

## CHAPTER 5

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# NEGOTIATING AND SELLING AN INTERVENTION- RESEARCH PROJECT THROUGH A STRUCTURED AND RIGOROUS METHOD

**Laurent Cappelletti**

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The objective of intervention-research is to transform organizations to develop their practical performance and to collect data of scientific quality. In this sense, since intervention-research is intended to contribute to the value creation of an organization, ideally it needs to be sold, with the price of its sale corresponding to a fraction of the value created for the organization. Furthermore, the sale of an intervention-research project may motivate the researcher and his team, becoming a source of resources and establish relations between the researcher and the organization which, in addition to its status as a field of observation, acquires the commitment of the client. Nevertheless, to sell an intervention-research requires a methodology of negotiation and sale adapted to the immaterial products-services of which

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it is a particular form. The chapter presents the key tools and features of an intervention-research negotiation and sales process (see also Chapter 2), illustrating them by studying the case of a sale of an intervention-research with a professional union in the recruitment sector.

## **CONVERGENCE AND DIVERGENCE BETWEEN CONSULTING AND RESEARCH-INTERVENTION**

In order to successfully sell an intervention-research engagement, the salesperson must be fully aware of the similarities and differences between this methodology and the one typically used by consultants.

### **Intervention-Research as Scientific Consultancy**

On the surface, intervention-research takes the form of a consultancy mission. In essence, unlike a traditional consultancy mission, its methodology must integrate epistemological mechanisms for data collection that must be explained in scientific publications. Should we reveal to the client these epistemological devices, which can remain entirely unknown to him? If the researcher wishes to quote the company observed in his scientific publications and thus obtain agreement for it, there is an ethical obligation to reveal the material to the client. If the researcher produces publications that respect the anonymity of the organizations observed, which is in principle our case and that of our research team, there is no obligation to reveal to the client this epistemological “cooking.” Indeed what interests the client organization most is the consultancy through which the intervention-research is intended to help it to develop its performance; from the client side, there is clearly less interest in the intervention’s scientific background or desire produce scientific publication. In summary, we recommend that researchers who wish to sell their research remain discreet about their scientific aspects and value their performance aspects in the eyes of the client (Savall & ISEOR Research Team, 1974–2017).

The convergence between a consulting mission and intervention-research resides in the fact that both will mobilize advisory tools to transform the organization and help it to develop its performance, for example, through surveys, analyzes, diagnostics, project groups, steering committees, training courses, and management tools. This implies that, as in a consulting firm, the researcher will develop a portfolio of salable consulting methods and services that will be applied for remuneration. The specificity between a consultancy engagement and an intervention-research project is that the treated company is not only a customer but also a scientific

observation area (SOA). Consequently, the methods and the services of the intervener-researcher must make it possible to mobilize epistemological devices guaranteeing the quality and validity of the observations made to produce the scientific knowledge—and not only the practical knowledge reserved for the client. For this reason, we refer to intervention-research as a process of scientific consultancy, in other words, a methodology that uses consultancy as a research technology. The non-researcher consultant who works in the office does not worry about the epistemological devices integrated into his methods and consulting services (Buono & Savall, 2007, 2015; Savall & Zardet, 2008).

A question for the researcher, which can often be disruptive to the intervention and its conceptualization and writing process, emerges when the object observed in an intervention-research depends on the client's objectives. For example, if a client company purchases a mission to improve the decision-making processes of its executive committee, the intervener-researcher, who is committed to focus on that object, will not be able to comment on other facets of the organization, for instance, on the working conditions of the company's employees. In this sense, at first glance, the objects observed by an intervener-researcher depend on the objectives of the client and not on the scientific objectives of the researcher. But that is both true and false. It is true that an intervention-research is an inductive process whose data collection is centered above all on the problems that the client wants to treat. But it is also true that, by methodological opportunism, in responding to the client's request the intervener-researcher may be led to make peripheral observations on objects related to the central one being observed. For example, observing the decision-making process of a steering committee to seek out ways to improve it may lead the researcher to observe the workers in the organization under study to evaluate their perceptions of the management decision-making process, and by the way their working conditions. Consequently, and this is one of the strengths of an intervention-research sale, is that it allows one to make observations and (as well as publications) on the central object of the client's request as well as making observations on related and peripheral objects (with additional publication possibilities).

