

Needs Assessment Survey and Creating a Client-Specific Project Repository for a Major Pharmaceutical Sales & Marketing Consulting Firm at Gurgaon, Haryana

By

Nupur Gupta

*Dissertation submitted for the partial fulfillment of the
MBA Hospital and Health Management*

Academic year, 2015-2017



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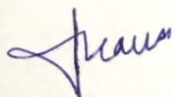
TO WHOMSOEVER MAY CONCERN

This is to certify that **Ms. Nupur Gupta**, student of MBA Hospital and Health Management from The IIHMR University, Jaipur has undergone internship training at **ZS Associates India Pvt. Ltd., Gurgaon** from **13th February 2017 to 5th May 2017**.

The Candidate has successfully carried out the study designated to her during internship training and her approach to the study has been sincere, scientific and analytical.

The Internship is in fulfillment of the course requirements.

I wish her all success in all her future endeavors.



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INTERNSHIP CERTIFICATE

This is to certify that Nupur Gupta (15417) has served in our organization from February 13, 2017 to May 05, 2017. She was working as Knowledge Management- Intern on contractual role and based at New Delhi office.

This is to confirm that all information\ projects shared\ worked in your Internship period is confidential and are not liable to be shared with anyone outside ZS network.

At last, wish you all success in future endeavors

For ZS Associates India Pvt. Ltd.

Sumeet Madaan
5th May '2017

Sumeet Madaan
Human Resources Specialist



CERTIFICATE BY SCHOLAR

This is to certify that the dissertation titled **“A Needs Assessment Survey and Creating a Client-Specific Project Repository for a Major Pharmaceutical Sales & Marketing Consulting Firm at Gurgaon, Haryana”** and submitted by **Nupur Gupta**, Enrollment No. **0313** under the supervision of **Dr. Susmit Jain, Assistant Professor**, for award of MBA in Hospital and Health Management of the University carried out during the period from **13th February, 2017 to 5th May, 2017** embodies my original work and has not formed the basis for the award of any degree, diploma associate ship, fellowship, titles in this or any other institute or other similar institution of higher learning.


Nupur Gupta

THE IIMMR UNIVERSITY, JAIPUR

CERTIFICATE BY SCHOLAR

This is to certify that all ethical issues have been considered while collecting data for my dissertation titled **“A Needs Assessment Survey and Creating a Client-Specific Project Repository for a Major Pharmaceutical Sales & Marketing Consulting Firm at Gurgaon, Haryana”**.



Signature of student

ABSTRACT

A Needs Assessment Survey and Creating a Client-Specific Project Repository for a Major Pharmaceutical Sales & Marketing Consulting Firm at Gurgaon, Haryana

Nupur Gupta

ZS Associates, Gurgaon

Guided by Dr. Susmit Jain

BACKGROUND

The nature of work a sales and marketing consulting firm gets is sometimes of similar nature as the other. Sometimes an old project may also form basis of a new project work. Keeping this in mind, this study was carried out to assess the need of a central repository containing material for all the projects done by a client team and implementation of the same according to the survey results.

OBJECTIVES

- To assess the need of a client specific central project repository.
- To identify the problems in accessing existing project drives.
- To create a central repository of client specific projects from the year 2015 onwards, containing only specific important documents.

METHODOLOGY

STUDY DESIGN: Analytical, Cross-Sectional.

SAMPLE SIZE: For the survey, 23 Client Knowledge Guides (CKGs) for different client teams were contacted.

SAMPLING TECHNIQUE: Convenience Sampling was employed.

SAMPLE SELECTION: The study would be conducted among CKGs, who are the POC in the KM team for a client.

DATA COLLECTION PROCEDURE: Primary data was collected using structured, mixed questionnaire. The questions were asked via online survey tool Survey Monkey and personal interviews, depending on the availability of respondents.

DATA ANALYSIS PROCEDURE: Collected data will be analyzed using MS Excel.

DATA COLLECTION INSTRUMENT: The questionnaire consists of 1 open-ended and 9 closed-ended questions with one of their options as open-ended (Others). The questions analyze the presence of existing project repositories, their updating schedule and person responsible for upkeep, importance to current teammates and problems faced while accessing the repository. One question is for comments and suggestions.

RESULTS

Approximately 52.17 percent of the respondents thought that the need of such a repository is of utmost importance and urgency. A good 39.13 percent respondents thought that it isn't that urgent but should be done for sure. About 8.70 percent deemed the repository to be desirable but not that necessary. Only the SOW/Proposal, Pricing and Final Deliverables were to be placed in the repository with 70 percent respondents voting from them. Approximately 61 percent of the client teams already have a repository, out of which, 86 percent of them are on a project drive. For majority of the teams, the content was uploaded by their onshore team (57 percent) after the completion of their projects (79 percent). For around 41 percent of the respondents, unstructured storage of files and improper naming was the biggest issue with their existing repositories. Once the survey results were out, the repository was created. Quality control was done in two rounds. First, to check the nomenclature of the file at our end, and second, by identified stakeholders to identify accessibility issues. Issues like slow navigation, denial of access, improper navigation and latest version of deliverable not available were brought to light and rectified. Access was then provided to the right team members associated with client XYZ.

