



IT consultants, salesmanship and the challenges of packaged software selection in SMEs

Packaged
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Abstract

Purpose – This paper seeks to analyse the process of packaged software selection in a small organization, focussing particularly on the role of IT consultants as intermediaries in the process.

Design/methodology/approach – This is based upon a longitudinal, qualitative field study concerning the adoption of a customer relationship management package in an SME management consultancy.

Findings – The authors illustrate how the process of “salesmanship”, an activity directed by the vendor/consultant and focussed on the interests of senior management, marginalises user needs and ultimately secures the procurement of the software package.

Research limitations/implications – Despite the best intentions the authors lose something of the rich detail of the lived experience of technology in presenting the case study as a linear narrative. Specifically, the authors have been unable to do justice to the complexity of the multifarious ways in which individual perceptions of the project were influenced and shaped by the opinions of others.

Practical implications – Practitioners, particularly those from within SMEs, should be made aware of the ways in which external parties may have a vested interest in steering projects in a particular direction, which may not necessarily align with their own interests.

Originality/value – This study highlights in detail the role of consultants and vendors in software selection processes, an area which has received minimal attention to date. Prior work in this area emphasises the necessary conditions for, and positive outcomes of, appointing external parties in an SME context, with only limited attention being paid to the potential problems such engagements may bring.

Keywords Computer software, Selling methods, Small to medium-sized enterprises, Management consultancy

Paper type Research paper

1. Introduction

Information systems development is replete with failures and much has been written about the classic problems of late, over budget, poor quality systems. In an attempt to address this situation numerous solutions have been proposed, including the use of packaged software. Packaged software [1] is generally sold as a tradable product (Carmel, 1997) and can be purchased from a vendor, distributor or store. For organizations facing the difficulties associated with embarking on custom software development, a dedicated package that offers support for a particular business function seems like an ideal solution. This is especially so for small and medium-sized enterprises (SMEs), who have limited time and resources for indulging in future business



development, including the exploitation of technology (Welsh and White, 1981; Gable, 1991; Levy *et al.*, 1998; Caldeira and Ward, 2002). Often lacking in-house development expertise, the opportunity to purchase a technological “solution”, along with advice from specialist IT consultants, appears ideally suited to the needs of SMEs. Indeed, Thong *et al.* (1994) suggest that those SMEs that engage combined vendors/consultants are more likely to develop effective systems than if they used separate parties – consultants for product selection and vendors for provision. Given this context, our research question is: What are the effects of engaging IT consultants, who are allied with a particular product, in the selection of packaged software in an SME?

Despite the adoption of packaged software across a range of organizations, there has been limited research on the decision-making processes surrounding the adoption of software packages (Pollock *et al.*, 2003). In addition, little is known about some of the key actors involved in the process, notably IT consultants, the intermediaries who position themselves between product vendors and purchasing organizations. As software becomes increasingly commodified (Quintas, 1994) generic products are developed and shipped to purchasing organisations the processual activities traditionally associated whilst the systems development process such as implementation, system integration and user acceptance are left to the purchasing organization or IT consultants to manage. Using an in-depth, longitudinal study we describe and analyse selection and procurement of a software package within a small organization, paying particular attention to the decision-making process and the role played by IT consultants. The case study highlights the dynamic and complex nature of software package selection. It illustrates how salesmanship, which is geared towards product adoption, is mobilised by certain external vendor and internal management user groups. Such activities shape the decision-making process in ways that can result in the designing out of user requirements.

In the next section, we discuss packaged software in the context of SMEs with a focus upon IT consultants and salesmanship. This is followed by details of the research approach. Fourth section considers the field study proper, before leading on to the discussion. Finally, the paper concludes.

2. Packaged software selection, IT consultants and salesmanship

Engagement with the packaged software selection process is often characterised in rationalist terms as the “buy-versus-build” decision and a number of benefits are suggested which aim to encourage adopters to purchase the package (Light, 2005). In general, the extant literature on package software selection offers a number of generic recommendations to guide potential buyers through the process. Most studies (Lynch, 1987; Sharland, 1991; Bansler and Havn, 1994; Chau, 1995; Stefanou, 2001) and practitioner-oriented guides (Martin and McClure, 1983; Nelson *et al.*, 1996; KPMG, 1998), with both large or small companies in mind, are imbued with rationalist assumptions and prescriptive guidelines. They broadly concur that selection should involve the identification and definition of user requirements, evaluation should consider “best fit” between package functionality and requirements, and that final selection and purchase should be based on these two prior phases. Such studies also tend to overemphasize the role of agency on the part of the buyer in the process. As software is commodified with the attendant increase in the supply-side of products, a range of additional parties are brought into this process that extends beyond the traditional IT in-house function. The intermediaries that are available include IT consultants, system

implementers, trainers and other software producers who are often drafted into the project when their technical expertise is required. While such external actors clearly have a part to play, it would be naïve to assume that they operate as neutral parties.

