of increasing its focus on offering integrated services to the user while enduring this cost-cutting exercise at the same time. The number of service employees had to be reduced by 50 per cent, and the amount of real estate also had to be reduced significantly. Second, these organizational changes strongly influenced *ServePublic*'s innovation portfolio, as the cost-cutting exercise forced *ServePublic* to change their service offerings from personal interaction

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<sup>†</sup> All organizational names and affiliations have been disguised.

to online services. This transition had substantial implications for the end users, since the number of face-to-face contact moments was minimized.

### 3.3. Data collection

To increase validity, we combined several data sources (Yin, 2003). To get an understanding of ServePublic's service offering and its position we first analysed several organizational documents, such as the corporate website, organograms and information on the intranet. Then we started the field research. Over the course of a year, the first author regularly visited the organization for one to two days per week observing formal meetings as well as informal interactions as a non-participant observer. During this time, she gathered documents regarding the meetings we observed such as minutes and meeting documents. We also conducted eighteen in-depth semi structured interviews lasting between 30 and 90 minutes, with an average of 60 minutes with respondents on project-, program, portfolio- and corporate level. We used a purposive sampling strategy to identify informants (Eisenhardt, 1989) and with the help of four experienced managers at project, program, portfolio and corporate levels, we selected meetings and suitable interviewees (see Table 1).

Table 1. Data collected at ServePublic.

Level of analysis	# Meetings	# Interviews	Types of informants
Project	16	6	Project manager, project team members
Program	12	7	Program director, program manager
Project portfolio	21	4	Project portfolio director, project portfolio managers
Corporate Management	1	1	Managing director
Total	50	18	

To increase the reliability of the study we used semi structured interviews based on topics corresponding to our research question (e.g., the organization, its users and its stakeholders, project coherence, project interdependence, new service development, service innovation, service offering, coordination (of projects and project portfolio). The interviews were transcribed in their entirety.

As a form of communicative validation and to generate further insights, we organized a feedback meeting with managers of ServePublic that had been involved in the study to present and discuss our initial results. The meeting helped to confirm that our interpretations rang true with the experience of our participants and their reflections and comments also helped us to further conceptualise where the current practices did not succeed in integrating a user perspective.

### 3.4. Data analysis

We analysed the data in several steps. First we conducted an inductive analysis (Braun and Clarke, 2006) by means of context mapping (Sleeswijk Visser et al., 2005). We created statement cards based on interview transcripts and observation notes. These statement cards presented quotes and insights from our data, which were interpreted by the first author on the same card as well. Recurring themes were elicited based on the statement cards. After making a codebook (see Table 2), the authors made a visual representation of all themes by combining the statement cards from the multiple data collection procedures to one poster. This poster helped them to overview recurrent patterns in the data.

We then employed a two-step procedure to analyse our data and look for practices, as suggested by Nicolini (2009). In the first step, we 'zoomed in' to bring the practical concerns that govern and affect all participants to the surface. We investigated members' experiences to develop an understanding of what needs to be done in terms of coordinating portfolio decisions towards integrated services for the user. In the second step, we 'zoomed out' to take

into account how practices extend beyond the scope of the local practical concerns, considering the variety of states of affairs in which the practices are embedded. We considered relationships with other practices, like information sharing and the way in decisions are made. This approach enabled us to identify current practices and processes – of effectively directing portfolio decisions towards integrated services for the user.

Table 2. Codebook.

Main themes	Sub themes	Explanations	Examples
Project portfolio management process	Portfolio composition	Types of projects in the portfolio	(Non) Governmentally required projects, current and future projects
	Advice and assessment of project documents	Key task of the project portfolio management office	Every project portfolio manager has his/her own focus area to which advice is related
	Quality control	Key task of the project portfolio management office is testing quality of project documents	Project portfolio managers reformulate work from project offices
	Information streams	Information flows in the organization	From the project office to project portfolio office to corporate board level
	Project prioritization	Importance of projects in the portfolio	Categories like: project with or without benefits are distinguished
	Project tools	Standardized project management method	Use of Project Initiation Documents (PID), Business Cases, Decharge reports
	Project start architecture	Document that describes the impact of ICT project on organization	Special review board approves document in relation to PIDs of ICT-projects
	Project portfolio management uncertainties	Factors that can affect project portfolio management (process)	Dynamic environment, conflict of interest, ICT changes
Dialogue (between portfolio and other organizational levels)	Dialogue about quality control	Test quality of project documents	Discussion about task division between project office and project portfolio management office
	Financial control	Controlling debits and credits of projects	Making a cost and benefit analysis
	Resource allocation	Allocating time, money and people to projects	Allocating human resources on projects
Drivers of innovation	Interest(s) of Ministry	Public financing body as stakeholder	Provides legislation
	Financial dependence	ServePublic is financed by the Ministry	Many governmentally required projects in portfolio
	Cost cutting exercise	Task of public financing body	Lower project budgets
Coordination practices	Developing a portfolio strategy	Making an outline of future mission and vision for project portfolio	Project portfolio managers make a Business Model Canvas
	Portfolio re-evaluation	Changing portfolio composition	Approval of portfolio by corporate board after changes in portfolio composition
	Considering coherence and	Between and among projects	Potential to create higher user value