CONCLUSION

As established by the survey, the repository was the need of the hour for client teams pan ZS. While maintenance related issues will continue to prevail unless a one person is dedicated to keep it updated, especially for ongoing and new projects, it should be made sure that every client team should have such a quick visit repository to avoid duplication of efforts in case of similar nature of projects. The process takes time since the files have to be acquired from the onshore team. Once the repository is set up and access is given to the right people, the maintenance and regular of updating should also be done regularly as in

this case. One POC for this purpose should be assigned who be responsible for all the correspondence related to the repository. Time to time feedback should be taken to recognize issues and incorporating latest trends.

ACKNOWLEDGEMENT

Dissertation is a golden opportunity in a student's life for learning and self-development. I consider myself very lucky and honoured to have so many wonderful people lead me through in completion of this project.

I wish to express my gratitude to **my project manager, Ms. Neha Agarwal, Knowledge Management Associate Consultant**, who induced me into their client team and assigned me a project with such a great learning curve. I'm also extremely thankful to **Mr. Mohit Saxena, Ms. Nidhi Khatura, Ms. Jyoti Sardana, Mr. Hemant Kumar, and Mr. Anand Trivedi**, my teammates, for their immense support and guidance throughout my internship. Despite their busy schedule, all my teammates would regularly take out time to hear, guide and keep me on the correct path.

I also express my deepest thanks to **Mr. Dapinderdeep Singh, my Professional Development Manager and Mr. Prateek Yadav, my mentor**, who made my tenure in the organization easier with their formal and informal advice.

Last but not the least, I express my deepest thanks to my guide, **Associate Professor, Dr. Susmit Jain**, IIHMR University, Jaipur for his prompt replies, able guidance and constant words of encouragement.

Nupur Gupta

Roll no. 0313

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LIST OF ABBREVIATIONS

SOW	Statement of Work
POC	Point of Contact
CKG	Client Knowledge Guide
WIP	Work in Progress
PAM	Principal, Associate Principal, Manager
EOD	End of Day
AC	Associate Consultant

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A NEEDS ASSESSMENT SURVEY AND CREATING A CLIENT-SPECIFIC PROJECT REPOSITORY FOR A MAJOR PHARMACEUTICAL SALES & MARKETING CONSULTING FIRM AT GURGAON, HARYANA

1. INTRODUCTION

Currently, ZS offers business consulting solutions to Amgen across different business verticals and therapeutic areas with cross-office teams in Thousand Oaks, Pune and New Delhi. Nature of these business solutions may be similar for various products of the same client. Therefore, it is important that project teams brush up their existing client knowledge. Thus, the objective is to create and maintain a central repository of projects taken up with client XYZ, wherein final versions of important documents such as proposal files, statement of work (SOW), pricing files, etc. can be deposited for quick reference.

Literal meaning of a repository is a central location in which data is stored and managed. For ZS Associates, the client specific repository will be created on a drive which will be accessible by all the members of that specific client team. Only specific files like the SOW, proposal file and the final deliverable will be stored for each project. The proposal files are usually PowerPoint files which is presented to the client when proposing a new project to them. It usually contains all the data given in a SOW, but for presentation purpose only and is not provided to the client. The SOW refers to a word document which contains the aim, objectives, timeline for the completion of the project, deliverables to be provided to the client, pricing and staffing components of the project. It is sent to the client for their reference after they accept a proposal. The final deliverable(s) is the outcome of the project undertaken which is presented as well as provided to the client by the onshore (client-facing) team. It is usually in PowerPoint format but maybe of any other format as well. Projects undertaken by ZS include assistance with forecasting, customer insights, segmentation, value proposition, marketing mix, and marketing performance measurement and optimization. The sales practice area services include go-to-market strategy and sales channel development, sales force design, sales force effectiveness, customer targeting, territory management, sales compensation, and sales performance management.

1.1. OBJECTIVES

- To assess the need of a client specific central project repository.
- To identify the problems in accessing existing project drives, if any.
- To create a central repository of client specific projects from the year 2015 onwards, containing only specific important documents.

1.2. RATIONALE

Creating a client specific central repository will help project teams better understand the client's situation and avoid duplication of effort. Doing so will also be beneficial in getting quick cost and staffing estimates, probable plans of action, etc. Such data quality management will not only help keep a central, concise, accurate and non-redundant record of projects from 2015 onward, but also help enhance business decision-making and increase efficiency and productivity. It will also be helpful in on-boarding new members to the client's project team. Also, the team members directly responsible for the creation of the repository will be the single POC for all project teams to further inquire about project materials for quick reference

2. METHODOLOGY

2.1. OVERALL APPROACH

- **Need Assessment Survey and Platform Finalization:**
 - Formulated and conducted survey to establish the need, identify problems while accessing a repository and categorize all the content types (i.e. SOPs, Final Deliverables, Scoping documents, Approach etc.) and their format (word, ppt, xls etc.) across all projects to be adapted in the repository.
 - Checked with the finance department to get a list of client projects undertaken in the last 1 or 2 years
 - Finalized the platform layout based on client team inputs (question included in the survey)
 - Connected with project leads for final deliverables and other material
- **Reporting and Access Control Framework Finalization:**

- Finalized access control framework for user groups across teams and countries
- Identified and finalized key reporting/analytics metrics around content usage and adoption
- **Repository Creation and Rollout:**
 - Created KM repository having dedicated folders for each project undertaken with three sub-folders namely- SOW, Final Deliverable and Proposal containing relevant folders. IT help was taken to configure the project drive and provide technical support
 - Executed testing with identified stakeholders
 - Uploaded all documents and enabled access to identified stakeholders
- **Instructions for Project Teams, Ongoing Operations and Follow-up:**
 - Instructions were given to different project teams for usage and upload of documents
 - Plans were made for periodic reinforcement of KM system usage across teams (including suggestions/discussions to improve the usage) and current status-quo check

2.2. DATA COLLECTION

STUDY DESIGN: Analytical Cross-Sectional.

