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KREATIVE ACTS OF STRATEGY (KAOS)
A BUSINESS PLAN FOR A NEW TYPE OF SMALL CONSULTANCY

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Abstract

The proposed business is designed as a small Creative Brand Consulting and Collaborative Innovation firm that caters to Small-to-Medium sized (SME) consumer goods/services producing enterprises. It derives its innovative approach from a proprietary framework, which is implemented as an analysis tool to audit a client's business in a strategically new way. The ASP framework draws its pillars, Authenticity, Sustainability, and Product Functionality from the condensation of contemporary discourse about these topics. All of the pillar traits can be found in many of today's successful, global brands, which encourages to manifest them as a strategically applicable tool. The overall goal is hereby to reduce so-called negative externalities, that is, to reduce environmental/societal harm and to enhance outcomes' functional value to eventually create a more friendly but efficient co-living environment. It is believed that doing so increases a brands' intrinsic value through claiming a socially beneficial purpose apart from the purpose to grow infinitely. Apart from offering Management Consulting services for small businesses within the respective context, the proposed plan stipulates a risk diversification through the offer of additional business services. The innovative approach focuses on a lean business structure, which entails to form a "temporary" enterprise by collaborating with contractors only when needed, that is, project based. The proposed business aims to grow slowly and organically, as it is demanded by its values and its mission to successfully shape a consumption environment that both grows **and** produces positive societal outcomes.

M310: **Marketing**

Keywords: Branding; Entrepreneurship

Z100: Cultural Economics; Economic Sociology; Economic Anthropology

Keywords: Economic Sociology; Cultural Traits

Portuguese

O negócio proposto é designado como uma pequena consultoria criativa de marca e firma de inovação colaborativa que presta serviços a pequenas e médias empresas (PME) produtoras de bens consumíveis (englobando também, nesta categoria, bens perecíveis) e/ou serviços.

As estratégias inovadoras, na qual os serviços propostos neste negócio são baseados, derivam de um framework da empresa que é implementado como uma ferramenta de análise, de modo a auditar o negócio do cliente duma nova forma estratégica, na qual foi dada a definição de ASP framework. O ASP framework cria os seus pilares, Autenticidade, Sustentabilidade, e funcionalidade do Produto, como um resultado da condensação de discursos contemporâneos referentes aos mesmos. Todas as características dos pilares podem ser encontrados em inúmeras marcas globais de sucesso, pelo que encoraja a manifestá-las como uma estratégia aplicável.Tendo por base de aplicação o meio retratado precedentemente, o objetivo é reduzir as negatividades externas, ou seja, reduzir perigos ambientais e sociais de modo a aprimorar o valor funcional (resultados) com o intuito de criar um ambiente eficiente de coabitação societal e, eventualmente, mais amigável. A sua aplicação é espectável na medida que contribui para um incremento no valor intrínseco da marca, reivindicando uma proposta de benefício social e contrariando a proposta comum de crescimento infinito. Para além de oferecer consultoria de gestão de serviços para pequenas empresas (PE), englobadas no respetivo contexto, o plano proposto estipula uma diversificação de riscos através duma oferta adicional de serviços de negócios. Esta aproximação inovadora foca-se numa estrutura de aprendizagem do negócio, que consiste na formação de uma empresa temporária, colaborando com contratantes apenas quando preciso consoante o projeto. Em suma, o negócio proposto procura um crescimento vagaroso e orgânico, tal como é exigido através dos seus valores e missão para moldar, com sucesso, um ambiente de consumismo que não só cresce mas também contribui positivamente para resultados sociais.

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Executive Summary

The business plan designs KAOS (Kreative Acts of Strategy), a small Creative Brand Consulting and Collaborative Innovation firm that caters to Small-to-Medium (SME) consumer goods/services producing enterprises.

It draws its concept from the review of contemporary knowledge discourses and economical status quos. In the limelight of economical downturn and over-saturation of consumer goods markets, the paper proposes a new analytic lens for marketing consulting and auditing. Through the review of these domains, the paper introduces the ASP (Authenticity, Sustainability, Product/Service Functionality) framework. It is held that successful brands within the consumer goods/services market feature a unique, differing mix of traits that are summarized in the framework's ASP values. For that reason, these pillars are adopted to structure any client business in a similar, successful way. The framework represents a condensation of contemporary economic discourse into a norm-based approach to identify and utilize opportunities in these areas, to eventually implement them into a client's operational activities and organizational structure. The attempt to conceptualize the mentioned areas constitutes a preliminary draft; however, it shows a possible direction of capturing recent economic, societal and environmental developments within a practically applicable model. The model aims to change organizational structures beyond amendments in communicational efforts towards an integrated, holistic interlacement of the framework with a client brand's foundations. The guideline values hereby revolve around the idea that goods and services need to have character traits that reach beyond the reflection of status and possession. Instead, A, S and P help to enhance an offered product's / service's value through conceptualizing them as a authentically, environmentally, and functionally beneficial offer to society. The overall goal is to reduce so-called negative externalities, that is, to reduce environmental/societal harm and to enhance outcomes' functional value to eventually create a more friendly but efficient co-living environment. It is believed that doing so increases a brands' intrinsic value through claiming a socially beneficial purpose apart from the purpose to grow infinitely. The own business operations are shaped and influenced by the design of this framework. KAOS provides brand audit sessions to clients using both the ASP framework and traditional audit methods to identify opportunities for re-shaping the client's strategic direction. The business offers additional services that focus on the realization of the consulted strategies, such as Project management for creative projects, Video Direction, and Online/Offline Marketing Management. The client can also purchase these services separately at a fixed hourly rate. KAOS' strategic direction heads towards working within spheres of

cultural and experiential consumer experience goods & services. That is, it consult companies that aim to sell their goods & services to a consumer base that is savvy of Lifestyle choices, well connected, and sensitive to the issues that are digested in the ASP framework. With this approach, KAOS focuses on hitting the Zeitgeist and on co-shaping the way how goods/services are consumed. It bases on a new, lean company model that may hire contractors for specific projects rather than expanding with a fixed set of employees. The values derived from the ASP framework also shape the business' strategic behavior. The greatest goal is always to deliver services & products that are environmentally & socially favorable, functional, meaningful, and related to a credible heritage. The business aims to grow organically so that the aim of economical/social harm reduction can be met. KAOS largely embeds itself in offline and online networks to leverage and identify business opportunities in niche areas and less formalized industries. It harnesses this network power additionally through employing online inbound Marketing strategies, such as the maintenance of Social Media profiles, Blog content production, and SEO management. The presented business plan is tailored to the idea of realizing projects independently of the location; however, the business plan analysis relates to the location of initiation, Lisbon, Portugal.

Sumário Executivo (Português)

Os projetos do plano de negócios KAOS (Kreative Acts of Strategy), uma pequena consultoria criativa de marca e firma de inovação colaborativa que presta serviços a pequenas e médias empresas (PME) produtoras de bens consumíveis (englobando também, nesta categoria, bens perecíveis) e/ou serviços. O seu conceito é desenvolvido após uma análise de conhecimento contemporâneo e *status quos* económicos. No centro de atenção de diminuições económicas e sobressaturação do mercado de bens consumíveis, o projeto propõe uma nova lente analítica, um novo algoritmo, para consultoria de marketing e auditoria. Através de uma revisão desses domínios, é introduzido o *framework* ASP (Autenticidade, Sustentabilidade, funcionalidade do Produto/Serviço). É suposto que marcas de sucesso dentro do sector de bens consumíveis e serviços apresentem uma mistura única e diferente das características possíveis de visualizar no framework proposto. Deste modo, esses pilares são adotados para estruturar qualquer negócios de clientes duma forma idêntica, uma forma de sucesso. O *framework* representa a condensação de discursos económicos contemporâneos numa aproximação baseada em normas de modo a identificar e utilizar as oportunidades nessas áreas, com o intuito de, eventualmente, implementá-las numa atividade operacional de clientes e organizar a estrutura. Tal demonstra uma tentativa para conceptualizar as áreas mencionadas duma forma preliminar: contudo, demonstra uma direção possível de captura de desenvolvimentos recente a nível económico, societal e ambiental dentro de um modelo praticamente aplicável. O modelo aponta para uma mudança na estrutura organizacional para além das substituições em esforços comunicacionais na tentativa de uma integração, entrelaçamento holístico, entre o *framework* e as fundações de uma marca direcionada para clientes. Os valores das diretrizes são, por isso, examinadas em redor da ideia de que bens e serviços necessitam de ter traços característicos que alcançam além da reflexão de estatuto e possessão. Em vez disso, A, S e P ajudam na melhoria do valor de produto(s)/serviço(s) oferecidos após conceptualizá-los como autênticos, amigáveis ambientais e funcionalmente benéficos para a sociedade. O objetivo geral é reduzir as chamadas negatividade externas, ou seja, reduzir perigos ambientais/sociais e aprimorar os valores funcionais (resultados) com o intuito de criar um ambiente eficiente de coabitação societal e, eventualmente, mais amigável. A sua aplicação é espectável na medida que contribui para um incremento no valor intrínseco da marca, reivindicando uma proposta de benefício social e contrariando a proposta comum de crescimento infinito. As operações deste projeto de negócio são moduladas e influenciadas pelo design deste framework. KAOS providencia sessões de auditoria de marca para clientes usando tanto o ASP framework e métodos tradicionais de auditoria de modo a identificar oportunidades para reformular a direção estratégica do cliente.

A empresa oferece serviços adicionais focados na realização das estratégias consultadas, tais como gerenciamento de projetos para projetos criativos, direção de vídeo e online/offline gestão de marketing. O cliente pode, caso seja mais adequado no seu caso, adquirir serviços separadamente com uma taxa horária fixa. A direção estratégica do KAOS aponta para trabalhar dentro de esferas culturais e experienciais do consumidor dos bens e serviços. Ou seja, consulta empresas que procuram vender os seus bens e serviços a uma base de consumidores associados a algum *lifestyle*, bem conectados e sensíveis a problemas digeridos no *framework* ASP. Com esta abordagem, KAOS concentra-se em bater o *Zeitgeis*t e em co-moldar a maneira como os bens/serviços são consumidos. Baseia-se, assim, num novo modelo de empresa, que pode recorrer a contratantes para projetos específicos, opondo-se à comum expansão com um conjunto fixo de funcionários. Os valores derivados do framework ASP, adicionalmente, contribuem para moldar o comportamento estratégico do negócio. O maior objetivo é sempre fornecer serviços e produtos que sejam ambientalmente e socialmente favorável, funcionais, significativos e associados a uma herança credível.

A empresa pretende crescer organicamente de modo a que os objetivos de reduzir danos económicos/sociais possam ser satisfeitos. Em grande parte KAOS incorpora-se em redes online e offline para identificar e alavancar oportunidades de negócios nas áreas de nicho e indústrias menos formalizadas. Ele aproveita este poder da Network, adicionalmente, empregando estratégias de marketing on-line de entrada, tais como a manutenção de perfis de social media, produção de conteúdo de blogs e gerenciamento de SEO. O plano de actividades apresentado é adaptado para a idéia de realizar projetos independentemente da localização. Todavia, a análise de plano de negócios refere-se ao local de origem, Lisboa, Portugal.

Identification of the Promoter and the Innovative Proposal

The promoter is the sole initiator and ideator of the business plan and its underlying framework, Nina Wiegers. The innovative edge derives from three distinct areas. Firstly, the promote developed a proprietary analysis lens that can be used within the proposed core operations, Management Consulting. The framework roots in the knowledge domains presented below:

Contemporary Economy, Entrepreneurship & Workforce	**Knowledge Sourcing & Innovation Management**	**(Open) Innovation**	**Lifestyle culture**
"Green" Imperatives of entrepreneurship; Social/Environmental Sustainability as "growth hack" / **KAOS pillar;** Collaboration & Freelancing; Online business & Collaboration tools/practices; Consulting Culture	**Outsourcing**: BPO & ITO; Transformational Outsourcing for Innovation; R&D & Marketing: New Outsourcing Areas	Project Management; Networking; Structuring Creativity: Knowledge Brokering / Actor matching; Innovation Management; Demand & Supply of Creativity	Consumers: Context / Behavior / Segmentation; Authentic behavior and authentic brands; Ethical derivatives from authenticity as a core value; Learning from authenticity-rich subcultures: **Product Quality/Functionality as a KAOS Pillar** Authenticity **as a KAOS Pillar**

Table 1. Knowledge Domains in the KAOS project. Own Contribution.

The architecture of the KAOS project includes both its theoretical foundation as well as its business analysis within the respective domains. Secondly, the proposed consulting activities resemble traditional consulting strategies but are adaptable through the promoter's capacities to deliver additional services that help the client to actually implement the advised strategy. Thirdly, the company structure resembles a freelance business with the option to hire contractors when needed, e.g. for the realization of said advisory. Here, the company's lean structure and ability to utilize (in-)formal networks almost location-independently remders new opportunities and opens the stage for a globally interconnected type of business.

Part I: Literature Review

1 Contemporary Economy

1.1 Growth through Environmental / Social Sustainability

> *"Reworking sustainability into the foundation of historic business has proven to be a tight-rope-walk of a task — the challenge to balance new innovations and consumer demands against an already established and 'successful' business model consisting of thousands of employees and billions of dollars of infrastructure."* (Donnatelli, 2014: 4)

The quote hints at a new era in scholar economic thinking. In this context, one of the greatest attempts in finding a solution to macro-economic phenomena such as the 2008 global financial crisis, the 2015 Greek debt crisis, or even the entire depletion of natural resources is to change a groundwork rule of the current economical system. Here, scholars, capitalism critics and supporters alike aim to (re-) design the idea of "benefit", which represents our economical system's intrinsic function. "Benefitting" in this case means to **maximize** one's utility within a transaction, it means **to grow**.

The currency for a maximum of utility is of financial nature because of its universality– accumulated financial capital equals a "high life standard" or "freedom" (Sen, 1992). Simply put: Someone is happiest when he owns a lot of money. Nijaki (2013) points out that (aggregate) capital growth is the classical way to ensure "a better quality of life" (p. 253) in any economically operating community (e.g. cities) trough the concept of growth's ability to incentivize investments, job creation, and even elimination of inequity between citizens. However, within a globalized marketplace that shifted economical powers from West to (South-) East (Chin, 2015) and within an environmentally harmful dependency on natural resources, more recent schools of economical thought suggest that growth will (and must) take on a different form or be completely eliminated as a measurement to reach prosperity (Woodrow 2013; Fullerton, 2015; Yunus: 2010; Nijaki, ibid.: 254).

However, a utilitarian economic system faces several flaws:

1) Because of its universality, financial growth is equaled to the maximization of an economic actor's marginal utility (Nijaki, 2013). This assumption neglects that not every entity gains greatest "happiness" out of gaining more money since other factors (such as social embeddedness, good networks) may weigh in unmeasured (Sen, 1992).

2) The existence of natural and man-made inequalities, e.g. the distribution of natural resources in one country compared to another, biases the equality of opportunities for the greatest maximization of utility (Nijaki, 2013; Collier, 2010).

3) The assumption of the universal amount of utility received for the same amount of time/resources invested by different market participants is false– In fact, 4000$ earned do not bring the same utility everywhere on the world. Moreover, utility consists of more factors than GDP calculations (Schor, 2010; Sen, 1992; Yunus, 2010).

4) Economies' high dependency on natural resources. Natural resources (e.g. wood) represent the raw material of every processed/produced good. They are "gratis" commodities. For the sake of capital growth (through minimized cost), compensation (for example through new planting projects in return for forest erosion) is limited to near zero, exhausting the natural source. In consequence, capital growth will be eliminated through systemic collapse. The only way to preserve capital growth at the current speed would be to compensate for the commodities taken. Therefore, preserving natural resources and environmental harm reduction is a fully economical need, which is recently only met through higher taxes (Woodrow, 2013; Collier, 2010; Blakley & Ley, 2010).

The current operating mode produces **negative externalities** of consumption and production such as "effluents, waste, and other forms of ecological disorganization" (Pellow, 2002: 34, after Nijaki, 2013:274), with Schnaiberg's (2000) *treadmill of production* a characteristic growth problem. Unarguably, the here presented economists' thought on growth examines a new, irreversibly changed, highly complex global market/environment ecosystem.

The macro-theoretic assumptions on economists' most favorable determinant of wealth shows proof that our globalized environment leads **capital** growth to be an outdated measurement to reflect a sustainable maximization of utility, or equity. At the same time, utilitarianism's relevance decreases through essential flaws in theory design. On the contrary, using growth for maximizing "happiness" is still what scholars consider necessary for sustainable, functional equity creation– Only, what **is** maximizing utility, if not infinite growth of capital?

It has been outlined that a fundamental reason for vast environmental and social dysbalances seems to be the current strive for unlimited financial growth, which simultaneously represents a measurement of wealth. Scholars agree, however, that maximization of utility for each individual for a great sum happiness remains favorable.

For instance, Blakley & Ley (2010) design a scenario in which growth remains important but changes its mode: Through investment in innovation and corporate networking, the maximization of utility happens through leaving the market's participants with the flexibility to adjust to rapid changes of demand. Fullerton (2015) conceptualizes the "Regenerative

Economy" as a whole, leaning on his theoretical base of scholars like Jacobs' (2000) thesis that economic systems behave well like (natural) ones. In consequence, Fullerton (ibid.) suggests to re-think growth as a means to collaboratively build a "flow network" (p.33) that eliminates "perpetual, unlimited growth" (p.3) for the sake of systemic health. Porter (2011) designs a shared value scenario eliminating trade-offs of Nijaki (2013) follows in consensus with Altschuler& Luberhoff (2003) on a hands-on, value-free notion of growth as a means to generate capital to achieve freedom as "everyone in the community can pursue his or her own values better [with money]" (Nijaki, ibid., p.257). That in conclusion means that at this historical point, it may be possible to redefine the way economies strive for a more ethically and environmentally sustainable profit growth design.
Our economical system powers the experience economy (Gilmore & Pine, 1999), in which any newly emerging product type is commoditized (Sassatelli, 2007: 10; Ritzer, 1983) and in which the utility derived from purchased "experiences" is authenticity and meaning (Mermiri, 2011). The relation of growth to product and service creation derives from the created items' existential reason, namely the maximization of financial profit [1]. The success of an item of (in-)tangible nature is decided by the consumer. Price, location and quality are hard-fact determinants of a consumers' decision towards an item, with the price determining the tradeoff between perceived quality and sacrifice (Monroe &Krishnan, 1985). Other influential traits such as consumer segment type or product/service complexity are subordinate (Mermiri, 2011). Therefore, consumers may not care about existential reason of an item/service as long as it serves its purpose, especially when consuming items that may not intrinsically harm anyone else (such as digital services, simple goods, etc). Moreover, the discussed ethical-normative claims to change capitalism mostly disregard industrial realities– As much as breaking the cycle of producing and designing for **growth** is desirable, the alternative approaches may well corrupt entire production cycles.

When addressing these issues, the concept of corporate sustainability reaches beyond business continuity– it represents a dynamic concept within a highly volatile environment that prioritizes the fulfillment of stakeholder expectations (Asif, 2011) with the 'triple bottom line' as systematic approach to include environmental/social efforts for risk minimization (ibid: 3). Pogutz et al. (2011) name sustainable ways as to produce and deliver goods/services

[1] Fullerton (2015: 18): „When it comes to sustainability, our leading business schools are primarily engaged in [...] the mantra "Businesses can become more profitable through more intelligent operating practices that reduce

honorable but hard to implement– Arguing in the same way like Donnatelli (2010) in this section's entry quote. The authors as well as Yunus (2010) hold that only **large** corporations may be able to implement "green" strategies through their wider scope and ability to finance potential growth risks through dedicating their major business focus on standard production. Even though efficient, clean environmental/social management may technically be realizable, "[M]arket growth rates may offset the environmental efficiency gains the firm is obtaining: when sales grow rapidly, improvements in environmental efficiency need to occur at a rate faster than market growth" to avoid competitiveness lags (Pogutz et al., 2011: 13). This applies intensively for emerging markets in developing countries. Other limitations are

- The lack of governmental trustworthiness to implement (and sanction) socially/environmentally sustainable standards (e.g. Germany's abandonment of nuclear power with simultaneous purchase from neighboring countries),
- No threshold measurement of what and who is sustainable (Nijaki, 2013)
- No relevance to producing entities (mindset; "consumers don't care")
- No infrastructural oversight on "sustainable" ways to act.

Even though it seems that the current environment may not fundamentally turn away from growth, approaches to eliminate the mentioned negative externalities do exist (examples):

1) Re-conceptualization of business practices such as decoupling material throughput from growth measurement (e.g. Fullerton, 2015) or the implementation of a business cycle in which each cycle stage creates value instead of contra-balancing profit-corrupting constraints (Porter & Kramer, 2011).
2) Hybrid examples of growth maintenance and ethical/socially favorable behavior. On the purely goods-producing side, brand examples such as the Body Shop, Natura or Patagonia adopted "closed-loop factories, re-designed products, adopted innovative eco-friendly materials, and radically changed their business model in order to protect ecosystems and biodiversity" (Pogutz et. al. 2013: 13). On the service side, the Grameen Group (Yunus, 2010) exemplifies how Microfinancing turns financially and socially beneficial for all stakeholders, and thus designing a shared value system according to Porter & Kramer (2011). An extraordinary example is the California State case (Grose, 2013) that achieved economic gains through the implementation of environmental goals.
3) Consumer-centric approaches that trace and verify consumers' changing expectations towards ethical & green consumption. BBMG (2014) characterizes the large

"Aspirational Consumer" segment and shows that despite their love for consumption, consumers expect companies to "act in best interest for society" (BBMG, 2014: 5) and produce sustainably .

4) Implementation of multi-nationally scoped programs such as the UN's (2015) UNEP programme as well as tightening governmental policies (such as Carbon Cap Trade legislations; UNFCCC, 2015).

These suggestions establish practical insights of implementation policies that increase the permeability of the only "bottom line [...] that ultimately matters in the capitalist system" (Yunus, 2010: 309). Such guidelines are often hard to implement, not least because of poor operationalization (if at all) or because of bureaucratization (Pogutz et al., 2013). It has been shown that adopting a critical view on the current status quo in terms of setting up new projects or business models is indeed viable although it can only exist when not the whole value chain is changed for a sustainability approach.

1.2 Knowledge Sourcing

The fast-paced consumption environment requires brands with a product pallet to source knowledge outside of their organization for marketing innovation, which can be characterized as an intra-organizational (not technological) aim for change. Product design, packaging, placement, promotion and pricing account for the traditional areas in which Marketing Innovation takes place (Schubert, 2010). Lately, these definitions happen in a more interwoven, internal and cross-disciplinary way. Blurred through newly emergent business and production models, both consumer goods industries and their Marketing Consulting/Branding satellite industries experience a whole re-conceptualization of innovation locus. Although traditionally with high failure rates (Ulwick, 2005), innovation remains vital to brands' competitive advantage (Mieres et al. 2012: 404). Thus, successful innovation processes may be a Marketing means in the scope of raising the actual utility and acceptance for purchasers (Holak & Lehmann, 1988: 60). The increasing shift from intra- to inter-organizational knowledge sourcing for Marketing purposes, from new product ideation to communications, becomes more and more challenging due to the process complexity (Chen, 2009). On the other hand, the upstream organizational flexibility in deciding for out-of-house knowledge acquisition may increase an organization's innovativeness. The reasons for knowledge sourcing vary by industry and organization. The rapid development of information technology in recent years simultaneously facilitated channels to source knowledge. In this respect, virtually anything that serves as storage for information may be

relevant to a company's quest to solve a problem[2]. Knowledge can be divided into **tacit** (for example skills; talent; a *set* of knowledge) and **explicit** information streams that "can be easily communicated [...] through language, text, manuals, codes" (Huggins et. al., 2010: 12). Traditionally, acquiring explicit/tacit knowledge from external sources has been vital to any company's existence and competitiveness (comp. Huggins et. al., 2010; Bei et. Al. 2008).
Huggins et al. (2010) outline that this type of search for expertise outbound happens in both service sector firms, which mostly look for *professional and intelligence* information, and manufacturing firms alike, which incline to look for *scientific knowledge*. Bonesso et al. (2010:1) show that the dispersed character of knowledge expertise lead companies to retrieve specialized knowledge from their existing **network**. Networks are particularly vital for understanding that organizational decisions are mostly made in favor of acteurs residing within the boundaries of an established network known to the organization ((Poirson, 2009). In this respect, the trend for interdisciplinary, collaborative value creation for a client strongly bases on the ability of acquiring projects through exploiting and broadening the professional network of both client companies and creative knowledge suppliers (Rajala et al., 2012).

1.2.1 Outsourcing

In this context, the concept of **Outsourcing** represents a form of a two-sided knowledge transfer. Mohr, Sengupta, & Slater (2011) define outsourcing as a process that encompasses a company hiring another firm ("the service provider", ibid.: 42) to execute a particular, not-core-process function by order of the remitting firm. The exact terms are laid-out in a contract. It is widely recognized that exploiting the value chain nowadays surpasses simple profitability enhancements in Information Technology (IT) and general Business Processes (BP) outsourcing. On of those surpass areas is strategical procurement is Research & Development (R&D) (Mohr et. al. 2011). Whereas R&D traditionally focused on technological innovation, the blurred boundaries between different innovation types and organizations' strategic flexibility (Rajala et al., 2012) inter-twine new product/service developments and the products' marketing. One example is the emerging trend for "business model innovation", which marks organizations' innovation considerations from a multi-angular perspective (Rajala et al., ibid.). Beyond cost saving and internal value creation, Mohr et. al (ibid.) suggest the term of Transformational Outsourcing (TO), hinting at a coaxial,

[2]Huggins (2010) names suppliers of equipment, materials, services or software; clients or customers; competitors or other same-industry companies; consultancies; commercial labs/private R&D institutes; higher education institutes (e.g. universities); conferences/trade fairs; the government/ public research institutes; scientific journals/technical publications; technical, industry or service standards as sources of knowledge and skill

collaborative interrelation of service remitter and provider. The term shows that for potential clients, embracing Transformational Outsourcing requires “major changes in organization structure and operations, and [...] extensive trust and operational linkages between client and service provider“ (ibid.: 42). This “organizational unlearning” (Mieres, 2012: 404), in turn, opens the stage for a new type of businesses– The complex process calls for external collaboration mediators helping to “unlearn” and, more importantly, to navigate between external sources of knowledge. A further explanation of Transformational Outsourcing conditions and predispositions can be found in Appendix 1 “Transformational Outsourcing”.

1.2.2 Open Innovation

In this respect, the term *Open Innovation* can be described as a form of Transformational Outsourcing. Promising “a more collaborative and networked approach to innovation and highlight[ing] the strategic benefits of transferring ideas, technology, knowledge and intellectual property (IP) between firms“ (Holzmann et. al., 2014: p.2), Open Innovation welcomes the idea of knowledge sourcing not only for common outsourcing areas but respectively for the creative, unstructured process of ideation for new products and services (Chesborough, 2009). Whereas Open Innovation as a full concept is still in its beginnings for organizations (NESTA, 2010), limited forms such as *Partnerships* or *Alliances* between procurement providers and seekers do exist. Both approaches source knowledge and skill sets from a human external entity, which can be consumers, experts, users, professional clusters, agencies or single professionals (Tijmen, 2010Huggins et. al., 2010, Ulwick; 2005). It is important to note that TO and Open Innovation cater to a **specific set** of unmet need, outlining that less flexible knowledge sourcing types may be more adequate upon analysis:

> *“The closed innovation model emphasizes the benefits of being first to market. In the closed approach, client-centric innovations are designed to meet explicit current or future market needs. Conversely, prior research suggests that, within the open innovation approach, superior business models are considered better than the aim to enter the market first.”* Rajala et al., 2012: 1369

There is a vast amount of yet unsteadily solved problems for companies in opening up their organization, which is specifically structured in a logical and, more importantly, unique way. These problems are especially important when building a consulting firm. Thus, dissolving or (at least) mitigating the limitations of constructing an “innovation brokering” (Fleming &

Waguespack, 2007, p. 165) freelance business must be a focal point in the business plan composition. The extent to which the problems are absorbed and embedded into KAOS' core operations determine some its most critical success factors.

Some of the main issues of *Open Innovation* or *Transformational Outsourcing* are mentioned in the following abstract. The practical solution to each of those terms will explicitly be addressed in this work's Part II: Business Plan.

1. **Cost.** Researching for new opportunities, comparing different options / offers, arranging meetings, acquiring literature, setting up infrastructure, prototyping, market introduction, staff training require time (=cost) and preliminary investments that have a risk of being sunk cost in case of market failure. Especially brands with a small amount of offerings suffer from cost disadvantages, causing them to cut out professional mediators such as innovation agencies (Huggins et al. 2010). Ulwick (2005) holds that only 18% of enterprise's marketing innovation efforts pass the initial investment cost. One important sub-category here is the problematic of the inadequacy of innovation analysis tools **during** the process itself.
2. **Source Quality and Accountability**. Because the market for knowledge is dispersed and competitive (Yavar, 2015) the selection of the "right" skill/knowledge source without external curators can be extremely time-consuming (NESTA, 2010; Holzmann et al. 2012).
3. **Boundaries of IP ownership**. On one side, organizations fear the loss of their intellectual property (IP) through collaborating closely with others, which marks their competitive advantage. Hyde (2010) observes an increasing violation of IP rights through digitization, which allows for secret copying, and rising the risk of the knowledge provider accountability for his project in case of market failure. A major problem is that "IP in works is intangible and difficult to control" (Scassa, 2011: 342), especially for the other side, the knowledge suppliers: Creative solutions to a problem constitute own IP, which is often devalued through competitive pitching, e.g. in open briefing challenges (Australian Government, IP Australia, 2015). On the other hand, Simoes-Brown (2015) accords with Hyde (2010) that IP with all its boundaries needs to remain republican estate, the "intangible equivalent of the tangible *res publicae* (roads, bridges, harbours) or of the Republic itself" (Hyde, 2010: 215), making it necessary to facilitate knowledge sourcing for all entities regardless of economic power with simultaneous IP protection.

4. **Vulnerability** of exchanged information. The leakage of mission critical information poses a major threat to any company's competitiveness (Mohr et al., 2011; Khidzir 2013). That is, the Information Security Risk (ISR) represents a major threat, with the Threat Risks Factor (TRF) as a measurement to assess this risk multidimensionally. The factor is comprised of project's characteristics such as type, number of service providers, outsourcing strategy (off-/near-/inshore), temporality (1 yr...5yrs), team size, and project duration. Upon measurement of those items the risk factor is either high, medium or low. Additionally, multidisciplinary innovation means a higher risk which is almost incalculable due to the involved disciplines' asychrone or unmatching ways of value creation (Blackwell et. al. 2010).
5. **Process structure**. If the function of the outsourced skill in question is mission critical (comp. above) but there are no cost-efficiencies through outsourcing, companies will develop their proprietary know-how for competitive advantage. For example, Apple's Design department is in-house because it is mission critical to success due to the brand's positioning as design product company. Apple's technology development, on the other hand, is outsourced because of its economies of scale (Mohr et. al. 2011). However it is notable that a process like Design is a creative one, meaning that it involves greater uncertainties about measurements and outcomes
6. **Temporality, Locality & Culture.** Set time spans may not correspond within the necessary innovation processes (the project management dilemma), causing decrease of quality and cost increase. Cultural differences between involved entities may limit the desired output. That is, traditional company culture (Bonesso et. al. 2014; Smith, 2010) renders current offerings to source knowledge/skill freely from platforms such as eLance.com or O-Desk.com somewhat useless because of organizations' need for face-to-face interaction, locality and, most important, accountability of the knowledge source (Huggins et. al. 2010, Yawar, 2015; Singh, 2014)

2 Beyond Consulting: Transition to collaboration and flexible contracting

"*[A] traditional agency is usually two steps behind true innovation. [...] Any marketing manager I've presented campaigns to throughout my career will rather choose constant 3% sales growth year-on-year than the possibility of 30% growth if there's also chance of market loss. So what does the future hold? A completely new business model [...]. One that relies on only the two pieces that deliver true strategic value to clients: the relationship owners and the vision shapers."* Amaral (2013), On why the agency business model must die.