In a way, while econometric empirical research by database may be easier and quicker to implement for a researcher, this approach only allows publications centered on the observed object. In contrast, an intervention-research on a SOA is certainly longer and more complicated to implement, but it allows a greater number of publications not only on the central object observed wanted by the client but also on related objects and peripherals observed during the research. As another example, based on an intervention-research carried out to foster the socioeconomic performance of a large company in the surveillance and security sector, we wrote dozens

of publications (communications, articles and books) not only focused on the socioeconomic performance aspects of this organization, but also on its management control system, enterprise risk management, commercial constraints, quality management, conflicts management in its governance, and so forth (see Cappelletti, 2005, 2009; Cappelletti & Baker, 2010). Similarly, whereas it is not possible to do so from an empirical research that forms a block, it is possible to make different publications on the same object using the various tools mobilized through an intervention-research—a publication stemming from diagnosis, another one from project groups, and so forth. To a certain extent, intervention-research is similar to an astronomer observing a galaxy: the researcher can describe this galaxy but can also more finely target planets within this galaxy to describe them elsewhere. That said, what are the key epistemological mechanisms of intervention-research that researchers must integrate into the methods and consulting services that they will sell to a client?

### Integrated Epistemology of Intervention-Research

The integrated epistemology of intervention-research is based on three key principles that the methods and services it engages must incorporate (see also Chapter 1): cognitive interactivity, contradictory intersubjectivity, and generic contingency. *Cognitive interactivity* implies that the collection of data and observations result from relational interactions between the researcher and the actors, for example, through interviews, diagnoses, or training-action sessions. *Contradictory intersubjectivity* means that the collected data will also be the subject of mirror-effect sessions between the researcher and the actors within the observed organization to validate the data through consensus, for example, through steering committees or interactive diagnostic presentation sessions. This epistemological principle provides that the researcher also gives his opinion on the validity of the data collected through his expert-opinion. Thus, intervention-research is not a quest for an illusory objectivity arising from the separation between the researcher and the observed object. On the contrary, it refutes the quest for “objectivity” in human sciences, which recognizes its congenitally subjective aspects. Its quest is, if one accepts the term, for “objectifying the subjective data collected” through the contradictory intersubjectivity principle. *Generic contingency* implies that during the phase of distancing the SOA the data collected will be positioned with regard to the existing literature as well as the results of previous intervention-researches to assess findings between those with a degree of regularity (generic character) and those with a degree of specificity (contingent character).

To summarize, the scientific intention of intervention-research consists of a rigorous epistemology based on methods to characterize the knowledge created according to their generic or contingent character (Savall & Zardet, 2008, 2011). One, of course, could question the level of client interest in such epistemological “cooking” and the extent to which it is simply easier for the researcher to focus solely on the consulting dimension of intervention-research. As we have written before, we recommend caution and discretion when discussing these epistemological dimensions. In some cases, the revelation of this integrated epistemology, which can perfectly remain concealed from the client, risks scaring away the client company by its complexity—thereby missing the sale. In other cases, the willingness to purchase intervention-research from a client may result, apart from a desire to improve performance through rigorous consulting methodologies, from a desire to contribute to research in human sciences in a societal perspective. It is then possible, with humility, to approach these scientific questions with the client. A fortiori, the case may occur, that the client himself wishes to become a researcher-actor (Savall, 1974–2017).

### **TOWARDS A STRUCTURED AND RIGOROUS METHOD OF SELLING INTERVENTION-RESEARCH**

Selling an intervention-research engagement means making the client pay a fair price for the intervention, that is, the price corresponds to a fraction of the value brought to the client, in a way that allows the researcher to release the resources which he expects and is acceptable to the client. To succeed in this challenge, it is necessary to adopt relevant behavior generating respect from the client as well as a rigorous method.