SETTING: Leading Pharmaceutical Sales and Marketing Consultancy, Gurgaon City, Haryana.

DURATION OF STUDY: February 2017 – May 2017.

SAMPLE SIZE: For the survey, 23 Client Knowledge Guides (CKGs) for different client teams were contacted.

SAMPLING TECHNIQUE: Convenience Sampling was employed.

SAMPLE SELECTION: The study would be conducted among CKGs, who are the POC in the KM team for a particular client. Their objective is to streamline support to project teams at the internal account level and with KM's staffing in projects. CKGs can leverage their experience and help cross-pollinate best practices and ideas across such accounts.

They usually work directly with the on-shore team for different projects and may feel the need to access old project files time to time.

DATA COLLECTION PROCEDURE: Primary data was collected using structured, mixed questionnaire. The questions were asked via online survey tool Survey Monkey and personal interviews, depending on the availability of respondents.

DATA ANALYSIS PROCEDURE: Collected data will be analyzed using MS Excel.

DATA COLLECTION INSTRUMENT: The questionnaire (Appendix I) consists of 1 open-ended and 9 closed-ended questions with one of their options as open-ended (Others). The questions analyze the presence of existing project repositories, their updating schedule and person responsible for upkeep, importance to current teammates and problems faced while accessing the repository. One question is for comments and suggestions.

3. RESULTS

Statistics of data collected from 23 CKGs is as follows:

3.1. Does the client team you work with have a repository to store files of all the projects done so far?

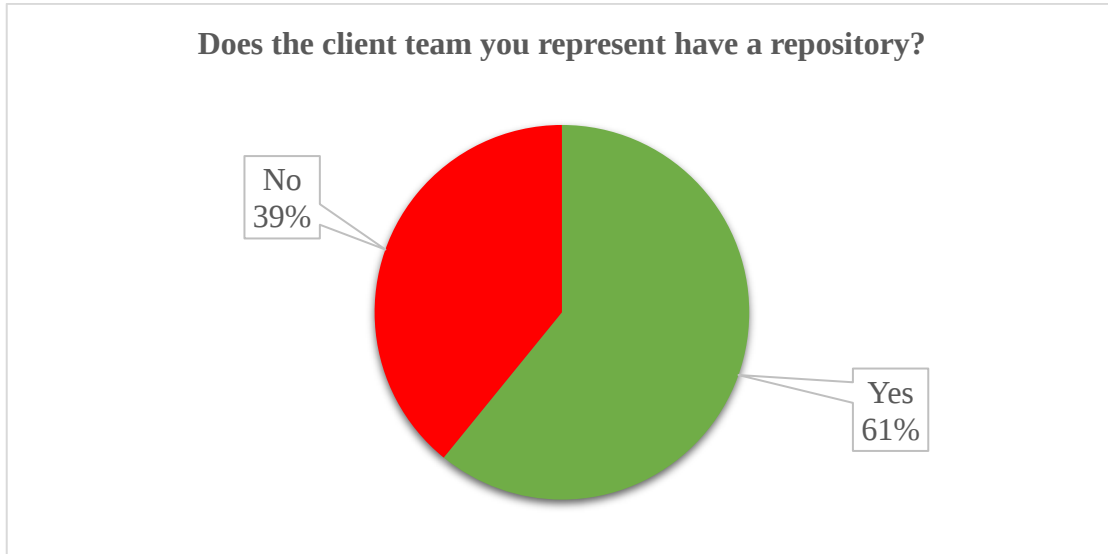


Figure 3. 1. Percentage of client teams having a dedicated repository (n=23).