	interdependencies		
	Informal coordination practices	Several ‘unofficial’ coordination mechanisms	Morning Prayer, Project Portfolio Team – CFO meeting, Leader Alignment Meeting
	Formal coordination practices	Several ‘official’ coordination mechanisms	Project Portfolio Team Meeting, Project Portfolio Steering Committee, Progress Review document, meeting minutes and agendas
Effect on user perspective	Supporting user perspective	Facilitating factor	Informal communication in project portfolio team
	Hindering user perspective	Complicating factor	Abstract project portfolio expertise

#### 4. Results

Our findings indicate that ServePublic had a number of coordination practices in place that enabled the organization to meet the expectations of its purported main stakeholder, the ministry. Historically, serving this one master meant avoiding overspending on projects because of the risk of associated political fall-out. With the focus on reducing public spending, the organization now had to change its way of working to more low-cost options such as digital services. This transition proved particularly challenging to combine with effectively serving its many powerless end users. We will first describe the project portfolio management process, followed by an account of the coordination practices, reported as narratives.

##### 4.1. Monitoring the project portfolio management process

The project portfolio management office regularly held a variety of meetings with individuals or teams throughout the organization. By means of the meetings, the project portfolio managers collected and shared information that helped them in monitoring the projects in the portfolio, which was the fundamental task of the project portfolio management office. Historically, the trigger for adopting project portfolio management was that ServePublic had lost the overview of expenditure in a large project resulting in a dramatic cost overrun, and had thus decided to streamline the financial control of projects and programs by means of project portfolio management. ServePublic created a project portfolio management office to provide corporate level decision-makers with independent advice about project costs, benefits and progress. At the time of our study, the project portfolio management office still fulfilled this advisory function. The monitoring of the project portfolio management process – “following the projects” as stated by an interviewee – was part of their daily practice.

To map the general project portfolio management process, we focused on portfolio decisions related to the composition of the portfolio for the upcoming year. ServePublic used two questions for composing the portfolio (e.g. for the use of creating a long and short project list): “Are we doing the right projects? Are we doing the projects in the right way?” as stated by an interviewee.

ServePublic’s project portfolio management process was characterized by several formal ‘decision steps’ (based on Prince 2 (Van Onna and Koning, 2010)). Project portfolio managers would typically create a long list by *summing up* and *displaying* all ServePublic’s projects with the help of evaluation criteria. They used the criteria to check for necessity, usefulness and project costs for example. Project portfolio managers would then *reduce* the long list to a short list of projects. They *categorized*, *prioritized* and *selected* projects based on prioritization categories and financial fit of project costs in the project budget. We observed that projects that had to do with the implementation of new legislation received priority over other projects. Project portfolio managers *discussed* the shortlist with business managers and *tested* whether the projects would fit the release planning. ServePublic had many technology-related projects and the release planning determined whether applications could be installed on time due to dependence on system capacity. After the projects were prioritized, project portfolio managers *advised*



the corporate level decision-makers by means of the short list. The corporate board provisionally approved the projects that would be included in the portfolio for the next year in September. After their review, they would decide whether the short list for the portfolio of next year would be adjusted, mainly based financial control aspects. During our observations, the project portfolio managers *changed* the *shortlist* and in some cases ‘waited’ until January. In January, the corporate level decision-makers decided which projects that were previously put on hold or frozen could be added to the portfolio. Subsequently, project portfolio managers *re-allocated resources* and *updated* the respective portfolio *reports*.

In sum, ServePublic’s project portfolio management process was highly structured (based on the project management methodology of Prince 2 (Van Onna and Koning, 2010)) and consisted of several formal ‘decision steps’ that included many practices. As a consequence of these ‘decision steps’, many monitoring moments were needed. At ServePublic, this meant monitoring by means of many meetings. We will describe these coordination practices through meetings in the following narratives.