It is observable that consumer goods/services producing organizations increasingly shift to a more flexible way of knowledge and skill acquisition outside of their own boundaries. The accretive focus on their outer environment leads organizations to innovate intra-organizationally for unmet customers' needs instead of simply procuring standard solutions by all means. That in turn causes innovation efforts to progressively happen in newly emerging modes, requiring structural advisory about both change agencies and original, new solutions alike. One of the reasons for the recent business permeability in terms of knowledge sourcing is the increasing work force flexibility. For one, within cultural paradigms to choose a meaningful, well-fitting profession (Mettler A. , 2012), the EU (2015) aims to encourage its citizens to turn into active entrepreneurs. The EU's efforts for a single market for global competitiveness harnesses its 23Million Small-and-Medium-sized Enterprises (SMEs), responsible for 85 % of recent job net growth in 2012, at the forefront of its economic power. Freelancing and Micro-businesses (<10 employees) hereby represent more than 80% of SMEs (Single Market Entrepreneurs, 2012). With ongoing administrative facilitation for SMEs within the EU internal market (e.g. double taxation agreements, simplification of employment processes, building a boundary-less e-market, decreasing public tender application cost, IP protection policies), the given priority to SMEs derives from their never-seen ability to adapt, innovate and bring in knowledge at much faster speed than large, hierarchically structured agencies. Second, the actual advantage, however, lays in the fact that the fragmented-expertise SMEs (e.g. Freelancers; Tech- Start-Ups) are able to source complimentary skill sets from collaboration processes with others and therefore create powerful, flexible synergies (Mettler & Williams, 2011). Here, web-powered technological advancements for seamlessly integrated collaboration such as cloud storages, whiteboard applications, or online payroll/billing options exploded in the last 3 years (Maqtoob, 2015; Appendix 2: Business Tools & Saas Services). In consequence, organizations seeking for knowledge/skill in a transformational manner benefit from this development. As they no longer have to hire needed talent long-term, they will instead be able to hire fitting candidates for project work and time-limited collaboration. When collaborating, SMEs are then capable to reach ideal team member ratios and optimal team collaboration requirements after (Katzenback & Smith, 1993):

- A Small number of participants
- Complementary skills
- Common Purpose and Performance Goals

- Mutual Accountability

Companies in both service and production sector source external knowledge for Marketing innovation purposes. The outlined relationship between General Knowledge Sourcing, Outsourcing and Open Innovation shows reflects the recent changes within the business services industry: On one hand, organizations' need to constantly ideate and innovate drives them to open their innovation processes, which they perceive with a great amount of pitfalls due to the OI approaches' different processes. As indicated, sourcing the right knowledge/skill for a desired solution for competitiveness is vital to organizations but especially for smaller brands unaffordable by traditional means. Existing solvers (intermediaries) of brands' open innovation problems such as creative agencies or strategy consultancies do co-create with clients' costumers (Tijmen, 2010) as a knowledge source within open innovation contexts. However, they **fail** to adequately address the increasing number of local, professional knowledge and skill experts (on a freelance basis) for collaboration purposes. Alongside the outlined characteristics of Open Innovation practices, a non-long-term contracted professional as a skill /knowledge source or mediator thus seems to be a viable consideration. The higher level of professionalization within the knowledge sourcing process generates cost advantages through timeliness, cultural alignment and a lesser extent of training for adequacy.

2.1 <u>(Management) Consulting in Europe: No standards?</u>

There are a vast number of different approaches aiming to define the activity external knowledge providers for companies, depending on the context such as industry type, organization type & size, and specific problem. Before, it has been outlined that in the context of marketing procurement in the widest sense, the new generation of providers and seekers may be characterized as Transformational Outsourcing partners. In regards to the effect that Marketing service providers advertise a specific skillset as knowledge, da Costa et al. (2014: 42) suggest to characterize this specific activity as management consulting (MC), which itself underlies paradox definitions. The authors (ibid.) mention a wide definition of MC as "[...] a professional service, capitalized on key features of professional business services to solve specific problems and complex structures of their clients (after Fincham& Clark, 2002; Werr & Styhre, 2002).

The consulting industry in Europe does not follow a unified standard in knowledge provision, which explains the countless variety in strategic approaches to solve a specific problem. These strategic services, however, unify by the original goal to bring added value, optimize processes, profitability and earnings. Simultaneously, the providers are now supposed to exceed advisory and to act as a change agent within the seeker organization (da Costa et al. 2014; Ishchenko, 2011). For the domain of marketing consulting and branding, it is to mention that not only classic consultancies but also "creative" companies (such as ad- or branding agencies), which traditionally supply clients with the visual Marketing communications side of strategic recommendations[3], are now competing for similar market niches (O'Kane, 2013). They underlie a common problematic: The dissolution of boundaries in a highly competitive market of offer characterization and demand segmentation (Ishchenko, 2011). In that matter, the "any strategy works" approach, the consultancies' and agencies' proprietary analysis methods (such as Bloom Consulting's Digital Demand© method, 2015) overlapping expertise fields and offer namings[4] render a difficult market environment. For one, potential clients' choice for a particular consultant or branding-related service becomes confusing because of inseparable offers for a structural business problem that is in fact poorly understood by the prospect client. Second, the merge of consultancy services with "traditional" branding domains produces categorical indeterminacies, causing businesses to misfit in any of both realms. In seeking to accommodate the vastly more complex process of branding, the sign of an ongoing dissolution of boundaries expresses itself in naming own services such as Brand Energizing, Brand Drive (Brandia Central, 2015) or Brand Culturing (Normajean, 2015).

The bottom line argument refers to the fact that the current structural conditions suggest that new, **non-categorized type of business models** within the business services industry become a new standard. Hybrid businesses, which seek to *consukt* on an organizational level and then, consecutively, offer to collaboratively implement the branding recommendations, seem to address sourcing seekers' need for convenience. In this line of argument, Winsor (2013) points out that both consultant and creative agencies, which deliver a (creative) problem solution in form of products or services for clients, have to change towards a more open, flexible work environment to stay competitive. This comes especially in context of the emergence of globalized, highly competitive freelance platforms such as PeoplePerHour,

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[3] In practice, branding is often solely seen as the visual end to which brands are modified– with advertising agencies representing the go-to destination through their expertise in visual communications. However, as discussed before, branding as a mere visual adjustment is a definition shortcoming of the actual branding process, which unfolds its potential through modification of strategies up to a deeply organizational level.
[4] Ishchenko (2011:15): "For instance, Human Resources Management can be called Talent management, nevertheless, de facto be the same service".

Upwork, Freelancer.pt, or Zaask[5]. Here, some of the most important changes demand for transparency, readiness to adapt to new demands rapidly; openness to ideas, especially from the outside and from other disciplines; and new compensation models.

As an example, in Portugal, a brand consulting business can be filed under the Portuguese classification of the following economic activities:

1) Activities of consultancy for the businesses and management (CAE REV.3.70220 / Group 5; INE, 2015)
2) Market studies (CAE REV.3.73200, ibid. 2015), enacting the planning, organization, information and marketing characteristics necessary to belong to this category.
3) Design Consultancy (CAE REV.3.74100)
4) Advertising Agency (CAE REV.3.73110)
5) Production of artistic activities in the domain of organization, promotion and and allocation of artistic skills/knowledge for the production and presentation of spectacles (CAE REV.3.900).

The example shows the paradox of the multiple of options and complexities related to the industry with a simultaneous need to "put a name on it" and deliver understandable services of convenient value to the source seeker.

3 Authenticity: A central concept shaping consumption culture

3.1 What is authenticity? Definitions

"Jim and I [Gilmore & Pine] realized that whenever experiences come to the fore, issues of authenticity follow closely behind. [...] People no longer accept the fake from the phony, the want the real from the genuine. [...] Whenever you see or read of such 'three-word offerings"—free-range chicken, dolphin-safe tuna, conflict-free diamonds– you can be sure [it means] appealing directly to authenticity." – Gilmore & Pine (2008)

Questioning a good's/ service's / experience's *authenticity* plays a major role in consumer decision making and corporation branding, especially within subcultural and traditional social contexts (Molleda, 2009; AM Azure Consulting, 2012). Across research domains, the concept comprises a notion that seems almost mystical in the context of the digital copy age: What is authentic, what is real if everything can be duplicated? Something that is "not a copy [or]

[5] Upwork.com; Freelancer.pt Zaask.pt, Peopleperhour.com

possessing original or inherent authority" (Oxford Dictionary, 2015); something sincere, natural, innocent, and original (Napoli, 2013, p. 1091); "a correspondence between what a person says and what he or she truly feels" (Cobb, 2014, p.2). Throughout scholar and cultural disciplines, authenticity is characterized in manifold ways and always relates to corresponding research hypotheses, turning it into a seemingly infertile ground to build theory on (Molleda & Roberts, 2008). The definitions' only mutual reference ground seems to be the "dichotomy between inside and outside" (Straub, 2013, p. 14). That is, alongside the tendency to be "[a] socially or personally constructed [...] **behavior** experienced by an individual [...] that is self-authored [...] and self-determined (Napoli, 2013, p. 1092), all studied concepts of authenticity indeed relate to either an individual's intrapersonal ideas of physical/psychological nature or to a perceived interpersonal, collective sense of creating relationships for identification and construction of a social reality (Wang, 1999). Citing Camilleri (2008), Molleda (2009) explains other notions such as iconic, original indexical, staged, or symbolic authenticity. Gilmore & Pine (2008) add exceptional, referential, influential, and natural authenticity. Between those "seemingly contradictory"(Kolar & Zabkar, 2009, p. 652) definitions, not only Straub's (2013) dichotomization helps to navigate. It is also the original quest for grasping its influence on agencies of reality construction within the cultural context of digitization, copying, and intellectual property discourses. The abundance of characterizations may be summarized as a failed attempt to fully utilize the concept– due to an intuitive, culturally inherited observation: The authenticity paradox. Cobb's (2012) describes the paradox as a "democratization of culture as enabled by digitization" (ibid., p. 3) with a simultaneous, upstream desire for consuming original, *real* products (We want to consume whatever we like to, at best gratis, **but** we want our breakfast eggs to be produced by a small, healthy group of hens living on a green farm and not on an industrial hallway). Gilmore & Pine's (2008) paradox description in short means that "individuals long for authenticity but struggle with how to gain it. Businesses long to fulfil [sic] that need by selling authenticity, but cannot really provide it" (AM Azure Consulting, 2012: 12). Straub (2014) wrote a whole book about recent authenticity paradoxes found in nearly all scholar disciplines. All of this renders a more contemporary definition of authenticity as an omnipresent "evaluative aesthetic property" (ibid. p.4; Kolar & Zabkar, 2009, p. 655). What strikes is that now, authenticity's rise as a means to **decide** on *what's worth to be consumed* seems to be deeply rooted in the corruption of a baseline prerequisite for the authentic item, namely its "[unique] presence in time and space" (Benjamin, 1969, after Cobb, 2014). Now that digitization dissolves this prerequisite (YouTube videos of fashion hauls are considered authentic by its audience; artificial creation is “real” within frame of reference), the concept’s extensive scholar citation and its manifold expressions in consumption culture[6] manifest its power to shape contemporary economy. On the consumers’ side, AM Azure Consulting (2012) assigns the construct’s popularity to the society’s low trust and cynicism in corporate decisions, an increasing ability for information access. Moreover, a striking reason for authenticity’s popularity is the individuals’ intensified search for identity in a fragmented world, choosing (or rejecting) products upon their authenticity as an act of self-positioning (Arnould & Price, 2000; Napoli 2013). As a working term, authenticity can handily be described as the consistency between appearance and reality: *Keeping it real* in the age of authenticity (Taylor 2007; Ferrara 1998).

[6] Cobb (2014, p.8): “That much of [authencity] t is an artifice constructed by marketing geniuses or starving artists desperate to make a buck seems to matter less and less. We may not understand all the modes of production and distribution behind our food, our art, or our culture, but we want it to be *real*. How will we know what that is? We will simply have to believe that we will know it when we see it“. Contemporary examples are e.g. the rise of the lifestyle sports industry, the need for experiential marketing, cultural tourism, the trend of vinyl collection, local craft beers, or the success of 50 shades of Grey.

3.2 The Authentic Brand

Authenticity draws its relevance not only from attention of scholar or an individual's attention. Any existing market represents the materialization interface from desires and needs into goods and services. The interface characterizes markets as projection canvasses for ideas on crafting authenticity by the involved providers to reach its target audience. However, drawing from the above-stated paradoxes, the practice relates more to an 'authenticity faking' than 'authenticity making': "Companies can "acquire an aura of authenticity through [...] commitment to traditions, a passion for craft and production excellence and the public disavowal of the role of modern industrial attributes and commercial motivations" (Napoli, 2013: 1008, after Beverland, 2005). An example is the brand storytelling case in luxury wines of Beverland (2005), where heritage, tradition, and references to a country-side location are traits to build a successful brand (Napoli, 2013). The problematic originates from extreme cases where the desired authenticity is seen by consumers as no more than a marketing lie, arguably in line with today's standard to by brands at the cheapest price. In addition, items' decreasing characteristic (and importancy) to exist uniquely within time and space (Benjamin, 1935) allows brands to configure authenticity however they want as long as they tell a compelling story and create an experience (Gilmore & Pine 1999). On the contrary, a number of brands prove that long-term success, besides the ethical rightness of "being true" instead of "lying", needs to base on authenticity in its original sense. Turning into an icon with brand status and equity like Nike, Corona, or Harley Davidson (Holt, 2004), which almost star as cultural heritage, can be seen as an overall goal in reaching today's consumers. Napoli (2013) maps brand authenticity through identified dimensions, each of which contains more than 20 sub-items denoting the concept with brand heritage, quality commitment, sincerity, cultural symbolism and nostalgia being the most important. AM Azure Consulting (2012) highlight that an iconizing process through authenticity can only be reached if intra-organizational structures align with the notion the organization wants its target groups to perceive. In ages

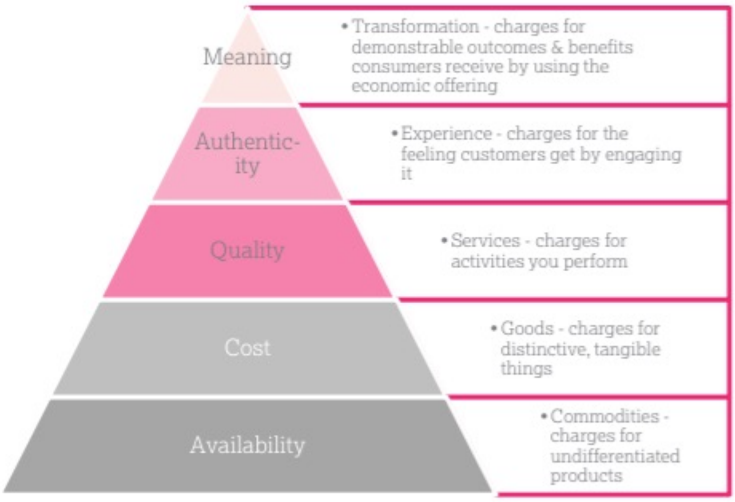

Figure 1. Hierarchy of Consumer Sensibilities. Adapted from Mermiri (2011).

where the best-selling items are experiences (Gilmore & Pine, 2008), and "sixty-year-old people can go to the South Pole or North Pole or to Everest Base Camp" (Breivik, 2010, p. 263), organizations need to address their past and heritage, their current positioning, their future destinations and executive practices in the light of credible authenticity (AM Azure Consulting, 2012, p. 18). Fleishman & Hillard (2014) as well as Robbins et al. (2009) state that brands are about experiences, which can ultimately be successfully designed if the brand's authenticity is given. Fleishman & Hillard (ibid.:2) conceptualize the "Authenticity Gap" as an organization's struggle to combine its branding ("What you say and how you behave") and its reputation ("What others say about you based on shared perceptions"). They employ expert consumers across industries to highlight brand's underachievement in authentically meet the consumers' expectations. Fig. 1 shows Mermiri's (2011) hierarchy of consumer sensibilities, with similarities to the laddered product qualities attribution of Reynolds& Gutman (1998). In the hierarchy, Authenticity shows to be the second most progressive consumer sensibility. In accordance with Gilmore & Pine's (2008) work on the ongoing commoditization of market offerings (the progression of value), Fig.1 additionally highlights business imperatives deriving from the different stages of sensibilities. It can be seen that the "Experience Economy" with its latest edition, the "Transformation Economy", base on authenticity and "meaning" respectively. Mermiri (2011) holds that transforming any kind of goods into "demonstrable outcomes" (Fig. 1) and therefore creating "Meaning", which represents one of the characteristics of contemporary consumers (BBMG 2014). Upon respect to the reviewed literature, however, it seems that only brand authenticity enables consumers to attach meaningful attributes to a brand through trusting, believing, and at best actively engaging within a brand's community.

3.3 Learning from Authentic Lifestyles: Functional consumption

"The problematic and complex relationship between lifestyle sports and commercialization, as revealed in various studies, has resulted in a struggle of participants to remain part of an exclusive and authentic subculture on the one hand, and to have access to the big money and to possibilities for professionalisation on the other hand" (p.31).

The concept of lifestyle has been a vital ground of analysis for Marketers (Zhu et al., 2010). When examining authenticity within consumption culture, the discourse is framed by the remarkably rich information about individuals' (sub-) cultural identification and self-authentication through her/his AIOs, media preferences, life plans and overall leisure time choices– their **Lifestyle** (Woermann, 2012). Brands' efforts to reach their targets through communication addressing their lifestyle choices therefore stretch into socio-cultural realms. The concept fits especially for Generation Y consumers, whose sensitivity to authenticity, rightly addressed, may increase a brand's return on investment (Bennett & Lachowetz, 2005). More often than not, lifestyle manifests itself in certain products and services consumed (Bennett & Lachowetz, 2005). It appears that when using Lifestyle as a segmentation lens, **expensive** product/service purchases seem to be legitimized through their **functional** purpose. In fact, Zhu et al. (2009) outline that different Lifestyle consumer clusters choose to purchase goods upon varied ratios of **hedonic vs. functional product** attributes. Carr (2005) explains that the Lifestyle product lines of the brand Adidas (e.g. freeskiing, park snowboarding) surprisingly retain higher performance/functional attributes although they feature strong fashion/style attributes simultaneously.

To sum up, it seems that lifestyle contexts ***produce*** authentic artifacts in which consumption plays at best a minor role while at the same time, it experiences unseen economical upswings. On one side, a certain lifestyle acts as an antagonist to our current consumption world as described by Ritzer (1983) as McDonaldization (Calculated, commoditized, and technocratic) through offering flexibility, unpredictability, risk and self-control. On the other hand, even though "real" authenticity becomes increasingly corrupted through its popularity (Sassatelli, 2007), products/services that help to **produce** authenticity (beyond being *real*), thus serving as a verification, social positioning, and identification tool for the individual, may become very successful in the marketplace. At the same time, other important characteristics such as style, functionality, and durability must be featured in the product consumed.

3.3.1 Product/Service Performance as consumption trend

In the antecedent section, the status quo of authenticity has been approached through the lens of authenticity-producing lifestyles, with action or lifestyle sports in particular. Because of their sociocultural embedding and their origin within the much liberal, option-loaded *Millennials,* the approach may help to understand the overwhelming popularity and the contradictory whereabouts of authenticity in today's consumption culture.

Overlapping other individual social roles and other social contexts allow for digesting originally *authentic* brands with performance-functional product lines as well as simple, price-based commodities as pure lifestyle image goods under one roof (Carr, 2005). This development has many facets, with brand's global growth opportunities (e.g. Quiksilver's successful expansion to Indonesia), media broadcasting technologies/strategies (e.g. Red Bull Media House), or facilitated purchase processes (e.g. through PayPal) being some of them. Salome (2012) states that the new affordability of highly functional materials additionally contributes to APLs' success in both outdoor and indoor settings.

A spillover effect of functional, *authentic* gear into an emerging Lifestyle factor is observed. For instance, The North Face's revenue-rising outdoor and athletic lines for mainstream (non APL) segments (Szmydke, 2015) as well as co-branding strategies from non-perfomance related brands such as Mercedes' surfboard for Garett McNamara (Higson, 2014) or the Lexus hoverboard in a regular skate park (2015) show that functional performance turns into a Lifestyle good feature, providing evidence that producing functional goods/services can be a successful branding strategy. Although the definition of functionality may depend on individuals' specific set of need priorities (Strategyn, 2010), it provides value to any good/service beyond branding. Ulwick (2005) states that designing solutions upon their functional value to the customer (Outcome-Driven Innovation®) increases the success rate of those solutions to 81% (as opposed to 17% in "normal" innovation processes). Additionally, the importance to recognize functionality as an important factor is the concepts' linkage to socially and environmentally sustainable economic decisions. As Yunus et al. (2010) highlight, building business models that both repay invested capital and maximize social profit (which may translate into near-market financial profit in the long term), the delivery of highly functional value propositions of any service/product must be given.

3.3.2 Takes from Authenticity and Product Functionality

The above-standing section highlighted the concept of authenticity from three different perspectives:

1) Its origin, definition boundaries, and controversial heritage in contemporary consumption culture
2) Its significance for B2C organizations
3) Its popularity explained through Authenticity-Producing Lifestyles (APLs)

The significance of authenticity derives from several factors. For one, the persistent mentioning of its importance in dimensions of individual, cultural, professional and scholar nature is striking. With real efforts to conceptualize it for managerial practice, it leads to the formation of an **implicit paradigm** to follow in execution of entrepreneurial undertakings. Second, although it has been shown that the notion and importance of authenticity changes in context, the core remains the same: The consumers' need for something trustable within a marketplace that is otherwise indifferent and rational about what is *real* and what is *fake.* Consisting of more than trust or sincerity, however, authenticity comprises many of the denoted "must-have" brand features to succeed in contemporary consumption culture. Under the roof of authenticity, brand characteristics such a genuineness and goodwill seem to be no longer valid within CSR efforts but turn into an elementary trait of organizational DNA. Furthermore, an excursion to the "epitome" of authenticity, Lifestyles with a strong heritage in non-consumption related spheres such as action sports or music production provided insight into the paradox of authentic lifestyles becoming commercialized (and copyable) **not in spite but because of** their authenticity, which produces a much-sought aura of anti-hierarchic, anti-commercial existence.

When examining the performance (functionality) of branded items, it strikes that sports brands with authentic heritage and therefore traditionally higher focus on functional product/service attributes[7] increasingly address mainstream segments. Those purchase branded items because of their intrinsic authentic value as defined in the beginning. In turn, this "spinning wheel" directly translates into surplus value within the whole supply chain, and turning the brand "sticky" in the consumers' heads.

4 Methodology

The here presented work bases its findings on different methods for information accumulation. Apart from the primary data generation described below, the different sections of the work (literature review and operational part) base on the sampling and analysis of secondary sources. The idea is to enrich and develop what Arnould & Thompson (2005) call Consumer Culture Theory (CCT), which represents an important frame for designing new approaches (such as the ASP framework). The built theory as well as numerical or statistical data for market research base on an **explorative, context-related sampling strategy** (Arnould et al. 2006). Here, the background and domain relation of a topic **guides** the search for and analysis of additional data. The data is contextually embedded to "negotiate the links between abstract ideas and concrete instances of these ideas" (Arnould, 2006: 106) and to "enable and enrich theoretical insights" (ibid, 2006: 107). Through this method, the employed information bits of empirical surveys and experiments transcend the **purely theoretical**

[7] I.e., in the service functionality category, Nike's (2015) „Training App" provides lean fitness training lessons that almost have Personal Training character. Sports celebrity endorsements such as Laura Enever (Surfer) that wear Nike Fitness clothing while explaining exercises combine both functionality and authenticity embedded in Lifestyle attributes.

heritage of secondary data analysis. The methods for data aggregation are not limited to the construction of the contextualized literature review. All information presented bases on different source types, such as scientific journal articles, online reports and statistics, conference transcripts, scientific and belletristic handbooks, and website articles. Because of each section's specific purpose, a variety of other methodologies has been employed according to Bahl & Milne's (2006: 200) "mixed methods" paradigm comprising both quantitative and qualitative research methods with an inclination to an overall positivist (as opposed to interpretive) research orientation. These additional methods fill the gap between a wide-scoped quantitative study and a mere understanding of the interrelation of the outlined domains. The different methodologies employed for each functional part of the presented work are explained as following:

4.1 Secondary Data Collection: Observation, interpretative Data and Projective methods

The different sections of the paper contain not only different types of data sources but specifically underlie an own qualitative methodology as described in the following.

4.1.1 Literature review, the ASP framework and related contexts: Deductive field data analysis

Method Description: The methodology to create a principle-based framework from reviewed literature is an interactive multi-stage process which is embedded in the larger attempt to build a solid theory *model*, which itself is divided into the descriptive and the normative stage (Carlile & Christensen, 2004). The descriptive theory making process is roughly split into
1. Observation & Measurement; 2. Classification; and 3. Defining Relationships (ibid.: 2004). However, actionable tasks within each stage may happen simultaneously, which can be observed in the case of the ASP framework: Whereas the *observation* (the literature review) and the *construction of phenomena* (the building of three pillars) as well as the *classification* (naming the three dimensions) were executed, the *measurement* of the observed artifacts is a process which has been split into different, simultaneous data. For primary data collection, the Qualitative Interview Series A is used to determine the frameworks' empirical value.

Aim: These methods are used to overcome the deductive problem of newly connected research contexts that build the ASP framework's foundation through implementing own measurements or at least close-to primary data collection. The framework resembles **a pre-theoretic setup**, which means that it still lacks the analysis and field-based research of causal relationships necessary to prove a **complete, normative-theoretic model**(ibid**.,** 2004).

However, it is worth noticing that again, the *simultaneous* character of theory building causes the framework analysis to already shift into normative spheres although not all technically **only** be possible once the framework turned into a solid model: When examining the causal relationship of brands incorporating any or all of the three pillars (Sustainability, Product Functionality and Authenticity), causal and normative observations are readily available rendering the preliminary character of the framework a little more reliable. As Carlile & Christensen (2004) point out, two rules seem to be almost uniformly important in theory building: 1) An explicit contextualization of a models' heritage and boundaries (!), as successful management practices in one case may lead to a disaster in another one. 2) A thorough, structured production of theory with the last step, the correlation of categorized phenomena with outcomes of interest. This second step, together with a steady refinement and operationalization of the ASP framework represents the next logical step in the production of a theoretical model for Branding efforts.

Time Frame: March- July 2015

Findings: The Findings are inherently presented in the antecedent sections of both Contextualization and ASP framework construction further in the beginning of this paper.

4.1.2 Market & Industry Research: Indirect, unstructured Observation of online archives

Method Description: Online-archives contain any directly retrievable information from the Internet. In this case, the Internet serves as an interconnected storage (archive) of different media and information types relevant to the research. As stated before, the employed type of research is contextual and iterative, which determines the observation as indirect and unstructured (Burns & Bush, 2003). Here, no general restriction to what may or may not be considered relevant information applies. Observational online archive data bears the advantage of inter-subjectivity as the source is readily available to anyone interested. This statement is only restricted by access boundaries (required VPNs/network membership of institutions) of some of the consulted literature (especially academic publications). The pitfalls of this method clearly lie in the potential selection bias. The exploratory way of sampling provides an arbitrary, non-standardized selection of useful vs. useless information. However, the information considered relevant derives from a specific question– For example, to analyze the Portuguese business service market, the researcher is required to observe websites that contain this specific information. In this example, the websites can be the hosts for scientific journal servers or the official web address of the Portuguese statistical institute

(INE, 2015). In Appendix 1 “Transformational Outsourcing”, the observational technique has been used to explain the Outsourcing model by Mohr et al. (2011) as an extension to the characterization of today’s knowledge and skill sourcing practices.

Aim: As observation represents the most foundational step in condensing information into an argument (Carlile & Christensen, 2011), it is thus found wherever the paper quotes or digests information within the academic manner. The aim is to gather accurate and illustrative data with an extra focus on standard compliance whenever the source relates to an academic context. The quality of found data can be secured by the sources’ own (in case of academic publishing, e.g. number of citations) implementation of quality measurements (such as code of academic conduct). The aim of all subsequently explained methods is to enrich the existing work with empirical data for a deeper understanding, and to map the framework’s ability to improve current branding and innovation concerns within the given context.

Time frame: March- September 2015

Findings: The findings interlaced with the interpretative text in each section of the work. As described before, the observational method reflects each of the consulted data that has not been specifically represented within the “Methodology“ section.

4.2 Primary Data Collection

4.2.1 Market Study I: Query Hit Comparison

Method Description: Because of scarce data availability, it is only possible to roughly estimate the actual number of consultancies and freelance consultants that specifically engage in brand consulting and execution, even more so for the relatively fragmented region of Lisbon. In the light of the discussed dissolution of traditional offer characterization tags and because of emergent, new definitions for consultancy and branding efforts, the desired factual information is substituted by an explorative enumeration of approximate values.

For that reason, a new type of data aggregation method has been employed, namely a query hit comparison. This type of comparison bases on the study “Distinctiveness in Web Results of Two Search engines” by Agrawal et. al (2015) and has been adapted to the specifics of this paper. For stringency and space reasons, the theoretic background cannot be discussed here. The named study, however, provides cogent canvass thereof, with an additional support pillar of Bakhshi and Collins’ (2014: web) similar conception of “Measuring the Information Economy using Big Data”. The query hit (search result) comparison aims to show a rough number estimation of professionals engaging in professions that approach the business type definitions given for the proposed business. In this case, the researcher pre-selected seven of

Portugal's most used business directory platforms to conduct the research on. The query tag words were selected upon the congruence with the Portuguese CAE business category system as well as with the chosen definition of the future business areas. For example, the researcher types the word "Brand consultant" into the search engine mask of a business directory such as "Portugalio.com" and opts for regionally confining the search for "Lisbon" since he looks for comparable results within this specific area. Then, he **counts** the query hits that correspond with his search text.

In this case, the query hit comparison underlies a second refinement through adding the tag word "unipessoal" to the original search. "Unipessoal" refers to a legislative form of business in Portugal in which a sole shareholder holds the totality of capital (Portugal Startups, 2015). This refinement is used due to the specific search for freelancers, i.e. single professionals that carry out the majority of their business offers by themselves. Because of the search in Portugal, the English query categories have been tried out in Portuguese translation as well so that the eventual number seen in Table 5 (in this work's section "Market Study II") represents the average number of both the English and the Portuguese versions' hits. The analysis of the findings leads to a second step of research: The researcher chooses the platform with the most query hits for the business proposal's main activity category. Here, he analyzes each query hit upon its competitive value. For example, the researcher finds 18 Marketing Consultancies in Lisbon that carry the label "unipessoal". These 18 hits are then examined in their competitive scope and presented in the section "Competitive Analysis"

Limitations: There are a number of limitations with using this method.

1) The chosen query words may be faulty; i.e. may exclude/distort equally important search results through pre-selection.
2) There is no measurement for size of overlaps between the query hits on different platforms.
3) The consulted platforms themselves offer different features to refine and restrict the query, rendering an increased analysis difficulty
4) The Pre-Selection of the platforms may be inadequate; one or more platform may not be represented although it may contain a lot of useful information.

The limitations show that especially the platform and query text sampling process proves relatively difficult. For that reason, it is important to contextualize the findings within the boundaries of preliminary exploration of said categories. Again, it shows that a clear definition of business offer and

Aim: The aim of this method is to aggregate specific information on possible competitors for the KAOS business from a broad, structured bandwith of business directory sources. Only though structuring the sources themselves under the manner allows for a decent analyisis of the competitive landscape in Lisbon, Portugal.

Time span: 5. July 2015

Findings: The findings relate directly to the "Market Study I: Query Hit Analysis" section of this work. Here, table 5 (Section "Market Study I) contains all factual numbers for reference in said section.

4.2.2 Market study II: Qualitative Interviews A

The Qualitative Interview Series A was conducted to gain insight into the business' related business industry. At the intersection of Management Consulting (MC) and more creative processes, the interviews held help to gain insight .

Method Description: Online (Skype-), semi-standardized Interviews (Redlich-Amirav & Higginbottom, 2014). Semi- standardized, qualitative interviews online enable the researcher to directly communicate with subjects of matter to the research. Through automatically recording both question and answer with time stamp, the chat program Skype bears the advantage of direct transcription and therefore a facilitated analysis. However, the non-direct, written manner within the interface may distort or corrupt possible answers. Consequently, the questions imposed must be clear, distinct, and easy to understand. On the other hand, in qualitative research for marketing, the questioned dimensions may exceed the required basicness into complexity. The standardization of the following questionnaire is limited in terms of the answer openness. Here, the questions are though to trigger original thought and at best, a discussion between researcher and participant, with the potential to open new threats and build new links between domains and. A face-to-face interview still represents the best methodology to engage in an exploratory way since a written interview requires the respondent to answer in a more distinct and formal manner. However, the chosen method allows for imposing relatively clear questions without provoking simple yes/no or multiple-choice answers. The semi-standardization allows the researcher to react to contextual backgrounds, to counter-questions, and to potential lack of discussion fluency by creation of sub-questions, examples, and statement refinement. Respondents may feel inhibited by the communication mode (written vs. oral) or may not fully respond due to unclarities. Nonetheless, the method is suitable to provide a starting point of exploration on the subject.