Within an SME context, there are a number of studies which point to the value of engaging consultants for IT appropriation purposes (Kole, 1983) for example, argues that using external expertise is essential for SMEs who want to experience success in IT implementation. By contrast, Lees (1987) suggests that consultants might not always be helpful in selection processes and Caldeira and Ward (2002) propose that regardless of financial resources, it is still a challenge for SMEs to find decent IT services and consultants. Despite mixed findings, the recurring problems with custom systems development have arguably helped spur the need for purchasing such expertise. IT consultants interpose themselves between IT suppliers and the client, presenting themselves as neutral conduits and in effect speaking for the technology (Bloomfield and Danieli, 1995). The selling of IT artefacts provides IT consultants with a more rational edge than management consultants, who are in the business of commodifying concepts, such as empowerment, excellence, or strategy. These intermediaries sell a combination of a vendor's products in addition to offering their own range of services. This includes aspects such as consultancy advice to assist with finding the appropriate product, the (possible) customisation and implementation of the product, the provision of training and support services, and the integration of software with other component-based products or existing systems. Their "objectivity" and status can then be used to legitimate or influence a course of action that is presented as a solution to new or continuing organizational problems (Sturdy, 1997).

Clearly, there is a co-dependent relationship amongst vendors, intermediaries and purchasers. For SMEs with limited resources, the prospect of having to attend 'user conferences' in order to lobby for a modification to a generic system, is neither productive nor indeed possible in many instances (Olsen and Saetre, 2007). Thus, the promise of external business and technical expertise proffered by IT consultants seeks to address areas where SMEs are often found wanting. Conversely, the packaged software vendors require customers to buy their products if they are to remain a viable operation and may call upon them for assistance when considering updates to an existing product range (Andersson and Nilsson, 1996). However, large firms with substantial investments (both current and potential) in these products may hold more power with vendors than smaller organizations. IT consultants as intermediaries are co-dependent upon vendors and purchasers, since their business is generated from this mediation process. Not surprisingly, this co-dependent relationship can be fraught with difficulties: consultants may be viewed as holding too much power (Skok and Legge, 2001) and having more of an interest in "sell on" than their current project (Sturdy, 1997). At the same time, customers of popular products which are in heavy demand may experience a dearth of customer support for selection and implementation (Lynch, 1984; Bingi *et al.*, 1999; Markus *et al.*, 2000; Sumner, 2000).

Packaged software selection involves interacting with those undertaking the selling of such artefacts; sales work which has considerable diversity. Darr (2006) notes that our conceptualisation of sales work is generally shaped by cultural stereotypes, often associated with people who hold low levels of formal education and technical skill. His research counters this, arguing that in contemporary practice highly developed sociotechnical skills are often keyed to "closing the deal". He suggests interactive sales

work takes place where sellers and buyers engage in the co-development of products and services *in situ*. Within the IT industry, where formal levels of education and technical skill are present, salesmanship is intertwined with the process of selecting, purchasing and implementing a packaged software product. Salesmanship can be thought of as those activities which aim to persuade customers and/or consumers (different kinds of users) of the benefits of a given IT product or service (Friedman and Cornford, 1989). This product may or may not meet the needs of a particular group and therefore the challenge being faced is to convince potential customers that a particular product is the most appropriate solution to their problems. Salesmanship is thus an important resource for those involved in selling software.

Beyond the work of Friedman and Cornford the role of commercially oriented salesmanship is a relatively neglected area in information systems and computing research even though some have referred to the role of bravado (Light, 2005), propaganda (Harrison, 2004) and buzz (Swanson and Ramiller, 1997). Indeed, it has been noted that an absence of research into sales work is a more general phenomena (Llyod and Newell, 2001). A notable contribution, however, is the work of Wybo (2007), whose study of vendors that sell IT services to medium to large organizations provides the empirical support for his argument that the sales cycle should be considered as an important constituent of information systems implementation. Wybo essentially characterises the selection process as a sales cycle which incorporates the activities of the request for information, call for proposals, product demonstration, conference room pilots and contract negotiations. Throughout this process the vendor/sales person influences and co-constructs the buyer's definition of the problem and its acceptable solution. In this respect the sales cycle can influence: conceptions of fit between the technology solution and organisational needs; the size and scope of the project; project team composition and contractual terms. Although Wybo points to the potentiality for vendors (as IT consultants) to influence system requirements and user involvement he suggests that this is largely mediated by the buyer. While larger businesses may have the staff and resources to embark on the process for the gathering and understanding requirements prior to package software selection, this is seldom possible for SMEs (Olsen and Saetre, 2007). This can provide IT consultants with an opportunity to steer the organization in a given direction. As Gable (1991) points out, some SMEs have the misplaced view that they can leave consultants to undertake the work with minimal input from themselves, even though this may lead to potential problems. In order to generate revenue, consultants sell ideas and techniques and aim to create a sense of control and reassurance, while simultaneously reinforcing or creating insecurities in order to help secure future work (Sturdy, 1997). As suggested by Bloomfield and Danieli (1995): "consultants do not so much target themselves at a particular niche as seek to create a niche and persuade clients that they are within it." In the study that follows we enquire as to how IT consultants employ the techniques of salesmanship to steer the direction of the sales cycle so that the process is skewed primarily in favour of their own particular interests.