#### 4.2. Narrative 1 – “The Morning Prayer”

*ServePublic Headquarters, Monday morning, 8.50 AM.*

*Project portfolio managers grab a cup of coffee or tea and talk shortly about the weekend while rushing to the meeting room. At nine o’clock sharp, the ‘morning prayer’ starts. The project portfolio director kicks off and informs the team that one member will arrive in ten minutes. Nevertheless, she wants to start the meeting. She looks around the table while asking if team members have urgent matters to discuss.*

This daily portfolio team meeting was an established practice, as the fact that participants referred to it as ‘morning prayer’ illustrates. It typically lasted about half an hour. Therefore, time had to be spent in the most efficient and effective way possible. In contrast to other portfolio team meetings this ‘morning prayer’ had no meeting agenda. It was a moment to *talk* with each other, *share* struggles, *anticipate* problems and *create* a team spirit. The atmosphere was open, informal and relaxed. Jokes were made and the team dynamics were positive, interactions friendly and supportive. Two members who had recently joined the team would *explain* problems they had come across and the other team members *facilitated* them by sharing their experience on how to solve or approach similar issues.

All project portfolio managers were present for the ‘morning prayer’. The ‘morning prayer’ was purely a project portfolio team meeting; no other project- or program managers or corporate level decision-makers were invited. This ‘project portfolio team moment’ helped the project portfolio managers to keep in touch and share information and expertise informally. The frequency of the meetings was high, which created continuity for information sharing and coordination of *problem solving* within the project portfolio team. By openly discussing experiences the project portfolio managers kept each other up to date and were able to anticipate similar future problems. Project portfolio team members could coordinate the approaches of issues in similar ways as in the past. Known effective or ineffective past approaches were used to support (new) project portfolio team members to solve problems.

The ‘morning prayer’ could therefore be seen as a portfolio team moment embedded in daily recurring practice. The practice appeared to support *informal sharing of information, experience and expertise* and *coordinated problem solving* within the portfolio team. Based on these observations, our first proposition is:

- Proposition 1a:** Informal communication moments with the complete project portfolio team can facilitate the coordination and informal sharing of information, experience and expertise within the project portfolio team.
- Proposition 1b:** Informal communication moments with the complete project portfolio team can facilitate the coordination of problem solving within the project portfolio team.

#### 4.3. Narrative 2 – *The daily grind; Meetings, meetings, meetings...*

Narrative 2 is subdivided in four sub-narratives, which each represent an example of a specific meeting type at ServePublic.

##### 4.3.1. Narrative 2a *The Project Portfolio Team Meeting*

*ServePublic Headquarters, 22nd floor, Wednesday morning, 8:45 AM.*

*One of the meeting rooms has been booked for the weekly project portfolio team meeting of 45 minutes. The atmosphere is professional, open and all members are well informed and critical. The seven project portfolio members are all present. The project portfolio director asks who are this week's chair and secretary. These roles rotate weekly, as agreed upon in a yearly schedule. Project portfolio team member A opens the meeting and member B is taking notes, the others participate in the discussion. 'Notorious' for this meeting is the extensive meeting agenda with a load of thoroughly prepared portfolio advice that needs to be discussed with the complete team before they are proposed to the corporate level decision-makers.*

The chair strictly *keeps track* of the *time* for each topic. The agenda contains between eight and fifteen items for the meeting that is scheduled for less than an hour. In other words, time was (always) short given the extensive agenda. Therefore, every discussion topic receives a specific number of minutes. We observed that this strict timekeeping implied that often not all agenda items could be discussed in detail. Sometimes this meant that agenda items would be delegated to the project portfolio managers involved or postponed to the next meeting.

In contrast to the informal character of the Morning Prayer, this meeting was more formal.

##### 4.3.2. Narrative 2b *The Project Portfolio Steering Committee*

*ServePublic Headquarters, 22nd floor, Wednesday morning, (about) 9:30 AM.*

*The project portfolio managers have a short break (less than five minutes) before the weekly project portfolio steering committee starts. The composition of this committee differed from the project portfolio team meeting, since the ICT director and Chief Controller also took part in this meeting. During the steering committee meeting, the various pieces of portfolio advice for the corporate board were discussed critically with the ICT director and Chief Controller. These directors participated in the project portfolio steering committee because they had a broader overview of the potential issues, suggestions and comments from managers in their department on the project portfolio advice. They functioned as a liaison between the project portfolio management office and their own departments and thus were able to share information and their specific expertise in the project portfolio steering committee.*

While this meeting was officially the last decision step before the project portfolio advice was sent to the corporate level decision-makers, there was another informal step, which is explained below.