3.1.1. If yes, what is the platform for storing the project material?

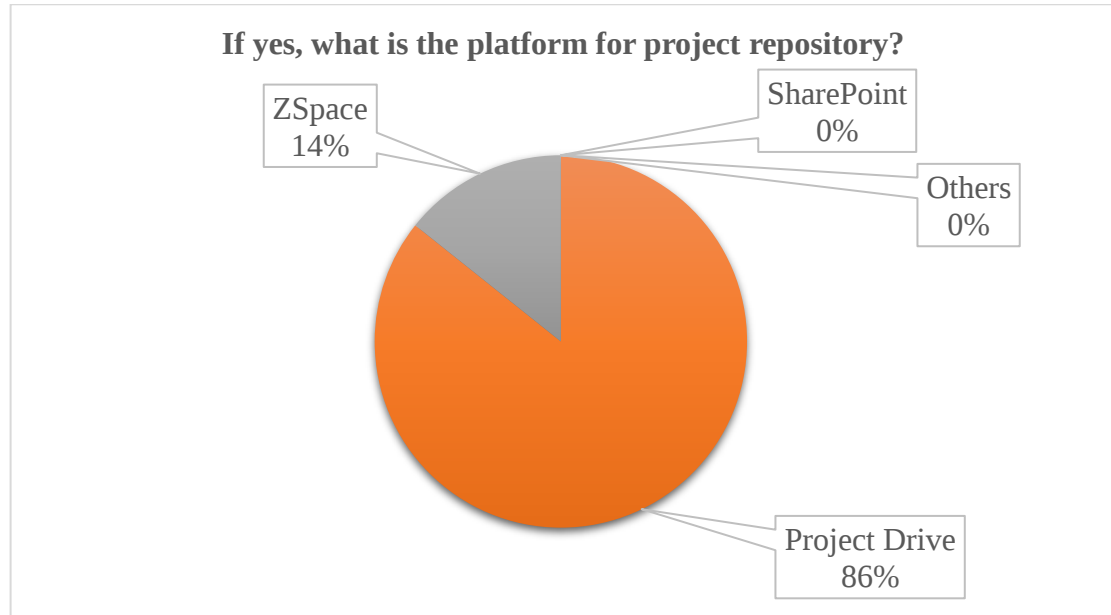


Figure 3. 2. Percentage of different platforms used by client teams to store their repository material. (n=14, since this question was asked to only those CKGs who had a repository for their team i.e. their answer for question 1 was "Yes").

3.1.2. Who is responsible for uploading relevant project files in the repository?

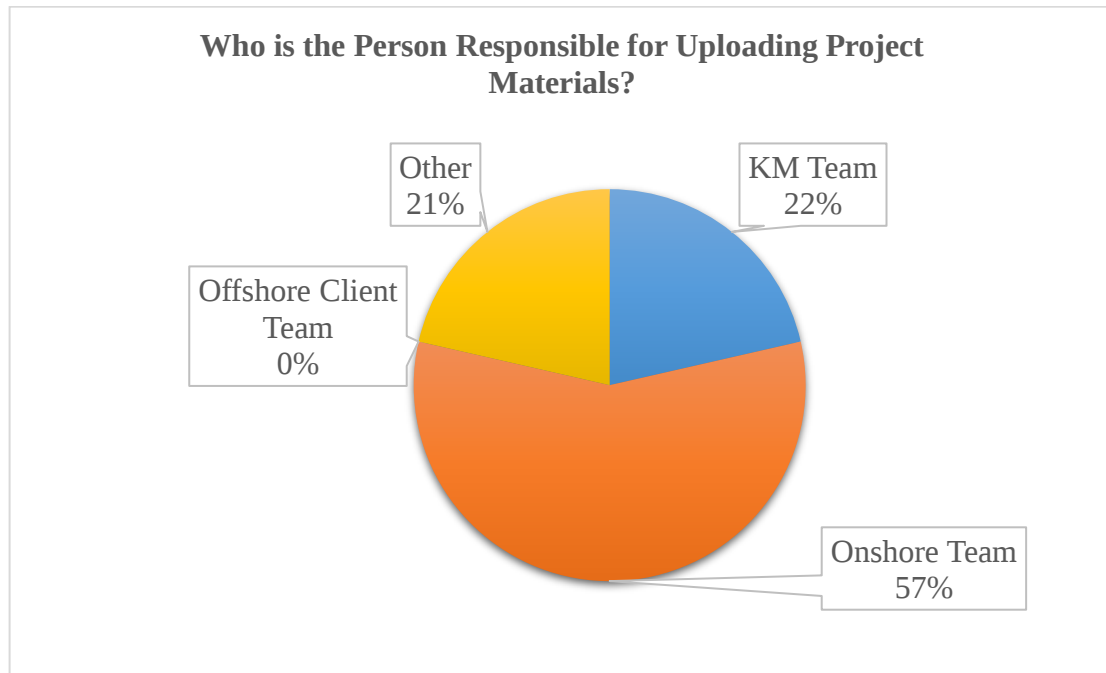


Figure 3. 3. Percentage of different POCs responsible for uploading relevant project files on the repository. (n=14, since this question was asked to only those CKGs who had a repository for their team i.e. their answer for question 1 was "Yes").