3. Research methodology

In order to illuminate the issues discussed above, an account of our empirical study, directed over a period of two and a half years and entailing collaboration between an SME (T.Co[2]) and a university, is given below. The research being reported here is

based on an interpretivist perspective which views reality as a social construction (Walsham, 1993) and makes sense of this by focusing primarily on human interpretations and meanings (Walsham, 1995a, b) with each interpretation having no absolute or universal status.

An action research study was performed, but for the purpose of this paper it is our intention to use the data from the study for illustrative purposes in order to throw some light on the process of packaged software selection within an SME. The project involved two academics and our role ranged from that of detached observer to fully engaged participant (Blaikie, 1993), providing specific guidance as necessary. Contact with the organization began in June 2000 and the details reported here lead up to December 2002. The client tracking project began in December 2000 and during this period we have had extensive contact with various staff at the company, as well as IT consultants. Data collection and analysis were performed simultaneously. This project involved both unstructured and semi-structured interviewing, observation, and document review. It has been argued that if we are to improve our understanding of IT production and use then an engagement in an ongoing dialogue with multiple voices can provide an enhanced understanding of the values of the relevant actors and their framing of problems and potential solutions (Suchman, 1994). Thus, numerous participants spanning vertical levels and functional groupings were included in the study, from senior management to administrative/secretarial staff, and from sales and marketing to client research staff. One or both of the researchers attended the research site every week and spent between one half and a full day there. Consequently, we were viewed by the organization as temporary, part-time members enabling us to acquire an "inside view" (Walsham, 1995a, b) of activities, including access to sensitive information.

Although our research plan was constructed in a linear fashion, the very nature of fieldwork intensifies the serendipitous events that characterise all research. In this respect, despite the well-defined objectives, the project was characterised by a considerable amount of flexibility and improvisation (Orlikowski, 1996). At the outset of the project, we hoped that we would be able to study the selection, adoption and use of packaged software and that we could see how the technology was configured *in situ* and over time. Unfortunately this never came to fruition, mainly because of unforeseen restrictions within the company, which delayed the implementation of the client tracking project.

As researchers, we were primarily interested in collecting data for research purposes (there were no consultancy fees involved) whereas most of the senior management team perceived our role as providers of inexpensive advice that would assist them in the implementation of their plans. The project and our role within it was at the initiative of senior management who viewed "success" primarily in terms of tangible results – the delivery and implementation of technology as easily and cheaply as possible, with minimal resistance and disruption. Although our presence in the organization was in a problem-solving capacity, we viewed our primary responsibility as being one of support and guidance to the IT manager as opposed to a commitment to the company and its primary goal of increased efficiency and profitability. As researchers we were keen that the research process should advance in a participative and collaborative manner, whilst simultaneously offering advice on theoretical and methodological issues.

4. Packaged software selection at T.Co

4.1 Background

The empirical study involves a small owner-managed business, T.Co., and its procurement of a customer relationship management (CRM) package. T.Co. provide a range of high quality career management services covering executive outplacement, career management and development. The company was established in 1990 and operates from three different geographical locations in the UK, with 19 internal staff and 20 external consultants who aid service provision. Although T.Co is a small organization, the company has strong control and command structures (Figure 1). As with many SMEs the senior managers and entrepreneurs are usually involved in many of the organizational processes, giving them a comprehensive perspective (Caldeira and Ward, 2002). At T.Co management dictates organizational goals and there is an assumption that all employees are committed to this set of unitary goals, with dissent seen as something to be reprimanded.

In 2000, the Company's strategic aim was to improve productivity and profitability whilst maintaining the high quality of service that their customers expect. This aim remains today. To achieve this, in 2000, they embarked upon a rapid programme of expansion to enable them to service a wider geographical area. With this expansion came a range of issues concerning (internal and external) communication and the difficulties associated with maximising the benefits of their information system.

The project discussed here concerns the acquisition and installation of a new client tracking system in the research department. This department provides a personalised service for clients, which has been described by senior management as a "unique selling point". It was intended that the new system would outline the sequence of activities that began when the client arrived at T.Co, monitoring them as they went through the process of client placement. The client tracking system consists of two main stages: the first is related to the finding and securing of sponsors (that is, companies that provide clients, usually as a part of a redundancy package); the second stage concerns the monitoring of the client progress during their time at the company.