##### 4.3.3. Narrative 2c *The Project Portfolio Team - CFO meeting*

*ServePublic Headquarters, 22nd floor, Wednesday morning, (about) 11:30 AM.*

*After the Project Portfolio Steering Committee, now the Project Portfolio Managers further polished away the last imperfections in the portfolio advice for the corporate board level. This task was typically completed in about an hour. During lunchtime, the Project Portfolio Director,*

*the Chief Controller and the CFO would discuss any pieces of advice that had recently been submitted. This meeting was an informal decision step initiated by the CFO to keep track of the projects in the portfolio, mainly based on a financial control aspect. After the meeting with the CFO, the Project Portfolio Director would communicate the responses of the CFO either personally or via e-mail to the project portfolio team members.*

#### 4.3.4. Narrative 2d The “Leader Alignment Meeting”

*ServePublic Headquarters, Friday morning, 9:40 AM.*

*The so-called ‘leader alignment meeting’ aimed to create a bridge between the project portfolio management office and the platforms and was organized every six weeks. ServePublic had several platforms that transcended the programs of business units, for example related to e-working and e-services. The corporate level decision-makers initiated these platforms to create strategic pillars and develop a horizontal link throughout the organization. The platforms were meant to help coordinate between projects and to capture coherence and interdependencies between the projects and programs in the organization.*

The meeting was planned to start at 10:00 AM. The first author arrived at the department and was welcomed by the secretary. She was asked to sit down. She asked the secretary for the meeting agenda, but was informed that the platform managers who arranged the meeting used no agenda. The first author was waiting to get invited to the meeting room, but at 9:50 AM, the doors of the meeting room opened and the platform managers told her that they cancelled meeting, because the project portfolio director would be absent. This event was remarkable, because the project portfolio director and first author e-mailed the same morning and planned to meet each other at the meeting. The doors of the meeting room were closed again. The first author informed the secretary who did not know about the cancellation. The two platform managers were contacted and the first author waited again for a couple of minutes. Then the platform managers arrived for a second time and the first author was again told the meeting was cancelled. Five minutes later, the project portfolio director came by and asked the first author why she did not enter the meeting room. She told her about the ‘situation’. The project portfolio director wondered why the platform managers were telling the first author that the meeting was cancelled. After ten minutes of discussion behind closed doors, the first author was asked to wait somewhat longer. Subsequently the meeting went on for ten minutes behind closed doors and then the project portfolio director left. The ‘leader alignment meeting’ had finished.

We observed that not everyone was open to welcome an independent researcher in an informal meeting. We could only speculate about the content of the meeting, but we know that sometimes ‘a fly on the wall’ is not appreciated.

We view these meetings as recurring practices that support coordination through the sharing of information and expertise. The meetings can be seen as practices that help to coordinate the information flows from project and program level and the steering programs, via the project portfolio management office towards the corporate level decision-makers. Formal as well as informal meetings were combined to go through all ‘decision steps’ in the project portfolio management process. Formal meetings like the weekly project portfolio meeting and project portfolio steering committee were characterized by extensive preparations of agendas and included meeting documents. This documentation shows that the degree of freedom during these meetings was restricted since a high number of agenda items had to be dealt with. Furthermore, there was often a lack of time to thoroughly discuss all agenda items. The practices of thoroughly *preparing* and *documenting*: project finances and progress, portfolio advice and decisions mirror the practice of strictly *monitoring* ServePublic’s portfolio. However, the monitoring of projects and programs was still directed at the individual evaluation of these projects and programs. The project portfolio management office strongly focused on monitoring the progress of the individual projects and programs, as well as their financial situation. We see the informal meeting between the project portfolio director, Chief Controller and CFO to discuss the portfolio advice as an example of an extra monitoring and control step.