3.1.3. How often is the project material uploaded?

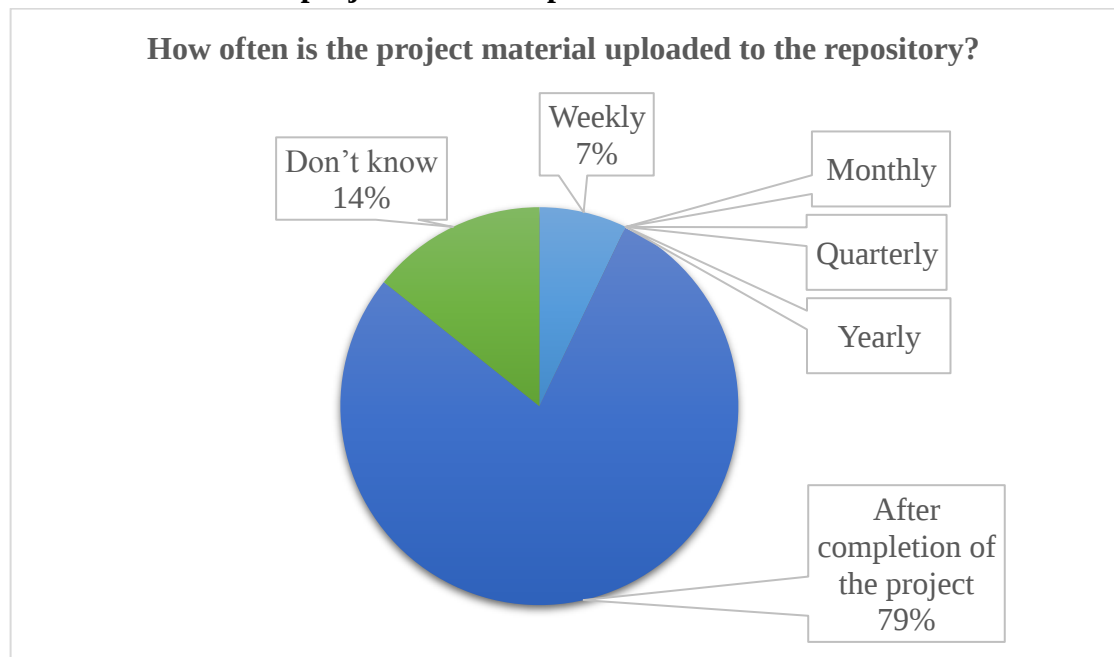


Figure 3. 4. Frequency of uploading project files on the repository. (n=14, since this question was asked to only those CKGs who had a repository for their team i.e. their answer for question 1 was "Yes").

**3.1.4. What problems do you face in accessing/navigating through such a repository?
(Multiple Options may be marked)**

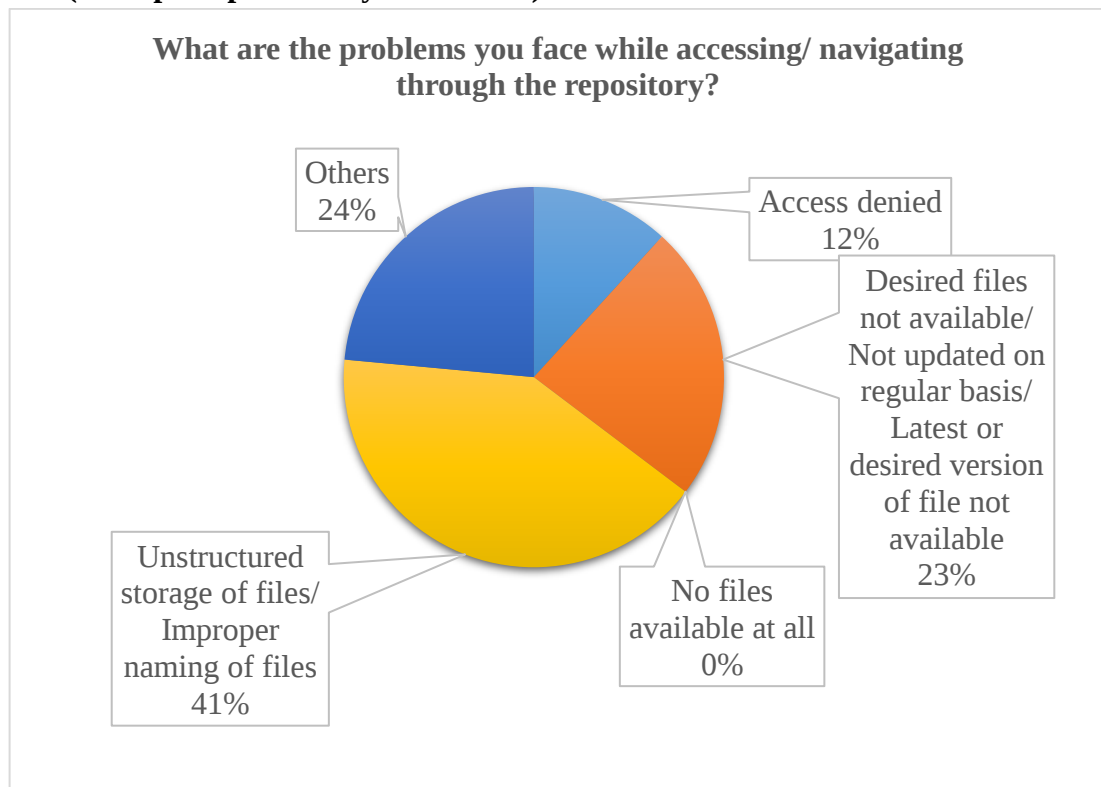


Figure 3. 5. Problems faced while accessing/ navigating through the repository. (n=14, since this question was asked to only those CKGs who had a repository for their team i.e. their answer for question 1 was "Yes").