#### **Pay as a Reflection of Client Respect**

A first behavioral observation on the sale of an intervention-research is that it causes joy and happiness that brighten the routine of the engaged-scholar. We are happy when we sell, and this creates a cohesive effect on the research team. It is often said that the commercial sense and ability to sell is innate and many intervenor-scholars have doubts about their role of seller, despise the commercial dimension of their trade. However, even from a young age, we are in a logic of charm and sale with our parents or teachers to get what we want. So everyone has a potential to sell that is going to be more or less stimulated over time, but no one is irretrievably condemned not to be able to sell.

Another important behavioral observation is that in order to sell an intangible object such as intervention-research, the researcher will have to adopt an appropriate attitude, in addition to a sales method that will be discussed, during the sales process as well as the production phase of the intervention-research. This attitude consists of being respected by the client and in maintaining an ascendant position (i.e., the intervener must maintain a higher level of expertise in intervention than that of the client during the entire project). Obviously, you may lose a client if he feels better than you to run the intervention. Unlike the sale of a physical object, such as a car or a house that closes upon delivery to the customer, an intangible object acquires its visible form during its implementation phase. Nothing prevents a client from stopping an intervention-research mission in progress because it does not suit him. In order to successfully sell an intervention-research and then to produce it to its end, the intervener must from the very first contact with the client be respected by the latter. In other words, the goal is to make the client understand that the intervener-researcher is not a service provider but instead a manufacturer of high-value products. The intervener-researcher must not accept anything less from the client, letting him or her know with subtlety and firmness in some cases. To summarize on this point, the intervener-researcher must be pleasant without being complacent with his client.

Secondly, the intervener must retain an initial influence on his techniques from the first contact with his client and then during the negotiation and production phases of the intervention-research project. It is the intervener-researcher who is the expert and not the client. To do this, the speaker-researcher must be very clear about what he sells: methods and services in the space of the organization as an expert in response to a request from the client. The client is in charge of this demand, but not the methods and services to meet them. This is why the sale after negotiation should be formalized in a precise intervention agreement that is up to the intervener-researcher to protect permanently. Consequently, during the negotiation phase, if the intervener-researcher does not have the skills (i.e., control of methods and services necessary for the processing of the client's request), he must not attempt to sell this intervention-research. Similarly, during the production of intervention-research, one must keep regular appointments with the client—the paying decision-maker of the mission—explaining and demonstrating how the methods and services put in place will meet the demand over time. But the intervener-researcher should never have to accept that the client refutes the methods and services or seeks to restructure them in his own way. Imagine patients explaining to a doctor how to make a medical diagnosis or prescription. If this scenario every happened, it would be the professional death of any doctor through the loss of their ascendancy over their patients. But this, of course, presupposes good mastery by the

intervener-researcher of the methods and services proposed and then sold (Cappelletti, 2012; Savall, 1974–2017; Savall & Zardet, 2008, 2011).

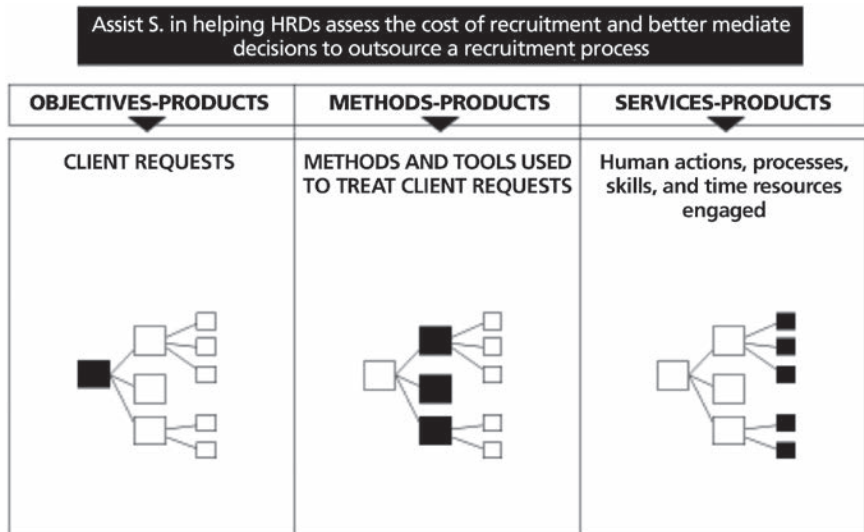
## The Three Stages of the Intervention-Research Sales Process