Aim: As indicated in the literature review, the current developments of knowledge sourcing structurally dissolves traditional and creates new forms of Marketing service propositions at the intersection of both the creative (branding) and the consulting industry. For that matter, the research quest is to identify and interview three professionals from either classic Marketing Consulting / Branding Industries or from a newly emerged type of Business service which resembles the referred developments. Moreover, the semi-standardized character of the Interview shall enable a deeper, explorative and mutual learning experience about the topic.

Participant/Entity Description:

1. José Alves, ISCTE Junior Consulting, Lisbon
2. António Bob Santos, ISCTE, Lisbon

The full descriptions can be found in Appendix 3: Qualitative Interviews A& B; Questionnaires, Full Interviews & Findings

Time frame: August- September 2015

Findings: The findings of the interviews can be found in the section "Market Study II: Qualitative Interviews A".

Guideline: The Guideline can be found in Appendix 3: Qualitative Interviews A& B; Questionnaires, Full Interviews & Findings.

4.2.3 ASP Framework Viability: Qualitative Interviews B

The Qualitative Interviews Series was developed to gather more insight on the theoretical review of the spheres Sustainability, Authenticity, and Product Functionality, but also to understand contemporary brand's efforts to reach today's consumers. In contrast to the interview series B, the aim is primarily to underline the topics reviewed in the literature synopsis.

Method description: Online (Skype-), semi-standardized Interviews (Redlich-Amirav & Higginbottom, 2014); see "Qualitative Interviews A"

Aim: This paper designs a partly new approach to Marketing Consulting. For that matter, gathering primary data serves two needs: First, to strengthen the three pillars within the proposed ASP model from a perspective of potential clients. Second, to test the outlined ideas within assumed activity fields and hence to refine potential markets and application frames. Therefore, three brand owners / or managing employees are invited to discuss about their connotations of Authenticity, Product Functionality, and Sustainability, as well as to describe and characterize the economic environment they engage in.

Interviewed entities

Titus GmbH, Skateboarding & Street Wear Brand, Münster, Germany;

Fuxbau, Sustainable Fashion brand, Münster, Germany

Time Frame: August-September 2015 (See Appendix 3)

Guideline Interviews B: The Guideline can be found in Appendix 3: "Qualitative Interviews A& B; Questionnaires, Full Interviews & Findings

Findings: The Findings drawn for further insights into the concept of the ASP framework can be found Appendix 3: "Qualitative Interviews A& B; Questionnaires, Full Interviews & Findings.

5 Reference Framework

5.1 A New Branding Framework With a Collaborative Back Bone: The ASP framework

In the context of global workforces' increasing flexibility and corresponding expectations towards their workplace (see section "Contemporary Economy"), the proposal to implement a new type of framework docks at the intersection of both Marketing Consulting and Marketing Innovation with the eventual aim to reduce economically-induced harm to both environmental and social spheres. The paper deducts the framework for Authenticity, Sustainability and Product Functionality (ASP) from the antecedent macro-theoretic, contemporary economic thought and practice to design an environmentally and socially sustainable approach to branding consultancy efforts. Upon designing the framework, its background derives from the idea to use it as a lens in auditing a branded business' unmet need or specific problem. In that sense, it must be understood that the type of consultancy/creative business that makes use of the framework steps into a new realm in which definitive boundaries of strategy/creativity may eventually be dissolved for the sake of an entire business model innovation process that incorporates more than just changing the outer appearance or the Marketing communications of a client. As a hypothesis, it's these actions that will affect the client's brand positioning and communication down the line.

5.2 Authenticity (A) as a framework pillar

The significance of authenticity derives from several factors. For one, the persistent mentioning of its importance in dimensions of individual, cultural, professional and scholar nature with real efforts to conceptualize it for managerial practice leads to the formation of an implicit paradigm to follow in execution of entrepreneurial undertakings. Second, though it has been shown that the notion and importance of authenticity changes in context, the core remains the same: The need for something *trustable* within a marketplace that is otherwise indifferent and rational about what is *real* and what is *fake.* Consisting of more than trust or sincerity, however, authenticity comprises many of the denoted “must-have” brand features to succeed in contemporary consumption culture. That is, characteristics such a genuineness and goodwill seem to be no longer valid within CSR efforts but turn into an elementary trait of organizational DNA under the roof of authenticity. Upon analysis, authenticity is suggested for a structural incorporation as an analysis dimension. This means to strive for an **ideal** of producing solutions of (in-)tangible nature with a **maximization of their authentic value** in any given business service transaction. Consequently, authenticity is incorporated as both a baseline value as well as a guiding tag word in actual business operations, such as branding audit and the collaborative creation of new solutions. It is introduced as a value according to the described definitions and notions– in short, the goal is to reach the maximum of brand authenticity as perceived by both potential clients (organizations) as well as its relevant stakeholders. It is important to note that this implementation remains contextual, i.e. dependent on the situation and opportunities of both client and provider.

5.3 Product Functionality (P) as a framework pillar

An excursion to the “epitome” of authenticity, that is, lifestyles with a strong heritage in non-consumption related spheres such as action sports provided insight into the paradox of authentic lifestyles becoming commercialized (and copyable) not in spite but because of their authenticity, which produces a much-sought aura of anti-hierarchic, anti-commercial existence. When examining the performance (functionality) of branded items, it strikes that sports brands with authentic heritage and therefore traditionally higher focus on functional product/service attributes increasingly address mainstream segments. Those purchase branded items because of their intrinsic authentic value as defined in the beginning. In turn, this “spinning wheel” directly translates into surplus value within the whole supply chain, and turning the brand “sticky” in the consumers’ heads. The proposal seen for the authenticity pillar is equally valid for the product/service performance pillar. This pillar directly relates to the importance of a product‘s or service’s functionality as described in the antecedent section. That is, when designing a solution to maintain or build a brand, the solution’s design must include a dimension in which the costumer derives utility from the sought product or service. Utility, in turn, is contextually different, depending on a product’s character and intrinsic function, the consumer’s preferences and individual decision making patterns. It needs to be examined and defined separately for each case.

5.4 Environmental and Social Sustainability (S) as a framework pillar

The review about different critiques of current economic thought and practice showed that within the timely context, environmental and social exploitation of resources are not longer sufficient to warrant systemic health. Moreover, the adoption of counterbalancing policies on a governmental level as well as single businesses which exclusively sell socially and environmentally sustainable goods/services exist for a relatively long time. The truly disruptive observation is the **new** origin of a 'sustainable mindset': Corporations traditionally experienced any "green" or "social" efforts as disruption to sufficiently cater its stakeholders. Now, the review showed that sustainability concerns are slowly implemented practically, e.g. through expansive hybrid models of both profit and social /environmental welfare.

The proposed business aims to adopt the findings as a fundamental pillar of business. That is, KAOS implements the striving for the contextually most sustainable practices in its core values. It seeks to implement environmentally & socially beneficial practices in its own operational activities as well as in client work. Examples for such activities on the business side include Hosting Website / E-Mail service on green-run servers; Traveling through low-impact means (Public transport vs. own car); and Transparent & participatory team collaboration practices. On the client work side, as examples may serve the analysis of clients' product/service upon its sustainability relationship & research for opportunities to improve it within given context and resources; and the translation of products'/services' sustainability traits into communicational tool.

5.5 The Framework explained

Figure 2. The ASP framework. Own Contribution.

The proposed ASP framework is designed to function as an observational lens which choses counterbalance this practical approach through a more norm-based approach.

Figure 2 highlights the contextual nature of the three pillars– Although each of them represents a condensed reflection of observations, the pillars' practical application needs to be performed within the reasonable limits of an organization's transformation abilities. The framework does not finitely serve as the sole structure to perform a **thorough branding audit**. Rather, it helps to examine a client's unmet need through the framework's constitution

as a consumer-centric, relativistic mapping tool for branding and innovation opportunities within the framework's expertise field. Moreover, it helps to craft a Unique Selling Proposition to differentiate in a highly competitive market.
The ASP framework assumes that created products/services **gain** relevancy on the consumer side because of their brand authenticity, their performance and their sustainable character. It is important to note that the pillars help to contrast two distinct sides:

1) Each of the dimension as perceived by a client's particular consumer segments; and
2) Each dimension's conceptualization and actual embodiment in the products/services of the client brand.

For the provider business, the pillars are used

- to **observe and measure** a client brand's activities in the contextually related field (Authenticity/Sustainability/Product Functionality), its **perceived** status by stakeholders and the brand's **communication in this respect**;
- to **identify** optimum states of favorable behavior in each of the dimensions;
- to **map** and **weigh** the brand's innovation the potential within and outside of for branding purposes
- to **build** a brief in regards to the findings.

As mentioned before, each of the three dimensions are only interrelated through their design as a fundamental value aiming to reduce negative externalities such as the exploitation of natural resources, overproduction, or 'empty promises'. As shown in Figure 1 through the +/- sign, the presence and optimization potential of each pillar in a client's organizational structure and communication largely depends on each case's specific context. Therefore, the diverse opportunities of A, S and P for a client render a unique mixture and positioning.
Each of the proposed pillars (A, S, P) was discussed upon their importance to contemporary branding and potential branding innovation practices. Arguably, concepts like brand equity or identity (Aaker, 1991) may tangent or incorporate similar dimensions like the presented ones. They are proven manifold and are discussed in any of the standard textbook. However, Bengtsson and Ostberg (2006) explain that these concepts were developed upon descriptive "best practices" of successful brand cases, yet hold little normative capacity[8] in the sense of incorporating current economic trends or observations. Consequently, the proposed ASP

[8]As shown, normative values, e.g. the need to produce more sustainably, are widely recognized. This leads to the yet unremitted, highly necessary incorporation of such values into executable model as introduced in this work.

framework is designed to function as an observational lens to counterbalance the common best-practice models through a more normative approach.
In the case of the proposed business plan, the usage of the ASP framework is embedded in a wider-scoped brand audit explained in Appendix 19.6: “Complete of Brand Audit” in the last sections of the work.

Part II: Business Plan

6 Introduction

The reviewed literature serves the purpose to capture the contemporary economical environment relevant to the business proposal constitution. The discussion shapes the definition of the proposal for a

> Small Creative Brand Consulting and Collaborative Innovation firm for clients on Micro-scale (<10 members) Small-to-Medium consumer goods/services producing enterprises with a branded core.

In the context of global workforces’ increasing flexibility and corresponding expectations towards their workplace (see section “Contemporary Economy”), the business proposal embraces both the promotion of individual existing skills as well as the recent opportunity to adapt to a customer’s problem solving need. KAOS aims to operate as an interface between market actors to build solutions that eventually benefit all involved actors and perhaps positively influences actual negative consumption externalities beyond original boundaries. The paper deducts one of its core principles for business operation, the ASP framework, from the antecedent macro-theoretic, contemporary economic thought and practice to design an environmentally and socially sustainable approach to branding consultancy efforts.
Upon designing the framework, the idea is to help small businesses to design their products/services more important and impactful to customers. In this classification, KAOS aims to

(1) advise companies for their brand strategy basing on the proprietary ASP framework as a Brand Consultant & Transformation agent;
(2) realize strategic recommendations derived from (1) through collaborative work with other branding professionals as an Art Director
(3) act as an Art Director (structuring mediator) (Oliveira, 2006) in other projects unrelated to the previous consulting work.

In that sense, KAOS' main activity (1) can be defined as a "brand consultancy", which conceptually belongs to Marketing Consulting, but may as well be defined as "creative direction" or "facilitator". The two resulting items (a) and (b) may, for definition and explanation purposes, remain secondary offers to broaden the original value proposition of the ASP branding audit. Noticeably, to "label" and to characterize the offer and function comprehensibly means to leave out other notions of function, which strongly affect the own brand positioning and communication down the line. Here, the given structural orientation point, the ASP framework, assists to model these Marketing decisions upon the inherent framework values. The business model therefore is primarily a one-sided, proved business model of business services in the area of Consulting, Marketing Communications, and Innovation.

7 Market Analysis

The proposed business lies between distinct market landscapes, providing a unique frame of analysis of both opportunities and threads. As stated before, the business lends parts of its operations from different types of industries. For one, the industry of which it derives its strategical and analytical operation pattern is the European/Portuguese Management/Innovation Consulting industry. Second, the industry that provides the potential of engagement opportunities is the one of the (Portuguese) creative/cultural landscape with branding, advertising and cross-categorical businesses. Thirdly, these two industries on the competitive side are strongly interwoven with the customer side of the proposed business. Because of this interlacement of economic and cultural landscape, a PEST Analysis is performed, followed by an analysis in the framework of Porter's five forces. The following steps comprise an internal (VRIN) analysis, which combined with the other analyses result in an integrated SWOT analysis.

7.1 Organization Environment I: PEST Analysis (external analysis)

The PEST Analysis represents an acronym for political, economical, social, technological, legal and environmental factors influencing the environment in which the proposed business is supposed to thrive.

7.1.2 Political Environment

The Portuguese government strives for external, strong economical networking through membership in the EU (since 1986), NATO, UN, Mercosul and the African Union (Araújo & Tenório de Figueiredo, 2014). The Portuguese-speaking markets with booming Brasil and

Angola foster Portugal as the “homeland connection” to Europe and as a connection hub for European countries with intentions to expand south- and westwards. Moreover, the allowance for EU citizens to work and live independently from their country of origin applies as well for Portugal so that (self-) employment opportunities stretch at least to the outer European borders (PKF, 2014). Portugal’s position within different markets as well as its economical fight against the impact of structural problems and the reverberation of the global market crises caused governmental policies to change for an increasingly entrepreneur-friendly environment. That said, within the frame of the EU’s Small Business Act (SBE; 2009), the process to register and set up a company is as short as one day due to the option to register online or with the “Firm on the Spot” (Empresa na hora; Enterprise Europe Network, 2009). At the same time, the real efforts to decrease the still relatively high risk for SME entrepreneurship in Portugal include an official setup of a Development Financial Institution to provide financing (OECD a, 2014). In coincidence with the instability of the financing sector caused by large corporate indebtation (see below), the government has already focused on firm recovery instead of liquidation. I.e., corporations and SMEs alike are less at risk of insolvency through the removal of tax authorities’ seniority and though establishment of a public insolvency mediation agency which reduces “friction” and paperwork between debtor and creditor and opens for an out-of-court agreement.

7.1.3 Fiscal Environment

Portugal’s fiscal environment is characterized by a stringent budget consolidation over the last years after the 2008 crises with a simultaneous enhanced access to market financing and with the exit from international financial assistance. (OECD a, 2014). However, credit conditions, although smaller loan interests are significantly lower in 2014 than in 2008, are harsh with an average 5% interest in 2014 for loans <1 Mio(ibid. 2014) . Portugal suffers from a higher tax burden than the EU average (OECD b 2014). One of the main problematic, especially within the context of bankrupt Greece is the instability of the banking sector on both equity and asset side with only a slight improvement to the second quartile of 2015 (OECD c, 2015). In 2009, 20 % of Portuguese firms had overdue loans; in 2014, it was 31% with non financial-companies carrying a debt burden of 156% of GDP; the fourth highest corporate debt average within the OECD countries (ibid. 2015). For the proposed business, taxes to be paid are comparably high (e.g. VAT: 23%) rendering the climate for entrepreneurial the opportunity to manage and pay all taxes online is much more facilitated. A striking advantage for foreigners that aim to engage in Portugal is the tax advantage when applying for the status of “Residente não habitual” and simultaneously enacting a profession that is classified as an activity of elevated value for society, with Management/Fiscal consultancy being amongst them. Those owning the status are taxed with an reduced income tax (IRS) of 20% for ten years, regardless of their earnings (Brito, 2014)

7.1.4 Economical Environment

Figure 3. Indicators of economic synthesis. INE (2015)

The Portuguese economy suffered from severe crises with the latest contribution of the Greek near-insolvency in the second quartal of 2015 setting back faster recovery. From a fiscal point of view, Portugal was able to exit the international fiscal aid program in June 2014 (OECD a, 2015) and aims to further consolidate. The country's annual productivity growth in comparison to 2000-2009, but low internal/ external investments cannot maintain the current capital stock, and thus risking the improvements through eroding the current account. In 2013, Portugal had an unemployment peak rate of 17.5%. In May 2015, the rate fell to 11, 9% (SEC, 2015). The country's economy grows very slowly but steadily with 0,8% in 2014. Portugal's economy saw a great rise in export activities, which are fostered by entrepreneurial programs such as StartUp Lisboa, a Public/Private partnership (PPP) tech-startup incubator only accepting businesses that help foster Portugal as a location to produce high-value consumer goods/services. Portugal is a country with great activity in the business service sector. In 2013, 105,678 businesses were registered as a business service firm in the widest sense, generating 1,132 billion euros turnover (ESPE, 2013) Whereas the traditionally dominating large business service providers saw an increased turnover, Micro enterprises (0-9 employees) suffered from a loss in turnover in the same year (ibid., 2013). On one hand, policy-production has set the frame for clustering innovative entrepreneurs, with cheap wages and upcoming private funding enabling to establish new ideas relatively risk-free. The setup of strong engagement for innovative entrepreneurship in smaller scales (StartUps, freelancers) in both public and private spheres can be seen in the variety of higher and further education programs, in the growth of accelerator and incubator numbers and the establishment of CoWorking spaces, and the city being host events built around innovativeness such as the Open and User Innovation Conferencor the Thought For Food Summit[9].

7.1.4.1 Portugal: The Creative Country

The positive economical development does not only reflect a numerical improvement but lined by the country (Lisbon respectively) developing into a Creative Hub (Fonseca, 2015). The inherent word of **creativity** builds the bridge between the country's vibrant cultural background and the economical predispositions to integrate it as a viable value creator for two reasons. First, cultural aspects of living (see below) may largely determine the attractiveness of a location as a place to create, build, and foster an economy of any kind. These cultural aspects, in turn, are especially vital to attract the sought-after, young, talented (inter-) national workforce as cultural variety provides great life quality improvements. Secondly, a diverse cultural landscape can be strongly associated with an increased creative (unconventional problem-solving) output that is demanded when talking about fostering innovation (KEA, 2009). What strikes most is that in a regional perspective, the city of Lisbon identified this interlacement of economic and cultural variables as an opportunity to invest and foster the newly coined term of the "Creative Economy" by aligning entrepreneurial hubs and creative spaces into a part of public policy. (CE; Palet, 2014; Cross Innovation, 2015; European Commission, 2014). This is especially valid for SMEs (Small-to-medium sized enterprises) which, after 2008, had to deal with a reduction of 13% of their original workforce and are now able to increasingly benefit from the administrative entrepreneurship enforcement within the Creative Economy (European Commission, 2014). The captured creativity thereby transcends its common definition of solely art-related output– Any actor is demanded to be creative in this setting[10]. Seen through this lens, it appears reasonable to propose a business that adopts this new type of economy as its reference frame, especially regarding the opportunity to actively improve economic activity through a structured approach.

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[9] Link: http://oui.clsbe.lisboa.ucp.pt, Thought For Food Summit: http://tffchallenge.org, both accessed Sep. 15, 2015

[10] Cross Innovation (2014: 20) delivers a handy definition: *[The] creative economy is to assume the existence of a specific set of activities with expression and dependence on creativity, ideas and new ways of doing which for their intrinsic value and the possibility of incorporating this value in related activities, become essential to economic growth, job creation and generation of new skills, wellbeing and development of societies, creating symbolic and cultural value but also physical and economic*. In Portugal, CE accounts for 38,287 jobs [up to 30% of employment; comparison: Barcelona =17,9] and 277 strategic actors in three major segments: Cultural Industries/Activities, Artistic activities, and Creative Services (ibid., 2014)

7.1.5 Social Environment

The Portuguese language is the fifth most-spoken language in the world, rendering Portugal itself as a melting pot of *lusophone* and international citizens alike. Its sea-sided location with its capital Lisbon provides a cultural richness, expressing itself in a variety of daily and nocturnal activity offers, in different literature, musical, architectural and traditional styles from all corners of the world (Enterprise Europe Network, 2009). As mentioned before, the social environment sets the stage for what developed as Lisbon's positioning as a hub for the Creative Economy: an opportunity for young talent to engage entrepreneurial because of both infrastructural (e.g. cheap housing) and diversity predispositions (Cross Innovation 2014). The culturally diverse vibe enables young people to think positively: In May 2015, the confidence indicator of Portugal's consumers rose to the highest scale since September 2007 (INE, 2015). On the other hand, the country suffers from one of the **highest income inequalities and poverty rates** in Europe, with the number of poor households still rising, causing these citizen groups to be marginalized and to live in ghettos (OECD, 2014). The combination of both strong immigrant influx and social inequality erodes societal wellbeing (Porter M. , 1990)g to the point where youth school drop-outs and employment loss replicate themselves, producing a counter-climate of **resignation** (ibid. 2014). Therefore, the inequality gap must be closed to warrant entrepreneurial participation of the same citizen cohorts regardless of social class. Only if talent is sourced homogenously, the vision of Portugal as a globally competitive country and not as an elite-oriented cluster.

7.2 Organization Environment II: The European (and Portuguese) Management Consulting industry – Porter's five forces

The Western European Management Consulting market is the second largest globally (Lopes da Costa & Santos António, 2014). It is highly fragmented in terms of both service offer and company size, although in Portugal, this fragmentation only applies to SME consultancies whereas the 10 largest companies concentrate in three main areas (IT; Accounting; Strategic Management; ibid., 2014). The Management Consulting (MC) industry in Europe experienced a steady but non-linear growth since 1998. In 2011, it was the large-sized MC-firms that grew most (9,6%) whereas smaller ones (<500.000 Euros turnover) only grew by 6,5% (FEACO, 2011). The European total 2011 turnover can be analyzed by country splits. In comparison, Germany contributed to 33% of the total, France to 10% and Portugal to only 1,5% of the turnover (ibid., 2011). Portugal, together with Slovenia and Greece, are the only countries that experienced **negative** growth rates in 2011 (P: 0,0%). Although the market appears relatively weak and small, Portugal's MC activities account for the 8th largest (out of 27) percentage of the GDP (ibid., 2011).

Lopes da Costa & Santos (2014) and Ishchenko (2011) note that the Portuguese Consulting market experienced a rapid employment growth of 278% from 1998 to 2004, reflecting the economic importance of the sector. However, the market now reaches a level of **total saturation**, with the economical instability and high concentration, narrow consulting service dimensions and, most importantly, the market's small size counteracting the overall economical 'opportunistic, creative vibe'. The authors (ibid., 2014: 327) hold that this saturation causes Portuguese consultants to "be forced to differentiate and develop more content and services [...] [and that] there will [not] be room for new companies [but rather] that these new companies need to operate [...] offering solutions truly disruptive." Finding an own **niche** that simultaneously solves and addresses the latest needs of a newly emerged economical actors therefore is crucial to the proposed business.

After all, Porter's five forces (2008) analysis helps to summarize the conditions for the proposed business as follows:

1) **Bargaining Power of Buyers**: Low-Medium. Many market offers (thus a lot of choice) and increased network relationships render a relatively high bargaining power for the target client companies. However, it is limited through the overall low economical buying power and thus limited decision-making factors other than price and personal connection. Moreover, the value proposition fast-moves into the discussed area of niche consulting with a specialization on the new Creative Economy.
2) **Bargaining Power of Suppliers:** Medium. On one hand, the proposed setting does not demand a lot of supply other than computing-related offers. Because the business is supposed to work for one person (freelance), asset investment is low (no office, no printers) and only rented when needed (e.g. in a Co-Working space). Suppliers, on the other hand, the business employee may use public entities (e.g. public transportation companies) for commuting to a job meeting. Those have non-negotiable prices and thus may render supplier bargaining power very high.
3) **Level of Rivalry:** High. The market growth slowed down, and large major consultancies with international network and economies of scale/scope may be able to serve both small and larger consulting seekers. On the other hand, the chosen niche provides a hybrid standing and high specialization for SMEs, which soothes the intense rivalry in so far as that the business' unique identity may not easily be substituted.
4) **Thread of New Entrants:** Low. Although the European Union's efforts to create a single market and therefore to enable facilitated market entry of actors of the same profession, the market is saturated. On the other hand, the increasing workforce flexibility may produce new *types* of entrants that accompany new market developments (e.g. StartUps), which may remain unresponded by larger MC firms because of slow organizational decision-making,
5) **Thread of Substitutes:** Low. It is unlikely, despite the vast information readily accessible online, that the highly specialized businesses with operational problems will be capable to solve internal problems entirely without sourcing human skill/ knowledge from outside.

7.3 Internal Analysis: VRIN Analysis & Strategic Capabilities

To analyze internal capabilities, Barney's (1991) VRIN (Valuable, Rare, Inimitable, Non-Substitutable) Analysis has been used (See Appendix 4: VRIN Analysis).

After mapping necessary competencies and resources related to the business, in the VRIN analysis, the capabilities can be summarized in a framework created by Johnson et al. (2011: 95). It gives an overview about the scope of strategic capabilities, that is, the „resources and competences of an organization needed for it to survive and prosper".

Term	Definition	Application for KAOS
Strategic Capability	The ability to perform at the level required to survive and prosper. It is underpinned by the resources and competences of the organisation	Capability to **network** at a fast pace; send adequate proposals; successfully **deliver** work under the **differentiation points**; manage teams and to communicate clearly
Threshold resources	The resources needed to meet customers' minimum requirements and therefore to continue to exist	**Computer & software** for processing creative & strategic work; printer; **Local network** of collaborating freelancers; **Access** to local industry/ market intelligence (market research subscription)
Threshold Competences	Activities and processes needed to meet customers' minimum requirements and therefore to continue to exist	**Understanding** of Industry-related codes/language; **Proposals/Process management/Production** at industry standards
Unique Resources	Resources that underpin competitive advantage and are difficult for competitors to imitate or obtain	**Own brand analysis framework** (ASP); **Membership** in newly emerging networks & clusters (e.g. Linnk; Mecenato; Edge Amsterdam)
Core Competences	Activities that underpin competitive advantage and are difficult for competitors to imitate or obtain	**Ability** to move fast; **no association** to one employer, ability to **source** fresh knowledge from heavy users; ability to deliver realization of consultancy recommendations

Table 2. Unique Resources and Capabilities for KAOS. Adapted from Johnson et al. (2011).

7.4 Competitive Analysis: Integrated SWOT

Opportunities	Opportunity 1 Freelancing & Collaboration	Opportunity 2 Demand within SME sector	Opportunity 3 Dissolution of Traditional Boundaries
Top 5 Strengths			
Process Design	Design efficient project collaboration process	Target SMEs with lean, cheap process	Center ASP framework in value proposition
Follow-up & Social Connectivity	Create own social network /Facebook group	Enable SMEs to participate on network intensively	
Adaptability of offer	Offer flexible project modes (collab. Times)		Provide clear process structure
Quality of Service	Provide incentives (e.g. salary handling) for collaborators	Adapt pricing to highest affordable quality	High communication level (good cust. Ser.)
Network membership management	Tie collaborators into the same network	Move in the same network like target SMEs	Remain consistent throughout network activities
Top 5 Weaknesses			
Collaborator's low formal professionalization	Implement regular training (against fee) to new collab.	Collaborate with experienced SME leaders	Increase stakeholder's access to information
Scaleability	Find digital item opportunities	Offer scaleable items (e.g. network membership)	Dedicate research to scaleability in new action fields
Network Power	Strong online presence, SEO, offline contacts	Strong offline connectivity in SME field	Connect with "Early Adopter" initiatives
Collaboration salary split process	Invest in powerful software	Develop easy handling strategies (1-Stop-Shop)	
Project handling (Production vs. Client Acquisition)	Automatize processes (templates...); Outsource	Focus on delivery, not on production	Employ internal short-term lending principle

Risks	Risk 1 One-Stop-Shop demand only	Risk 2 SME Borrowing Capacities / Debt profile	Risk 3 Market Saturation
Top 5 Strengths			
Process Design	Also offer complete solutions	Allow for client's financing alternatives	Delivery of disruptive ideas at lower cost
Follow-up & Social Connectivity	Leverage Social network for broad offer	Provide clients tips for efficiency through E-Mail	Be familiar and honest in communication
Adaptability of offer	Meet demand with adequate tailoring	Provide different packages in one proposal	Learn from other's best practices
Quality of Service	Excel in offered service	Save cost in non-core areas (e.g. no office rent)	
Network membership management	Create On-demand One-Stop shop with collaborators	Leverage Network to enhance capacities	Connect w/ stakeholders informally and officially
Top 5 Weaknesses			
Collaborator's low formal professionalization	Improve Project Management Skills	Leverage & promote positive project outcomes	Represent projects formally under one name (KAOS)
Scaleability	Stndardize processes for re-use	Provide Public Funding opportunities	Bessere Kundenbindung wichtig
Network Power	Focus on cash cow projects	Focus on client retention	Focus on cash cow projects
Collaboration salary split process	Split salary according to responsibility level	Focus on lean groups with high capabilities	Enable other market participants to collaborate, too
Project handling (Production vs. Client Acquisition)	Supervise projects	Remind clients to pay on time	

Table 3. Integrated SWOT analysis with action recommendations. Adapted from Fuer-Gruender (2015): SWOT Analyse.

After evaluating both internal and external factors for the proposed business, the SWOT analysis aggregates the previously drawn conclusions into a strategic overview of **S**trengths, **W**eaknesses, **O**pportunities, and **R**isks. The SWOT model helps to contrast external trends and streams with the business' very own identity and internal logics. Then, it shows the joint factors' structure in a way that allows for the formulation of objectives & strategies and the allocation of said resources (Koch, 2000). These activities, in turn, influence the project's margin, which can eventually be expressed in its positioning strategy and its pricing values. In order to properly apply the SWOT analysis, a rating of the project weaknesses and strengths has been conducted (scale from one to nine). In a second step, the external trends have been rated in importance (scale from one to nine) and negative/positive impact (opportunity/risk).

Then, the top five strengths/weaknesses were combined with the three most impactful environment opportunities/risks to trigger a seizing action like suggested by Fuer-Gruender (2015). In this case, the grey fields in the table suggest actions to counterbalance negative externalities and to utilize favorable synergetic scenarios. The full analysis with the pre-SWOT item rating activities can be found in Appendix 5: SWOT Analysis.

7.4.2 Key Success factors

One of the most striking features of a detailed SWOT analysis is the possibility to describe the business' key success factors. They can be summarized like this (scheme adapted from Ishchenko, 2011) :

Key Buying Factors	Key competing factors	Key success factors
Flexible offer characterization; Price; Reduction of negative externalities; Innovation; Value through Network benefits; Long-term relationships; Contemporary lens of analysis (USP: ASP framework); Range of Services	Low fixed cost; Location independence (=low cost / best solution); Partnerships; (in-) formal network leverage; Innovation; Certification; Service-based pricing	Ratio Price/Quality; Network membership; Acquisition/Production Cycle; Valuable, functional solutions; Speed of Establishment; Strong Testimonial/Client Recommendation

Table 4. Key Competing Factors. Adapted from Ishchenko (2011).

8 Market Study

The proposed business bases itself in a niche influenced by varied industries, rendering an interwoven and complex base of industry analysis. On one hand, KAOS structurally resembles a classic consulting business and therefore competes within the respective *industry*. On the other hand, it identifies its cultural background and engagement opportunities from what was referred to as the "Creative Economy" (CE) above. Here, actors within this field may appear as both collaborators and as procurement seekers of KAOS services. In their roles as collaborators with KAOS, actors in the CE (for example Web Designers) may participate on delivering a value proposition to a client from another sector (for example, a branding package for a Craft beer company) and thus simultaneously compete in the Marketing consulting industry and the Creative Industry. In their roles as a procuring entity (e.g. an Advertising Agency hiring KAOS for a branding job), actors in the CE are classified as a consumer segment and thus belong to a *market.*

8.1 Market Study I: Findings of Qualitative Interviews B/Consulting Environment

8.1.2 Consulting culture

José Alves' (ISCTE Junior Consulting [ICJ]) responses to the questionnaire provide insight to contemporary consulting culture, especially for the younger work force in the age between 20 and 30 years. For one, the description of the activity of the Consulting firm ICJ coincides with the reviewed literature: It sells itself through a interdisciplinary, apolitical, different, "fresh view" on a client's unmet need. This corresponds with the crises of the Portuguese consulting industry that has been characterized as urgently needing disruptive, flexible strategies to stay internationally competitive and at pace (Ishchenko, 2011). Although the respondent classifies the successful status of known, large consultancies as relatively undisputed, the discussion shows a potential of permeability for SMEs from both the client seeker and consultancy provider point of view. As highlighted in the literature review, SMEs occupy a specific space in the European economic policy making – On one hand, they largely contribute to the European GDP and incorporate some of the highest innovation rates within the sector (EU, 2014). On the other hand, they are not able to fully harness their potential because of the lack of consultancy offers that cater to the high speed of the new business developments that bring new challenges and problems (Santos, 2015a). It was highlighted that the proposed business functions in the same business class like SMEs since self-employment counts as a Micro-enterprise. The respondent hints at the possibility of ICJ to cater to SMEs due to the consultancy's young approach and to their aim for high customer satisfaction, which additionally concords with a significantly lower price. From that point of view, the mentioned "win-win" situation (learning for the members, free help for sustainable clients) for ICJ as a non-profit organization implies the feasibility to realize credible consulting projects with young professionals or students in a small (SME) consultancy as long as they bring in a reasonably strategic background. ICJ's focus on client satisfaction, a different view on client problems, an internally rich learning environment, and an ethically ambitious value system shows the successful adoption of such principles without getting erased from the highly competitive market. Interestingly, the respondents' opinion on the question towards the critical aim of many young entrepreneurs to grow fast and heavily is seen much less value-denoted than discussed previously. The "new start-up dream" is not seen as something generally bad, since "[...] in [José Alves'] opinion, the ones [start-ups] that succeed are the ones who focus on actually solving people's problems [...]. So the real product/service functionality is the key to growth." Here, growth is characterized as a symptom or measurement of a company's capacity to solve a specific problem, which is unrelated to product type and ethical background (hence, no difference between a fast-food or an ecological supermarket start-up).