3.2. How important do you think such a repository is?

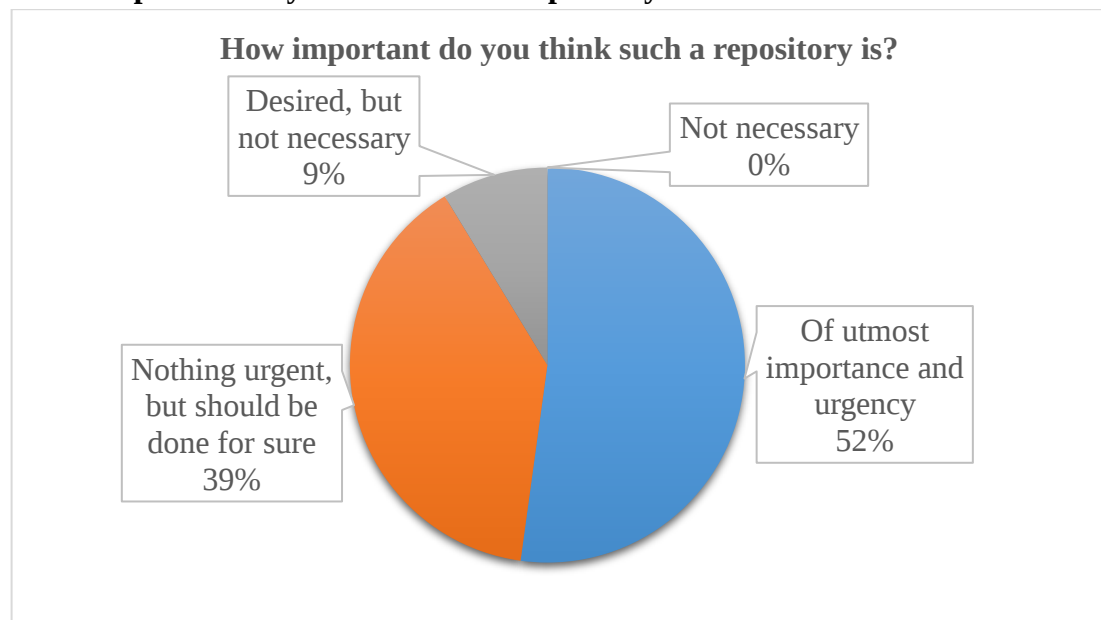


Figure 3. 6. Importance of a project repository according to various CKGs (n=23, since this question was also posed to CKGs whose client teams did not have any repository).

3.3. Which files according to you would be most suitable for such a repository?

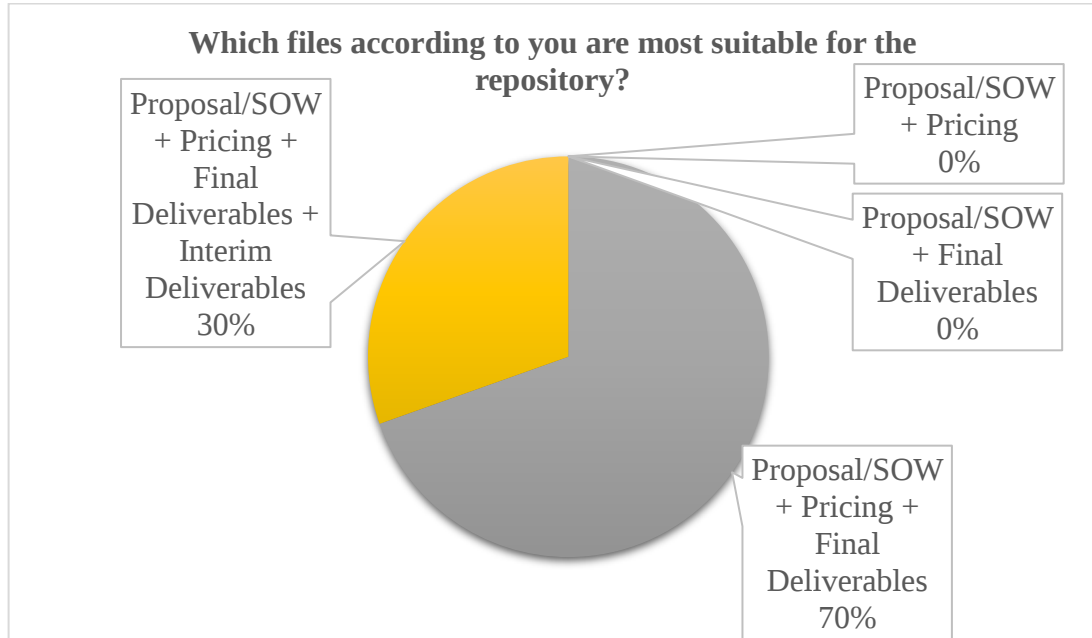


Figure 3. 7. Files most suitable for the project repository according to various CKGs (n=23, since this question was also posed to CKGs whose client teams did not have any repository).

4. DISCUSSION

The survey was floated among 23 CKGs of different client teams of the Knowledge Management capability group. Due to their busy schedules, survey questionnaire was designed to be short and quickly readable. Initially started off as an online survey, the method had to be changed to personal interviews to accommodate according to the CKGs' schedule.

- The first and second questions of the survey were “Name” and “Client team you’re associated with” respectively. Names of clients cannot be disclosed due to ZS’ confidentiality clause, hence these two questions were used solely for internal tracking purposes.
- Question 1: Majority of the client teams, 60.87 percent (14 out of 23) have repositories for their client’s projects. These respondents answered subsequent questions 1.1-1.4. The 39.13 percent who didn’t have a repository for their clients, directly skipped to questions 2, 3 and 4.