In addition to these behavioral qualities that are indispensable for selling intervention-research, the intervener-researcher must rely on a sales technique specific to intangible objects such as intervention-research. This technique is based on a three-step process: (a) a first listening meeting with the client, (b) a second appointment to present the methods and services offered to meet the client's demand, and (c) a third appointment to sell the price of the intervention-research engagement. During these appointments, ideally, the intervener-researcher will have to act in concert with a colleague to take exhaustive notes and capture the information exchange. Otherwise, intervention alone is possible, of course. The intervener should always act with humility in mastering this three-step process, skillfully presenting it to the client.

The first appointment is used to make an inventory of the client's objectives. It should consist of 90% listening to the client on the part of the intervener-researcher: what does the client want and what are his objectives with regard to performance improvement wishes? At this point, the question of who is physically the client emerges. In this context, the client is the decision-maker of the intervention-research mission. In most cases, the decision-maker is fairly easy to detect—typically the head of the targeted organization, possibly accompanied by its chief financial officer. But in some cases, the decision-maker is actually a more complex human group. For example, in a negotiation with a town hall, the decision-maker may be the mayor with his director of services and the financial director of the mayor's office. It is therefore these three people who will have to be gathered by the intervener-researcher in the three appointments. During the first meeting, the researcher asks only questions about the client's demand and objectives, taking complete notes on the objectives expressed by the client. At the end of this first appointment, depending on the objectives expressed, the intervener-researcher is in a position to know if he is competent to respond to the request. If this is not the case, the intervener must terminate the negotiation. It would indeed be suicidal professionally for him to seek to answer a request that he is not competent to deal with. If this is the case, the researcher will schedule a second appointment with his client a few days after the first.

In the second appointment, the researcher presents the methods and services offerer to the client to process his request using a tool called the





**Figure 5.1** Example of OMSP: The case of a request from a professional union in the recruitment sector (S).

OMSP (objective-method-service-product), a synthetic tool summing up objective-products, method-products, and service-products that constitute the specification manual at the center of the intervention agreement (Buono & Savall, 2007, 2015). The matrix of this tool is presented in Figure 5.1, in the case of a request from a professional union in the recruitment sector.

The OMSP's first column uses the client's own words to describe the objectives. This column "belongs" to the client. In the second column, the researcher presents the methods (diagnosis, implementation of a project group, etc.), which is detailed in services in the third column (number of diagnostic interviews with persons involved and duration, number of project group sessions with persons involved and duration, etc.). The OMSP materializes the intangible object sold—the methods and services in response to a request. In addition to the OMSP, during the second meeting, the researcher also formalizes the representation of the intervention-research in space through its precise architecture (who are the people and services of the company that will be affected by intervention-research?) as well as its representation in time through its schedule of implementation.

The discussion then begins during this second appointment on the participant-researcher's understanding of the objectives of the client formulated during the first appointment, and the client's understanding of the methods and services proposed as well as the feasibility of the proposed architecture and planning. If there is no agreement between the client



and intervener-researcher on this qualitative proposal, there is no third appointment dedicated to the sale of the price of intervention-research. In essence, the proposed intervention stops at this point.

The third appointment is dedicated solely to the sale of the intervention price because qualitative sales and financial sales are based on different factors. The third appointment is therefore financial and concerns the presentation of the sale price and its justification. To determine the selling price, the intervener must first define the upper and lower boundaries of the price, proposing a price located between these two terminals. This price is for the methods and services offered to meet the demand as well as the days of production that they involve for the researcher (and his team if not alone). Indeed, the key to selling the price of an intangible object is to offer a complete price for this object and not a tariff of the days necessary for its realization. As an analogy, the intervener-researcher sells a price for “a car that rolls” and not “days needed to make the car.” In essence, the “day rate” must remain a manufacturing secret (except in the case of a response to an invitation to tender or the day rate is formally requested). An underlying goal is not to tempt the client to negotiate a price reduction by seeking to reduce the number of days of production. To determine its price limits, the intervener-researcher must first define the maximum day rate that he wishes to apply. This is based on an analysis of the rates charged by one’s competitors, consultants or other researchers. Thus, on the European market for management consulting, the average tariffs considered in the high range are approximately 3,000 euros per day, average tariffs around 1,500 euros, and low tariffs less than 1,000 euros. The intervener-researcher must then, through an internal analysis of his own organization, define the full cost of a day of intervention-research production. This full cost constitutes the lower limit of his day-to-day rate. In order to realize a margin and to generate net own resources, which remain the economic objective of the sale, the researcher will have to sell his work beyond this lower limit. In the end, the day tariff is defined by the consultant between these two upper and lower boundaries according to his marketing and financial positioning strategy.