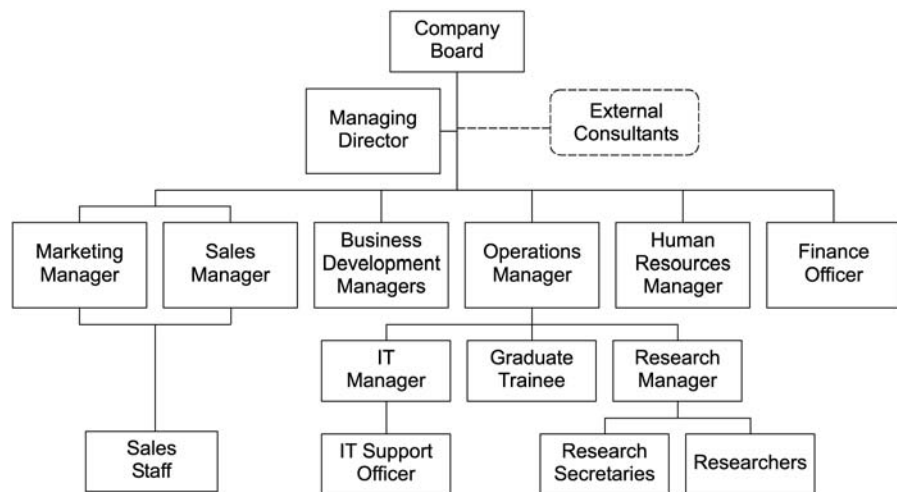


Figure 1.
The organizational structure of T.Co

Clearly, the quicker the client progresses (that is, finds employment), the greater the profitability for the company. It was hoped that a CRM package would contribute towards this enhanced profitability, standardising and streamlining activities across the three geographic locations.

4.2 The launch of the client-tracking project

In December 2000 the client-tracking project was launched, with dedicated resources and an anticipated implementation date of February 2002. It was widely agreed that the implementation should be within the research department, which was considered the most complex business function.

A project management team[3] was formed and two members of the team conducted an analysis of the client journey in the hope that this document could be used to assess various packaged software products. At this stage, the main concern of the project team seemed to lie with ensuring the (financial) support of senior management. This was confirmed with much of the documentation that was written to appeal to the interests of senior management. These documents included statements declaring “Our aim is to introduce a flexible system that will streamline and improve our current business processes and speed up the client journey thus becoming more cost effective” (User requirements document, 20 December 2001). Similarly, the client-tracking project was claimed to enable “T.Co to continue to provide a business class service and grow effectively in the future, whilst maintaining efficiency in all areas” (Board of directors document, 22 January 2002). There was little information provided on the day-to-day operational specifics and functionality that was required.

4.3 Product identification and selection

Concurrently, research was being conducted into a variety of packaged software products so that a number of suppliers could be short-listed. By December 2001, four potential products from four vendors had been short listed. The vendors were sent the requirements document along with the invitation to tender for the work. However, one of the providers (Vendor A) of a CRM package (Siebel) responded by stating that they could not meet the company’s requirements, since their product was “too big” and you “couldn’t afford us”; any dialogue ended here (Table I).

Initial negotiations were set up with the three other vendors and the project management team. The vendors included Vendor B who supplied a Sage product, Vendor C who supplied a product called Commence and Vendor D who supplied Goldmine. Negotiations took place through two different IT consultancy companies, both of which represented the vendors and mediated between them and potential customers.

Vendor/product	Details
A: Siebel	Too expensive; “You couldn’t afford us”
B: Sage	Communication problematic and too expensive
C: Commence	Lacked the required functionality
D: Goldmine	Standard product demonstration; “Goldmine isn’t for us”
E: Goldmine	Successful demonstration; eventually implemented 2004 and replacement being sought 2008

Table I.
Details of the vendors and products

Communications with the IT consultants representing Vendor B were problematic from the outset and the product seemed comparatively expensive and so contact with this company never went beyond initial negotiations. The IT consultants representing vendor C gave a presentation to senior management at T.Co, but the product was not perceived as containing the required functionality. The IT consultants representing Vendor D, who sold the Goldmine product, had a number of meetings with the project management team before demonstrating the product and discussing its capabilities with the managing director. Despite having fairly detailed discussions on the nature of the company requirements, this presentation was unsuccessful in that the salesperson simply demonstrated the standard product and paid no attention to the localized needs of the firm. The managing director concluded: "Goldmine isn't for us". Following this, the Board expressed their concerns about the value of a CRM package and demanded more research into the possibilities of further developing their existing custom applications (Filemaker Pro).

Despite senior management's expressed desire to explore custom development, the project team believed that a package was the best way forward and continued their search for a suitable vendor. An additional IT consultancy company also representing the Goldmine product (Vendor E) approached the IT manager. An initial meeting took place whereby the project team provided the IT consultant with detailed information on the nature of the organization, the history of the search for a CRM system, and how to appeal to the interests of the managing director. A presentation to the board of directors was scheduled. The consultant made use of the background information that had been provided and personalised much of the product terminology for the presentation, which was well received by the board. The managing director took control in this meeting and asked the IT consultant if Goldmine was able to support the following business functions:

- Can it tell us where a client is in the process?
- Can we obtain management information about client progress that we can use it to deal with sponsors?
- Can we obtain performance metrics to manage the process?