The responses for questions 1.1-1.4 were only from the 14 respondents who answered the first question as “Yes”, since others would not have been able to answer those repository specific questions.

- Question 1.1: About 85.71 percent of the client teams have their repositories on a project drive, whereas the remaining 14.29 percent have it on ZSpace, the online portal exclusive to ZS employees. Since no project drives were found to be on SharePoint-preferred platform by our team, the repository was decided to be created on a project drive. Cost factor was also considered, where again project drive proved to be a more feasible option.
- Question 1.2: The onshore team, i.e. the teams who directly deal with the clients, mostly located in the US offices, were responsible for uploading the project content for 57.14 percent of the client teams. It was closely followed by the KM team for 21.43 percent of the respondents. 21.43 percent of the respondents chose “others” option wherein they mentioned the specific project team members (who may be onshore or offshore KM team members) and the ones who have the final versions of the files, to be responsible.

- Question 1.3: Majority of the respondents uploaded the materials after the completion of the project (78.57 percent). About 14.29 percent of the CKGs were unaware about the schedule of uploading. Only 7.14 percent of the client teams updated their repository on weekly basis.
- Question 1.4: Multiple responses to this question were accepted during the survey. Unstructured storage/improper naming of files was the biggest problem faced by the teams while navigating their repositories at 41.18 percent. Following this was non-availability of desired files or the repository not being updated on regular basis or non-availability latest/desired version of the files at 23.53 percent. “Other” reasons which also constituted 23.53 percent of the responses included problems like slow and time consuming connection to the project drive or no problem at all. The least of all problems was access being denied at 11.76 percent.
- Question 2: Approximately 52.17 percent of the respondents thought that the need of such a repository is of utmost importance and urgency. A good 39.13 percent respondents thought that it isn’t that urgent but should be done for sure. About 8.70 percent deemed the repository to be desirable but not that necessary.
- Question 3: The most suitable files according to 69.57 percent of respondents were the proposal files, the SOW, the pricing file and the final deliverables. About 30.43 percent thought that interim deliverables should also be included along with the above files.
- Question 4: Only four respondents provided with additional comments apart from filling up the regular survey questions. They were as follows:
 - “It would be ideal to have a go to place for all the client work done along with key files leveraged”
 - “Thanks for checking, but we are in the process of suggesting something like this to our on-shore team. Will get back when we get an approval”
 - “The repository for <ABC company> is in WIP as off now”
 - “We used to maintain internal tracker - simple excel workbook with the list of projects, PAM member, start date, end date etc.”

After taking into consideration these results from the survey, the following things about the repository creation were finalized:

- The platform for the repository would be a project drive created on ZS servers which may be accessed by the client team members and specific project team members.
- Consistent with the survey results, client XYZ's final deliverables were also handled by the onshore team. So, as a start, the onshore managers of various projects would be contacted to acquire the appropriate files for the repository. It would then be up to the onshore managers to further delegate the responsibility among relevant POCs.
- It would be proposed to the Principal of the client team to make it compulsory for the project teams to upload the relevant deliverables to the repository after submission of the project's final deliverables. Until then, the billing code for that project would not be closed.
- To overcome improper naming of files and confusion while navigating through the repository, the names of the files must have certain keywords to differentiate them from other files. "ZS SOW- <project name>" and "ZS Proposal- <project name>" format for the SOW and proposal files respectively. For the deliverables, version control was to be maintained. Every final deliverable must be "v1.0". Access to the relevant onshore and offshore team member would be provided.
- According to survey results as well as space and cost constraints, only final deliverables of the projects would be stored in the repository. Also, since pricing and staffing estimates are already provided in the SOW files, pricing file for a project would also not be necessary.
- Keeping in mind that most the respondents think of it as important and urgent, the compilation of the repository would be treated as a priority with a dedicated Associate-Intern assigned full time for this purpose, guided by an Associate Consultant.

After finalizing of these crucial factors, the implementation of the plan began.

5. IMPLEMENTATION

Since the Principal of the onshore team was directly involved in repository creation, all the mail correspondence was done from their E-mail ID to give a sense of urgency and importance to the recipients.

List of projects from the Finance department was obtained and the POCs for them were identified by the onshore team members. Each POC, usually managers, were contacted to provide the SOW, proposal and the deliverables for the various project codes mentioned against their names. Friday EOD was given as deadline for the mails sent out on Monday of that week. Follow ups and reminder mails for non-responsive POCs were sent the subsequent week's Monday with the renewed deadline as Friday EOD of that week. This was done for four weeks, including the week when mails were sent out initially. Meanwhile, folders for each project were created and named according to "<Project Code> <Project Name>" format. Subfolders, namely "SOW", "Final Deliverable" and "Proposal" were created in each of the project folders. Also, the mails with files were moved to another folder- "Responses with deliverables" as soon as they arrived to separate them from day to day mails for quick reference. Their content was downloaded and saved according to the already created project folders. An excel spreadsheet was maintained to track responses side by side. At the end of four weeks, information and material for 55.56 percent (125 projects out of 225) projects was collected.