However, the project portfolio managers did not focus prominently on the creation of integrated services that could provide a higher value for the user. Aiming for a holistic portfolio focus on the coherence and interdependencies among projects in the portfolio appears to be a complex issue, as indicated by an interviewee:

*“ServePublic is not doing a good job at doing ‘real’ project portfolio management. We focus too much on quality control of project documents, which should actually be delegated to the business units”.*

This quote shows that project portfolio managers acknowledged that their current focus was on monitoring and controlling the quality of project documents, whereas the coordination of decisions among projects and programs in the project portfolio remained a challenge. The project portfolio management office thus had a synthesis function. By means of several types of meetings on different organizational levels, the project portfolio management office was connected with the entire organization. Project managers, program managers and project portfolio managers aimed to capture the coherence and interdependencies between projects, but it was unclear who should provide information about possible interdependencies. As an interviewee explained:

*“It is very difficult to look at coherence and interdependencies. That is why it is very important to come together [as a project portfolio team], otherwise you only have expertise about your own part of the [project] portfolio, but... This coherence is very important! It is a difficult point and still a development point. Everything coheres with everything. If you are going to draw it, you block at some time. You have to focus on one area, one approach. For example: human resource planning, release capacity, one specific system with a specific bottleneck. If you are going to connect everything it becomes a tangle”.*

The quote indicates that visually capturing coherence and interdependencies made the complexity even larger, although visual representation can normally be expected help the people deal with complexity.

We have the impression that the current practices of coordinating through meetings did not help to create more integrated services. Several types of meetings were identified (see Narrative 2), which were all characterized by zooming in and discussing the specific progress of individual projects or programs in terms of the documents prepared per project or program or items on the meeting agenda concerning individual projects or programs. The ‘bigger picture’ of looking at the projects and programs in the project portfolio as a whole based on coherence and interdependencies was a difficult struggle according to interviewees. However, we expect that an overview of interdependencies in the project portfolio would be very helpful for creating integrated services. Project portfolio managers might focus on monitoring and coordinating similar interdependent projects in the same way, to create ‘clusters’ of projects instead of ‘islands’, that users can experience as ‘integrated solutions’

Based on several observed meetings, we have the impression that the current practices appear to hinder the coordination between projects. ServePublic's project portfolio management process is strongly based on meetings on an operational level. ServePublic's project portfolio meetings appear technocratic: based on an extensive (financial) analysis and the use of project management methods for individual projects (like Prince 2). We have the very strong impression that meetings become technocratic because the ‘way of working’ at ServePublic is strongly focused on the progress and performance of individual projects and programs. Projects and programs are steered, monitored and coordinated based on the creation of individual user value per project or program. Nonetheless, we expect that by creating integrated services the sum of value created for the user is higher than the sum from individual services.

In sum, we have identified *meetings* as a recurring practice at the project portfolio level. We suggest that the current ‘daily grind’ of managers’ diaries completely filled with meeting appointments to discuss individual projects and programs can actually hinder the coordination between projects and the creation of better-integrated services. There was no time for reflexivity to analyse and understand what the potential consequences of decisions might be and to evaluate if decisions made are indeed the ‘right’ ones. Extensive meeting agendas required extensive preparation and documentation and left few degrees of freedom for a more holistic analysis of coherence and interdependencies between projects. As we argued earlier, project portfolio management needs coordination among projects and programs in the project portfolio to create an overview of interdependencies and integrated services in the end. A focus on the user’ needs could help to capture the complexity of coherence and interdependencies,

because it can provide a basis for the creation of integrated services. Based on these observations, our second proposition is:

**Proposition 2:** Operational meetings that focus on technocratic decisions regarding individual projects or programs in the project portfolio instead of considering the project portfolio as a coherent and interdependent whole appear to hinder the creation of integrated services for the user.

#### 4.4. Narrative 3 The Progress Review

*Each project portfolio manager had his or her own focus area. These focus areas were affiliated with the several business units of ServePublic. Each business unit had its own project office that would consolidate information about project documents for the project portfolio management office. The responsible project portfolio managers functioned as a liaison between the project office and project portfolio management office. After the project portfolio manager and the project office had discussed the consolidated information, the responsible project portfolio manager would assess on-going projects and programs from the specific project office by means of a traffic light metaphor. The colour red indicated that either: an adjustment or any additional actions were required by the corporate level decision-makers; or that the project or program were under close supervision of the corporate level decision-makers; or that the project was not based on the requirements as formulated by Prince 2 (based on the Progress Review). The colour orange indicated a problematic project status that was dealt with by an aligned collaboration between line management and the project portfolio management office. The colour orange did not require immediate action or decision of the corporate level decision-makers. This colour was used to signal and inform the corporate level decision-makers about projects that could turn to a 'red' status in the near future. The colour green indicated that the project or program was on track with no further comments. The project portfolio managers asked the project office critical questions about the status of projects and programs to determine the colour in the 'Progress Review'.*