This tariff then serves to develop the intervention estimate, which is also never communicated to the customer. This estimate makes it possible to define the price of the intervention that is communicated to the client during the third appointment. In this appointment, if the client validates the price and accepts it, the intervention agreement can be signed without any problem. If the client seeks to negotiate the price, it is necessary to argue to justify it not according to the days that the intervention-research calls for but according to the *value* that it is likely to create for the client. This subtle commercial skill consists of demonstrating to the client that the sale price

of the intervention will be largely self-financed by the gains it will generate for the client, while being as truthful as possible for obvious ethical reasons.

This demonstration assumes that the researcher-speaker has reflected on this upstream demonstration. It is done orally, on the basis of examples, and it never becomes a formal agreement element. Indeed, the intervener-researcher, like a doctor, has an obligation of means but no results. He is therefore committed to the intervention agreement on methods, services, architecture, schedule, and a price that must be respected—but the focus is on the means, not the results. Even if carried out exactly as agreed, outcomes still depend in part on factors that the intervener-researcher cannot control, such as the behavior of the client during the intervention or variations in the socioeconomic environment of the client organization.

If the customer wishes to lower the price proposed for budgetary reasons, this may be acceptable by reducing the methods and services proposed and hence the number of days necessary for their production. But in this case, the intervener-researcher must know in advance to appropriately narrow the intervention so that it does not threaten the processing of the demand and the objectives of the client. Generally, in the case of price negotiation by the customer, a reduction in the intervention is possible within a limit of 5 to 10% of its perimeter, but rarely more. As a last resort, the researcher must not hesitate to refuse to sell the intervention if the client wishes to reduce prices that exceeded the limits of his own resources and the achievement of the objectives of the mission. It is better not to intervene at a discount price that devalues the mission than to intervene in this case because the resulting loss of ascendancy will inevitably undermine the quality of the research-intervention and hence its final results. In summary, the state of mind appropriate for this third appointment is that of making the company be aware that it is not doing the researcher a favor by offering him a SOA, but that it is the client who is fortunate to have the intervener-researcher develop the program. And this, of course, presupposes that the intervener-researcher is convinced of it him or herself.

Once the sales price is accepted by the client, it remains simply for the intervener-researcher to set out the payment schedule. This schedule spreads over the duration of the intervention with monthly payments and 20% of the sale price to be paid as a down payment upon signature. This deposit is important because it engages the client in the intervention and it is legitimate because there will be an investment of preparation of the intervention-research that should be financed. If we did not receive the 20% down payment, of course, we did not start the intervention-research at the client's company (Cappelletti, 2005, 2012; Savall, 1974–2017; Savall, Zardet, & Bonnet, 2008).

## THE ONGOING SALE OF INTERVENTION-RESEARCH

Following the third negotiation meeting in the event of agreement on the qualitative and financial proposal, the intervention-research process begins subject to the payment of the deposit on signature. The sale, however, does not stop at this point. In reality, it is permanent concern throughout the implementation phase because even a signed intervention is a fragile process that can be easily suspended by the decision-maker if he loses confidence. Therefore, it is imperative to have an intervention agreement signed to ensure at least the continuity of the production. But, in addition, the intervention agreement will be used by the intervener-researcher during the production phase to show the client that the methods and services implemented correspond to what was agreed upon and its application is in process. Let us not forget that, as an intangible object, intervention-research remains invisible despite the meetings and tools that help to materialize it. It must therefore be given maximum visibility to maintain the client's confidence and his engagement in the intervention (Savall, 1974–2017).