001 Project 1	File folder
002 Project 2	File folder
003 Project 3	File folder
004 Project 4	File folder
005 Project 5	File folder
006 Project 6	File folder
007 Project 7	File folder
008 Project 8	File folder
009 Project 9	File folder
010 Project 10	File folder

Figure 5. 1. Repository Layout for Client XYZ

 Final Deliverables	File folder
 Proposal	File folder
 SOW	File folder

Figure 5. 2. Sub-folders inside each project folder in the repository

Once all the information was compiled, first round of QC was performed to check nomenclature and proper placement of files within respective folders. There were instances where interim deliverables were also sent along with the final deliverables for a project. Such material was stored along with the relevant material but wasn't uploaded to the final repository. After completion of QC, the material was uploaded on the designated folder for the repository.

For the second round of QC, 20 random stakeholders from the client team across ZS offices were provided access initially and asked to assess the accessibility of the repository and navigation issues. Certain issues which arose were:

- Slow navigation- time consuming searches: attributed to variable internet speeds which is used to give access to various servers pan ZS.
- Access denied- access flow to some deep-rooted files (located in multiple subfolders) was faulty. The error was immediately brought to IT team's attention and rectified.
- Improper naming- the project name and name of the final deliverable were different for a few project codes, especially umbrella project codes- single project code for multiple requests. This made opening of the files mandatory to confirm the nature of the content, making the entire process time consuming. No concrete solution could be found for this problem, since names of already completed projects could not be changed for ease. However, further structured sub-folders was suggested which couldn't be implemented during this time frame due to lack of availability of experienced staff to review each file.
- Latest version of deliverables not provided- Despite asking specific POCs for the deliverables, some of them were not the latest or final versions, which was pointed out by the testing stakeholders. The ones pointed out were immediately contacted and asked for the latest versions. For the rest, it was decided that the deliverables will be reviewed by an experienced AC over an indefinite period.

Once the above issues were taken care of, the stakeholders were again asked to look for issues in accessibility, navigation and content of the repository. The common consensus was obtained that the repository was fine but it would be great to have the material for the missing projects as well. For this, it was decided that the POCs for those projects would be contacted and reminded over time and the repository will be updated as and when the material is available.

Maintenance of Repository: One person was assigned temporarily to update the repository for the period I won't be available. Once I join back full time, I'll be the one-stop POC for the up-keep and updating of the repository.

6. CONCLUSION

As established by the survey, the repository was the need of the hour for the client team I was associated with along with the client teams pan ZS. While maintenance related issues will continue to prevail unless a one person is dedicated to keep it updated, especially for ongoing and new projects, it should be made sure that every client team should have such a quick visit repository to avoid duplication of efforts in case of similar nature of projects. The process takes time since the files have to be acquired from the onshore team. Once the repository is set up and access is given to the right people, the maintenance and regular of updating should also be done regularly as in this case. One POC for this purpose should be assigned who be responsible for all the correspondence related to the repository. Time to time feedback should be taken to recognize issues and incorporating latest trends.

APPENDIX

APPENDIX I

REPOSITORY NEED ASSESSMENT

Most of us at ZS are aligned with various client teams and more often than not, we are also involved in projects related to repetitive therapeutic areas, brands, and issue areas for the same client. Knowledge for these projects and tasks is often scattered across multiple sub-teams and there is an increasing need to have a go-to place to refer to for all the project and client related important documents. Keeping this in mind, we are floating this questionnaire to gather team's thoughts based on your experience, regarding client-specific potential repositories for this purpose. We value your feedback and really look forward to your response. Won't take more than five minutes of your time.

1. Name:

2. Client team you're associated with:

***3. Does the account team you work with have a repository (on a drive/ SharePoint etc.) to store files of all the projects done so far?**

- ☐ Yes
- ☐ No
- ☐ Don't know

***4. If yes, what is the platform for storing the project material?**

- ☐ SharePoint
- ☐ Project Drive
- ☐ ZSpace

- ☐ NOT APPLICABLE
- ☐ Others (please specify)

***5. Who is responsible for uploading relevant project files in the repository?**

- ☐ KM Team
- ☐ Onshore Team
- ☐ Offshore Client Team
- ☐ Don't know
- ☐ NOT APPLICABLE
- ☐ Other (please specify)

***6. How often is the project material uploaded?**

- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Yearly
- ☐ After completion of the project
- ☐ Don't know
- ☒ NOT APPLICABLE

☐ Other (please specify)

***7. What problems do you face in accessing/navigating through such a repository?
(Multiple Options may be marked)**

- ☐ Access denied
- ☐ Desired files not available/ Not updated on regular basis/ Latest or desired version of file not available
- ☐ No files available at all
- ☐ Unstructured storage of files/ Improper naming of files
- ☐ NOT APPLICABLE
- ☐ Other (please specify)

***8. How important do you think such a repository is?**

- ☐ Of utmost importance and urgency
- ☐ Nothing urgent, but should be done for sure
- ☐ Desired, but not necessary
- ☐ Not necessary

***9. Which files according to you would be most suitable for such a repository?**

- ☐ Proposal/SOW + Pricing
- ☐ Proposal/SOW + Final Deliverables

- ☐ Proposal/SOW + Pricing + Final Deliverables
- ☐ Proposal/SOW + Pricing + Final Deliverables + Interim Deliverables
- ☐ Others (please specify)

10. Additional comments/suggestions

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