*The 'Progress Review' was a monthly management summary created by the project portfolio management office for the corporate level decision-makers. The 'Progress Review' report was between the eight and ten pages and only described the 'red' or 'orange' projects or programs that deserve attention from the corporate level decision-makers. The 'Progress Review' was a summary of a more extensive consolidated review of all projects and programs in the project portfolio. The project portfolio advice was discussed in the weekly project portfolio meeting and project portfolio steering committee (see Narratives 2a and 2b).*

##### 4.4.1. Analysis of coordination practices in Narrative 3

The monthly 'Progress Review' shows the results of the meetings between the project offices and project portfolio management office, the project portfolio team meeting with the steering committee, and the project portfolio team meeting with the CFO. The 'Progress Review' was a monthly recurring practice based on several rounds of consolidating information. First the project portfolio management office received information from each project via the project office. Then the project portfolio managers consolidated this information and wrote the project portfolio advice. Subsequently the 'Progress Review' was given to the corporate level decision-makers.

Project portfolio managers at ServePublic advise the corporate level decision-makers in their decisions: the corporate level decision-makers take their advice seriously, but the project portfolio management office does not have formal decision-making authority. The project portfolio management office is seen as powerful, because the corporate level decision-makers strictly follow their advice. An interviewee stated: "In 90 to 95 per cent of the cases, the advice of the project portfolio management office is directly followed by corporate level decision-makers". The power of the project portfolio management office was therefore high because the corporate board took

their advice very seriously. Another interviewee stated: “*The corporate level decision-makers do not consider requests without advice from the project portfolio management office. It is a real power factor*”.

Ultimately, the project portfolio managers did not have the formal decision-making authority to make project portfolio decisions. Therefore, project portfolio decisions made by corporate level decision-makers were mostly based on the highly abstract ‘Progress Review’. The corporate level decision-makers did not have the same detailed knowledge and expertise about the projects and programs in the project portfolio as the project portfolio managers have. They basically based their decisions on the traffic light metaphor, which only described three categories. We have the strong impression that this abstract way of project portfolio management did not create integrated services for users. In other words, very detailed knowledge and expertise are needed for the coherence and interdependencies of projects and programs in the project portfolio, but this appeared to lack at ServePublic.

In sum, we identified the ‘Progress Review’ as a recurring practice at the project portfolio level. In our view, doing project portfolio management by means of three rather abstract colour categories in a consolidated document is unlikely to facilitate the creation of integrated services, because the lack of detailed information means the interdependencies among projects become less visible. Based on these observations, our third proposition is:

**Proposition 3:** Project portfolio management based on an abstract progress review appears to hinder the creation of integrated services.

#### 4.5. Coordination practices of project portfolio management

This study was conducted with the aim of adopting a practice theory approach to analyse how coordination of project portfolios is actually accomplished. Fig. 1 shows the coordination practices of project portfolio management at ServePublic. We proposed three propositions, related to project portfolio team coordination (Propositions 1A and 1B), coordination on individual project level (Proposition 2) and coordination of information via the ‘Progress Review’ (Proposition 3). The latter two propositions are linked to the creation of integrated services from a user perspective on an organizational level, which might be a potentially desired outcome on the organizational level.