### The Intervention Agreement: A Tool for Steering the Intervention-Research Process

In order to formalize the process, the intervention agreement must cover the key elements discussed during the negotiation process in three appointments: (a) the OMSP, (b) the architecture and schedule, and (c) the financial annex and payment schedule. To illustrate a convention, we will take the case of the sale of a 2011 intervention-research by a team of three ISEOR researchers to a professional union of recruitment firms, referred to as “S.” This syndicate regrouped several thousand recruitment consultants aimed at providing members with a rationale to help them convince human resource directors (HRD; the clients of recruitment consultants) that the full cost of recruiting was lower by hiring a good external consultant rather than trying to recruit themselves. Given our work on the issue, S represented by its president and vice-president (S's pay decision-makers) decided to interview us. The first meeting made it possible to detect the objectives of S beyond its general demand: (a) deepen and generalize the work carried out on the full cost of recruitment through a survey of HRDs that was statistically representative, (b) propose to the HR managers a tool to diagnose a recruitment process to better balance internalization and outsourcing recruitment, and (c) develop S's notoriety with HRDs of SMEs through effective and creative communication (see Figure 5.2).

Assist S. in helping HRDs assess the cost of recruitment and better mediate decisions to outsource a recruitment process

- 1** Deepen and generalize the work carried out on the full cost of recruitment through a survey of HRDs that is statistically representative.
- 2** Propose to the HR managers a tool to diagnose a recruitment process to better balance internalization and outsourcing recruitment.
- 3** Develop S.'s notoriety with HRDs of SMEs through effective and creative communication.

**Figure 5.2** Example of a client demand: The case of a professional union in the recruitment sector (S).

The second negotiation meeting with S was to explain (through an OMSP; see Figures 5.3 & 5.4) the methods and services proposed to meet the objectives: (a) conduct a quantitative survey with HRD to determine the full cost of recruitment; (b) facilitate a project group to design a diagnostic tool enabling HRD to better reflect their recruitment decision; (c) animate a steering group with S to define appropriate communication to

Assist S. in helping HRDs assess the cost of recruitment and better mediate decisions to outsource a recruitment process

| OBJECTIVES-PRODUCTS  | METHODS-PRODUCTS  | SERVICES-PRODUCTS   |
|--|---|---|
| <p><b>Number 1</b><br/>Deepen and generalize the work carried out on the full cost of recruitment through a survey of HRDs that is statistically representative.</p> <p><b>Number 2</b><br/>Propose to the HR managers a tool to diagnose a recruitment process to better balance internalization and outsourcing recruitment.</p> | <p><b>Quantitative Survey</b></p> <ul style="list-style-type: none"> <li>• Generalize the dysfunctions and the hidden costs observed during an internal recruitment thanks to a representative sample of HRDs</li> </ul> <p><b>Project Group</b></p> <ul style="list-style-type: none"> <li>• Designing a recruiting diagnosis tool adapted for HRDs</li> <li>• Building the action and communication plan to set up the recruiting diagnosis tool</li> </ul> | <p><b>Leading a statistically representative survey draws upon a sample of hundred HRDs of SMEs:</b></p> <ul style="list-style-type: none"> <li>• Questionary design</li> <li>• Questionary process</li> <li>• Results analyses</li> </ul> <p><b>4 sessions of project group (2.5h each) with the prospective commission of S.</b></p> <p>Each session is divided into two phases: a focus phase with the president and the deputy president of the commission and a plenary phase with the whole commission.</p> |