The response was positive and immediately the managing director shifted position from his initial suspicion of the product to completely embracing it: "This system can do all we need, and more!" He decided that the system was to be installed incrementally throughout the whole organization. Following the successful "sales pitch", senior management resistance to cost seemed no longer relevant as the number of user licences increased and the costs were revised to over double the original estimates. Indeed, the cost of the package from Vendor E was marginally higher than the same product from Vendor D, but in the eyes of senior management the latter were no longer a viable alternative.

4.4 Implementation planning

As the implementation was now to take place across the entire organization, the starting point was altered. The IT consultants felt that as the research department was the most complicated business function it would be left until last. They proposed a different phasing of the implementation process, as shown in Figure 2 (adapted from Vendor E Workflow Document). Implementation was to begin with the sales and marketing functions as it seemed they had the "best fit" with the packaged software on offer.

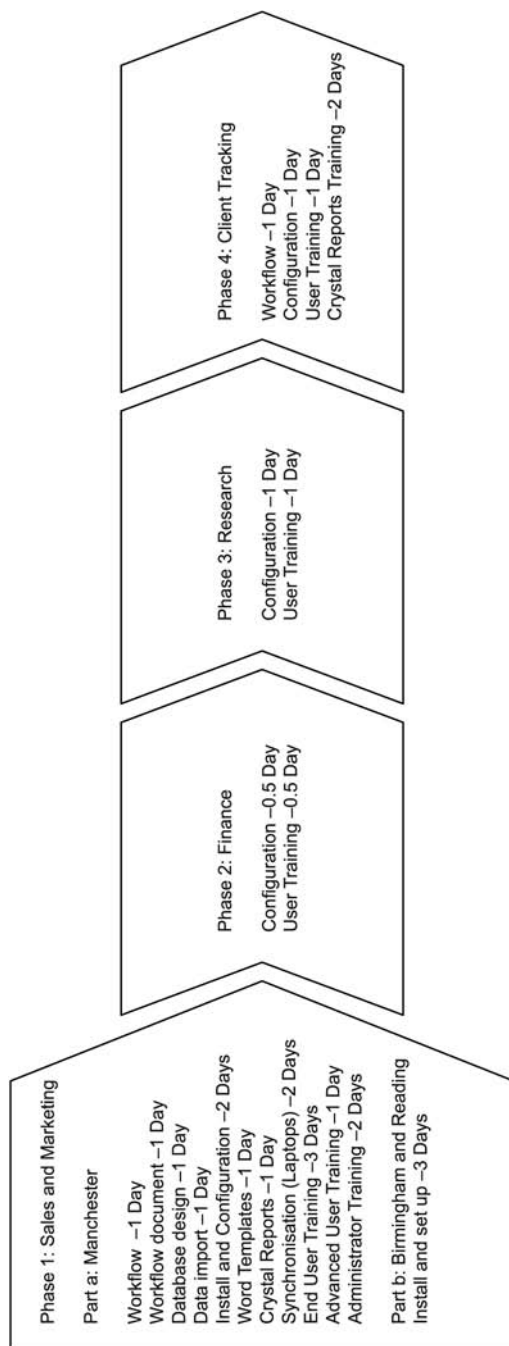


Figure 2.
The goldmine implementation plan

Interestingly, this was also the most expensive phase, accounting for nearly 60 per cent of the budget. The managing director described the process as “an implementation strategy that allowed for risk management.” He felt that it was less risky to go with implementing the sales and marketing module first as the standard software mapped closely to these existing functions in T.Co. By contrast, the research process was proving to embody different functionality to the standard version of Goldmine, thus more change would be required.

4.5 *The workflow day*

Up until this point, involvement in the project had been limited to project team members and senior management. As the planned implementation now loomed, the involvement of users was seen as key to project success. The IT manager reported “Organizational change will be managed as a high priority and emphasis will be placed upon bringing the users fully into the project” (Client-tracking meeting executive summary). Part of this planning process with end-users involved a workflow day with the IT consultant (which cost £750) whereby selected members of the various functions (sales, marketing, purchasing, research) were representing the interests of their respective team members. They agreed that all personnel needed to have the opportunity to be included in the project to ensure minimum resistance to change.

A different consultant arrived for the meeting with staff and he clearly had more technical expertise than the consultant giving the product presentation to the Board. The meeting began when the Goldmine technical consultant introduced himself, sat at the head of the table in the meeting room, and quickly pointed out that although the package was highly configurable “sometimes the organization has to bend toward the product as well”. He also stressed that it was up to the users’ to decide how they wanted the product to work and pressed the point that if “you don’t say it, you don’t get it”, thus ensuring clear demarcation of responsibility. As the technical consultant discussed user requirements, he configured the package on his laptop. Staff were able to see the capability of the application and so they refined and generated further requirements as the day progressed. The mood was optimistic since the staff were generally positive about the product. However, there was an underlying tension as users focused on lower-level details (their everyday working practices) whilst the consultant resisted suggestions of reconfiguration in the hope of being able to implement the standard “vanilla” software – which would be the easiest option. He interpreted the specificity of requirements as “naval gazing”, complaining that staff were “getting into the detail”. As more questions were being asked (partly fuelled by enthusiasm), he became increasingly uncomfortable and said that the purpose of the day was to focus upon the sales and marketing functions, not the other areas of the organization.