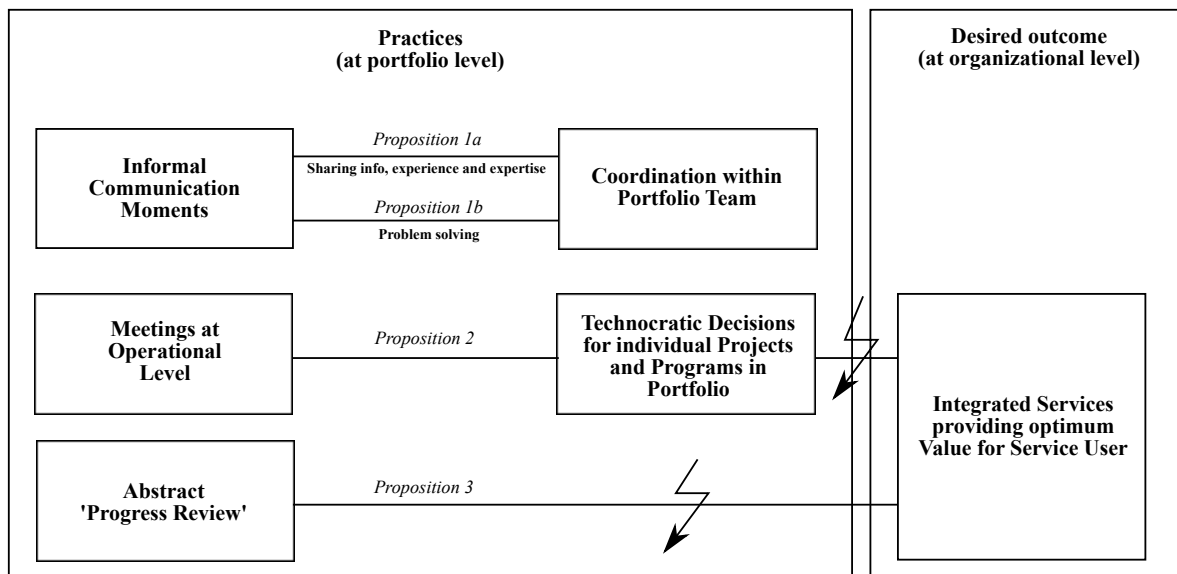


Fig. 1. Coordination practices of project portfolio management.



## 5. Discussion

This study set out to identify coordination practices for project portfolio management in a public organization that was confronted with a powerful stakeholder and rather distant users. We identified three types of coordination practices. First, informal communication within the project portfolio team enabled coordination through informal sharing of information, experience and expertise. Our data suggest that such informal communication practices can support the coordination of problem solving within the project portfolio team (Gutiérrez and Magnusson, 2014; Martinsuo, 2013). Second, operational meetings like the weekly recurring project portfolio meeting and project portfolio steering committee were mainly focused on technocratic decisions regarding individual projects or programs. This practice appeared to hinder the creation of integrated services for users, because it did not support seeing the portfolio as a ‘whole’ (Girotra et al., 2007). We suggest that considering the project portfolio as a whole containing interdependent projects could help to create value for the user (Killen and Kjaer, 2012; Voss, 2012). Third, a steering board that was provided with very abstract information made the ultimate decisions. We propose that such abstract progress reviews hinder the creation of integrated services for the user, as there is not enough detailed information to see the possible links and interdependencies between projects (Van Riel et al., 2013).

Overall, our study revealed that current coordination practices are unlikely to counteract project portfolio managers’ large blind spot for the end user (Wägar et al., 2012). Public service organizations like ServePublic have to deal with the high demands of a single public financing body that often overshadow the needs of rather powerless users. The interests of the public financing body can obstruct project portfolio managers’ capability to view and manage the project portfolio as a service system from an integrated perspective (Osborne et al., 2013). Public service organizations have to deal with ‘one master’, the public financing body, but also with many users. This reflection on a user perspective could be mirrored in how projects are monitored and evaluated in public project portfolio management.

### 5.1. Theoretical implications

The present study has generated theoretical implications related to two fields. First, we contribute to research on project portfolio management. Previous project portfolio management research has insufficiently taken into account the issue of interdependency between service innovation projects, and the need for harmonisation among them (Killen and Kjaer, 2012). We pay specific attention to the role of interdependencies between service innovation projects because we have analysed how coordination of project portfolio is actually accomplished and can be improved in the future by focusing on the alignment of project outcomes to create integrated services that create an optimum value for the user (Osborne et al., 2013; Van Riel et al., 2013).

Coordinating between projects while considering the project portfolio as a whole instead of considering them in isolation can facilitate the creation of integrated services, because coherence and interdependencies among projects are considered and taken as a starting point to develop new services for users (Girotra et al., 2007; Van Riel et al., 2013). Previous research considered project portfolio management a merely rational process (Kester et al., 2011). By using a practice approach we identified collective practices for gathering evidence for project portfolio advice by means of several formal and informal meetings and conversations between different organizational levels, and for monitoring projects based on ‘abstract’ individual assessments of projects and programs according to a traffic light metaphor. We have shown that project portfolio management is more than a just a rational process, as also suggested by Gutiérrez and Magnusson (2014) and Martinsuo (2013). The existing project portfolio management support tools were targeted at the individual evaluation of projects and programs. Nevertheless, project portfolio management is a challenging and complex task. In particular public service organizations might struggle with this challenge since they have to balance demands from a single public financing body and the needs and expectations of multiple, less powerful, users. To capture the complexity in project portfolio management, we suggested a potential way forward for coordination towards the development of integrated services from a user perspective that provide an optimum value for the user.