**Figure 5.3** Example of an OMSP (page 1 of 2): The case of a professional union in the recruitment sector (S).

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Assist S. in helping HRDs assess the cost of recruitment and better mediate decisions to outsource a recruitment process

| OBJECTIVES-PRODUCTS   | METHODS-PRODUCTS   | SERVICES-PRODUCTS  |
|---|--|--|
| <p><b>Number 3</b></p> <p>Develop S.'s notoriety with HRDs of SMEs through effective and creative communication</p> | <p><b>Steering Committee</b></p> <ul style="list-style-type: none"> <li>• Be informed of the works in progress and shake their conformity to the S.'s policy and strategy</li> <li>• Use the results of the work mode to promote S. branding and that of the recruitment sector</li> </ul> <p><b>Option: Training on the Hidden Costs Methodology</b></p> <ul style="list-style-type: none"> <li>• Give to a manager of S the basis of the hidden costs methodology</li> </ul> | <p><b>3 sessions (1h each) with the member of the prospective commission of S.:</b></p> <ul style="list-style-type: none"> <li>• Discussion about the survey</li> <li>• Presentation of ISEOR expert opinion</li> <li>• Validation of the solutions proposed by the project group and definition of a strategy of communication</li> <li>• Each session begins with a head-to-head between the president of the commission and ISEOR</li> </ul> <p>Training session <b>Performance +:</b><br/>4 sessions (2 days each) over a 5-month period of time</p> |

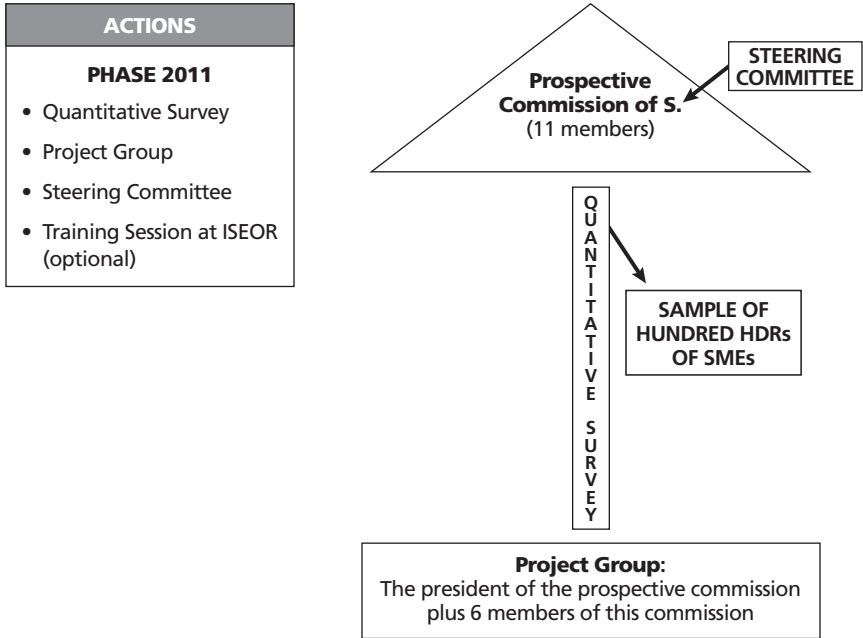
**Figure 5.4** Example of an OMSP (page 2 of 2): The case of a professional union in the recruitment sector (S).

promote S's image; and (d) conduct training sessions with S's managers on the hidden-cost performance method, an appropriate method for evaluating the full cost of recruitment (optional).

During this second meeting, the architecture of the proposed intervention-research and its planning were presented and explained to S (see Figures 5.5 & 5.6). After discussion and understanding, S validated this qualitative proposal, and a third appointment was the next step, focused on selling the price of the intervention. Taking into account the estimate made, which of course was not communicated to S, the intervention price was fixed at "XYZ" thousand euros (the actual price is coded in this chapter by confidentiality) to be paid according to a monthly schedule with a 20% deposit to be paid upon signing the agreement (see Figure 5.7 & 5.8).