Yet despite this tension, there were numerous occasions where staff obligingly agreed to consider changing some of the ways that they currently worked since Goldmine could not support these processes as they stood at present. Examples of incompatibilities between the product functionality and T.Co’s business requirements are highlighted below:

- The sales manager wanted to be able to convert a client into a sponsor, yet Goldmine was unable to do this. A new record would have to be created and this meant that the history regarding the sponsor (as a client) would be lost.

She asked if Goldmine would be able to do this in the future and the IT consultant replied: “yes, if enough customers ask for it”.

- The research manager was impressed by the pipeline functionality for client-tracking purposes. However, it was not possible to construct individual pipelines that reflected an individual client’s progress. Neither was it possible to create various standard pipelines, which reflected the stages at which clients would “normally” be expected to have completed certain phases (e.g. CV preparation, Interview training).
- The sales manager wanted automatic reminders for follow-up actions (e.g. follow-up telephone calls when a brochure was sent to a potential sponsor). The IT consultant said that this was impossible, but when challenged by members of the academic team who knew from a past experience that this was possible, he said that it would take more time to configure the software – but agreed to do it.

Notwithstanding this good intention, the limitations of the consultant’s knowledge became increasingly obvious. It was clear from the outset that he was unfamiliar with the basic workings of T.Co in terms of both processes and terminology, despite having been sent company documentation beforehand. For example, the nature of the business, the role of subcontracted employees, the nature of sponsors, and the client journey had to be explained to him by various employees. As the day unfolded, his lack of understanding became increasingly obvious and several staff noted their concerns about his capabilities and those of the package. As the human resources manager remarked: “I’ve only just joined the company and I know more than he does, he’s just not prepared.”

By the end of the workflow day, users felt uneasy about the selection of Goldmine and these concerns were voiced to the managing director. He contacted the IT consultants to express his disappointment since he had assumed the workflow day would be focussed on aligning T.Co processes with those embedded within Goldmine, rather than ascertaining whether or not it was the right product for them. The IT consultants advised him to wait for the delivery of the workflow document. Prior to its arrival, the managing director arranged a meeting with staff members in early July in the hope of trying to work out the best way forward. At the meeting, the managing director asked staff to endorse Goldmine and agree that it could “broadly” do what they required. He said: “. . . we know there are problems with Goldmine, but can it do most of what we want – yes or no?” Essentially, he was pushing for a decision and given his dictatorial attitude, the majority of people acquiesced. On this basis, the decision to proceed with Goldmine was made, despite not having yet received the workflow document.

4.6 Signing off the workflow document

The workflow document arrived mid-July, but failed to meet the expectations of the members of the project team. The research manager said “it does not provide us with enough detail about the proposed system for us to sign this off”. The IT manager was equally unconvinced stating: “it’s not clear what we are buying at this stage, it’s going to need more work”. By now, the managing director had become the “product champion” of Goldmine and hoped to persuade the rest of the staff that this technology was the answer to their problems; a series of internal meetings were arranged to

further endorse the decision that had already taken. A meeting took place involving the managing director, The IT manager, and the IT consultants whereby it was agreed that the two organizations would work together. The IT manager relayed the tale of how the managing director pulled off his favourite “one-time party trick”, whereby he threatened to withdraw completely from the deal should the IT consultants not deliver the system they had promised in their original sales demonstration of Goldmine. This effectively negated the workflow day and the subsequent meetings with users, even though they were only ever brought into “rubber stamp” decisions that had already been made elsewhere.

Regarding functionality, the IT manager and another member of the project management team had been charged with the responsibility of discussing requirements with the technical consultant. Yet, when they later met with the managing director he stated that he now had “different, simpler requirements”[4]. The changes he suggested were reflected in a second workflow document that was delivered at the end of September. The “sign-off” of this document was re-scheduled for 21 October 2002 but further internal meetings with the project team generated additional requirements. In October 2002 the purchase was postponed to December. When interviewed a few months later, The IT manager commented that it was becoming difficult to keep staff motivated because of numerous postponements and false starts. Her patience was clearly wearing thin: “This isn’t over, I expect the workflow document to be double the size it is now – just you see.” After further extensive negotiation Goldmine was eventually implemented with the assistance of Vendor E during 2003/2004. However, in 2008 the senior management team are currently looking for a new vendor and software package to replace this as they feel that that functionality of Goldmine has been exhausted, despite extensive software configuration taking place.

5. Discussion

When the range of options expands from developing customised software to purchasing standard software products, the presumed benefits for SMEs seem obvious. However, we suggest a degree of caution is exercised and highlight the potential implications of adopting such a strategy. In the context of the field study, this will be discussed in relation to the role of IT consultants and the technique of “salesmanship”.