8.1.3 External Knowledge Acquisition and Open Innovation

António Santos (2015) provides insight into the general and the Portuguese business service landscape, with a focus on Open Innovation. In the present paper, OI is discussed as a more (than traditionally applied) transactional, collaborative way of sourcing extra-organizational knowledge. In this context, Santos' observations focus on the need for a development of stronger public policies and incentives in areas of less high-tech industries and SMEs. The latter, as discussed earlier (e.g. in the Qualitative Interview Series A with José Alves, ISCTE Junior Consulting), specifically call attention because they are the ones that carry a majority of productivity load and potential on both EU aggregate and Portuguese national level. Because of Portuguese SMEs' lacking financial incentives and a relatively low formal qualification, their potential cannot be efficiently sourced to date. This, in turn, opens an opportunity for both public and private intermediaries to act "pushing" and "advising" for those who at first fail to afford sourcing of external knowledge. However, Santos claims that consultancies in the widest sense may help to provide this knowledge but indirectly appeals to a stronger systematization and control of external knowledge sourcing as it happens through OI: "[...] Every major consultant company wants to be an expert in OI, because it is a fashionable issue and easy to sell to companies!" Santos states that the high collaborative productivity through the increasing web-connectivity (and ICT services) by single professionals (freelancers, contractors) may increase overall business opportunities. However, he argues in the same line like J. Alves (ISCTE Junior Consulting) when stating that the true key to collaborative productivity is not necessarily the Internet but the professionals' complementary specialization. In this respect, the observation in this paper about the dissolution of traditional boundaries and the "double function" (creative + strategic) of new market actors in the field becomes somewhat limited. However, it becomes clear that new roles and the need for their organization emerge and thus create a market space for the management of such "multi-talent" professionals. Depending on the case, Santos names both responsible actors (OI manager; top level advocate for OI) within a knowledge-seeking organization and outside (network manager). The latter becomes interesting in the light of the previously highlighted need for a mediator between stakeholders with different operational logics, which can be theoretically transferred to the case of a loose professional collaboration project that needs to employ a network manager for the exact same reasons.

Another important point to mention from the interview with Santos is the opportunity for an economic engagement within **local** SME spheres since "it's difficult to have access to global markets" because of the high search/transaction costs so that engaging with intermediaries such as KAOS in projects for local innovation appears easeful.

8.1.4 Innovation and Success Management

António Santos (2015) describes the measurement of success of Open Innovation and collaborative external knowledge sourcing as difficult. He splits the measures into in-and output variables to create a before-after situation. The response generally hints at the establishment of a variety of different measurements, before and after the beginning of a new (OI) project, depending on the case, business and budget.

In terms of consultancies' applied strategy, it becomes clear that with the enterprises' individuality, it is difficult to apply one certain normed or certified strategy. Regardless of opportunities and bottlenecks of this status, it can be said that companies face the difficulty that is described in section XYZ (insert section): On one hand, the normative absence of a standardized consulting/innovation process enables companies to communicate their (potentially) innovative, different and useful approach to a client's unmet need. On the other hand, the resulting variety of approaches disguises the actual value for potential clients, rendering it even more necessary for knowledge providers / consultancies to communicate within a sphere of relatable standard or norm.

8.2 Market Study II: Query Hit Analysis

Name of business directory/Link	Brand Consultant/ Consultor de Marca (of which "unipessoal")	Agencia de Publicidade (of which "unipessoal")	Marketing Consultancy / Consultoria de Marketing (of which "unipessoal");	Branding / Gestão da Marca (of which "unipessoal)
Portugalio.com	14 (3)	250 (0)	462 (8),	225 (46)
Pai.pt	1 (0);	503 (107)	48 (18)	8 (0)
Guianet.pt	0	31 (0)	69(7)	2 (0)
Hotfrog.pt	2	1195 (115)	18 (1)	99 (undeterminable)
Directorioamarelo.pt	415	204 (0)	12 (1)	0
SICAE	12820 (Portugal) / Code 70220: Activities of consultancy for the businesses and management	4370 (Portugal) / Code 73110: Advertising Agency	320 (Portugal) / Code 70210: Activities of PR and Communications	Undeterminable; no code (belongs to 70220)
Pt.Kompass.com	13 (2)	181 (23)	72 (13)	10 (7)

Table 5. Query Hit Analysis for different Marketing professions in the area of Lisbon, Portugal. Own contribution

As stated in the Methodology/Secondary Data Collection/ Competitive Analysis section, the market information on competing businesses around the focal area Lisbon, Portugal, is extremely scarce. Although there is general data on economical developments of the MC industry available, it has been demonstrated that the proposed business does not entirely fit into these categories. To gain a better overview over more approximate competition actors, a secondary data collection method has been employed, namely the query hit analysis, which showed the following results.

The analysis shows that different business directories obtain a very different amount of search results for the same keyword employed. This can have different reasons. For one, the most complete directory, the Portuguese integrated system of codes of economic activity (SICAE) provides codes to classify which industry a business belongs to but does not specify enough to locate similar businesses like KAOS. Additionally, as outlined in the Literature review, even the sub-classifications provided by the entire industry do often not match with the real economic activity of a business. The other, here used directories may appeal to different user segments, or simply do not aim to reflect the actual breadth of businesses as they are shown in SICAE, The table shows that throughout the different directories, the tag word "Consultoria de Marketing" (Marketing Consultancy) provides the most query hits in relation to the desired type of business: In this context, the most favorable outcome would be a high number of "Marketing Consultancies" (Consultoria de Marketing) that carry the additional "unipessoal" tag. Albeit "Agência de Publicidade" has more absolute hits, it is to note that the first mentioned tag word applies better to the business proposition for the laid-out reasons (see the

Literature Review's final Section: Framework: A New Consulting Focus with a Collaborative Backbone). For a deeper analysis of similar competing entities, the directory of Portugalio.com was chosen, with the typed tag word of "Consultoria de Marketing, unipessoal" and applied filter for the area of Lisbon, Portugal. Here, the results were filtered upon their actual match with the proposed business' economic category to provide a base for the following competitive analysis. The query hit analysis shows a great number of enterprises involving in consulting activities and related business services, That is, the SICAE directory lists 12820 businesses of this kind; 4870 for Advertising Agencies. Interestingly, only a small fraction of businesses are represented on either of the commercial business directories. As stated before, this may be due to possible inadequacy of the chosen key words. However, the big difference between the SICAE and the other directory results imply following assumptions:

1) The market for Management Consultancy seems to be vivid; however, only few are present on the popular business directories. Because there is no information about the companies' actual activities for the last 12 months, there is no information about the real market structure. The SICAE does not allow for searching location-based, so that there is also no information about the specific location of Lisbon.
2) The directory with the most overall query hits is Hotfrog.pt (>1200), followed by Portugalio.com (951)
3) The directory Hotfrog.pt seems to be the most viable for researching Advertising Agencies; followed by Páginas Amarelas (pai.pt) and Portugalio.pt.
4) For the tag word of "Branding", the two most reactive directories are Portugalio.pt and Hotfrog.pt.
5) The weakest overall directories for the queried keywords are Guianet.pt and Pt.Kompass.com; their richness in information is comparably low.

8.3 Benchmarks

To date, there was no data found about a business that entirely resembles the proposed one. Albeit its uniqueness, this means that there is no business that

- combines both the aim to use a proprietary analysis frame for Sustainability, Authenticity & Product Functionality;
- works as a consultancy and secondarily as a collaborative backbone for realizing the consultancy recommendations;

- that features the leanest possible company structure with the ability to build a company-like environment;
- tries to trigger change for an overall higher amount of summed utility of stakeholders

However, there are many benchmark companies which excel in one or more of the mentioned characteristics, for that the proposed business draws structural inspiration and best practices from them. They are briefly described below

1) Faber Novel is a new type of consultancy focusing on aiding grown enterprises to innovate "at StartUp speed". It succeeds to do so by assembling a specific team of experts for each project, thereby sourcing from its own StartUp incubator, Parisoma, in San Francisco, USA. With its Three-Step approach (Envision, Plan, Execute), the business provides a structured overview over possibilities within any industry. Since 2011, the company grew by 50%.
    a. Origins: USA; San Francisco (branches in 5 countries; as well in Lisbon, Portugal)
    b. Benchmarked for: On-the-spot team assembly, Elite Sourcing strategy,
2) Kooky Agency excels as a consultancy in Business Innovation through applied Problem Solving lenses such as Design Thinking, Business Model Innovation, Business Anthropology and "classic" Marketing Strategy. With their base values around human centered innovation, Kooky enables a fixed but interdisciplinary team to solve contemporary business problems. Like Fabernovel, they recently co-created an incubator, Mouraria, which focuses "100% on startups developing ideas [...] within Creative Industries".
    a. Origins: Lisbon, Portugal
    b. Benchmarked for: Interdisciplinarity, Anthropologic Business thoughts, Innovation
3) Thinkwide calls itself a "Creative Hub & Agency", focusing on Brand Design and the production of creative content. With a lean company structure of just one founding member, the company offers both Consultancy and implementation of the advised outcomes through leveraging its network and "matching the most talented people [...] with our projects".
    a. Origins: Lisbon, Portugal
    b. Benchmarked for: Lean Company structure, Assembly of Team, Creative Focus, Business process (Consulting to Execution).

9 Competitive Analysis

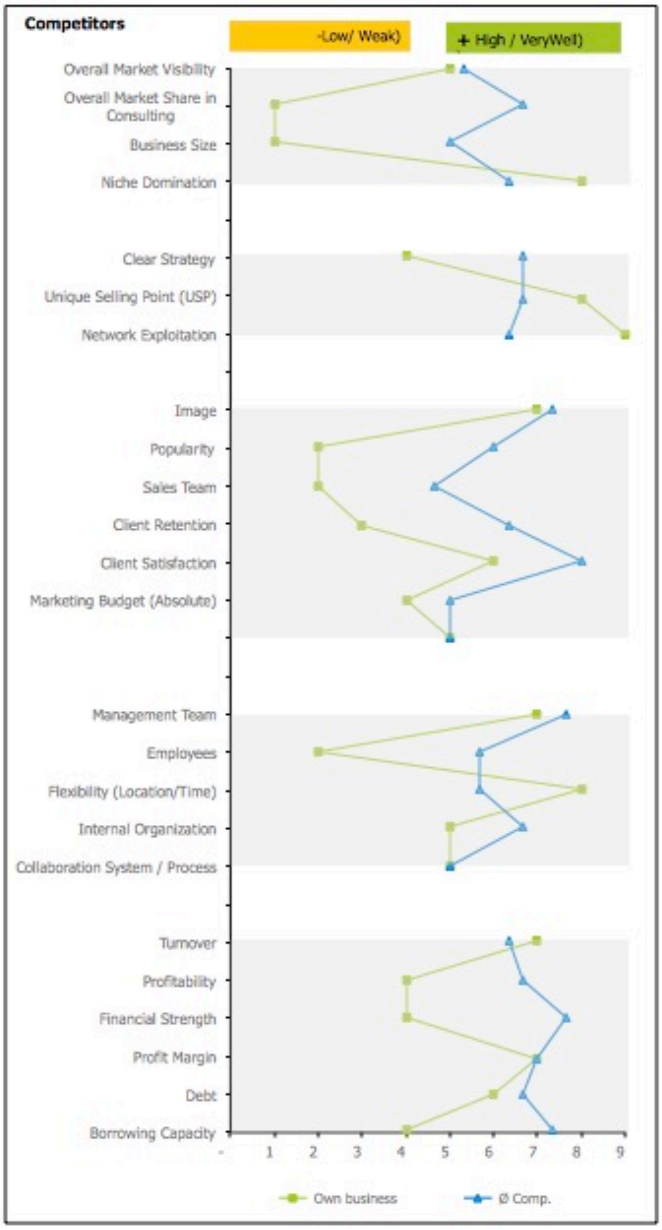

Table 6. KAOS vs. Averaged strenghts/weaknesses of competitors. Adapted from Fuer-Gruender(2015): Competitive Analysis Tool.

To investigate on the individual, direct competitors, the business directory Portugalio.com was employed as outlined in the section Market Study I: Query Hit Analysis. In a first step, a list with 6 viable competitors was built with the help of the directory and the used keywords; the competitors were then formally named, located and analyzed (See Appendix 8: QHA Competitor List), and the **three strongest** competitors were chosen. Importantly, the chosen competitors are all related to the “free market”, that is, no universitary/public initiatives have been considered. The competitor analysis happened through the **observation** of the target companies’ visual communication online on both their proprietary landing page as well as connected social media channels.

Secondly, the competitors were compared with the proposed business in terms of their strengths and weaknesses of both their organizational structure and their service offer (See Appendix 9: In Depth Competition Analysis). The third step was to build an average of the three competitors’ performance in all analyzed dimensions and to compare the average with the proposed business’ one (Table 5). As mentioned earlier, it is extremely difficult to compare offers within the Portuguese Management Consulting Industry. The three competitors chosen can be located in a similar area of Management Consulting for Marketing/Branding/Innovation; however, they are structurally very different, each of which dominates their specific niche. One of them simultaneously serves as an industry benchmark (described below). The respective graphic indicates that the proposed business has to establish itself in a **highly competitive, very skilled market**. The high average shows that the proposed business has only few excellence points in organizational performance to use for outstanding differentiation. The reason for that is e.g. because of the establishing entities' lack of practical experience, and as a new player in an established field, market share and reputation are naturally at a low point. It is important to note that not all points that appear with a low/weak score imply negative outcomes for the proposed business. For example, the number of employees lies much under the average, which is voluntarily chosen as a means of creating a powerful value proposition (Team instead of Employees). The competitors' high client retention & satisfaction, brilliant image, high Marketing budget and above-industry standard profitability and margin and their mutual excellence in team (and employee) management position the competitors as imitable and successful brands. However, their weakness clearly lays in their lack of flexibility, and their path dependency in already-established routes of either creative or strategic project delivery. Consequently, KAOS has to dominate and excel a new type of market niche through its value propositions and positioning as a flexible, innovative, culturally understanding hybrid between strategy and creation (See Perceptual Map in the "Positioning" section). Second, an opportunity arises from the ambitions of KAOS for an efficient, unseen team management and organizational adaptability, which may correspond to the necessity of speed and truly innovative project outcomes. In this respect it is important to note that the business' overhead costs remain relatively low (No office rent, few utilities), providing a good stance in holding up a higher

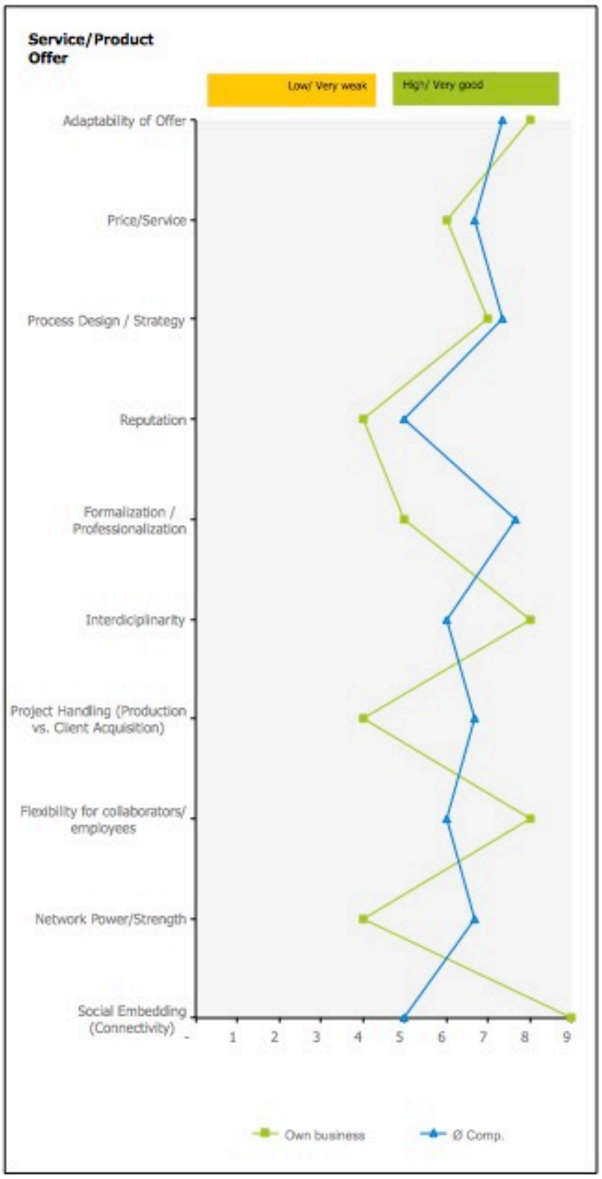

Table 7. KAOS vs. Averaged Competitors' Strenghts/Weaknesses in Product Offer. Adapted from Fuer-Gruender Tool (2015): Konkurrenzanalyse.

profit margin. When looking at the competitors' actual product offer in comparison to the one of KAOS, the differences become less amplified and surprisingly complementary (Table 6). Whereas the Adaptability of offer, the pricing and the process design are relatively similar, the table shows that the professionalization and formal approach of the competitors is high; the one of KAOS remains mediocre. This implies that the business needs to be cautious to not render the brand perceivable as "sloppy" and not serious enough. Two major points may additionally threaten the business success when held against the competitors, which themselves average a relatively good (but not excellent) score in this field: Because of its singular nature, KAOS is weak in **project handling**, that is, to sell the offered services and to simultaneously produce/deliver solutions to current clients. It is difficult to sell and market services whilst producing profitable solutions as a freelancer, which puts the liquidity cycle at risk. This is especially important because clients are likely to postpone/delay due payments. Here, competitor teams are more likely to have a better split between sales & production, simply because the companies' employment structure is mainly fixed. KAOS needs to find a way to gain a solid customer base retention because of the high secondary customer acquisition cost explained above, as well as its inability to assign fixed roles to team members other than the ones related to a specific project. Another important weakness of the business is its Network Strength at the beginning of operation. Whereas the professional network needed for realizing and implementing recommendations exists in the area of Lisbon, the collaborators for already realized projects of the business are now dispersed and not locally anchored. For that matter, KAOS needs to heavily invest into strengthening both informal and formal ties to complementary-skilled sources of both collaboration and consulting jobs. This factor, however, is counterbalanced by the proposed business' strong default "Social Connectivity" strength. The factor determines the degree to which the company adopts contemporary means of connection with other professional entities, including Social Media, Connectivity Events (e.g. Digital Nomad meetups; thematic workshops, after-work meetings, thematic conferences). Because the business is proposed as a dynamic approach to create collaborations on the spot, it needs to be much more involved in transactional exchanges of ideas, skills, and knowledge to function. In turn, this connectivity enables the business to make use of structures that would otherwise remain undetected within purely professional spheres, so that important network connections can happen anywhere and any time. Its strengths in interdisciplinarity widens this opportunity, producing an environment of at best highly suitable project outcomes for a client. The product offer is especially designed to perform well because the collaborators of any type of project housed under the KAOS roof are usually involved in other projects, i.e. they voluntarily select a KAOS project because of their personal interest and motivation for it. In this case, Table 5 shows a complementary, different approach to the consulting market, although the business features crucial weaknesses that need to be addressed.

9.1 Potential Partners/Networks

A crucial aspect of the business' success is its belonging to and establishment of professional networks. These networks, however, can manifest themselves from a very informal degree (solely verbal, with peers/friends, irregular interaction) to a highly formal degree (written/ stored online, with high-profile business acquaintances, regular interaction). In this matter, both types and intermediate kinds of networks feature their unique set of (dis-)advantages. In the following, some of the most significant networks / partnerships to participate in are presented.

Traditional Agencies & Consultancies	**Innovation Clusters & Hubs**	**Elite Sourcing Networks**	**Social Networks**
Because of the variety of offers proposed by KAOS, it may be handy for business services enterprises to source expertise/skillsets for certain projects from secondary contractors like KAOS (e.g. for content production, research, project management; see "Offer characterization").	Co-working spaces, FabLabs, Community Work spaces. Provide office infrastructure (desks, address, mail handling, printing). Later types of these focus on creating an own, motivated community, e.g. at Lisbon's Innovation Kluster (Linnk; 2015) or the Tribewanted Community (2015)	Elite Sourcing Networks (Edge Amsterdam (2015)), source adequate professionals for specific projects on the base of crowdsourcing. Edge Amsterdam as well as Mecenato a (2015) use the process to match capable professionals with fitting projects. Freelancers like KAOS can sign up for the networks.	Social Networks such as LinkedIn or Facebook, although with different clienteles, structurally resemble each other. Since both networks are among the globally biggest in user numbers and

Table 8. Different type of networks. Own Contribution.

10 Objectives Of The Plan

The objectives of the plan are to

1) Deliver insight into both contemporary business service delivery culture and consumption culture with a focus on Ethical & Environmental Sustainability, Authenticity, and Products'/Services' Functionality;
2) Provide a new, innovative approach to counteract and address the above-mentioned features through the means of consulting businesses for an improvement thereof;

3) Verify the feasibility of the theoretic approach from an hands-on, economic perspective;
4) Encourage positive change within common practices to reduce harmful, negative externalities inherent in our current system.

11 Strategy Development

11.1 Mission, Vision, Values

The Mission of KAOS is to embrace, digest and shape some of the most recent economical developments through establishing itself as an intermediary at the intersection of product/service consumption and creation. Because of the deep-rooted belief in success through reduction of negative impact on human interaction, environmental change, and technological artifacts, KAOS provides consulting and the realization of the consultation within the boundaries of authentic, sustainable, and functional product/service development for the client. Simultaneously, it aims to provide the most viable outcome to its customers by implementing rigorous analysis and success measurements, which are followed by an on-the spot created team of professionals.

The Vision of KAOS is to function regardless of location, that is, to follow and realize projects throughout the globe wherever opportunity is given. It aims to develop and refine its boundaries of heritage, to learn and to strategize the learned input in a both economically and ethically charitable way. It aims to inspire and encourage others to implement these values to build a both more efficient and more enjoyable consumption environment.

KAOS' values are derived from the observations and causalities related to the above-mentioned contemporary knowledge strains. They revolve around the conviction to develop and create ideas in favor of human interaction, the need for authentic, *real* matter, and environmental harm reduction, for that societal progress needs to gradually enable a value-free, happy and thriving co-living environment. This environment can be crafted by the way how companies design, produce and deliver their products, and it is believed that mediating between the relevant stakeholders following a guideline such as the ASP framework significantly increases successful societies.

11.2 The Business Model Canvas

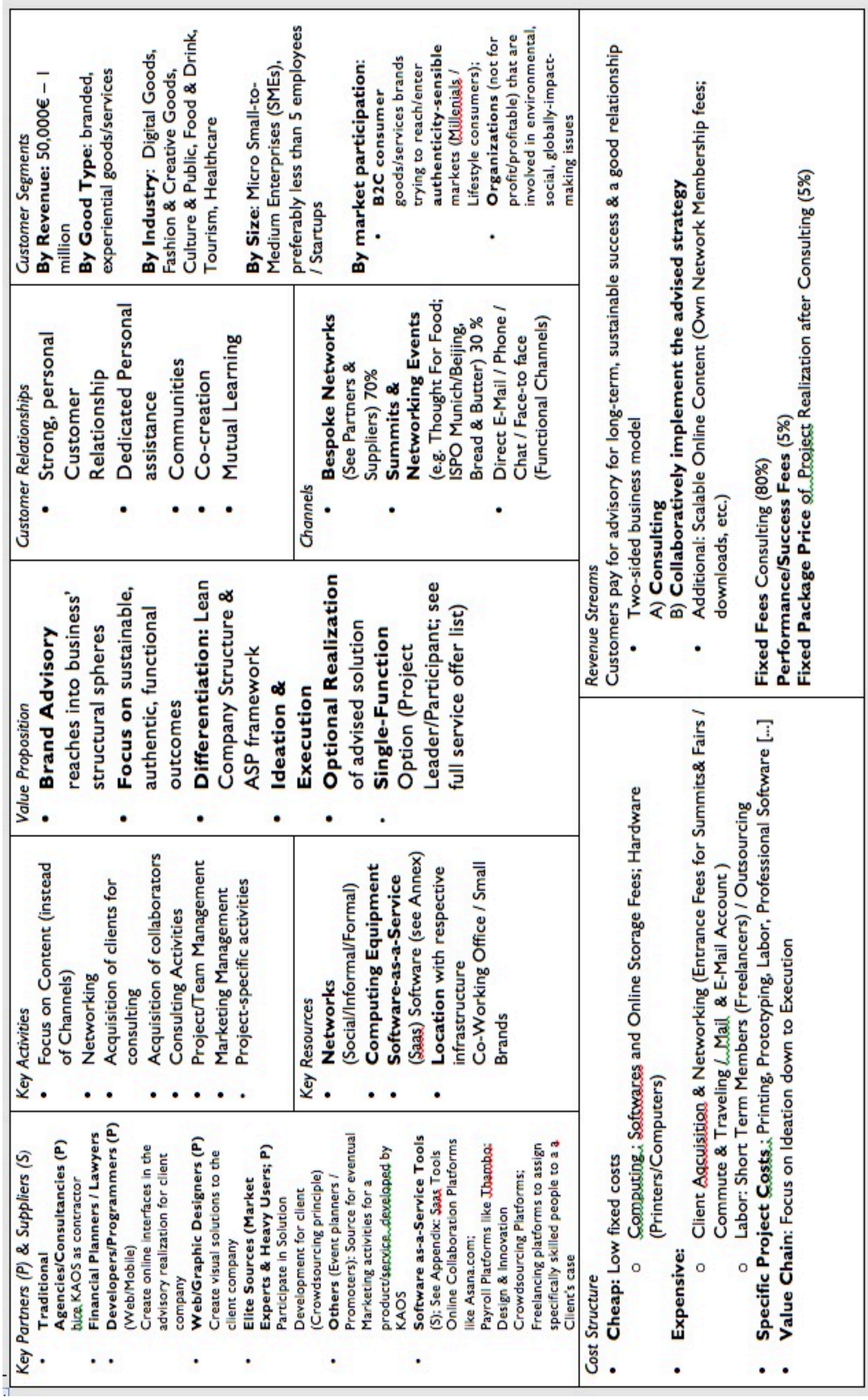

Figure 4. Business Model Canvas. Adapted from Osterwalder (2013): The Business Model Canvas.

12 Global Strategy: The Brand Elements & Services

KAOS' (Kreative Acts of Strategy) core activities can be classified as Management Consulting in the area of Marketing, Communication & Innovation. However, the proposed business offers an additional variety of services which can be selected and combined according to both the client's need & budget as well as according to proposal by the consultant upon which services fit best to the unmet need. A full list of these services can be accessed under Appendix 19.6: Offer Characterization. The roughly outlined Consulting process, including the ASP framework audit, (Acquisition-Handling-Delivery) can be accessed in Appendix 19.7: Complete Brand Audit. It is worth noticing that some of the activities necessary to deliver the services, the backoffice, will be processed computer assisted with some of the latest software. An example list of productivity tools can be found in Appendix 19.2: Business Tools & SaaS Services. A central part of the brand's client touch point is its web presence, that is, its proprietary website.

12.1 Visual Elements

Figure 5. **Logo on visual artifacts of the brand. Own Contribution.**

13 Implementation Policies

13.1 Segmentation

There are different ways to segment a market according to the specifities of the proposed business. In this case, the primary segments are the ones served within the proposition of delivering consultancy services. Implement Consulting (2013) states that segmentation is important to refine the business model, to understand the market (and sub-genres), and to align the value proposition with segments in need for it. Another point is the opportunity to outline synergies across the value chain (ibid, 2013). The optimum segmentation approach for the proposed business would be to segment potential B2B clients upon the type of goods that they sell– In this case, positional goods (Veblen, 1989; Vatiero, 2011), superior goods (Nelson, 1970), or credence goods (Dullek & Kerschbaumer, 2006) are examples that are produced by companies which could be targeted by marketing, branding, and innovation efforts in conjunction with the ASP framework. The advantage of this "behavioral" (as opposed to mere demographic) segmentation lens would be to gain a good matchmaking balance between resources needed to get this particular information from potential customers and the internal capabilities to create value and use the customer insight strategically (Implement Consulting, 2013). However, as highlighted within the Market study context, data about segments other than demographic ones are relatively scarce.

For that reason, different pre- elected Industries have been analyzed upon demographic variables and consequently scored in relation to their attractiveness to engage in. Here, the markets were rated upon their buying power and their need for advisory/innovation on a three-fold score (low/medium/high).

13.1.2 Different Industries in Portugal

Because of the inherent business structure of the proposal, the type of companies targeted have pre-set characteristics:

- **Micro Small-to-Medium Enterprises (SMEs**; less than 10 employees and annual turnover not greater than 2 million euros) (European Commission 2014a):
    - Size of Sector: 803.708 Micro enterprises (94,5% of all SMEs in Portugal)
    - Workforce: 1,39646 million (43%) full-time equivalent Workforce.

However, opportunities arise not only from the size of companies but also from different Industries in Portugal:

Industry Name (Data Source)	**Sector Size**	**Workforce size** (fulltime equivalent)	**Amount of SMEs** in Prtgl, 2012	**Birth Rate** of new compa-nies	**Buying power** / Opportu-nity for growth	**Need for advisory**
Creative Economy (Communication Cross Innovation (2014); Pordata (2012); INE (2011)	3% Portuguese GDP; 2009: 14,591 enterprises 2012: 13,927 enterprises	2009: 78,004 2012: 80,682 3,4% of total employment [In Greater Lisbon: up to 30% of employment])	n.a.	2011: 19,57 2010: 16,88	low	high
Recreation, Environment, events, sports & Culture Campos Franco et al. (2011); Pordata (2012), INE (2011)	4,2 % of GDP; 10% of entire Culture & Public Sector; 1,9 bn € in expenditures; 2009: 94,634 2012: 70,875	2009: 148, 286 2012: 120,500 (Volunteers & Paid) 19,76 % of total employment	85,183 (98,3%)	2011: 14,71 2010: 13,61	medium	high
Fast-moving consumer goods, Food & Drink Pordata (2012),; INE (2011)%	% of GDP: n/a 2009: 269,623 2012: 236.722	2009: 831,810 2012: 754,049	718,608 (95,3% of all)	2011: 10,72 2010: 10,08	medium	low
Tourism (aicep, 2015) Pordata (2012)	15,9% of GDP 2009: 89,242 2012: 83,103, 7,1 bn € in expenditures	2009: 292,705 2012: 270,455	255,483 (95,5%)	**2011**: 13,92 **2010:** 12,64	high	medium

Table 9. Different Industries in Portugal. Own Contribution.

13.1.3 Needs in Authenticity, Sustainability & Product Functionality of small businesses in different Industries

Micro/Small SMEs	**Resources**	**Objectives**	**Needs**
Creative Economy	Small to medium budgets (depending on funding opportunities / business phase)	Proof of Business model Growth, Verify business model; Communication of Business model vision;	Delete flaws of previous phases, Focus on authentic heritage & narration (A); map opportunity in Sustainability (and P)
Culture, Public, NGO	Public-backed funding; Crowdsourcing; Sponsoring. Depending on area: Little to small budgets	Get Public funding; Gain large followership / audience; build networks of performing actors/events, provide merit values	Leverage subcultural niche impact (A); Design solid revenue streams (P); disruptive branding
FMCG	Depending on product & phase medium to large; especially with established brands: large	Gain social traction, get “brand lovers”, establish as unique, emblematic & culturally important artifact	Refine Product functionality beyond branding (P), tie in big opportunities for sustainable production (S) reconsider internal structure within ASP
Tourism	Depending on phase: Small-to medium sized budget; no option of co-funding/	beat local competition, service excellence, create experience, gain good ratings	Define authentic heritage (A) & sustainability (S) and communicate it; Focus on inside-out change towards these values; strong marketing activities, establishment of universal brand

Table 10. Needs for Authenticity, Product Functionality and Sustainability of SMEs in Portugal. Own Contribution.