Second, we contribute to the service systems literature by studying the implications of an attempt to introduce a user perspective in project portfolio management as included in the idea of creating integrated services. Previous project portfolio management research has considered projects in isolation (Chao & Kavadias, 2008, Cooper et al.



2001). However, we suggest that project portfolio managers need to consider and coordinate among projects in the existing project portfolio as a ‘whole’ (Girotra et al., 2007), because the potential value to the user of services from a project portfolio is larger than the sum of (individual) services considered in isolation, as suggested by the service constellations approach (c.f., Van Riel et al., 2013).

### *5.2. Managerial implications*

Based on our findings, a number of implications can be derived for organizations in the public service sector. As described in the methods section, public service organizations are financially dependent on a public financing body – for example a ministry. The financing body may, in such a case be seen as the sole important stakeholder, as a result of its power. However, when taking a user perspective in project portfolio management, the desired outcome needs to be the creation of integrated services that provide an integrated solution for user problems.

Formal and informal meetings to share and discuss projects and programs in the project portfolio can serve as coordination mechanisms (Okhuysen and Bechky, 2009). These ‘meeting’ practices can be a first step towards reflexivity and thinking about the coherence and interdependencies among projects and programs in the portfolio (Hammedi et al., 2011). Capturing the coherence and interdependencies is complex (Killen and Kjaer, 2012). To address this complexity we suggest that portfolio managers could express the required coherence and interdependencies based on user needs. A focus on user needs is an underlying potential approach to create services that users desire. The several meetings can serve as coordination platforms to communicate about the coherence and interdependencies and create a fundament to work on the creation of integrated services. A ‘Progress Review’ that is executed on too abstract a level might hinder this creation. In our view, hindering practices can become supporting practices. Hindering practices may be turned into supporting practices that focus on the creation of integrated services. For example, the abstract ‘Progress Review’ that we found at ServePublic could be specified by including a focus on user’ needs and on the coherence and interdependencies between the projects and programs in the project portfolio.

We acknowledge that the relative impacts of external stakeholders – ‘one master’ versus many users – on the project portfolio management of the public service organization can be somehow unbalanced. E.g., due to the large impact of the financial dependence and the contractor’s role of the ‘master’ for the public service organization. However, to prevent a mismatch between user’ needs and the service innovations offering of the public service organization both areas need to be somehow connected and aligned. Therefore, we suggest that the observed coordination practices can form a starting point for coordination towards the creation of integrated services. This connection and alignment remained absent and was not a discussion topic – at the project portfolio level of – ServePublic. Therefore, we expect that the new generation of innovation projects may still fail to create well-integrated services that create an optimum value for the user.

We suggest public service organizations to focus more on their societal role as a public service organization instead of mainly focusing on the ministry – ‘master’ – as the ‘stakeholder’ with the largest impact. A dialogue between the public service organization and user can be fruitful to start the co-creation of value for both parties (Grönroos and Ravald, 2011; Voss, 2012). A better balance between the impact of external stakeholders – ‘one master’ versus many users – can be reflected in an explicit and concrete vision and value proposition; as well as serving as a focus for coordinating the coherence and interdependencies among projects and programs in the project portfolio. We suggest a focus on coherence and interdependencies that reflect the creation of integrated services for the user.

### *5.3. Limitations and future research*

The present exploratory case study combines multiple sources of data to increase internal validity. However, our research is restricted to a single case in the public service sector. To extend the external validity of our results, future research with multiple cases is recommended to refine and externally validate the observed coordination practices and their effect on integrated service development. Since this case study reports on a public service organization in which the user perspective is less prominent, future studies would need to include cases exhibiting a stronger user

perspective. Future research could, for example, focus on other cases from the public service sector, like health care, where the user or patient perspective is more prominent.

Furthermore, future research might entail an experimental design, to isolate the coordination practices found in this study and to develop project portfolio management support tools. These tools can help project portfolio managers and public service organizations to implement a user perspective in project portfolio management with a focus on the creation of integrated services that provide an optimum value for the user.

Our study revealed several practices that support or hinder the coordination towards integrated services. However, other practices – for example decision-making success factors like reflexivity (Hammedi et al., 2011) and transactive memory systems (Hammedi et al., 2013) – could support coordination among projects in the project portfolio towards the creation of integrated services. These practices have been demonstrated to be helpful on a project level and a screening committee level, but their effects on the level of the project portfolio remain unclear. Future research could investigate the potential effects of these practices combined with the user perspective focusing on an optimum value of services for the user.

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