With packaged software selection, we witness a range of various internal and external actors that engage in the decision-making process. The adopting organization aims to implement the most appropriate product that matches their needs, preferably at reasonable cost and within an acceptable timeframe. The IT vendors and consultants require some control over the packaged software selection and implementation process, in the hope of a successful implementation with limited configuration and customization. In contrast with much of the packaged software literature, our study reveals how the “consumer” organization had only partial influence over the process of selection and implementation, which was strongly directed by the IT consultants. Although they had ultimate power regarding the decision as to whether or not to authorise purchase of the product, they had limited control over configuration of the specifics of the product, as the software that was initially described as being able to “do all we need and more” revealed incompatibilities.

Thus, although SMEs may need to appoint external consultants to aid technological developments (Kole, 1983), the outcomes of this are far from predictable. Indeed, by choosing to engage with the vendors, rather than “let the experts” handle it (Gable, 1991), as is often the case in SMEs, the managing director at T.Co played a considerable role in aiding the vendors, despite the fact that their interests were not necessarily aligned with those of the end-users. Accordingly, the outcome has been the implementation of a package that has required extensive reconfiguration to suit user needs[5]. In 2008, T.Co is seeking to replace the package rather than adopt the next upgrade from the vendor. Moreover, our work brings into question the claim by Thong *et al.* (1994) that SMEs which employ combined vendor/consultants are likely to benefit from more effective systems implementation than if they had used separate partners. It is debatable whether such an approach was the most effective given the consultants strong affiliation with a particular product. From the vendor/consultant perspective their salesmanship activities were focussed on ensuring a particular product would be implemented.

We also see how salesmanship goes beyond the simple consultant-client buyer relationship. This is something not previously raised in research related to IT vendors and consultants. More generally, relations between managers and consultants are usually emphasised, particularly in terms of their interests feeding off each other and their levels of contextually influenced mutual dependency (Fincham, 1999). Instead, our research shows how the project team were complicit in their aiding of the IT consultants by working with them to convey senior management requirements, in order to obtain project approval. This was due to the significant amount of pressure upon them to secure an implemented system. They then went on to persuade management (particularly the managing director) of the benefits of packaged software and opted for a solution that would satisfy senior management concerns. Yet aside from this subtle manipulation, the professional, organizational and technical expertise of this project team was largely ignored by both senior management and IT consultants as they took primary responsibility for product negotiations. For senior management within the organization the decision to purchase was primarily seen as a financial one rather than a technical one. It was then assumed that once the decision to proceed had been made, that the “right” product would work seamlessly once implemented.

The end-users of the system had only marginal involvement in the project, despite a couple of them being part of the project team. Although Wybo (2007) argues that the vendor and buyer negotiate project team membership we illustrate how membership can be tokenistic and employed for instrumental reasons to reduce resistance and ensure user buy-in to the organizational change programme. According to academic literature and consultancy guides, the process of purchasing software packages is presented as a homogenous, unitary and rational procedure (Chau, 1994, 1995; Montazemi *et al.*, 1996; KPMG, 1998). Managers are seen to be the voice of the organisation and are positioned as being best placed to speak about system requirements. At T.Co end-users were formally consulted only three weeks before the planned implementation date, at which point both the product and the vendor had already been selected by the managing director. Prior to this they had been fed “promises” of how the technology would transform their working practices. Yet their involvement was deemed crucial when management became aware of the need to enrol end-users so that they would support the planned change process and minimise potential resistance. However, this involvement was merely symbolic, since

when end-users raised their concerns about the appropriateness of Goldmine and confidence levels in the vendor, their input was no longer required and the managing director regained responsibility for the negotiations. Following this, end-users expressed their resentment at having been asked for their opinion, only to have it ignored when it failed to align with the views of senior management, especially the managing director. Whilst genuine attempts at user involvement cannot guarantee success (Cavaye, 1995), its mismanagement has the potential to cause considerable difficulties.

The process of “salesmanship”, an activity driven primarily by the vendor and focussed on the interests of senior management, ultimately secured the selection and procurement of the packaged software product. In relation to the IT consultants we see how their selling skills are variously received by T.Co as two of them represented and presented the same product (Goldmine). Vendor D's presentation of non-configured software resulted in a lack of faith in the product on the part of senior management, whilst Vendor E's presentation of the configured software resulted in a complete change of opinion. Both parties sold licences for the same product and both vendors suggested how they could customise the software for the company's unique requirements, yet ultimately the “configured” presentation and the accompanying “sales pitch” was more persuasive. Management committed to the product because of the strong salesmanship skills of Vendor E. The skills they exhibited during the product demonstration resulted in a turnaround of opinion amongst senior management: there was a shift from cynicism to enthusiasm about the product; there was a substantial increase in the number of user licenses as the new system was extended from the research department to company-wide installation; there was an escalation in cost; and the implementation plan was reversed (beginning with sales and marketing instead of research). As Darr (2006) remarks, it is the application and display of socio-technical skills that often closes the deal. In this respect, the process of salesmanship was elevated above the software product that was being purchased.