The outlined industries do not only participate in the Portuguese economy with different shares. The SMEs within these industries also have different needs in terms of Management consulting. The following table explicates needs of SMEs in the different industriews when analyzed upon the opportunities within the ASP framework dimensions (A: Authenticity; S: Sustainability; P: Product/Service Functionality).

13.2 Targeting

After analyzing different segments that may correspond with the proposed business operational aims, the target market can be defined as companies of

- The Creative Economy; Culture, Public & NGO economy; Tourism economy;
- Small (& micro) size in a medium to grown maturity state

Here, especially those companies that want to build a new product/service for a consumer segment of 20-30 year-olds or for Lifestyle-conscious consumer segments are focused. Moreover, organizations (not for profit/profitable) that are involved in environmental, social, globally-impact-making issues are addressed. Examples are e.g. Innovation/Branding enterprises, Sports clubs, NGO initiatives, Theaters, Surf Camps, Yoga Retreats, Lifestyle brands (e.g. Craft Beer, Apparel, Vegan Restaurants)

13.3 Positioning

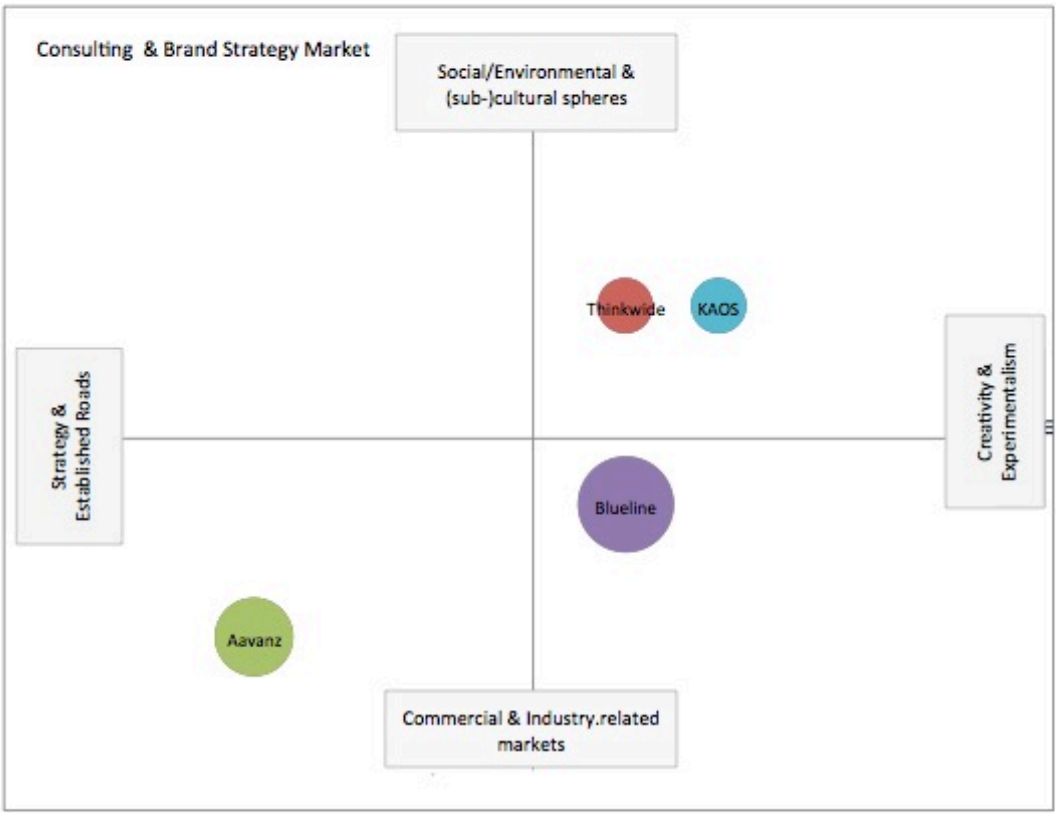

Figure 6. Perceptual Map. Own Contribution. The size of the circles indicates the competitors' power.

Positioning harnesses the unique predispositions of the business in combination with business areas that are likely to experience growth or already grow (Treacy, 2015). In this case, the perceptual map for positioning shows the values shown in Figure 6.

X-Axis: Strategy & Established roads vs. Creativity & Experimentalism describes the competitors' approach to solve a client's specific unmet need. It can follow strict strategic analysis models or rather follow an experimental, "trial-and-error" way of operation.

Y-Axis: Social/Environmental & (sub-) cultural spheres vs. Commercial & Industry-related spheres refers to the competitors' locus of action. That is, some competing Marketing consultancies focus on consumer goods & production; the others focus rather on culturally enhanced contexts (e.g. experiential branding; sports, tourism). In relation to its competitors, KAOS rather acts upon creative, case-dependent solving strategies with a strategic backbone in consumer markets that can be rather defined as culture production/contribution.

13.4 Place

Since consultants often consult in-house of their clients, the place of action will be mostly in the place of residence in the respective client's city. The offered model bases on the assumption to start the business in Lisbon, Portugal.

13.5 Pricing

The pricing structure in the beginning will be an hourly rate multiplied by the upfront negotiated volume of work hours combined for a particular project ("Project-based fixes bid, Think Redwall, 2014). Additional cost incurring through the purchase / use of materials will be calculated upon the purchased materials' price and time of use (ICB, 2013). However, KAOS will maintain the previously negotiated quote even if more work occurs because of the cost sensitivity of its small customers to maintain a high base retention rate and a good credibility. FEACO (2011) quotes the daily fee rates per country range between 700-1250€ (Switzerland/Germany) and 200-400€ (Greece/Portugal). The most important differentiators for the charged rate are Experience; Qualifications; Scarcity of Talent; Intellectual Property (proven IP enhances rate); Sector; Geography and the duration of assignment (decreases price). After calculating all incurring cost to the business[11] (49,250€) and dividing them through billable work hours in a year (211 days/886 hours), after considering a work-hour

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[11] Personnel cost for a KAOS consultant and one part-time collaborator; personnel side cost; rent; marketing; IT& tools; Depreciation; Insurance, Travel cost

utilization of 70%, & a profit margin of 20% per hour, and after considering the above-mentioned factors, the hourly rate, including sales tax, is **40,73€.** (See Appendix 10: Pricing).

13.6 Promotion & Communication

The aim of KAOS is to use its communicational potential for promoting the business operations, for turning them more transparent, interactive, understandable, and reactive.

The objective for the first 12 months is to establish, promote, and manage client & stakeholder touch points through a website, relevant social media channels (Inboudn) and offline networking strategies.

13.6.2 Overall Strategy, Tone, Theme

KAOS aims to advise companies for "Doing good", and this will be transmitted through its Media channels. Here, the network effect of external viral content supporting the cause, as well as the opportunity to shape/communicate the own vision and values through interactive means help to leverage KAOS' idea.

Audience Targets are leaders and decision makers of the target client SMEs in Portugal, mainly in the area of Lisbon. Another, more fragmented target audience is the one of freelance professionals within the "Creative Economy" in whole Portugal, which function as a conversion & recommendation funnel between companies and KAOS. Additionally, larger organizations, such as NGOs and Clubs, especially within cultural economies count to the core audience of KAOS. Especially in regards to the business' newness and the corresponding lack of project experience, the theme may rather try to avoid bold, big-headed tag lines and rather focus on the potential change it brings when hiring KAOS as a consultancy. At the same time, the themes of sustainability, authentic brands, and product functionality featured in KAOS' ASP analysis framework may be cited and digested in form of benchmark examples and previous case studies of KAOS.

13.6.3 Communicational Activities

KAOS chooses a mixed approach of Online and Offline Activities.

Online, KAOS will primarily focus on Inbound Marketing, that is, an organic approach to generate visitor traffic by delivering compelling information. It will use its own website and Facebook page for keeping a destination for first-visits.

Offline, KAOS will be strategically present on innovation, marketing and branding meetings, conferences or fairs. It will take into account relevant networking events. A large portion of time will be dedicated to search for opportunities "off-grid", that is, to identify opportunities by listening and recognizing actors that are not primarily associated with actively looking for consulting help.

Other acquisition strategies such as cold E-Mails or Calls are only implemented if there was previous contact with the potential client or if a clear opportunity is identified through secondary information sources. Because of an inclination to personal interaction, phone calls are preferred and rigorously implemented with all client transactions.

13.6.4 Timeline

The activities will be implemented with the inauguration of the business, and adapted to available budget and time considerations. Generally, the focus lays on an "Owned media" communications approach to maximize the impact on the subsequent "Earned Media" resonance. As for the employed networks, the timeline is continuous as the platforms will be maintained throughout the time span in which they are a strategic tool for KAOS.

Networking Events and Innovation fairs on which KAOS will be present are

1) Eco Week Greenhouse, Thessaloniki, Greece, 1-7 November 2015
2) Thought for Food Summit, Zurich, Switzerland, 1-4 April 2016
3) Bread & Butter tradeshow, Berlin, Germany, 7.9 July 2016

On the fairs, KAOS intends to gain qualitative leads and opportunities for consulting and innovation projects within its expertise fields.

KAOS' own website and Facebook page will have pre-scheduled content to publish with an interval of 1-2 posts/week. Additionally, monthly guest contributions on other online/offline publications and blogs with expertise-related content will be released.

13.6.5 Budget

The largest quantity of Communications budget flows into Inbound Marketing activities (60%), followed by networking activities the visit of trade fairs/conferences (20%) and Outbound Marketing (10%).

13.6.6 Measurements

Outputs: To reach the objective in the first 12 months, output measurements ONLINE will be the amount of articles/content produced for the "owned media", the volume of mentioning in the "earned media", the amount of shares/likes/reactions to each of the output produced, and number of acquisition e-mails sent. OFFLINE, the number of visited networking events, the amount of "off-the-grid" activities/visits, and the amount of outbound marketing activities made are adequate measures.

Outcomes: ONLINE Outcome measures include the number of leads' direct addressing of KAOS after publishing information; and the number of received E-Mails/Calls/Messages related to business after publishing new content. OFFLINE Outcome measures include the number of leads gained from networking and the amount of sales realized, the scope and volume of projects arising from networking offline.

14 Financing

The Financing will be funded 100% through own means. The initial funding is set with an initial 6000 €, which covers 3,340€ startup investment and part of the operating costs. The project will receive further private subsidies of 1500 Euros monthly for the first 7 months, so that the amount of total invested capital sums 16,500€. The capital surplus received from the profit/loss account of 1,505 € is discounted from this total sum, totaling 14,995€ in capital need for operations and initiation.

15 Financial Evaluation

15.1 Assumptions

An advantage of a freelance consulting firm is that many of otherwise business-related costs are counted private cost. In the plan, cost for office rent (equals private home), cost for phone & internet, insurance and part of the travel cost are near-equal to private expenditure. The salary paid equals the additional private household costs (food, additional expenditures, hobbies).

To translate the business' dependency on the participation & leverage of networking, the amount of spending for Inbound Marketing is comparably high. Inbound Online Marketing, that is, the employment of SEO, Social Network, Blogging and WoM strategies are significantly less costly (when measured through cost per lead).

One problem of freelancing is that there is only a limited amount of billable hours. This means that the scalability (and thus growth opportunity) of delivered services is very low. To avoid dry-run of billable hours, measures implemented are

- **Increased Productivity**. That is, hours are utilized more effectively, e.g. through implementation of more powerful software, work flow automatization, an enhanced lead conversion rate, and reduction of churn rate (and therefore customer Acquisition cost). As for the consulting part, it is assumed that the amount of hours billed is extremely low at the beginning, reaching the full utilization after **one year** of operation. The monthly cost for

- **Enhanced billing rate**. An enhanced billing rate can only be established by increasing experience/ added value. The billing rate is enhanced after nearly a year and a half because it is assumed that increased experience justifies the raise.
- **Other capital influx is added**.
    - **In this case**, as mentioned in the business plan, the opportunity to collaborate with other freelancers to realize consulted projects is used to a small extent (once every 4 months, counting a project lasts 3-4 months). The volume of the project realization counts in as total package price for the client, of which cost for collaborators is discounted.
    - **An additional influx** is created by offering Online Branding lessons. Here, consulting "best practices" are formed as a 3-month curriculum and recorded by video, to broadcast it on a online classroom platform such as Udemy or Khanacademy[12]. The recording of the classes account for a relatively high initial cost, which are offset by the almost infinite amount of possible lesson subscription. Because the business plan already incurs relatively high inbound/outbound Marketing costs, the only additional cost is the commission charged by the academy platform.
- The opportunity to work in an additional part-/quarter time employee job is considered. Because the business approach incorporates uncertainty and the opportunity to involve in other projects, the amount of total billable hours is set to 6 (instead of 8) daily (Check Table 7 [Pricing]). The utilization rate is set to 70%, and sickness/holiday days count high (See same Table 8).
- One of the most problematic characteristics of freelancers is that debitors do not pay on calculated time. For that reason, it is necessary to incorporate slightly higher capital buffers (30%).

15.2 Cost budgeting

The Cost structure is composed as follows:

Fixed Costs: Insurance, Phone/Internet, Web Hosting, Rent (60%)

Marketing: Inbound, Outbound, Network Membership (15%)

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[12] Websites: http://udemy.com & http://khanacademy.com. Both accessed on September 15, 2015.

Sales: Traveling, Audit Material, Contractors, Office Expenses (additional in case of co-working space rent & business meetings) (18%)
Development & Administration: Software, Legal Expense, Accounting (7%)

15.3 Profit Margin & Cost structure by Turnover

Margin	2015	2016	2017	2018
Profit Margin				
Profit Margin before Taxes	neg.	27%	52%	55%
Profit Margin after Taxes	neg.	22%	36%	38%
Cost Structure				
Production cost % Turnover	13%	18%	13%	13%
Personnel % Turnover	38%	19%	15%	14%
Marketing % Turnover	10,9%	5,6%	3,2%	2,9%

Table 11. Profit Margin & Cost by turnover. Adapted from Fuer-Gruender (2015): Financial Planning tool.

The Profit margin before taxes increases very strong in the second half of the business' first two years of operations. Because of taxation discounts in the first two years, the margin is nearly not affected. The profit margin after taxes in 2017/2018 after taxes adds to solid 38%– Mainly because the weight of the additional capital influxes created over the time of operations. However, the margin greatly covers private expenses to the extent that KAOS' founder receives a relatively small salary (500€ per month in the beginning). The Cost structure in percentages of the turnover shows the relatively high cost in Personnel & Marketing in the initial 3 months (the last months of 2015). The spending nivels out towards the second half of the three-year period.

15.4 Account Balance vs. Credit & Debit Flows

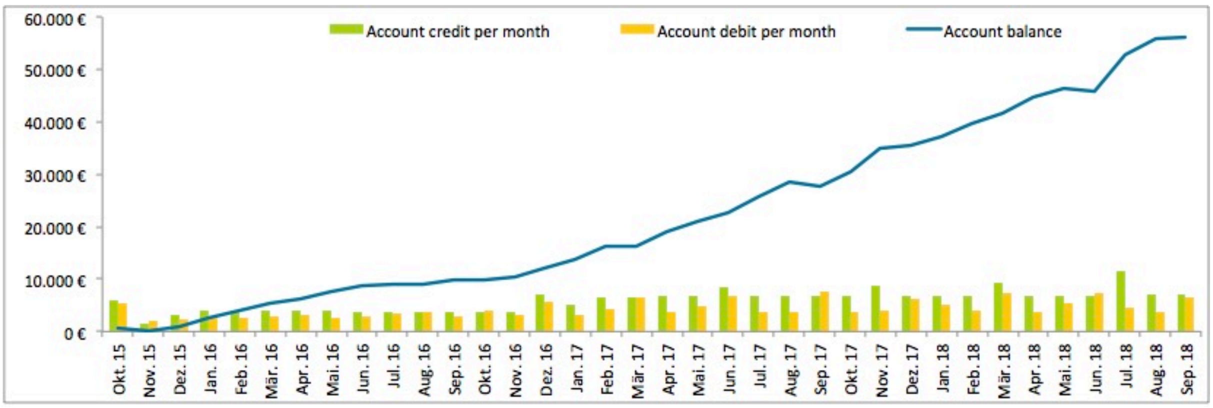

Figure 7. Account Balance vs. Credit& Debit Flows. Adapted from Fuer-Gruender (2015): Financial Planning Tool.

Figure 7 shows that the account credits almost never exceed the account debits. The credits are especially enhanced in the months of executing the consulted strategy as a service package

(Nov. 16, March 17, Oct. 17, Febr. 18, June 18. The account balance growth is non-linear and increases at a higher rate after the first year of operation.

15.5 Breakeven

The breakeven of the undertaking appears between October and November 2016, shortly after the first year since the beginning of operations.

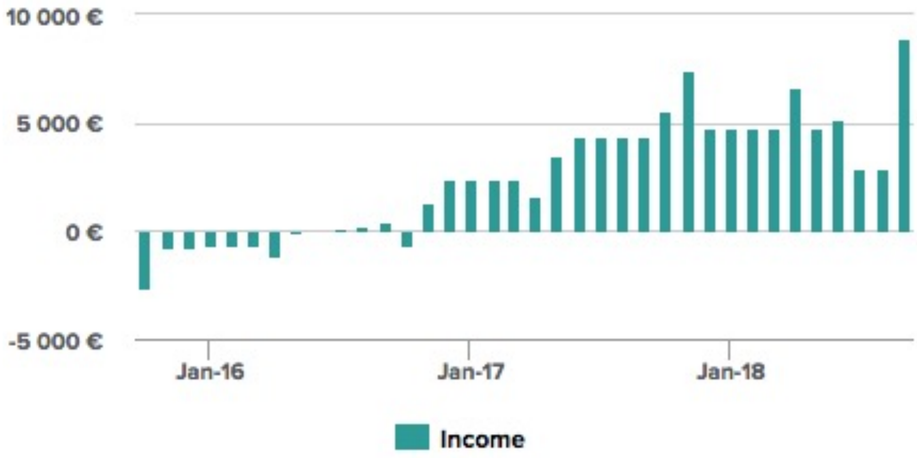

Figure 8. Breakeven graphic. Own Contribution.

15.6 Profit/Loss account

Profit/Loss (ROI)		2015	2016	2017	2018
Amount of Months		3	12	12	9
Turnover (excl. Sales Tax)		4.950 €	38.640 €	67.370 €	55.400 €
Cost					
Pre-Sales, Proposal, Material		650 €	6.780 €	8.500 €	7.420 €
Personnel		1.875 €	7.500 €	9.783 €	7.493 €
Rent (Office)		2.325 €	9.465 €	9.600 €	7.200 €
Marketing		540 €	2.160 €	2.160 €	1.620 €
Insurance		300 €	1.200 €	1.200 €	900 €
Other		- €	500 €	600 €	500 €
Depreciation		500 €	500 €	500 €	- €
Founding Investments		3.037 €			
Total Cost		9.227 €	28.105 €	32.343 €	25.133 €
Earnings before Taxes		- 4.277 €	10.535 €	35.028 €	30.268 €
Accumulated Deficit			- 4.277 €	- €	- €
Ø Taxes	30%	- €	1.877 €	10.508 €	9.080 €
Profit		- 4.277 €	8.658 €	24.519 €	21.187 €

Table 12. Proft/Loss Account (ROI). Adapted from Fuer-Gruender (2015): Financial Planning Tool.

15.6.2 Three Year's Profit/Loss Account

Profit/Loss	Okt.. 15	Nov.. 15	Dez.. 15	Jan.. 16	Feb.. 16	März. 16	Apr.. 16	Mai. 16	Juni. 16	Juli. 16	Aug.. 16	Sep.. 16
Total Profit (without Sales tax)	990 €	1.980 €	1.980 €	1.980 €	1.980 €	1.980 €	2.970 €	2.970 €	2.970 €	2.970 €	2.970 €	2.990 €
Total Profit	1.188 €	2.376 €	2.376 €	2.376 €	2.376 €	2.376 €	3.564 €	3.564 €	3.564 €	3.564 €	3.564 €	3.588 €
Total Cost (without Sales Tax)	4.842 €	1.935 €	2.450 €	1.950 €	1.950 €	2.150 €	2.380 €	2.080 €	2.080 €	2.600 €	2.860 €	2.080 €
Total Cost	5.002 €	2.087 €	2.605 €	2.105 €	2.105 €	2.351 €	2.634 €	2.265 €	2.265 €	2.842 €	3.131 €	2.265 €
Operating Cost without Depreciation	4.842 €	1.935 €	1.950 €	1.950 €	1.950 €	2.150 €	2.380 €	2.080 €	2.080 €	2.600 €	2.860 €	2.080 €
Operating Cost with Depreciation (without sales tax)	4.842 €	1.935 €	2.450 €	1.950 €	1.950 €	2.150 €	2.380 €	2.080 €	2.080 €	2.600 €	2.860 €	2.080 €
	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
Profit/Loss before Tax												
EBITDA	-3.852 €	45 €	30 €	30 €	30 €	-170 €	590 €	890 €	890 €	370 €	110 €	910 €
EBIT	-3.852 €	45 €	-470 €	30 €	30 €	-170 €	590 €	890 €	890 €	370 €	110 €	910 €
Earnings before Tax	-3.852 €	-3.807 €	-4.277 €	-4.247 €	-4.217 €	-4.387 €	-3.797 €	-2.907 €	-2.017 €	-1.647 €	-1.537 €	-627 €
Taxes												
Taxes Ø Income/Sales/Corpor 30% -> Zum Thema Steuervorauszahlung sprechen Sie bitte mit Ihrem Steuerberater			- €			- €			- €			- €
Profit/Loss after Tax /Month	-3.852 €	45 €	-470 €	30 €	30 €	-170 €	590 €	890 €	890 €	370 €	110 €	910 €
Cumulated sum after tax	-3.852 €	-3.807 €	-4.277 €	-4.247 €	-4.217 €	-4.387 €	-3.797 €	-2.907 €	-2.017 €	-1.647 €	-1.537 €	-627 €

Table 13. October 2015-2016 projected cash flow. Adapted from Fuer-Gruender (2015): Financial Planning tool.

Profit/Loss	Okt.. 16	Nov.. 16	Dez.. 16	Jan.. 17	Feb.. 17	März. 17	Apr.. 17	Mai. 17	Juni. 17	Juli. 17	Aug.. 17	Sep.. 17	Okt.. 17
Total Profit (without Sales tax)	5.580 €	3.980 €	5.300 €	5.330 €	5.330 €	5.330 €	6.930 €	5.330 €	5.360 €	5.360 €	5.360 €	6.960 €	5.360 €
Total Profit	6.696 €	4.776 €	6.360 €	6.396 €	6.396 €	6.396 €	8.316 €	6.396 €	6.432 €	6.432 €	6.432 €	8.352 €	6.432 €
Total Cost (without Sales Tax)	3.025 €	2.225 €	2.725 €	2.225 €	2.793 €	2.793 €	2.493 €	3.293 €	2.493 €	2.493 €	2.493 €	3.293 €	2.493 €
Total Cost	3.428 €	2.444 €	2.944 €	2.444 €	3.094 €	3.094 €	2.725 €	3.709 €	2.725 €	2.725 €	2.725 €	3.709 €	2.725 €
Operating Cost without Depreciation	3.025 €	2.225 €	2.225 €	2.225 €	2.793 €	2.793 €	2.493 €	3.293 €	2.493 €	2.493 €	2.493 €	3.293 €	2.493 €
Operating Cost with Depreciation (without sales tax)	3.025 €	2.225 €	2.725 €	2.225 €	2.793 €	2.793 €	2.493 €	3.293 €	2.493 €	2.493 €	2.493 €	3.293 €	2.493 €
	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
Profit/Loss before Tax													
EBITDA	2.555 €	1.755 €	3.075 €	3.105 €	2.538 €	2.538 €	4.438 €	2.038 €	2.868 €	2.868 €	2.868 €	3.668 €	2.868 €
EBIT	2.555 €	1.755 €	2.575 €	3.105 €	2.538 €	2.538 €	4.438 €	2.038 €	2.868 €	2.868 €	2.868 €	3.668 €	2.868 €
Earnings before Tax	1.928 €	3.683 €	6.258 €	9.363 €	11.901 €	14.438 €	18.876 €	20.913 €	23.781 €	26.648 €	29.516 €	33.183 €	36.051 €
Taxes													
Taxes Ø Income/Sales/Corpor -> Zum Thema Steuervorauszahlung sprechen Sie bitte mit Ihrem Steuerberater			2.066 €			2.454 €			2.803 €			2.821 €	
Profit/Loss after Tax /Month	2.555 €	1.755 €	510 €	3.105 €	2.538 €	84 €	4.438 €	2.038 €	65 €	2.868 €	2.868 €	847 €	2.868 €
Cumulated sum after tax	1.928 €	3.683 €	4.193 €	7.298 €	9.835 €	9.919 €	14.356 €	16.394 €	16.458 €	19.326 €	22.193 €	23.040 €	25.908 €

Table 14. October 2016-2017 projected cash flow. Adapted from Fuer-Gruender (2015): Financial Planning tool.

Profit/Loss	Okt.. 17	Nov.. 17	Dez.. 17	Jan.. 18	Feb.. 18	März. 18	Apr.. 18	Mai. 18	Juni. 18	Juli. 18	Aug.. 18	Sep.. 18
Total Profit (without Sales tax)	5.360 €	5.360 €	5.360 €	7.360 €	5.480 €	5.480 €	5.480 €	9.280 €	5.580 €	5.580 €	5.580 €	5.580 €
Total Profit	6.432 €	6.432 €	6.432 €	8.832 €	6.576 €	6.576 €	6.576 €	11.136 €	6.696 €	6.696 €	6.696 €	6.696 €
Total Cost (without Sales Tax)	2.493 €	2.493 €	2.993 €	3.493 €	2.693 €	2.793 €	2.493 €	3.693 €	2.493 €	2.493 €	2.493 €	2.493 €
Total Cost	2.725 €	2.725 €	3.225 €	3.955 €	2.971 €	3.094 €	2.725 €	4.201 €	2.725 €	2.725 €	2.725 €	2.725 €
Operating Cost without Depreciation	2.493 €	2.493 €	2.493 €	3.493 €	2.693 €	2.793 €	2.493 €	3.693 €	2.493 €	2.493 €	2.493 €	2.493 €
Operating Cost with Depreciation (without sales tax)	2.493 €	2.493 €	2.993 €	3.493 €	2.693 €	2.793 €	2.493 €	3.693 €	2.493 €	2.493 €	2.493 €	2.493 €
	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €	- €
Profit/Loss before Tax												
EBITDA	2.868 €	2.868 €	2.868 €	3.868 €	2.788 €	2.688 €	2.988 €	5.588 €	3.088 €	3.088 €	3.088 €	3.088 €
EBIT	2.868 €	2.868 €	2.368 €	3.868 €	2.788 €	2.688 €	2.988 €	5.588 €	3.088 €	3.088 €	3.088 €	3.088 €
Earnings before Tax	36.051 €	38.918 €	41.286 €	45.153 €	47.941 €	50.628 €	53.616 €	59.203 €	62.291 €	65.378 €	68.466 €	71.553 €
Taxes												
Taxes Ø Income/Sales/Corpor -> Zum Thema Steuervorauszahlung sprechen Sie bitte mit Ihrem Steuerberater			2.431 €			2.803 €			3.499 €			2.779 €
Profit/Loss after Tax /Month	2.868 €	2.868 €	-63 €	3.868 €	2.788 €	-115 €	2.988 €	5.588 €	-411 €	3.088 €	3.088 €	309 €
Cumulated sum after tax	25.908 €	28.775 €	28.712 €	32.579 €	35.367 €	35.252 €	38.239 €	43.827 €	43.415 €	46.503 €	49.590 €	49.899 €

Table 15. October 2017-2018 projected cash flow. Adapted from Fuer-Gruender (2015): Financial Planning tool.

16 Implementation Requirements

16.1 Legal and Tax Requirements for a flexible freelance Consulting business in the European Union

Generally, (income) tax has to be paid in the country of the taxpayer's permanent residency, primarily regardless of the country where the income has been produced. That said, for "free movers" and the upcoming branch of "Digital Nomads" who can work flexibly from any part of the world through Internet connection, this regulation is problematic. Since many of them aim to work in the manner as proposed in this business plan without any specific, long-term attachment (or residency) to one specific country, the term of "permanent residency" is difficult to determine. Freelancers gradually travel and work abroad for longer than the 183 days of required permanent residence in one specific place, with some of them completely giving up their status as permanent resident in any country, including their country of origin. In this case, the easiest regulation would simply be to get both sales- and income-taxed at the actual (at best global) rate of the country of current residence, even if the time span in one country may less than 183 days, which is practice by countries like Singapore or Panama. Although there has been efforts to increase the flexibility of freelancers and self-employed persons in the EU, it is still problematic for them to get taxed territorially in Europe so that they are required to have a permanent residency in any of the EU countries to legally work and produce income (Kühn, 2014). In the presented business plan, the attempt to work flexibly at least on European soil renders the applying tax legislations significantly more complex.

16.2 Business Requirements and Applicable Taxation

Key to abbreviations

EStG: German Income Tax Act

From the literature review (IAPMEI, 2015), the status of proposed business can be described as "Limited taxpayer as a Self-Employed person in a Single-Member Limited Company (Sociedade Unipessoal por quotas) in a liberal Profession with status of "Residente não Habitual" in Portugal and must meet the following criteria:

- The acknowledgement of Consulting as a liberal profession of increased value according to §81(4), 3-303 of the Portuguese CIRS with special taxation. This is, all profits become taxable through the natural founder of the business.
- Name need to hold "Unipessoal, Lda"– KAOS Empire Unipessoal, Lda.
- Freely quota value; never less than 1,00€. In this case, the initial capital of 6000€ including a buffer of 1000€ is implemented.
- The totality of the capital must be held by one single member (The proposing entity).
- Registration at the "one-stop shop" (Empresa na hora)
- Registration with Social Security Regional Center & Workmens' accident compensation insurance
- Furthermore, the German entitiy can apply for the status of a "Residente Não Habitual" (RnH; separately-lawed taxpayer) status in Portugal through
    - No permanent residency in the last 5 years in Portugal
    - Registering the taxpayer's residency at the Portuguese "Portal das Finanças"

- Taxpayer's Residency can be registered if the tax paying person stays more than 183 days/ calendar year in Portugal
- Applying for the status of "Residente Não Habitual" at either the local "Loja da Cidadão" (Citizen Hall) or the "Serviçio das Finanças" (Finance Department).

17 Planning Objectives: PERT Chart

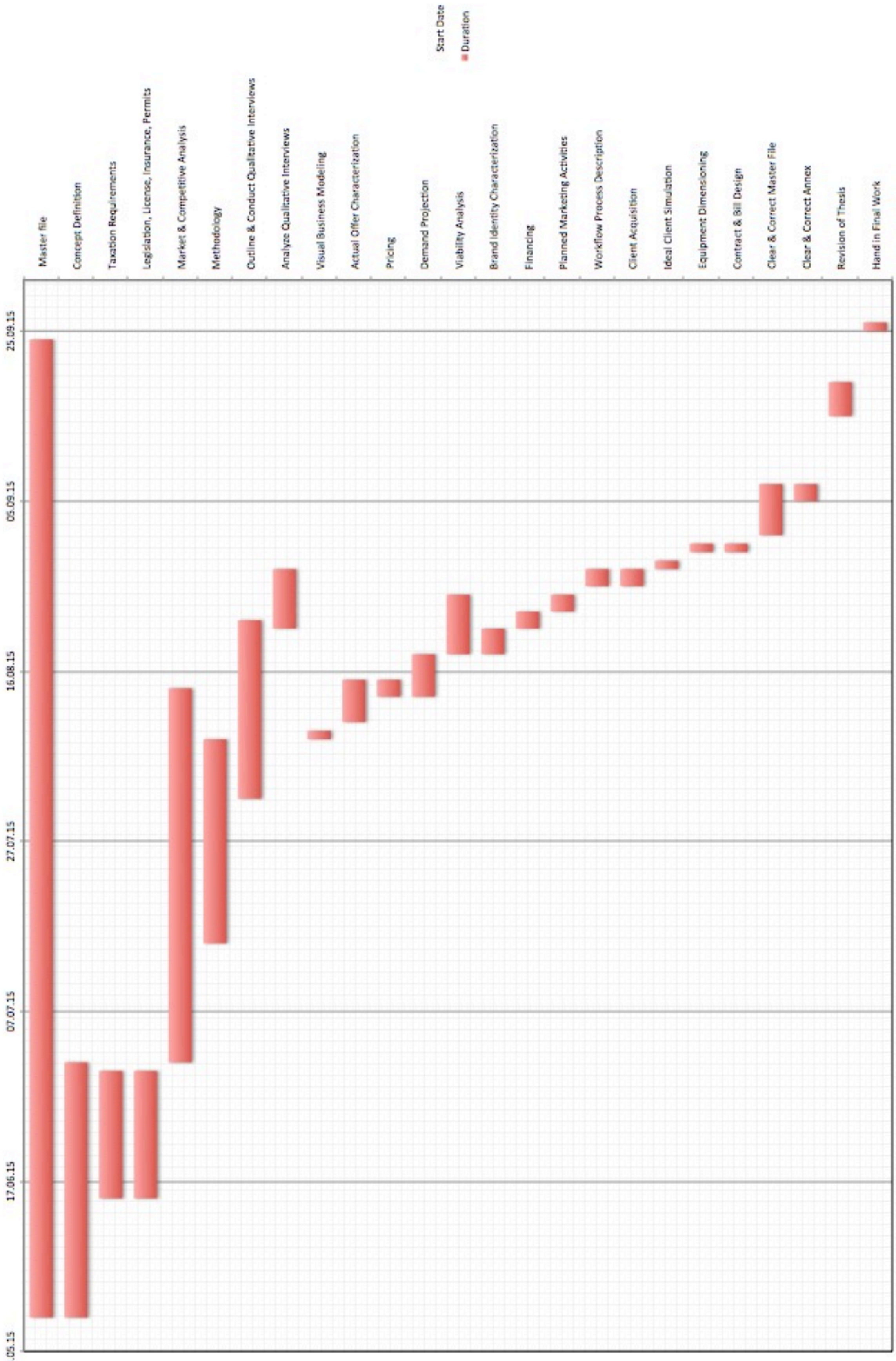

Figure 9. PERT Chart for the thesis work flow. Own Contribution.