An advance payment when the intervention agreement is signed is an indispensable phase of the negotiation process to finance the preparatory work of the intervener-researcher necessary to start the intervention and to engage the client firmly within the intervention-research. Once agreed on the price and timetable, the OMSP, the architecture, the schedule, and

Assist S. in helping HRDs assess the cost of recruitment and better mediate decisions to outsource a recruitment process



**Figure 5.5** Example of an intervention architecture: The case of a professional union in the recruitment sector (S).

Assist S. in helping HRDs assess the cost of recruitment and better mediate decisions to outsource a recruitment process

| ACTIONS  | MONTH |     |     |     |     |     |     |
|--|-------|-----|-----|-----|-----|-----|-----|
|  | Mar   | Apr | May | Jun | Jul | Sep | Oct |
| STEERING COMMITTEE<br>(3 sessions of 1 hour each)    | 1     |     |     | 2   |     |     | 3   |
| QUANTITATIVE SURVEY                                  |       |     |     |     |     |     |     |
| PROJECT GROUP<br>(4 sessions of 2.5 hours each)      | 1     |     |     | 2   |     | 3   | 4   |
| TRAINING SESSION at ISEOR (optional)<br>(4 sessions) | 1     |     | 2   |     | 3   |     | 4   |

**Figure 5.6** Example of a schedule: The case of a professional union in the recruitment sector (S).

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**INTERVENTION IN A PROFESSIONAL UNION IN THE RECRUITMENT SECTOR (S.)**

*Budget (in €)*

**Actions**

|                       |               |
|-----------------------|---------------|
| • Steering committee  | X K€          |
| • Quantitative survey | Y K€          |
| • Project group       | Z K€          |
| <b>TOTAL</b>          | <b>XYZ K€</b> |

**Figure 5.7** Example of the pricing of an intervention: The case of a professional union in the recruitment sector (S).

**INTERVENTION IN A PROFESSIONAL UNION IN THE RECRUITMENT SECTOR (S.)**

*Payment Schedule*

| <b>Deadline</b>                | <b>Amount</b> |
|--------------------------------|---------------|
| Deposit payment upon signature | a €           |
| March 20                       | b €           |
| April 20                       | b €           |
| May 20                         | b €           |
| June 20                        | b €           |
| <b>Total</b>                   | <b>XYZ K€</b> |

**Figure 5.8** Example of the payment schedule of an intervention: The case of a professional union in the recruitment sector (S).

the financial annex became the documents of the agreement signed with S. The management of this agreement in terms of respect for the means used (methods, services, planning, architecture, schedule of regulations) becomes a permanent agenda item for the intervention-research steering committees between researchers and the president and vice president of S.

**The Search for Accomplices During the Intervention**

The researcher’s respect for the intervention agreement is a central element in maintaining both the client’s respect for the researcher and his or her ascendancy over the client. Any attempt to disregard the intervention agreement by the intervener-researcher must therefore be formally



prohibited. Just as any attempt by the client to depart from the intervention agreement, for example by refusing certain agreed services during the course of the assignment or by failing to pay the invoices at the scheduled deadlines, must be avoided by the researcher through courtly but firm discussions that may require courage. This courage could go as far as threatening to stop the intervention if the client deviates too much from the agreement, for example by not paying bills or blatantly lacking respect and elementary courtesy. A rigorous control of the intervention agreement by the intervener-researcher should attempt to prevent such extremes which, on analysis, prove to be extremely rare if the rigorous and structured method of selling the intangible process has been respected. The scrupulous steering of the intervention agreement also helps to maintain the complicity of the decision-makers. Indeed, in particular in a large-scale intervention, it is important that the intervener-researcher to develop internal accomplices, that is to say, people of importance in the studied organization who are ready to support the researcher in the event of attacks and criticism. An intervention-research process, and this is part of its charm, is that the process is rarely “a long quiet river” because, by the changes that it causes and subsequent questions that it creates, often induces “resisters” to implementation and opposition can emerge. This opposition and resistance can sometimes come from internal competitors of the intervention-research, for example, members of the organization who wanted to carry out the intervention by themselves or those who have it refused similar interventions in the past.

## CONCLUSION

Once the intervention is sold during the implementation phase it is useful to continue to maintain a specific dashboard of the intervention-research that includes the intervention agreement as well as the gallery of key actors of the intervention, including accomplices, resisters, internal competitors, the decision-maker, and so forth. This dashboard serves as a guide in helping to make decisions and plan appropriate actions. It is important to remember that only once the intervention-research has been completed and fully paid that it can be considered that its negotiation and sale have been fully successful (see Buono & Savall, 2007, 2015; Savall, 1974–2017).

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