6. Conclusion

For SME's considering the adoption and implementation of ICTs, the attraction of standardised packaged software products is understandable, especially in the light of rhetoric that classifies customised development as costly and time-consuming. Yet, little is known about this area, despite the growth in adoption of packages generally and the financial constraints over IS investments that many SMEs face. In this paper, we offer some insights with a case study that explored negotiations and decision-making processes at the local, organizational level, with particular consideration being paid to the role of IT consultants. Specifically, we paid attention to IT consultants who are allied with particular software products. Using a field study illustration we observed how the process of “salesmanship” unfolds over time, a process which is aimed primarily at convincing senior management of the benefit of a particular product that the IT consultant has commercial associations with in this case a CRM package. We showed the alignment of interests between the external IT consultants and the internal project team who leveraged salesmanship techniques in order to secure approval for the intended system. Additionally, they managed to convince senior management that the size and scope of the project should be expanded and the software product launched across all business functions. Given the focus was

on the need to obtain senior management approval, everyday user needs were effectively marginalised. Moreover, even when users attempted to aid the implementation process with the sharing of their detailed knowledge of the how the company worked, their assistance was disregarded. From the IT consultants' perspective, their primary objective was to keep senior management on board and satisfy their interests. Although it may be argued that the designing out of users might be a necessary part of systems development (consider Stewart and Williams' (2005) comments regarding applications such as internet browsers), if a product is too generic it can become far removed from the application area and thus unusable (Chiasson and Green, 2007). In the case of T.Co, the software did not become unusable; instead the company invested substantial resources over a number of years in order to ensure greater alignment between the generic functionality of the package and their localised working practices.

The adoption of information systems in large and small enterprises involves intangible costs with particular problems in trying to evaluate the benefits in relation to financial investment (Wilson and Howcroft, 2005). Packaged software appears to overcome, or at least significantly reduce, some of the challenges facing SMEs when considering the adoption and implementation of new technology. However, while the benefits for SMEs are difficult to refute, we urge a degree of caution. Although the purchase of packaged software appears to involve a one-off purchase decision, the study highlights that this process can be just as complex, messy and difficult as the literature on custom systems development informs us.

The use of consultants, although often deemed necessary, offers no guarantee of the effectiveness of IT implementation. Indeed, even if those in the organisation engage with consultants, as recommended by Gable (1991), this may result in greater benefit to consultants rather than those in the organisation. In the case of T.Co, the salesmanship activities performed early on in the project were persuasive; the managing director in particular was enrolled into the consultants' view of the world. What may appear to be a straightforward decision about the purchase of a technical artefact is multifaceted as different actors engage in the process of persuasion. As with custom systems development, the consumers of package products do not always have a clear understanding of the potential of the technology, how it maps on to their existing working practices, and how to use it in the most appropriate way. This can place SMEs, who often lack in-house IT expertise, in a vulnerable position with regard to IT consultants, whose priority is to focus on the possibilities, rather than the constraints and limitations of the system (Olsen and Saetre, 2007). Yet these consultants are working with a generic product, one that will have varying success depending on the context in which it is adopted. Too much customisation results in additional cost, which then begins to negate the benefits of the economies of scale of packaged products. A lack of expertise surrounding negotiations with these technical experts as to the suitability of software products may result in increasing expenditure and/or indeed an amended project plan. Arising from the process of salesmanship, we see that what may initially appear to be an affordable opportunity to participate in technology adoption could result in the implementation of a product at escalating cost that fails to map onto the specifics of specialised SMEs.

Despite our best intentions, there are a number of limitations to the paper. We undoubtedly lose something of the rich detail of the lived experience of technology

in presenting the case study as a linear narrative. Specifically, we have been unable to do justice to the complexity of the multifarious ways in which individual perceptions of the project were influenced and shaped by the opinions of others. Limitations aside, we hope that the insights detailed above will be of value to both IS researchers and practitioners. Hopefully, IS researchers will continue to direct attention towards understanding the social context of IS development and use and explain why seemingly straightforward processes are far more complex in reality. Practitioners, particularly those from within SMEs, should be made aware of the ways in which external parties may have a vested interest in steering projects in a particular direction, which may not necessarily align with their own interests. While the research reported here has focused upon the experiences of an SME, the prevalence and expansion of package software adoption and IT consultant usage in numerous organisations makes this an area worthy of further study.

Notes

1. Packaged software can take many forms and can be commercially and non-commercially licensed. In this study we are concerned with packages that cannot be used 'out of the box', those requiring extensive software configuration, and sometimes customization, to make them work in practice.
2. T.Co is a pseudonym used to protect the anonymity of the organisation.
3. Comprising the IT Manager, Operations Manager, Graduate Trainee, Research Manager and two academics
4. For example, he wanted to generate exception reports that would highlight where deadlines had not been met.
5. See Griffiths and Light (2007) for an account of making the client tracking system work at the same organisation.

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