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Appendices

19 Transformational Outsourcing

To understand and map a company's potential to outsource knowledge, the predispositions must be understood. Mohr et. al (2011) hold the term against other forms of Outsourcing (Figure 2) to map the different sourcing types assess the necessity of acquiring knowledge out of house. Transformational Outsourcing (TO; case 4 in Fig. 1), bound to its antecedent explanations, provides an important 'shape giver' to the proposed business plan as it is the type of knowledge sourcing KAOS can provide expertise within. The graphic shows that Transformational Outsourcing (TO) is only reasonable for an organization to implement if three major conditions are met:

1. The company lacks adequate (financial and/or human) resources to manage innovation processes in-house. It turns out to be more efficient to
2. The company chooses TO only if the business area to be outsourced is "mission critical" (ibid., p. 43). That is, "those processes and functions that provide the foundation for sustainable competitive advantage in the marketplace" (p. 43) are outsourced in respect to the high inherent risk of confidential information spill. Here, TO in contrast to e.g. simple procurement of IT or other BP processes can help to ease the risk (comp. further down) through the concept's communicational openness and flexibility, sometimes even providing positive spillover effects that would not happen within own boundaries.
3. Cost advantages must occur. Even if there would be capable outside resources and even if the process to be outsourced is a "mission critical" one, the aggregate cost of all occurring actions within TO must be cheaper than finding a different solution (for example a learning partnership [joint venture; case 8 in Fig.1]. Huggins et. al. (2010) mention in this context that joint ventures a far more often-used method of sourcing innovation knowledge, gaining "competitive advantage through formal collaboration" (p. 10). The cost efficiencies can occur through the outsourcing provider's economies of scale– For example, Apple outsourced its production partly to its competitor Samsung.

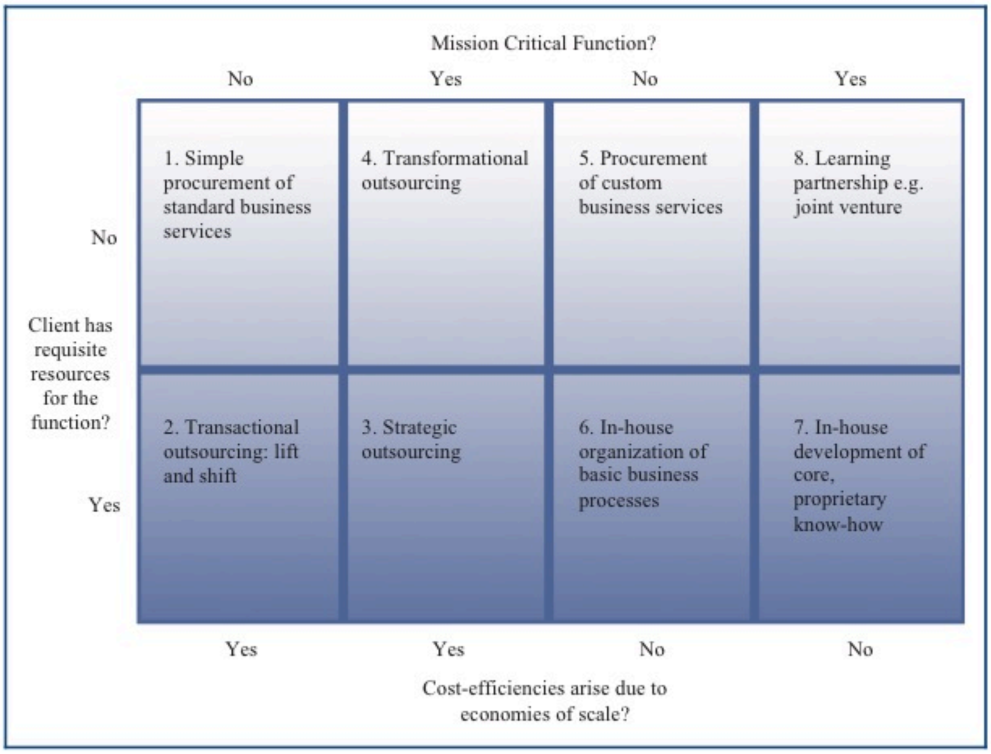

Figure 10. Mapping the decision for different types of Outsourcing. Adapted from Huggins et al. (2011).

The term of TO shows two important nodes that shape the construction of this business plan. First, it resembles an interface where KAOS is supposed to dock: A mediator between a firm, meeting the above-mentioned requirements, that searches for an adequate way to innovate for a certain audience, and innovative (human) sources that are able to provide valuable tacit and explicit knowledge for the organization. Second, Transformational Outsourcing bears the idea of a network, which constitutes a main determinant of business success in the KAOS case.

19 Business-Tools & Saas-Services

As stated earlier, our rapid technological advancements allow small businesses to fully focus on core value proposition by decreasing the time spent within administrative back ends. To begin with, much of administrative work and business processes are readily handled by software. Apart from "big players", already incorporated by larger corporations, such as software products by Zendesk, SAP, Workday, Taleo or Oracle, digital technology now enables smaller firms and freelancers to participate on the race for business process automation, eventually aiming to take over processes that do not relate to the firm's core value proposition.

The idea is to digitally improve important, cost-intensive and complex workflows. The problems aimed to be solved by the following platforms is to transform our innovation, collaboration, communication, administration and outsourcing habits, which still greatly depend on face-to-face and e-mail interaction. Gradually, remote work possibilities allow for collaboration independent of location and time, and thus streamlining economies for greatest talent at greatest speed and quality.
Some of the presented services below go as far as utilizing complete algorithms to evaluate workflows and turning them more efficient.
All of the services presented here are paid-for but offer differently-sized packages, mostly restrictive in data volume or user number. However, they often provide free packages for freelancers or small businesses. Moreover, the platforms enable to freely access their service online from anywhere and any device. Local desktop software versions are downloadable as an add-on but not the central product. That said, what turns those services valuable is their seamless integration with any other field-related software or work-flow, bringing in the opportunity to completely switch to their offer.

1) One of the most complete directories for SaaS- offers is called "Maqtoob.com". It is a directory of utility websites for SMEs and larger-companies alike, from collaboration platforms over graphic design tools to invoicing processes. All of them are curated, that is, rated upon their usability and pricing, and the database, fully set up by full of helpful stuff in a way that is easy to understand and use.

2) In some cases, there are only some functions or tools needed to accelerate certain business processes. In that case, toolkits like the one from100Open provide utilities useful for both ideation and innovation processes.

3) Some of the SaaS-offers, however, are not (yet) represented on the Maqtoob platform:

Recruiting
Gradberry is a recruiting platform for people who code. Instead of applying for jobs, the platform's algorithm checks an individuals produced computer code via OpenSource platforms like GitHub. Upon the functions they built, the platforms suggests the individuals vacant job positions.

Data Analysis

CoolaData is a project to help gather and track important behavioral data for one's (Online-)Business. That means that CD interprets and tracks how users use the entrepreneurs' website, e.g. when a costumer in an online shops adds an item to the shopping cart but never checks out and orders the item. CoolaData collects data provided by the entrepreneur, enriches it semantically, and visualizes the findings.

Project Management

TeamGantt enables teams to collaborativley plan a project with their core product, the Gantt chart.

ThriveSolo enables SMEs and freelancers to time-manage their projects. They can review their performance, percentage of met deadlines, and manage time and tasks. The app also takes over invoicing by providing a one-click option with automated data fill-in and individual logo-templates for invoicing. It enables the user to track spendings, prioritize his work load, and manage clients.

Collaboration

Basecamp (the oldest player in the collab-platform business) enables different stakeholders to collaborate remotely and online, with a vast functionality and over 15,000,000 users from Fortune 500 companies to SMEs.

Collarborne enables teams of different stakeholders to collaborate through the usage of "playbooks", which contain specific organizational knowledge. In turn, this knowledge is "hardwired" into actionable processes, and thus connected to the process they describe, allowing for real-time problem-solving by accessing work streams necessary to get a specific task done.

Asana for collaboration and project management represents a free-to-use model with a similar focus like basecamp.

Deekit provides a simpler approach by simply providing a digital whiteboard on which collaborating participants can remotely draw and develop their project.

ProjectPulse for letting all stakeholders easily know which status the ongoing project has with an integrable front-end website for everyone to see. Instead of round-mailing for actualizing progress, the milestones achieved and ahead are visualized, with necessary steps to take for progress.

Product Development

Pop is one of the many examples to prototype an app (to build a mockup). The difference is that the protoype for an app can be sketched out on paper, photographed through Pop's proprietary camera function, and then digitalized through the service.

Quirky is a recent crowd-source platform. It enables users, innovators, and professionals to invent products and services, which then are collaboratively refined. Every collaborateur who helped built the product until its market state gets a profit share of any sold unit.

Work Presentation

Bunkr enables the integrated presentation of "any online content", for example videos, code, charts, music, articles, and mixed media. Although the online presentation field is competitive (e.g. PowerPoint live, Google Slides, Prezi), none of the options integrates literally any popular SocialMedia content (e.g. Pinterest, 9Gag, Facebook) in a presentable way.

Cash Advance, Contracting, Billing & Invoicing

In the context of the rise of the Financial Technology (FinTech) movement, it appears particularly interesting how platforms aim to revolutionize the sector by cutting out or outplaying traditional financing institutes.

Fundbox remarkably solves one of small businesses' vital problems: It advances payments by clients at low fees in real time, closing cash flow gaps resulting from invoicing time until client payment. With its competitor, Blue Vine, it enables to regulate the impact of large projects on a SME's profitability.

Fusion Invoicing helps freelancers and SMEs to track their invoices and to visualize their data. Integrating PayPal and Stripe as direct payment options, the service aims to accelerate the slow client payment time, which represents one of the greatest risks in freelance cash flow management.

DryRun helps to build cash flow scenarios and to visualize them in a facilitated, easy manner.

StratPad is a free tool for business planning, financial modeling, an funding application.

Bmfiddle is a free business model canvas tool, basing on Alexander Osterwalder's business model. The software represents an editable canvas consisting of 10 different units, each of them vital to produce and evaluate a viable business model.

HelloSign provides legally binding online signatures for sent-out contracts, meaning that important paperwork can be completely done online.

Thambo is used for easily sharing profits of project collaborations by different freelancers/entrepreneurs.

Online Marketing

Buffer enables individuals and companies to pre-produce and schedule social media-content on any known Social Media platform. This process facilitation renders individually scheduled posts for continuous updates obsolete.

19 Qualitative Interviews A& B, Questionnaires, Full Interviews & Findings

19..0 Qualitative Interviews A: Guideline

1. Introduction: [Informal, personal introduction with reference to precedent conversation]. We are here in the Skype chat to talk a little bit about the Consulting/Marketing/Innovation Industry, especially about how you see some of the latest developments from a professional point of view. I have a rough guideline of questions I'd like to discuss with you; however, you are free to answer them to any extent. The more detailed, the better! The goal here is to explore the topic together, which means that in the best case, the original questions serve only as a cue point for deeper discussions. I would love to hear your explications, anecdotes, ideas, and opinions! You can ask, interject, correct, and direct the chat to your liking. Please note that this chat is transcribed fully. If there are any doubts about answers given (for example due to information vital to competitiveness etc.), you may object the raw publication of certain parts at the end of the official chat, which will be indicated. Are you ready?
2. Please introduce yourself and explain the function you have in your company [Insert Company name]. What's your job?

3. What is the core offer of your company? What does it do differently in the market? Which markets do you engage in?
4. Which types of professional functions do you need to solve a client's quest? What are the typical tasks in your company and who does them?
5. Talking about the Innovation / Marketing / Consulting [choose one] industries: In my research, I observed a strong dissolution of "traditional" industry boundaries. Today, a marketing consultant seems to have the abilities of an innovation or branding agency and vice versa. Can you observe something like that? Which are the trends and recent developments you can observe here?
6. David / Manuel: iMatch/100%Open/insert company has a distinct step-by-step strategy that guides clients through the subsequent innovation phases. Could you please explain it and why it brings you an advantage?
7. Don't you think that these specific "Solving strategies" are more or less all the same? If you have a great methodology, what more is important to strike out and really bring value to the customer?
8. Some while ago, I stumbled across a network called Mecenato. Originally, it was created for the advertising industry but lately, the network seems to cross these lines. If you are a B2C consumer goods company, you can enter your unmet need or problem and the administrators assemble a team of freelancers to solve this specific need. The freelancers are spread all over the world and collaborate online on the task. The offers include app building, marketing campaigns, website development, and even strategic consulting. The idea is to open the source pool for problem solving to a wider community of professionals that may fit much better to a company's quest. In this context, and in the context of the increasing flexibility of workforce, how important is it nowadays to stay still local? Can we not just take everything online like Mecenato does?
9. Closing Remarks.

19..1 Interview with José Alves, ISCTE Junior Consulting, Lisbon, Portugal / Qualitative Interviews A

Time/Date of the Interview: 26.08.2015; 23:58- 00:58

Mode of the Interview: Skype Chat with clear names

Description of the entity: José Alves is a Marketing Management student at ISCTE university, Lisbon, and is the Marketing director at ISCTE Junior Consulting (IJC). ICJ is an award-winning junior consulting enterprise that enables both students and young professionals associated with their Alma mater to work within the consulting field with different projects and focuses (see below). Generally, ICJs employees offer a different view on projects at a lower price (due to less experience) since none of them is directly associated with a certain sector.

[26.08.15 23:58:48] Nina Wiegers:

1.Dear José, thanks for agreeing to answer some of my questions and giving me some of your time. I have been hearing a lot about what ISCTE Junior Consulting does and it’s pretty cool that young professionals get the opportunity to consult big firms. I am curious to learn about what you do there, and also to learn a little bit about the Consulting industry in Portugal, especially about how you see some of the latest developments from a professional point of view. I have a rough guideline of questions I’d like to discuss with you; however, you are free to answer them to any extent. The more detailed, the better! I would love to hear your explications, anecdotes, ideas, and opinions! You can ask, interject, correct, and direct the questions to your liking. If there are any doubts about answers given (for example due to information vital to competitiveness etc.), you may object the raw publication of certain parts at the end of the official chat, which will be indicated. OK?

[26.08.15 23:59:39] José Alves:

Ok.

[27.08.15 00:00:09] Nina Wiegers:

Fine then. So first, please introduce yourself and what you do for a living. What is your job at ISCTE Junior Consulting? Which projects do you do apart from it? You told me you’re doing an internship– Looks like you are pretty busy right now!

[27.08.15 00:07:44] José Alves:

So first things first. As you know my name is José Alves, I'm 21 years old, and I'm attending marketing management at ISCTE. I entered in ISCTE Junior Consulting at my first year in ISCTE, and I had the opportunity to do a few proposals that unfortunately didn't become projects. One consisted in a market study for a German company that wanted to enter the Portuguese market. And the other one was a business plan for a marketing magazine. I had also the opportunity to make part of a project that consisted in a business plan for a company that had an innovative product in the energy sector, I was mainly focused in the marketing plan, with special attention in the distribution. Besides external projects I managed to participate in internal tasks such as communication inside ISCTE due to recruitment purposes and contribute with content for our social presence.

In june I had the opportunity to embrace a new challenge - Marketing Director. As we entered on "holidays" I still can't tell you much about it but I'm very excited to start the new year!

About my internship... whoa! I'm working at Digital Marketing at LeasePlan and I'm loving it, I'm very fortunate to have the opportunity to work in two of my passions: Marketing and the automotive industry (LeasePlan's core business is renting). But with the internship and the strategic planning for IJC's I'm kinda with no time to breath... but you know how they say in portuguese "Quem corre por gosto não cansa".

27.08.15 00:08:54] José Alves:

(*online magazine, not marketing magazine sorry)

[27.08.15 00:09:43] Nina Wiegers:

Wow, that sounds awesome! So you are literally completely full of work. I tell you what about the automotive industry: Personally, I love cars and individual mobility but like we Germans are, I hate that they still are bad for the environment ;)

[27.08.15 00:10:03] Nina Wiegers:

I already asked you that before, but just for the record: What kind of services does ISCTE Junior consulting provide? What kind of segments do you guys serve? What kind of segments are you dealing with? What kind of problems or pains do your clients have that you can help with?

[27.08.15 00:14:40] José Alves:

So ISCTE Junior Consulting provides consulting services in five different areas: Strategy and Management, Marketing, HR, IT, and Finances.

We offer a 'fresh view' of the daily problems of the companies since our members are all students completely exempt of any sector vice.

Our clients are both big companies and SME, even tough our offer at first sight may seem more attractive to SME's since we practice lower prices than a "normal" consulting company. For the big companies money isn't a problem, so they can get to us in order to receive that 'fresh view' that I recently mentioned.

[27.08.15 00:18:36] Nina Wiegers:

Makes sense to me. Do client companies sometimes come and say, "wow, I didn't think of this solution" because it's simply not in the mindset of older managers? I am right now researching a little bit on Open Innovation practices within the business services field, for example Marketing consulting and branding services. I investigate it in the context of Open Innovation because when a company wants to get a service done, it's much more collaborative these days–Just like in Open Innovation. I recognized two interesting facts. Please comment on it, maybe with some examples. Do you agree? What do you observe?

a. Today, seeking a business service from another entity merged into a type of sourcing external knowledge like it happens when companies apply Open Innovation: Much more collaborative, much more transactional. It is no longer sufficient to just accept the recommendations given out by a consultant, and also, it doesn't seem to be enough for a creative to implement a new strategy visually–Every professional seems to need a distinctive set of both creative and analytic skills. Do you see that as well at ISCTE Junior Consulting?

b. I also have the impression that there's an increasing flexibility in the business service sector, both on the creative and on the strategic side, since a lot of professionals work partly as freelancers in Marketing apart from their "real" job. Doesn't this kind of revolutionize the way of how companies seek and get help as well? Companies can now source these professionals' knowledge (either online or offline) through short-term project contracts regardless of the big, expensive major players like PwC or any big ad agency. It even seems like those freelancers get together and work jointly in projects that are limited in time– In your opinion, what is the future development of this?

[27.08.15 00:27:56] José Alves:

a. Yes I agree that it is good to every professional to have a distinctive set of both creative and analytic skills, but more important than the professional itself, in ISCTE Junior Consulting, we focus on the skills of the team, so when we assign a team to a project we pick people with different profiles from different backgrounds so they can complement each other. So the team definitely needs to have that set of analytic and creative skills, but I believe it can be achieved due to the "person A" more creative, and the "person B" more analytic. (I know my english is not the best, so I don't know if I was able to made myself clear...)

b. Definitely, I'd say that mainly in the creative side of the business, freelancers are the latest trend and I believe this trend will become more and more popular because it has many advantages for both sides (the clients and the freelancers). The freelancers: manage their workload as it suits them the best, can almost "pick" the projects they prefer, and they build their portfolio which adds much value to their career. The companies can have a service done at a lower budget, with a closer contact, and more flexible. About that scenario of freelancers getting together and work jointly in projects, I've seen it recently, and I believe it is a great solution, since it is possible to assemble a team with the perfect people for the task, with the best suitable profiles, they work on that project and that's it - it is a more efficient way to approach the market.

Despite all this, I believe that big companies will keep working with the big players.

[27.08.15 00:30:29] Nina Wiegers: Your english is fine! I also think the big players will remain like they are. Where did you see this collaboration between professionals that you talked about happen? Anywhere in the internet on a certain platform?

[27.08.15 00:31:23] José Alves:

No, I met some people that made a few projects in that condition.

[27.08.15 00:31:34] Nina Wiegers:

In the limelight of current economic crises: What are typical success measurements of projects you do? Just growth? What about ecological/ethical sustainability in projects?

[27.08.15 00:38:07] José Alves:

ISCTE Junior Consulting is a non -profit organization, so our main focus is not necessarily to grow in turnover. Our success is measured by the satisfaction of our clients and most of all by the development/evolution of our members (learning by doing). We aim for excellence in every project we do. An hypotethical situation: 10 clients ask us for projects. If we feel that we can only assure excellence in 7 projects, we prefer to reject the other 3. We also have a great sense of social responsibility, proof of that are the three 'social responsibility projects' that are due to start in September in order to help two different organizations that can benefit from our help. It's a win win situation, those organizations receive free help, and our members can keep developing themselves in challenging projects!

[27.08.15 00:42:27] Nina Wiegers:

Ohh, three projects! It must be so cool to develop new stuff! How far do you go in developing projects: Do you only recommend, or do you also manage the implementation and exectuion? Looking around, I see that the comparison lens for many of the companies in business services I am looking at is the specific “Solving strategies” that they employ. They are often having 3-5 steps and typically guide clients and stakeholders through the phases. Are they not all a little bit the same? It makes sense to me that in this respect, for ISCTE JC, it must be kind of cool that you are a Nonprofit because you can focus on satisfaction, which also seems to have some decent ethical, positive value in it, so it doesn't really need a well-selling strategy how to BOOST the growth. Additionally to this “great methodology” thing that you can see now everywhere, is there anything more that is important to strike out and really bring value to the client?

[27.08.15 00:47:21] José Alves:

On the majority of our projects we only recommend but there are exceptions. For example, on the project it is planned to create a website, if the client wishes so, we also have the capacity to create it.

I honestly don't know how to answer to the 3-5 steps question...

I believe that the things that bring value to our clients are mainly the motivation of our members (not employees! :P), our 'fresh view', and our commitment to excellence (besides the competitive price).

[27.08.15 00:49:14] Nina Wiegers:

Okay, fine. The three steps are meant to be something like a certain strategy that is advertised on the companies' websites. You can see it e.g. at fabernovel.com. Now: Last question! I had an interview with a firm that distributes skateboards and street wear in Germany. The brand was one of the first ones to import skate stuff from the US and played a major role in shaping the culture and scene related to it ever since. In the 90s, when it grew very much, the family owned brand wanted to do an IPO and totally crashed, mainly because the investors saw it as an investment but didn’t understand the viscosity of a market that has such a big anti-commercial culture related to it. So the advisory board kicked out the brand’s founder and tried to artificially run the brand by enhancing turnover to generate enough bonus without really selling anything because the customer base didn’t care to buy more. After investing all their private funds, the former owner bought the company back and now, they are back in the game– From what I got, it was pretty cathartic. I asked them some questions about what they’d do if they wanted a rebranding (e.g. hiring a consultant). They clearly said that this would contradict their values because the only way to change the brand would be to do it slowly, organically, and in concordance with the community base, so they definitely learned their lesson. My question is now: Between all this tech start-up craziness and innovation efforts, between all the brilliant creative ideas, it seems like our environment for business services is just to effectively create growth. What about authenticity, and real product functionality? Are they just functions of growth, or can we hope that there’s still real passion behind the products and services we produce and buy?

[27.08.15 00:55:31]

José Alves: Tricky question... I believe that when a company is focused on growth, it doesn't necessarily means that there is no real passion behind it! In fact, many start-ups are made by people very passionante about what they do, and in my opinion the ones that succeed are the ones who focus on actually solving people's problems (because at the end of the day, everything a costumer buys is in order to solve a problem). So the real product/service functionality is the key to growth, otherwise you may grow a bit, but it won't be sustainable.

Despite all this is funny to notice the new job titles that are around there such as "Growth hacker".

[27.08.15 00:57:36]

Nina Wiegers: You completely speak my mind. But don't you think it's also a litte bit sad that start ups have to grow so extremely much? The whole start-up scene is full of incubators that seem to have the only goal, to make them grow as fast as possible and then to sell it so a larger company.... I know that a lot of younger founders don't really have the choice but it doesn't seem to be very sustainable.

[27.08.15 00:58:36] José Alves:

That phenomenon is the new "start-up dream", everyone wants to create a start-up and be a millionaire before 25... But I understand your point!

[27.08.15 00:58:54] Nina Wiegers:

José, that was it! Thanks so much for your rich text and for investing so much time!

19..2 Interview with António Bob Santos, ISCTE university, Lisbon / Qualitative Interviews A

Time and Date of the Interview: 25.08. 2015; 16:06 – 17.32

Mode of the Interview: Facebook Chat with semi-private accounts

Description of the entity: António Bob Santos is a researcher and PhD candidate at ISCTE university, Lisbon andthe coordinator of the SMART cities programme at the Center for Innovation and Creative Engineering, Lisbon. His research field spans from general Open Innovation practices to actual determinants of policy making for Open Innovation with a focus on his home country, Portugal. After publishing several papers in this field, António spoke on the 2015 Open and User innovation conference, Lisbon, and will speak at the World Open Innovation conference in Santa Clara, California.

Nina Wiegers:

Dear António, thanks for agreeing to answer some of my questions and giving me some of your time. I am really curious about what you're working on, and also to learn a little bit about the Innovation Industry in Portugal, especially about how you see some of the latest developments from a professional point of view. I have a rough guideline of questions I'd like to discuss with you; however, you are free to answer them to any extent. The more detailed, the better! I would love to hear your explications, anecdotes, ideas, and opinions! You can ask, interject, correct, and direct the questions to your liking. If there are any doubts about answers given (for example due to information vital to competitiveness etc.), you may object the raw publication of certain parts at the end of the official chat, which will be indicated.

25.08.2015 16:06 **Nina Wiegers**

Okay?

25.08.2015 16:07 **António Bob Santos**

ok.

25.08.2015 16:07 **Nina Wiegers**

Please introduce yourself and explain what you are working on right now. I know you are writing a lot about the Portuguese Open Innovation and entrepreneurship landscape, so what's up for the upcoming year?

25.08.2015 16:08 **António Bob Santos**

ok.just a few seconds to respond :-)

25.08.2015 16:09 **Nina Wiegers**

yeah! Take your time!

25.08.2015 16:14 **António Bob Santos**

My name is Antonio Bob Santos. I`m researcher from ISCTE-IUL, and my research is focused on open innovation. I`m analyzing is we have (in Portugal) the right public policy framework to stimulate open innovation in companies. I`m also a Smart Cities program coordinator at the private sector, at CEiiA (Centre for Innovation and Creative Engeneering). In the next year I intent to have robust conclusions about the implications of my work in Portuguese competitiveness.

25.08.2015 16:18 **Nina Wiegers**

Okay, and what would you say is one of the greatest challenges for Open Innovation in Portugal? Which industries excel, which ones really don't? And, do you witness any Open Innovation tendencies in the consulting industries? Consulting, at least my conclusion, is seems to be a way for a company to source knowledge– And for consultancies to provide innovative approaches. How much does Open Innovation play a role there?

25.08.2015 16:30 **António Bob Santos**

Well, i think that the main challenges for the adoption of OI in Portugal are related to two aspects: the evolution of general conditions of the economy, namely the availability of qualified human resources, access to financial instruments; and the capability of companies to upgrade their management skills, in order to absorve external knowledge and to stimulate their employees to be more innovative. For that reason, I think that in the short term high-tech industries are in better position to use OI activities, because they are more organized, open to the global markets and highly qualified. The challenge in the future is how to stimulate the adoption of OI in SME and less technology-intensive industries. Here, I think that public policy can have a major influence in create incentives to that. Consulting industry can also play an important role, as well as the technological intermediaries, R&D entities, Public entities, etc. In a country where companies (and SME) are less qualified (like in Portugal), intermediaries can be important to create links between industry and universities and to spread innovation.

25.08.2015 16:32

Nina Wiegers

So you would say that these intermediaries as well as public policies function in that case as a framework to teach practices for SMEs to use OI?

25.08.2015 16:38 **Nina Wiegers**

As you might have guessed, I'm researching a little bit on Open Innovation practices within the business services field, for example Marketing consulting and branding services. I recognized two interesting facts. Please comment on it, maybe with some examples. Do you agree? What do you observe? a. Today, seeking a business service from another entity merged into a type of sourcing external knowledge like it happens when companies apply Open Innovation: Much more collaborative, much more transactional. It is no longer sufficient to just accept the recommendations given out by a consultant, and also, it doesn't seem to be enough for a creative to implement a new strategy practically–Every professional seems to need a distinctive set of both creative and analytic skills. In that respect, it seems like everything moves a little bit towards OI, but with no official guideline how to use it. Here, it makes sense to me what you said, that public policies and intermediaries may be helpful to strategically implement OI. b. I also have the impression that in the business service sector, there's an increasing flexibility of both creatives and strategists as freelancers. That, in turn, kind of revolutionizes the way how companies seek and get help. Companies can now source these professionals' knowledge (either online or offline) through short-term project contracts regardless of the big, expensive major players like PwC or any big ad agency. It even seems like professionals/ problem solvers of any background get together and work jointly in projects and deliver them.

25.08.2015 16:40

António Bob Santos

They can have an awareness role, for example, demonstrating the benefits of having a more open approach of the innovation process. But also a push role. Public policies can create fiscal and financial incentives for SME for the adoption of IO - for example, through R&D tax credits or innovation vouchers, stimulating the acquisition of external knowledge and technological services to R&D institutions and universities.

25.08.2015 16:41 **Nina Wiegers**

Okay! Did you see the question above?

25.08.2015 16:50 **António Bob Santos**

Question A: I think that every major consultant company wants to be an expert in OI, because it is a fashionable issue and easy to sell to companies! But they can be important, if they involved themselves in the managerial and routines change of the companies, in a cooperative way, instead of only advise them. But SME and very small companies usually don`t have money to buy that services. That`s why public institution and incentives (like the vouchers) are important to SME.

25.08.2015 16:50 **António Bob Santos**

Question B: Yes, I agree. The evolution of ICT technologies allow the democratization of the access to knowledge, as well as promote the rise of new entrepreneurs that can sell services and solve problems in any part of the world. In economic terms, ICT turn innovation services delivery more efficient through the labour division (specialization)..

25.08.2015 16:57 **Nina Wiegers**

okay! 6. In your opinion, which types of professionals does a company need in an Open Innovation challenge to be successful? Who is curating these processes in a company?

25.08.2015 17:05 **António Bob Santos**

Some examples: • Open Innovation manager, with horizontal power in the company to evolve all the departments in OI process; • At the top level, someone responsible to put OI as a priority in the corporate strategy • In bigger companies, innovation teams in each department, to spread OI practices and to identify new ideas and solutions advanced by the employees. • A network manager, responsible to scout external ideias and collaboration opportunities (with other companies, universities, etc.)

25.08.2015 17:07 **Nina Wiegers**

Which ones are typical measurements in Open Innovation processes?

25.08.2015 17:11 **António Bob Santos**

That`s difficult! Well, we can have input measures and output measures. Input: nº formal collaborations; nº informal collaborations; Crowdfunding money, in percentage of external financial loans; Output: nº products after the implementation of OI measures (from collaborative and individual) projects; nº patents and trademarks after OI measures (from joint and individual projects); sales (% business) from these products; revenues from patents licensed to other companies;

25.08.2015 17:16 **Nina Wiegers**

I've seen a lot of consultant and creative companies that offer a certain strategy, like a three-step solution like e.g. Fabernovel does. They seem to use it as a distinction characteristic. In your opinion: How strategic can you manage innovation generally? Is it not more of an ideation process that randomizes the outcome? In that respect, is not always the best to get as many solutions to a problem as possible?

25.08.2015 17:24 **António Bob Santos**

I think companies need to incorporate OI in their strategy that responds to their needs. But first, what are the bottlenecks of a company, the main competitiveness constraints? If they have the right diagnosis, it is easier to design a strategy (including different paths). Each company is a company. There is no single suit to all companies, each one has their own specificity.

25.08.2015 17:18 **Nina Wiegers**

Alright. Some while ago, I stumbled across a network called Mecenato. Originally, it was created for the advertising industry but lately, the network seems to cross these lines. If you are a B2C consumer goods company, you can enter your unmet need or problem and the administrators assemble a team of freelancers to solve this specific need. The freelancers are spread all over the world and collaborate online on the task. The offers include app building, marketing campaigns, website development, and even strategic consulting. The idea is to open the source pool for problem solving to a wider community of professionals that may fit much better to a company's quest. In this context, and in the context of the increasing flexibility of workforce, how important is it nowadays to stay still local? Can we not just take everything online like Mecenato does?

25.08.2015 17:31 **António Bob Santos**

That's the result of the division of labour. We can have the solutions to our problems, from a company or an individual located in any country, available 24/7. For certain needs and industries that can work! (for example, in Pharma). But it depends on the industries, the IP strategy adopted, the cultural issues, etc. For less qualified industries and SME it`s difficult to have access to global markets (search/transaction costs). For them, local ties and connections can be more important (for example, in the glass industry or footwear, local suppliers are still important). But here, intermediaries can be important to connect this kind of industries with global entrepreneurs and entities from other countries (like Innocentive) .

25.08.2015 17:32 **Nina Wiegers**

This one was the last question! Thanks so much already; I'm sorry it took so long! You help so much with your answers. When I am back in Lisbon, we can talk personally about it and I can send you the full work.

25.08.2015 17:32 **António Bob Santos**

I`m glad i could help!

19..3 Qualitative Interviews B: Guideline

1. Introduction (as Qualitative Interview A)
2. Please explain a little bit what [insert company] does. Which industry are you in, what do you offer, and who is supposed to buy your product [service]?
3. Which associations and values come to your mind when you think of your business? What kind of brand is it?
4. Do you think your costumers buy your products [services] because they help them to express their own identity?
5. Do you do any Marketing Communications to promote your products? Which values and images are you communicating?
6. In your opinion, which (potential) customers identify strongly with your brand? Imagine "your perfect costumer": What job does he have, where does he live, what does he do in his free time? When & why does he buy your product?
7. Do you think that people buy your product [service] because it has a certain function for them? If so, can you explain which function that is, and if this function is the primary reason for people to consume your product [service]?
8. Do you do any activities that are helping to protect the planet or that are improving the society? Please explain what you do and if you don't, why.
9. If you could ask a Marketing agency or a freelancer to do some Marketing work (for example branding) for you, what kind of Marketing tasks would you like them to do?
10. Would you prefer a fixed team to solve your Marketing quest? Or, could you imagine that you publish your quest on a social or professional network and then professionals would sign up to solve it and deliver a tangible work for you?

19..4 Interview with Daniel Baarck, Titus GmbH, Münster, Germany / Qualitative Interviews B

Time & Date of the interview: 21.08.2015; 19:00

Mode of the interview: E-Mail Questionnaire back-mailed answers

Description of the entity:
The interviewed person is Daniel Barckhan, the administrative marketing lead of the Titus GmbH.
Titus GmbH is the most popular German brand for skateboarding and street wear distribution. Founded 1978 out of the idea to teach his students skateboarding, the then-teacher Titus Dittmann imports skateboards from the USA as the first German importer of such gear. Hitting a cultural vein the family business with the owner's name grows until 1998 and holds partly up to 95% of the market share. Because of its strong growth, the company becomes confusing, but also interesting for external investors. Titus prepares for an initial public offering through acquisitions for a greater conversion. Unlike the plan, the deal bounces and the Mr. Dittmann as the former founder loses his vote within the company to investors and advisory managers. In 2004, the company has lost more than 10 Million Euros, and all external interim management fails to stop the spiral. Dittmann and his wife then decide to invest all their private property to buy the company back. In 2007, the founders take over the operative management and finish the year with a positive saldo. After going through this procedure, Dittmann says in an interview that "the investors didn't have a clue of our market. They just cared about the investment" (Fisher, 2008: web). Today, the brand is healthy and represents the pioneer work that originated from a community thought, with its ideals and values deriving from a base that proved imperturbable by classic neo-liberal attempts to open for external stakeholders.

1. *Please introduce yourself. What are you doing at Titus, what's your job, and which daily activities do you do? Which Marketing-activities do you do in-house?*
   – Hi Nina, I am Daniel and I am at Titus for 6 years. My job is to be the „Administrative Marketing Lead". I coordinate, organize and plan the global Marketing topics of the brand. Our Marketing department comprises: An own video making department, one Social Media Manager, several E-commerce and SEO people and a little office that produces target-group-relevant content and our house magazine "Brettkollegen". Every action is very fine-tuned with the product management.
2. *Titus imported at the end of the 1970's skateboards from the States to Münster– and since then, it's a fixed part of the scene. What do you personally associate with Titus, and what do your customers associate with the brand?*
   - Titus as a person and a company is and was always authentic. We've had tough times (e.g. in 2001 and with the bounced initial public offering) and that we are still here shows that our customers go this way with us. The brand Titus in Germany for the general public is a pseudonym for skateboarding. We are reflecting this topic with competency and credibility. At the same time, the brand can be experienced: Come into the shop, visit our events, and at best, go skateboarding yourself and become an active part of the scene.
3. *Skateboarding as a sport is often described as a Lifestyle. Could you describe a little bit what it means to live such a lifestyle?*
   – Everyone interprets this 'Lifestyle' always somewhat individually. Skateboarding generally reflects basically this individuality, but also community, freedom and fun. You don't need an exam, no

membership fees and no fixed training places. You go outside, search for your spots and you reclaim urban spaces. The only important message is: You may fall on the ground, but you get up again! Apart from this freedom, the core somehow revolves around that it's a 'scene', so you have to commit to it to some point. In turn, that is something different than just going to the football training once a week. From that point of view, it has many parallels to music or gaming scenes.

4. *Do you think that the products that you sell (your own brands and others as well) provide a base of identification with this lifestyle?*

   –Sure, for many of our costumers, the brand Titus, conjointly with the buying experience, represents something special, no matter if online or in our shops. Through the brand and our identity, we incarnate a certain set of values, and represent a certain style. Even if you don't skate you can interpret this lifestyle for yourself.

5. *Apart from all the "useful", mechanic tools for skateboarding (skateboards, bearings, rolls etc.): Which function do the things that you sell (e.g. branded shirts of a certain company or accessoires) have for your customers?*

   - From a plainly theoretic brand comprehension point, we definitely provide our customers an *added value* with our products that exceeds the purely functional reason for purchase (wearing clothing to stay warm). Here, the functions of prestige and identification (being part of a group/scene) certainly play important roles. From a distribution point of view, our wide experience, high competency and grown identity in the area of street wear and skateboarding help the customer to orientate. Amongst the general high quality of the products, you know that the brands of our (Online-)Shop are assigned to a certain relevance within the skateboarding and street wear segment, and that you are thus authentic with it.

6. *With the social project of Skate-aid, Titus engages within the social responsibility spheres. How important are things like that?*

   A social engagement is very important to us because it reflects the overall open, communicative and communal thinking of the skateboarding scene. Right now, Skate-aid engages actively for the refugees, which we absolutely support. Everywhere on the world, skateboarding can help to create some free, jaunty moments young peoples' world. The colleagues of skate-aid are doing amazing and really important work which we support on many levels!

7. *There are ambitions of some shops to offer e.g. completely socially/ecologically sustainable products; would that be an option for Titus? Which problems (e.g. certifications) are related to this? How does the community perceive this?*

   As a producer and distributor of textile, we are conscious of our responsibility and, for example, send our designers twice a year to the factories. Amongst the existing written certificates, our colleagues can also directly investigate on the working situations. However, we don't plan to exclusively offer fair-trade or "eco"-articles. From our knowledge base, there's no relevant demand of our clientele.

8. *If you considered a Marketing-activity such as a re-branding or business model innovation, would you then work with a full-service agency? In Amsterdam, for example, there's the opportunity of "Elite Sourcing", that is, to send a creative brief via a professional network and to get back a variety of different solutions. Would something like that be an option?*

In advance: A topic like a rebranding is not debatable. The brand is changing organically and of course, a strategically planned relaunch would contradict a lot of our basic values of our identity. Business model innovations are naturally fascinating. To use a network of professionals would be a conceivable way. But again, for us there's currently no inducement and we rather go our own way, which likewise always contains innovations.

19..5 Interview with Fuxbau, Brand, Münster, Germany / Qualitative Interviews B

Date & Time of the Interview: 23.08.2015; 16:00

Mode of the Interview: E-mailed questions with mailed-back answers

Description of Entity: Fuxbau is a small apparel and accessories label founded in 2013 in Münster, Westfalia, Germany. It is run by a core of 3-4 actors but associates a wider network of artists, craftspeople and friends, which partly release co-branded items and projects (e.g. music or a limited edition of bags).

With about 2,400 facebook followers, the brand just starts to gain more traction, which, however, is only seen as a secondary effect in the brand's concept (see below). The primary focus lays on producing sustainable and stylish apparel for the associated network and for customers that identify with the idea to change the mode of consumption towards a more need-oriented, ethically responsible way but stay fashionable. The interviewed person is Phillipp, the label manager and founder of FUXBAU.

Introduction

[Resarcher/Nina Wiegers]: *Dear Fuxbau, thanks for agreeing to answer some of my questions and giving me some of your time. Fuxbau is exactly a brand within the range of small to medium-sized businesses I am investigating on. I think that your aim to give back to the community and to strive for sustainability is completely within Zeitgeist, which is why I'm trying to learn more about the idea of sustainability. so I am really curious about learning more about it. and of course because you guys come from my hometown. I will interview the Titus guys about some of the topics I'll ask you about, so I am curious what you have to say within the realm of branding and Marketing. I have a rough guideline of questions I'd like to discuss with you; however, you are free to answer them to any extent. The more detailed, the better! I would love to hear your explications, anecdotes, ideas, and opinions! You can ask, interject, correct, and direct the questions to your liking. If there are any doubts about answers given (for example due to information vital to competitiveness etc.), you may object the raw publication of certain parts at the end of the official chat, which will be indicated. If you are cool with this, let's start.*

1. *R: Please introduce yourself. What is Fuxbau, and do you just sell clothing and accessoires? It looks like you are much more than just a clothing brand.*

   F: FUXBAU is best described as a group of friends that has fun doing what they do – but also, we don't really fit into a category. So, we are a pile of laymen that got into the apparel industry kind of accidentally, and we try to do it as good as we can. In the course of time, our motto " Rags for Friends and Together for a Good Cause" (in German: "Klamotten von Freunden für Freunde und gemeinsam für den guten Zweck") crystallized and is now both our philopsophy and code of practice. In the future, we'd like to produce entirely ecologically and ethically sustainable apparel. Right now, we can do that at around 90%. Besides, we donate part of our profit to different aid projects worldwide. The most important thing hereby is that we make sure that the money really arrives where it's needed.

2. *What are you doing at the business, and how did it all start? Which are the daily activities you do for the brand?*

   Like I said before, we never had the intention to become rich with FUXBAU. Originally, the name just developed from my old living community, which we called this name [In German it means “fox den” or “fox burrow”]. The name just came up and then we suddenly had a large written character with a corresponding logo on the wall at the entrance. In summer 2013, we printed some tank tops with the logo and the character for people that lived in the flat. Afterwards, it accelerated more and more. The idea of FUXBAU was and is until today realized through our friends– We see ever single one as part of the project and want to deepen these connections in the future, too.
3. *Which kind of Marketing-activities do you do in-house? Social media, and what else? Who built your website, and do you do anything Guerilla-like for promoting Fuxbau? Tell me everything.*

   Since everything that we do is based on the support of our friends, we try to keep the project as open and accessible as possible. When it fits, everyone can deliver his ideas and shape the project. For example, a friend of ours crafted our first homepage. Generally we just advertise through Social Media, with Facebook and Instagram being the ones we use most. Everything else does not make sense financially and from the point where we are right now.
4. *From what I know about the brand, it kind of started “out of your kitchen”– It seemed to make sense to produce items that are related to the good times you guys have together. Why did you also go the way to produce sustainably, or at least give back to the community with part of the profit you make?*

   Over the time, I got more and more in touch with the fashion industry and the whole machinery around it. I realized pretty fast that there’s a lot of wrongdoing going on but also that there’s a lot of improvement potential. That, in turn, was an even greater incentive to illuminate this topic for my friends and my network. I personally am aware of the impact of my friend’s opinions and recommendations so that I really wanted to motivate them to change their buying behavior. Generally, to all of us at FUXBAU it’s clear that we had luck that we were born on the “bright” side of life. For that reason, we want to give back to the people that don’t have this privilege. Although we are only able to give a small amount, it’s still better than nothing and we are sure that the amount can increase much more.
5. *What do you personally associate with Fuxbau, and what do your customers associate with it?*

   With the project FUXBAU, I mainly associate friendship. The project was born out of this context and still lives exclusively through it. In my opinion, that is the

   Ich verbinde mit dem Projekt FUXBAU vor allem Freundschaft. Das Projekt ist special feature about it. Here, nobody wants a fixed salary or to become rich in a short period of time. We will do the project as long as it’s fun, and then we will see. I think that we do honest work and we don’t try to pretend to be something else. In our field, we are 90% amateurs, which I think turns the whole thing a little charming and attractive for those that don’t directly belong to us. In the first instance, however, we know that we have to still learn a lot, but we see it as our challenge. Besides I am convinced that our customers feel good when they buy FUXBAU items. The people can be certain that our clothing made out of great commitment and passion, and that our aid projects aren’t just empty promises.

6. *Fuxbau reflects a certain kind of, say, Lifestyle, or savoir-vivre– Could you describe a little bit how this Lifestyle looks like? What does someone who buys items from Fuxbau do all day? Surfing? Studying?*

   That's a good question, to be fair. To be honest, it's simply important to me that the customer understood the message and idea of FUXBAU. We don't care if the neighbor's grandma or the cool surfer dude wears our gear. Essentially, we want the customer to understand the problems within the apparel industry and to help us raise attention for it. But if I had to describe a certain segment, then it's probably mostly students in the age of 20-29 years that do a lot of sports and are inclined to help improving the environment and social contexts ☺

7. *Do you think that the products that you sell (your own brands and others as well) provide a base of identification with this lifestyle? I mean, it's arguable what lifestyle means, I agree. But at the end of the day, you serve a certain type of segment. So, I wonder what this segment uses your products fo, and in which situations–I want to learn about* **style.**

   Another good question. I think that our customers partly care much more about handicraft and individuality. Someone wearing FUXBAU apparel is conscious about what we do and why we do it. From that point of view I think that many of our customers prefer a subtle but simultaneously individual style.

8. *We already talked about it, but: Why do you think it is important to produce sustainably and be ethically responsible? In big corporations, these things are often just used as a communicational tool (like green washing) or to sell to an even greater customer base.*

   In my eyes, our attitude towards apparel and many other material goods has developed into a completely wrong direction in the past. Today, we don't buy things because we really need them but rather to feel good for a short amount of time. We often buy a certain [commercially] exemplified lifestyle of a brand without even consciously noticing.

   I'd find it desirable if we would attach much more value to quality and the way of production. The people shall become aware that a T-Shirt for 5€ or a pullover for 9€ cannot be reasonably produced. Instead of buying 5 shitty pieces, the people shall rather buy something reasonable in the future. Especially items that they really need and that they do not only buy out of a mood swing. I am furthermore convinced that sustainability and fashion are not a contradiction. One should try to balance fashion and nature as good as possible.

9. *What I am doing right now is to write a business plan for a new breed of freelance consultant/ creative direction. The aim was always to be flexible in working from anywhere, but also to turn our consumption world a little nicer. I have always been connected to nature and to improving the way how we live and consume. In my work, I built something called the ASP framework. It is a framework that is supposed to help brands to do better– Financially, but also structurally. The idea is to use the framework as an analytic lens, that is, to analyze a brand from the perspective of opportunities within the given frame. ASP stands for Authenticity, Sustainability and Product Functionality. The baseline idea is that if a brand implements these three dimensions into its DNA, it will become more successful – Because it goes the way of an ethically responsible, but still functional and contextually authentic behavior. Important is here that it's not like the empty Marketing green washing strategies in which you*

simply communicate that you are a good company but in reality, you still use the cheapest materials. The idea is that as a brand, you would have to change internally, e.g. improve the materials used, get eco-certified, and find own, real heritage. When looking at Fuxbau, it strikes to me that this mixture seems to work: You sell wearables (so the items are functional beyond just looking good), you (are and) communicate transparent, friendly and inclusive (so you seem to be authentic) and you aim to be socially and environmentally aware and responsible). Now that we talked about the aspects of cultural heritage, lifestyle, and sustainability, Do you think that there are more reasons why Fuxbau is successful? What do you think: Which other characteristics should a successful brand of 2015 have?

Ohh, now it gets serios ;-)

First of all, I need to say that we only though superficially about these things. Like I said, we do our project mainly when we have time alongside of our studies, friends, family and hobbies. Unfortunately, we did not really think about the financial future. So, a business plan or similar things don't exist ;-).

In the future, we'd first like to see how our project works, when we are not seen any more as a little fun label from the garage next door, but when our internet presence is seen as a professional one by many people. I advance the view that from now on, we will compete with significantly more labels than before and that the expectations towards us become higher, too. Right now, the people have still a lot of sympathy for us. Lastly, the success of FUXBAU greatly depends on the overall concept. Apart from "good rag" I think that especially our service and the basically inexistent Marketing activities the three most important success criteria to communicate to the outside.

10. *Let's say Fuxbau grows so much that you would have to outsource all your Marketing activities or to hire an own department: If you considered a Marketing-activity such as a re-branding or business model innovation, would you then work with a real full-service agency? In Amsterdam, for example, there's the opportunity of "Elite Sourcing", that is, to send the idea for a project out via a professional network and to get back a variety of different solutions. Then you could collaborate on any kind of project– E.g. to record a Fuxbau album full of awesome music from artists that share the same vibe. It's within the context of the increasing flexibility of professional artists, creatives, and strategists. They can work from everywhere and even collaborate on projects with real companies- Would that be an option for you guys?*

    Generally, we are always open for everything. It only has to fit to the FUXVAU idea and is therefore situation dependent. Prospectively, my dream is it to collaborate with people that really love their craftwork and what they do no matter how much money it brings. In my opinion, this is the most solid building block for success in both life and job. Everything else comes then, later. I also decided that I will only do the project as long as I can identify myself 100% with it.

11. *Last question: Where is Fuxbau going in the future? Which projects do you want to realize?*

    Like already highligted, in the future we want to focus to support humans that think similarily to us. We want to work with small, uprising labels that internalized the same set of values. We are open for everything and just see where we are going. Besides, we want to further our aid projects. My greatest wish is a long-term project in which we can change and develop something over the years ;-)

19..6 Findings Qualitative Interviews B

Philipp Koch (Fuxbau): Sustainability & Authenticity

The label FUXBAU incorporates what has been observed before: The organic development of the brand started by not setting a financial goal as a primal reason to engage economically but rather to use this transactional way to inspire and to sensitize the audience for alternative ways of consuming material goods. Another point that becomes clear is the one of social embedding: The brand is almost exclusively promoted through Word-of-mouth and a rather small but well-connected network of peer. This type of anti-Marketing, however, is not strategically implemented to reach a greater audience but rather to connect with like-minded people. Paradoxically, the brand employs the sales of goods to promote a lifestyle in which consumption is coupled to the actual need for a new item and thus carries characteristics of the previously described phenomenon of authenticity producing lifestyles, which are detached from the idea to participate on economical transactions for other reasons than functional need. The label manager's characterization of a young buyer segment that cares for handicraft and individuality corresponds with the previously described Generation X/Y, which is said to increasingly care about values such as the mentioned ones, in correspondence with sustainability and a simultaneous consciousness for style and fashion (e.g. Aspirationals, BBMG, 2014). The respondent characterizes the need for a sustainability dimension within the apparel industry as a normative, desirable outcome because of consumers' decreasing valuation of handicraft and quality. This effectively missing valuation by consumers was also observed in the literature review in a rather paradox way: On one hand, consumers experience a facilitated, cheap buying environment for the instant gratification of desires, which devalue the bought item's origin in the mentioned terms of e.g. handicraft and quality. On the other hand, the increasing success of brands communicating these values shows a demand for a production and delivery mode that actually contradicts our fast-living consumption habits. Here, consumers seem to feel indifferent towards brands' actual efforts to structurally implement these values or the brands' simple communication without real sustainability efforts. It was highlighted before that the notions revolving around the quality/sustainability dimension are especially inherent in today's notion of authenticity; which itself is interlaced with the dimension of sustainability.

Daniel Barckhan (Titus): Authenticity & Functionality

Daniel Barckhan gives insight into the branding and marketing activities of the German skateboarding and street wear brand Titus. From an operational point of view, it is interesting to see that the brand employs a way of media communication that is greatly produced and distributed through in-house actors. Although it is a distributor of hardware and apparel, it houses a content production department (film, print, Social Media) as well as SEO and e-commerce employees. This in-house team creates a multidimensional enterprise serving a single, dominant claim: “The company is and was always authentic”. The call for authenticity seems to be an important characteristic to pursue, which may result from both the sold items’ experiential value (skateboarding incorporates individuality, “community, freedom and fun”) and the company’s failed IPO history. Strikingly, the process of the customer’s identification with Titus “represent[ing] a certain set of values, a certain style” bases on a strong community, which welcomes a new member the warmer the more he commits to it. In a secondary scenario, this setting allows for an individual to interpret this lifestyle for himself regardless of skateboarding activities. After digestion of Baarck’s (2015) interpretation, the lifecycle of this “certain style” cosmos may therefore look as follows:

1. Community Building & Radiation: Single individuals get together to share and produce a certain lifestyle (here: Skateboarding)
2. Setup of economic actors for functional supply: Companies like Titus start to sell supplies for the scene
3. Attracted individuals’ interpretation of discovered structures: The existing scene attracts the individual because of authenticity production
4. Community Building & Radiation

The circular process character of such an ecosystem puts authentic brand into the middle of community and individual; it serves as a mediator and aggregator between actors. From an economical point of view, the brand catalyzes and manifests the otherwise not economically documentable actions of its immediate stakeholders (here: the consumers that buy items for self-authentication and functional use alike, e.g. skateboarders). Interestingly, the values provided by Titus to strengthen this stance are their “wide experience, high competency and grown identity in the area of street wear and skateboarding [...], the general high quality of the products [and] you know that the brands of our (Online-)Shop are assigned to a certain relevance”. The here discussed functions of offered items contradictorily exceed the actual function into a socio-cultural space although they are much more functional than pure fashion items (e.g. skateboard decks from different brands).

Social /Ecological Sustainability

The respondent holds the brand's heritage responsible for its engagement within the social spheres. It supports and works closely with an organization that finds its roots in the brand of Titus, which creates synergies and greater economical freedom in realizing socially sustainable projects. From an environmental point of view, Baarck hints at the Titus staff's personal verification of working conditions and the compliance with existing Germany laws in terms of the textile contaminant loads. However, his answer shows that the ultimately deciding bottom line of producing in a more sustainable way is the buying public, which in this case does not demand a change in production. It seems that larger brands underlie a duality in the sustainability discourse, in which they decide for either social or environmental engagement and comply with the respective non-followed dimension on a minimal scale.

Use of Business services

In the last part of the Titus interview, the respondent vehemently rejects the idea to use any offered business service for Marketing or Innovation purposes. Contextually, the brand sampled a near-death experience when external investors tried to set the strongly growing company up for an IPO in 2001 but failed to satisfy the stakeholders. The family-owned brand expelled its founder for strategic interim management, which led to artificial growth creation by increasing turnovers without actual demand. The owner eventually bought the company back; the reason for failure is seen by him in the external investors' and managers' ignorance towards the cultural embedding and viscosity of a lifestyle brand (Fischer, 2008). This cohesion provides relevant knowledge about the necessity to understand a market's composition, and to understand the importance of authentic, organic set-up of a brand: "The brand is changing organically and of course, a strategically planned relaunch would contradict a lot of our basic values of our identity". Within brand analysis, it is important to notice client sensitivities deriving from both brand history and current situations.

19 VRIN Analysis

The main idea follows the logic to foresee the impact a certain set of resources/competences has on the delivery of the intended product/service; in this case, it's the delivery of a business service in the consulting sector. The strategic tool was used to map the undertaking's core competences and resources within the above-mentioned four dimensions. In a second step, each of the dimensioned resources was explained upon its core function ("core competency"). Through implementing this way of exploration, the business' unique strengths and weaknesses were outlined, which are vital to a complete SWOT analysis. The dimensions of VRIN can be explained after Future SME (2015) as follows (YES/NO):

VALUABLE: Resource increases revenues/ decreases cost or combination

RARE: Resource is NOT rare. Resources should be rare enough to not produce heavy but light competition.

INIMITABLE: Resource is not easily copied. Especially important if resources are not rare since other traits such as inimitability must be added. In case the resource is inimitable, competitors suffer from cost increase to imitate the resources. Generally: Intangible assets are harder to imitate; bundles of resources are more costly than single ones.

NON-SUBSTITUTABLE: Resource helps to render the final product as **unique** in time & space so that competitors may not easily substitute the offered service/product.

VRIN: Core competencies and resources

RESOURCES	VALUABLE	RARE?	COSTLY & DIFFICULT TO IMITATE?	NON-SUBSTITU TABLE?	CORE COMPETENCY
Financial					
Company’s borrowing capacity	yes	no	yes	yes	Sustainable comtetitive advantage
Internal funds	yes	yes	yes	no	Temporary Advantage
Physical					
Computer	yes	no	yes	no	Platform to run software on
Software on Computer	yes	yes	yes	no	Mix of applied software ensures optimal assistance for producing unique output
(Temporary) Office	no	no	no	no	Space of collaboration & productivity: nice to have but not necessary (meeting points can be everywhere)
Technological					
Application of technology (know-how)	yes	no	yes	no	Analyze a brand for competitive advantage in the 21st century
Human					
Skills, expertise	yes	yes	yes	yes	The unique mix of skills aggregated(ASP framework) + potential new acquisitions positions the skills & expertise at the core of the undertaking
Adaptability& Loyalty of eollaborators	yes	no	no	yes	The idea to work with contractors produces a high flexibility and a "pay-for-hours-only" scenario
Reputation					
Products/services	yes	no	yes	no	The rendered services are not rare and can theoretically be easily substituted; however, the imitation of these intangible services is not easy
With community, suppliers, collaborators	yes	yes	yes	no	Maintaining and building up a strong, loyal and reliable network is at the core of operations. However, the community and collaborators are engaged in multiple actions/projets at the same time and don't exclusively belong to KAOS. Also, this resource is not as storng as it needs to be to gain comeptitive advantage yet.
CAPABILITIES	**VALUABLE**	**RARE?**	**COSTLY & DIFFICULT TO IMITATE?**	**NON-SUBSTITU TABLE?**	**CORE COMPETENCY**
Management					
Financial management	yes	no	no	no	The financial management is largely computer-assisted / fully ran by owner
Network Membership management	yes	yes	no	no	
R&D					
Basic research	yes	no	no	no	It is assumed that all competing providers have a weaker scientific network than the proposed busines. However, the assumption may also be the opposite so that this
Innovation in new products/services	no	yes	yes	no	The core is to innovate steadily with others so that the innovation within the organization is not in the focus.
Marketing					
Responsiveness to market trends	no	yes	no	no	Responsiveness is valuable but not hard to imitate due to internet intelligence; also not a must-have
Promotion of quality	yes	no	no	no	Competitors try to differentiate themselves through own analysis strategies
Sales					
Quality of customer service	no	no	yes	yes	Good customer service is important but the outcome of the project, which is already human centered, counts more
Follow-up and social connectivity	yes	yes	yes	no	a personalized follow-up and intense social connectivity embeds the business and soothes empty demand times
Information processing					
Information system which is comprehensive and effective	yes	no	no	no	collaboration and information exchange in near-real time with simultaneous documentation and structuring of upcoming task is vital
Collaboration management	yes	yes	no	no	SCRUM & AGILE methodologies as management aid

Table 16. VRIN Analysis. Table adapted from Future SME, 2015: VRIN tool.

19 SWOT Analysis

1. Analysis of Strengths and weaknesses

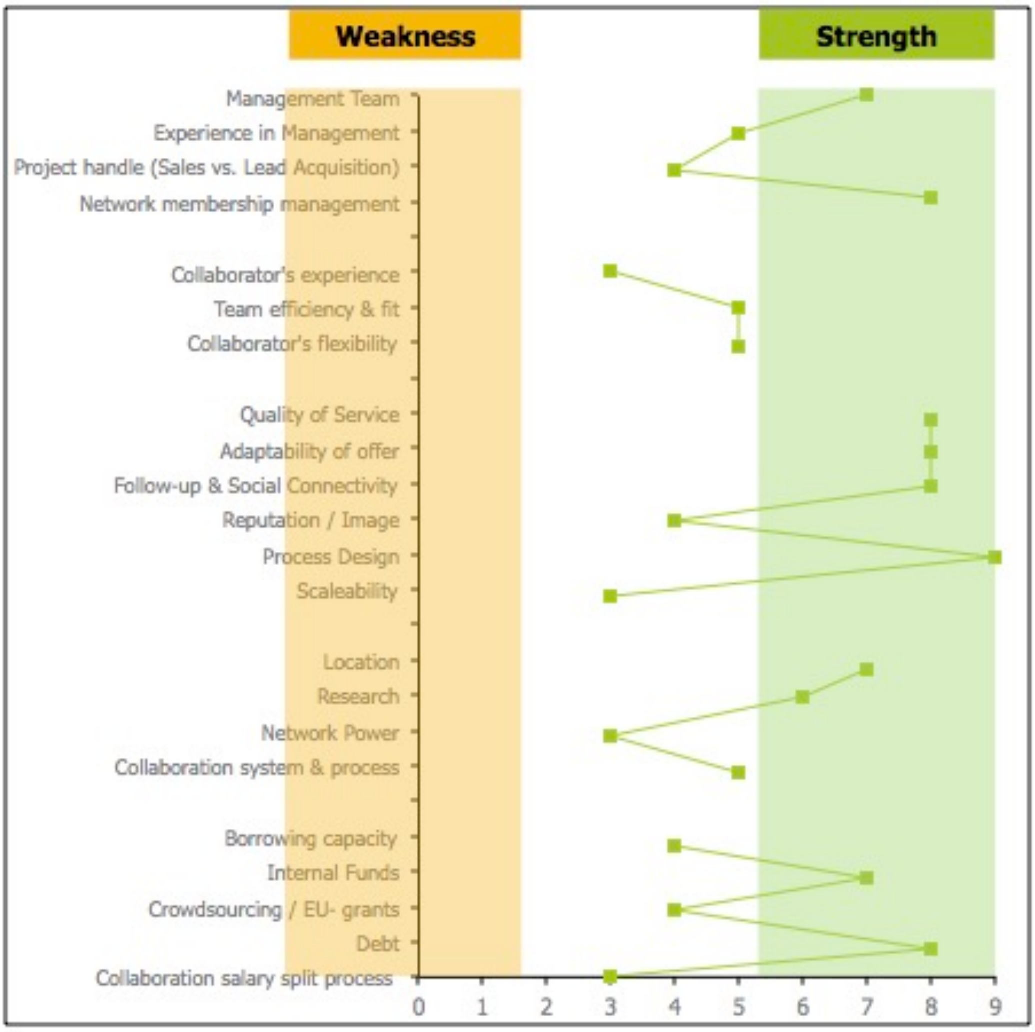

Figure 11. Analysis of Strenghts and Weaknesses. Adapted from Fuer-Gruender Plan (2015): SWOT

2. Trend Analysis and Opportunity/Risk characterization

9 = Very relevant trend	
1 = Weak, rather irrelevant trend	

Trend	Trend strenth	Opportunity	Risk
Sustainable consumption / production	4	✓	
Demand within SME sector	8	✓	
Authentic Consumption & Lifestyles	5	✓	
Freelancing & Collaboration	8	✓	
Market Saturation	6		✓
SME Borrowing Capacities / Debt profile	7		✓
Power of Big Consultancies/Agencies	4		✓
Economic Environment	5		✓
Cultural Embbeding	3	✓	
Dissolution of Traditional Boundaries	6	✓	
One-Stop-Shop	7		✓
Value propositions with functional value	5	✓	

Figure 12. Trend Analysis and Opportunity / Risk characterization. Adapted from Fuer-Gruender Plan (2015).

Opportunities	Opportunity 1 Freelancing & Collaboration	Opportunity 2 Demand within SME sector	Opportunity 3 Dissolution of Traditional Boundaries
Top 5 Strengths			
Process Design	Design efficient project collaboration process	Target SMEs with lean, cheap process	Center ASP framework in value proposition
Follow-up & Social Connectivity	Create own social network /Facebook group	Enable SMEs to participate on network intensively	
Adaptability of offer	Offer flexible project modes (collab. Times)		Provide clear process structure
Quality of Service	Provide incentives (e.g. salary handling) for collaborators	Adapt pricing to highest affordable quality	High communication level (good cust. Ser.)
Network membership management	Tie collaborators into the same network	Move in the same network like target SMEs	Remain consistent throughout network activities
Top 5 Weaknesses			
Collaborator's low formal professionalization	Implement regular training (against fee) to new collab.	Collaborate with experienced SME leaders	Increase stakeholder's access to infomation
Scaleability	Find digital item opportunities	Offer scaleable items (e.g. network membership)	Dedicate research to scaleability in new action fields
Network Power	Strong online presence, SEO, offline contacts	Strong offline connectivity in SME field	Connect with "Early Adopter" initiatives
Collaboration salary split process	Invest in powerful software	Develop easy handling strategies (1-Stop-Shop)	
Project handling (Production vs. Client Acquisition)	Automatize processes (templates...); Outsource	Focus on delivery, not on production	Employ internal short-term lending principle

Risks	Risk 1 One-Stop-Shop demand only	Risk 2 SME Borrowing Capacities / Debt profile	Risk 3 Market Saturation
Top 5 Strengths			
Process Design	Also offer complete solutions	Allow for client's financing alternatives	Delivery of disruptive ideas at lower cost
Follow-up & Social Connectivity	Leverage Social network for broad offer	Provide clients tips for efficiency through E-Mail	Be familiar and honest in communication
Adaptability of offer	Meet demand with adequate tailoring	Provide different packages in one proposal	Learn from other's best practices
Quality of Service	Excel in offered service	Save cost in non-core areas (e.g. no office rent)	
Network membership management	Create On-demand One-Stop shop with collaborators	Leverage Network to enhance capacities	Connect w/ stakeholders informally and officially
Top 5 Weaknesses			
Collaborator's low formal professionalization	Improve Project Management Skills	Leverage & promote positive project outcomes	Represent projects formally under one name (KAOS)
Scaleability	Stndardize processes for re-use	Provide Public Funding opportunities	Bessere Kundenbindung wichtig
Network Power	Focus on cash cow projects	Focus on client retention	Focus on cash cow projects
Collaboration salary split process	Split salary according to responsibility level	Focus on lean groups with high capabilities	Enable other market participants to collaborate, too
Project handling (Production vs. Client Acquisition)	Supervise projects	Remind clients to pay on time	

Table 17. SWOT analysis. Adapted from Fuer-Gruender Plan (2015).

19 Offer Characterization

(Branding) / Marketing Consultant

- Acquire, correspond, and oversee client relationships; active account management
- Analyze client's unmet need and articulate a problem definition
- Propose a
- Collection and assembly of ideation points from different stakeholders (client, client's employees, external personnel, customers, creative professionals) and market information into usable data
- Use the gathered data to run a branding audit with the means of the proprietary ASP framework and other adequate analysis tools
- Write and present a strategic Marketing plan upon findings, including
    - Review of findings
    - Status quos and opportunities of action (=Creation Strategy)
    - Information on strategy implementation and new project development
    - Recommendation on further proceeding
- Help to implement the presented strategy, either through
    - Project development management, directly working for the client
    - Project Management with assembled team

Marketing Management

- Business Analysis (qualitative & quantitative)
- Design & execute Marketing campaigns through adequate channels, including building time & cost plans
- Identify Key Performance Indicators and try to meet them
- Participate on existing Marketing programs of a client (virtual/offline events, direct marketing)
- Lead & justify decisions related to both brand and product strategy, and sales
- Collaborate with or represent other Marketing-related roles for optimal strategic decisions and outcomes
- Credence

Creative Direction /Project Management

- Recruit and manage a team of developer, content creators, graphic artists, social network professionals and other actors
- Development, translation and explanation of consulting strategy into actionable events for participating team members
- Depending on case: Leader of video & content (written/audio) production, leader of communicational distribution of produced content, involving
    - Video Direction / Location Scouting
    - Copywriting
    - Video Editing
- Leadership of creative/strategic teams to meet pre-set deliverables on time, within budget and in best quality (Agile method / Scrum methods)
- Design, follow and improve a best-practice strategy for the management tasks
- Documentation for all involved stakeholders through efficient means (cloud briefing, cloud collaboration, etc.)

- Manage technology development, production, content, copywriting, strategic actors: Mentoring, reviewing, organization, deadline supervision, content recommendation, correction and development
- Serve as a “needle eye” for all project-related undertakings, and stay in correspondence with project-related stakeholders through steady updates
- Prioritize budget and time resources
- Adopt and excel in new creative, technologic, and strategic strategy principles (e.g. usability, collaboration, SaaS)
- Measure success by pre-set KPIs,
- Intend, set up, and synthesize research findings into recommendations and
- Prepare deliverables through presentations, style guides, and other comprehensive means
- Present deliverables to team and and to client

Business Services to team members

- Manage time frames and quality supervision
- Serve as a key link between client and providers
- Communicational trustee for both sides
- Team payroll management

Single Business Services
Multimedia Production /Editing
Search Engine Optimization
Youtube channel setup & supervision
Marketing Strategy in-house
    Development /Refinement of existing Marketing Strategy
    Supervision & Management of all communicational channels (Social Media, YouTube, Events, Direct)
    Success tracking & Analysis
Copywriting
    Article Writing
    Blog Writing
    Copy editing/writing
    Editorial Writing
    Editing
    Web Content Management
Qualitative & Quantitative Market Research
Other Content Production (Cross-Channel)
- Video Direction / Location Scouting
- Copywriting
- Video Editing

19 Complete Brand Audit

Introduction

This Brand audit comprises both questionnaires as well as indications and checklists to follow in order to provide a thorough review and recommendation for the client's brand.

Branding defines the process by which a company crafts and adjusts the signals it sends to the consumer (Landor Associates, 2009) in order to gain competitive advantage. Branding consists of defining the brand idea, its architecture, and the brand personality to allow for the consequent verbal, visual and sensory identity creation process (ibid., 2009). Contextually, branding and innovation are interrelated to the point that both technological and marketing innovations may be the means by which an organization's brand will be commercially successful, indicating that structural organizational weaknesses need to be eradicated in order to boldly communicate crafted brand signals (Fleishman-Hillard, 2010). Reversely, the corporate brand and its direction influences the orientation of innovation projects (Nedergard, 2013a).

Keller (2001) designs the Customer-Based Brand Equity Pyramid, which serves as an exemplary model to guide the following audit example. Here, he asks for the brand identity, for the brand meaning, and for the brand relationships, which may be analyzed using the developed framework as well as the additional questions. Albeit this model, the exemplary Audit process may be modified and adequately built up with the help of other models and frameworks.

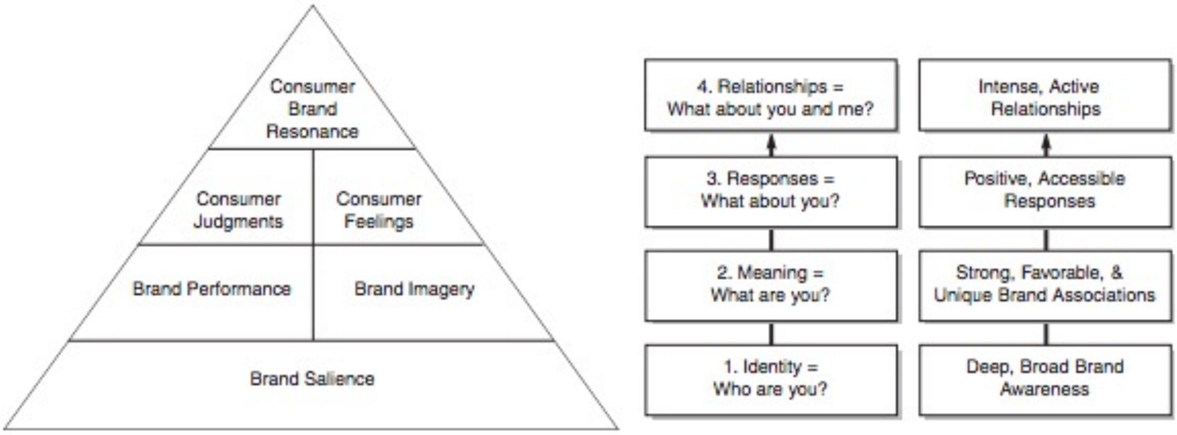

Figure 1. The CBBE Pyramid (Keller, 2001). Adapted for own use.

Business Process

The service process related to KAOS' operational activities comprises 4 stages. The fifth stage, the realization, remains as an optional step depending on the client's service demand. The stages are:

1. **Lead Generation**
   a. Potential clients are successfully turned into interested potential clients
2. **Client meeting**
   a. The meeting gives insight about the client's unmet need and provides the frame to characterize a certain proposal. Here, it is important for the provider to already gain substantial insight into the client's business processes to generate an adequate proposal that meets the stakeholder's expectation. Therefore, the client is asked some basic questions which can be found in the following under: 1. Brand Summary Questionnaire (First Client Meeting)
3. **Proposal**
   a. The proposal comprises the description of services intended to deliver to the client, the time span, desired outcomes & measurement metrics, as well as a price tag, which is due to negotiation for an optimum offset between the projects' budget, time frame, and quality.
4. **Audit**
   a. The audit is comprises an integrated approach, incorporating both "classic" branding audit elements as well as the own developed ASP framework audit. As for the structure, the audit can be split into two distinct sides:

Brand-side audit

- What does the brand intend or already execute in regard of the dimension?
- What does the brand communicate? And where?

Stakeholder-side audit

- Which type of user/ consumer do consume the products the most? Heavy Users, Experts, Lagged Users?
- What is actually perceived by stakeholders?
- What do stakeholders expect the brand to do/communicate within each dimension?

The audit guideline is found below (Brand Audit: Guideline); it was adopted from Sango Digital (2011) & Newman (2015).

5. **Presentation & Recommendation**
   a. The Presentation and Recommendation phase comprises the findings of the analyses run by the consultant, readily digested for presentation to the client. This phase is especially vital to the business as it determines to prolong the collaboration of client and consultant beyond the original, first consulting activities. The phase contains both recommendations of classic "brand" analysis and the ASP framework.
6. **(Realization)**

Brand Audit: Guideline

1. Brand Summary Questionnaire (FIRST Client Meeting)

Meeting	Date	Place

Please state your value proposition. What do you deliver to the customer?

Primary value proposition	
Secondary value proposition	

Which consumer segment(s) do you serve? Please characterize each segment through the characteristics you think apply (e.g. average age, social milieu, leisure time activities, other)

Segments	
1	
2	
3	
4	
5	

Please indicate which product/service is aimed at which segment.

Segment	Products/services
1	
2	
3	
4	
5	

Please state the position of your brand in relation to other competitors.

Please indicate why you seek for KAOS. Describe your problem or need.

Please describe how the ideal solution would look like.

1.2 ASP Weight/Score from the client side (Impact scored according to industry & case)

In the first step, the ASP dimensions are split into three sub-dimensions and then measured and weighed through a questionnaire the client has to answer. It is to note that especially the third sub-dimension is subject to change and adaptation.

One reason for that is that there may be other sub-dimensions that are not adequately represented by the existing ones. Here, the question can target implicit industry knowledge / observations of the client that may fit into one of the three categories. The client is then asked to weigh the importance of each dimension, that is, how much each of the dimensions plays a role in the value proposition and the impact on actual sales of the brand's items.
The procedure applied to assess these questions are

	Dimension 1/Weight	Dimension 2/Weight	Dimension 3/Weight
Authenticity - After questioning each dimension, the client is asked to indicate which of the sub-dimensions he thinks is the most important one in terms of sales impact.	Sincerity – "How sincere are you about your brand's production and service delivery? Which parts of it do you communicate, which ones you leave out? "	Heritage- "Which heritage does your brand have? Which parts of this heritage do you communicate? "	Other dimension E.g. "Is this segment related to any (sub-)cultural group or movement?" or "Describe in three words what your brand means to the customer."
Sustainability see above	Industry Standards- "Are you involved in activities that can be related to efforts to save the planet & improve work conditions? Do you follow certain industry standards"	Additional Qualifications /Batches- "Besides industry standards that you may follow, is there any external batches or recommendations you obtained from a different entity?"	Own efforts regardless of standards– E.g. "What does your brand do to save the planet or to improve the work conditions? Do you think your customers care about that?"
Product/Service Functionality	Function of Product/Service as intended "Which core function do your products / services have? "	Additional Function related to the product's / service's original one "Which additional function does your product/service have?"	Other function unrelated to the original one "Did you witness that your customers used your service/product for something completely different tha intended? Which other uses could people have for your service/product?"

a. 2. MARKET & STAKEHOLDER RESEARCH

In the second step of analysis, the gained insights provided by the client guide the market research. The weights given by the client provide an impression about the importance of certain brand character traits. Each dimension is analyzed upon the answers given and then reconciled upon data obtained from a source different than the client.
Here, the primary action is to identify the consumer segments who are currently buying the client's service to gain insights about each of the three pillars from these type of segments If there is no recent data available that gives insight on customer's opinion of each of the three dimensions in the respective Industry, it may be helpful to conduct interviews with customers and/ or employees in a similar fashion to the questionnaire for the client himself. Here, the customers can be asked about their perception of the brand's activities in the respective fields, as well as about their use for the brand's offerings.

Current Customer Segments: Characterization (Best Segmentation method)

2.1 SURVEY Questions

Question	Comments
(Work through the ASP matrix and adjust the questions for each audience)	
How would you describe your experience with the {product/company}?	
When purchasing from/working with {product/company}, what's a word or phrase that describes what you expect from us each time?	
If {insert your product or company name} were a person, how would you describe him/her? What human personality traits match the brand?	
What is the main thing your think of when you hear {insert your product or company name}?	
Other	

2.2 RESPONSE RATE
A) Total number of targeted respondents
B) Percentage of active respondents

Segment / Group interviewed	
Size of respondent population of group (A)	
Est. % of responses (B)	
Number of completed surveys desired (C = A*B)	

Number of completed surveys needed (C)	

Projected minimum response rate (D) (as a decimal)	
Number of surveys to send out (C / D)	

NOTES
Set up a work sheet to warrant a quantitatively measurable way; keep the survey short; ask people to respond in short time; try to personally address them if not responded; set an incentive; thank participants at best personally

2.3 SURVEY REPORT

Purpose of survey	
Date	
Method used	

	A	B	C	D
Groups targeted				
Number of surveys sent per group				
Number of completed surveys received				
Response rate				
Number of surveys needed for statistical validity / met?				
Confidence level				

Attach a copy of the survey and a copy of the results.

2.4 SURVEY ANALYSIS

Goal: Determination of mismatches between current and future brand strategy.
Analyze the answers per strategic stakeholder group / segment and count the overall amount.

A high score number means a higher match of responses with the current brand strategy.

Survey Group	

RESPONSE RATING
How much does each response in the segment meet

Ratings	3 = the response matches extremely much to the current strategy 2 = the response matches with the strategy 1 = the response does not match the strategy at all

Number	Response to Question with same number	RATING
1		
2		
3		
4		
5		
6		
7		
Total		

Group	Score / Comment
Employees	
Vendors	
Customers	
other	

CONCLUSION

For each group, determine the results.

Group	Biggest Difference	Biggest Agreement

3. BRAND COMMUNICATIONS

Overall Corporate identity	Is it consistent with the client's brand promise?	Is it consistent with stakeholder's perceived traits?	Next steps
Logo / Colors	Y N	Y N	
Headlines / Copy	Y N	Y N	
Brand Voice	Y N	Y N	
Consistency	Y N	Y N	
Printed identity	Y N	Y N	
Other	Y N	Y N	
Online			
Website	Y N	Y N	
Social Media	Y N	Y N	
Interaction Design	Y N	Y N	
Tone of voice	Y N	Y N	
Visual Identity	Y N	Y N	
E-Mail	Y N	Y N	
Media (Video, Blog)	Y N	Y N	
Usability	Y N	Y N	
All versions updated?	Y N	Y N	

4. AUDIT RESULTS & Reconciliation of Findings

A) INTERNAL

Audit Targets	

Specify the findings of the audit in 5 short sentences.

The different brand domains are perceived as follows by the internal stakeholders:

Area of brand (ASP or other)	INTERNAL STAKEHOLDERS	Major perception/ opinion differences to current strategy

Solutions for eliminating the identified threads

Item	Activity	Goal

B) EXTERNAL

Audit Targets	

Specify the findings of the audit in 5 short sentences.

The different brand domains are perceived as follows by the internal stakeholders:

Area of brand (ASP or other)	Group	Major Difference to current strategy

To resolve any Solutions for eliminating the identified threads

Item	Activity	Goal

4.2 ASP Findings

For the ASP part, the third step comprises to build a difference matrix out of the findings from both the client's (internal view) and the customer's/market implications (external view). Depending on the case, it may be sufficient to graphically indicate the status quo, the opportunities, threads, strenghts and weaknesses through +/- symbols, which can be then explained in depth. A matrix incorporating the findings would look like this:

	Dimension 1/Weight		Dimension 2/Weight		Dimension 3/Weight	
	Client	Market	Client	Market	Client	Market
Authenticity	Sincerity		Heritage		Other dimension	
Sustainability	Industry Standards		Add. Qual./Batches		Own efforts	
Product/Service Functionality	Function of Product/Service as intended		Add. Function related to the original one		Other function unrelated to the original one	

5 Checklist

INTERNAL Positioning Brand values Unique selling proposition, brand promise, or brand essence Brand Voice Culture Product/service positioning	EXTERNAL Corporate identity—logos and other brand elements Collateral – brochures, print materials, tradeshow displays, etc. Website Social media Sponsorships & memberships News/PR Content marketing and other assets—blogs, white papers, case studies, articles, books, etc. Testimonials Videos
SYSTEMATIC ACTIONS Corporate identity/brand standards HR policies/on-boarding process Sales process Client touch points	OTHER Brand Market Value proposition (internal/external) Perception Status quo vs. Opportunities / Threads

19.8 QHA (Query Hit Analysis) Competitor List

Competitor Name (unipessoal)	Website	Location	Similarity to business	Core Area	Offers	Strenghts	Weaknesses
Likeforlike	http://www.likeforlike.pt	Lisbon	Brand Audits, Company Image Tests, Sales Consulting	Field Market Intelligence	Market Research, Brand audit from consumer side	Experience, Focus on client's Sales performance, data driven Clear Report structure,	No own analysis strategy, re. Low Social Media impact,
Eco Partner	http://www.eco-partner.pt	Lisbon	Environmental &Sustainability Consultancy	Environmental, hygiene, food security consultancy & norm implementation, focus on Automotive industry	Complete residuals solutions, Consulting, Sustainability Managment Outsourcing, Carbon emmission reduction, instalment of tangible environmental improvement equipment/machines	Structured approach (no ideologic environmentalism); Involvement in low-visibility business areas; Aim to improve processes for environmental safety; technical know-how	No english website/clients; few innovative projects (more: implementation/standardization to sustainability norms), clients almost exclusively auto (≠ communication), very strategic & commercial (no creation/ideation part involved)
Aavanz	http://aavanz.biz	Lisbon	Business Consulting for SMEs / Start-ups with EU Funds	ICT systems, Aeronautics, Space, GMES, Security, Transport, Environment, Energy and Health.	Consultancy for SMEs/Startups: Market strategy, raising R&D and innovation funding, management of such projects,	Excelling in EU-backed funding; clear strategic cycle; technical know-how	Focus on "traditional" R&D areas suitable for public policy; no Social Media / low visibility outside of industry ;experienced- B2B company, no creative part
Blueline	http://www.blueline.pt	Lisbon	Marketing Strategy, re. Small clients	Web/Digital Marketing, Packaging design/production	"Traditional" visual branding / packaging, website building	Own social involvement projetcs, one-stop-shop offer; established brand; credibility, seriousness	No english website/clients , usual Outsourcing partner (no transformational inetraction), pre-defined actionable offers; sells offers (Marekting Startegy consultancy) it never applied
Thinkwide	http://thinkwide.pt	Lisbon	Brand Design & Strategy; same company structure (owned by one person, no employees)	Brand Strategy, Visual Branding, Graphic Design, Copywriting	"Traditional", visual Branding;	Lean company structure (contractors/freelancers on project base); Strong online presence; Stong Network; Relatable/steady Social Media	No clear communication about offers & past projects; no economies of scale (only one person runs it officially); remains within creative field; blatant own-advertizement
KAOS	http://kaosempire.com	Lisbon/other	(own)	Contemporary brand consultancy, creative project management	Brand consultancy,Cultural Innovation direction, Creative Marketing Strategy	Lean company structure; Own analysis lens; Open & transformational client relationship; openness to learn & to complement other's skills/value proposition; flexibility for collaborators; Interdisciplinarity	Language; Weak Network Power; Newness of the company; no economies of scale (see above); Experience; Risk of getting ideologized;

19.9 In-depth Competitor Analysis

In depth competition analysis: KAOS vs. 3 strongest competitors

1 = Worst Performance 9 = Best Performance	Own business	Thinkwide	Aavanz	Blueline	Ø Comp.
1. Diagram: Service Offer					
Product					
Adaptability of Offer	8	9	7	6	7,3
Price/Service	6	7	9	4	6,7
Process Design / Strategy	7	6	8	8	7,3
Reputation	4	2	7	6	5,0
Formalization / Professionali	5	8	7	8	7,7
Interdiciplinarity	8	7	7	4	6,0
Project Handling (Production	4	5	7	8	6,7
Flexibility for collaborators/en	8	9	6	3	6,0
Network Power/Strength	4	8	6	6	6,7
Social Embedding (Connecti	9	7	6	2	5,0
2. Diagram: Competitors					
Market					
Overall Market Visibility	5	8	3	5	5,3
Overall Market Share in Con:	1	5	7	8	6,7
Business Size	1	1	6	8	5,0
Niche Domination	8	8	7	4	6,3
Strategy					
Clear Strategy	4	5	8	7	6,7
Unique Selling Point (USP)	8	5	8	7	6,7
Network Exploitation	9	8	6	5	6,3
Marketing					
Image	7	9	5	8	7,3
Popularity	2	8	4	6	6,0
Sales Team	2	3	4	7	4,7
Client Retention	3	5	7	7	6,3
Client Satisfaction	6	8	8	8	8,0
Marketing Budget (Absolute)	4	5	3	7	5,0
	5	5	5	5	5,0
Organization					
Management Team	7	9	6	8	7,7
Employees	2	3	6	8	5,7
Flexibility (Location/Time)	8	7	5	5	5,7
Internal Organization	5	5	7	8	6,7
Collaboration System / Proce	5	6	5	4	5,0
Finance					
Turnover	7	8	5	6	6,3
Profitability	4	6	7	7	6,7
Financial Strength	4	7	8	8	7,7
Profit Margin	7	8	6	7	7,0
Debt	6	6	7	7	6,7
Borrowing Capacity	4	6	8	8	7,3

Table 18. KAOS vs. 3 Strongest Competitors. Adapted from Fuer-Gruender Plan "Konkurrenzanalyse"

KAOS versus Competitors' Product/Service Offer

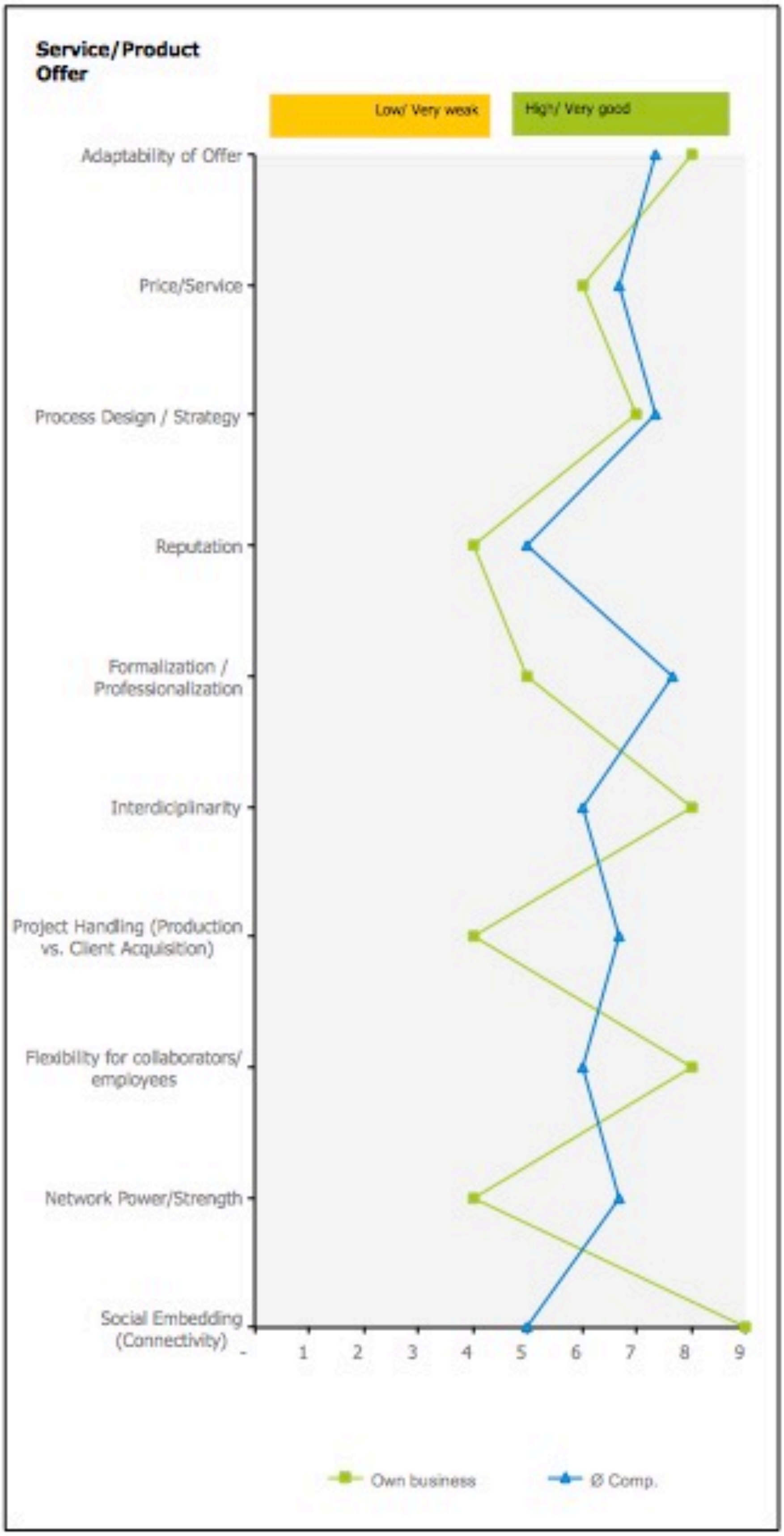

Table 19.KAOS vs. Competitors' Product/Service. Adaoted from Fuer-Gruender Plan: Konkurrenzanalyse.

KAOS vs. Competitors’ Strenghts & Weaknesses

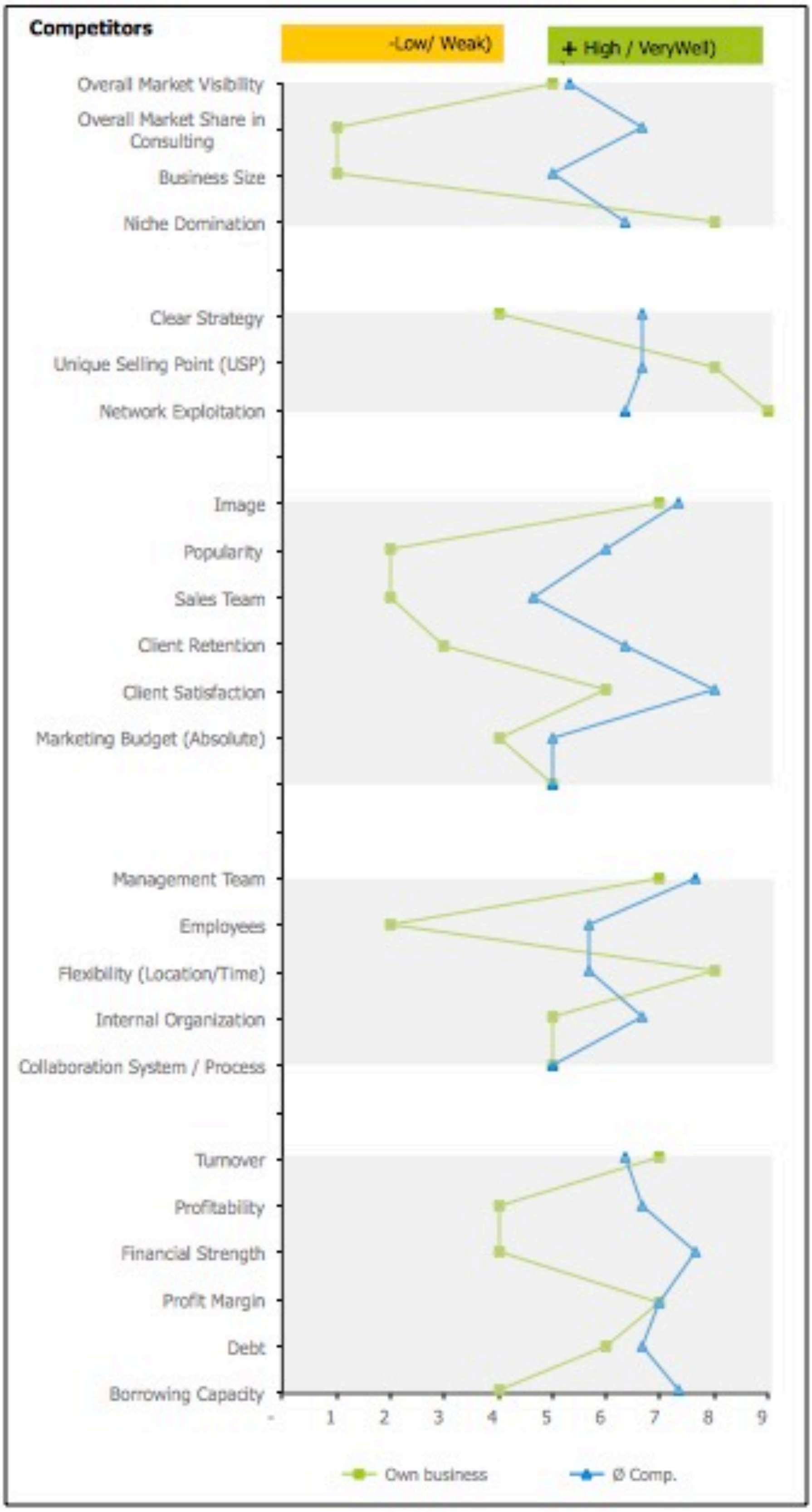

Table 20. KAOS vs. Competitors' Stregnths& Weaknesses. Adapted from Fuer-Gruender Plan: Konkurrenzanalyse.

19.10 Pricing

Yearly Cost	%	Cost per hour	Cost per year
CEO salary (=private living expenses)		6,77 €	6.000 €
Personnel side cost	25%	1,69 €	1.500 €
Rent		8,12 €	7.200 €
Marketing		3,11 €	2.760 €
IT & Tool Cost		0,42 €	370 €
Depreciation		0,56 €	500 €
Insurance		2,03 €	1.800 €
Sales		0,84 €	740 €
Travel Cost		2,71 €	2.400 €
Total Cost		26,26 €	**23.270 €**

Billable hours per year			Days / Hours
Days Per Year			365 Days
Saturdays & Sundays			104 Days
Public Holidays			10 Days
Holidays			25 Days
Sickness			15 Days
Net Workdays			**211 Days**
Work hours day		6 Hours/Day	1266 Hours
Time loss due to non-utilization of hours	30%		380 Hours
Net work hours per year			**886 Hours**
Number of Collaborators that can be counted			1
Total annual billable hours			**886 Hours**

Cost per billable hour		26,26 €
Plus profit margin		
Option 1.) Profit per hour in %	15%	3,94 €
Option 2.) Profit per hour in Euro	29%	7,68 €
Net offer price		**33,94 €**
Sales tax	20%	6,79 €
Offer price after tax		**40,73 €**

Table 21. Price Calculation on base of billable work hours. Adapted from Fuer-Gruender (2015): Price Calculation.