

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

PRESENTED BY

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INTRODUCTION – ABOUT THE ORGANIZATION



- ZS ASSOCIATES IS A SALES AND MARKETING CONSULTING, OUTSOURCING, AND TECHNOLOGY FIRM HEADQUARTERED IN EVANSTON, ILLINOIS THAT PROVIDES SERVICES FOR CLIENTS PRIMARILY IN THE PHARMACEUTICAL INDUSTRY.
- IT OFFERS BUSINESS CONSULTING SOLUTIONS TO MULTIPLE PHARMACEUTICAL COMPANIES ACROSS DIFFERENT BUSINESS VERTICALS AND THERAPEUTIC AREAS WITH CROSS-OFFICE TEAMS ACROSS THE GLOBE.
- NATURE OF THESE BUSINESS SOLUTIONS IS SOMETIMES SIMILAR FOR DIFFERENT 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 (NAME CONFIDENTIAL), WHEREIN FINAL VERSIONS OF IMPORTANT DOCUMENTS SUCH AS PROPOSAL FILES, STATEMENT OF WORK (SOW), PRICING FILES, ETC. CAN BE DEPOSITED FOR QUICK REFERENCE

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.

RATIONALE

Client Specific Repository

- To help project teams better understand client's situation
- To avoid duplication of efforts.

Quick Estimates of

- Cost
- Staffing
- Plan of Action

Quality Data Management

- Central, concise, accurate and non-redundant record of projects
- Increase efficiency and productivity

Other Benefits

- Easier onboarding of new members
- Single POC to maintain, update and contact for inquiries

METHODOLOGY- OVERALL APPROACH

Need Survey Assessment and Platform Finalization

- Formulated and conducted survey to establish the need and identify problems
- Finalized the platform layout based on client team inputs

Reporting and Access Control Framework Finalization

- Finalized access control framework for user groups across countries
- Identified and finalized key reporting timelines for content in the repository.

Repository Creation and Roll Out

- Created repository containing relevant files and folders.
- Executed testing with identified stakeholders
- Uploaded all documents
- Enabled access to identified stakeholders

Instructions for Project Teams, Ongoing Operations and Follow- up

- Instructions to different project teams for usage and upload of documents
- Planning for periodic maintenance and updation of repository

METHODOLOGY (CONTINUED)

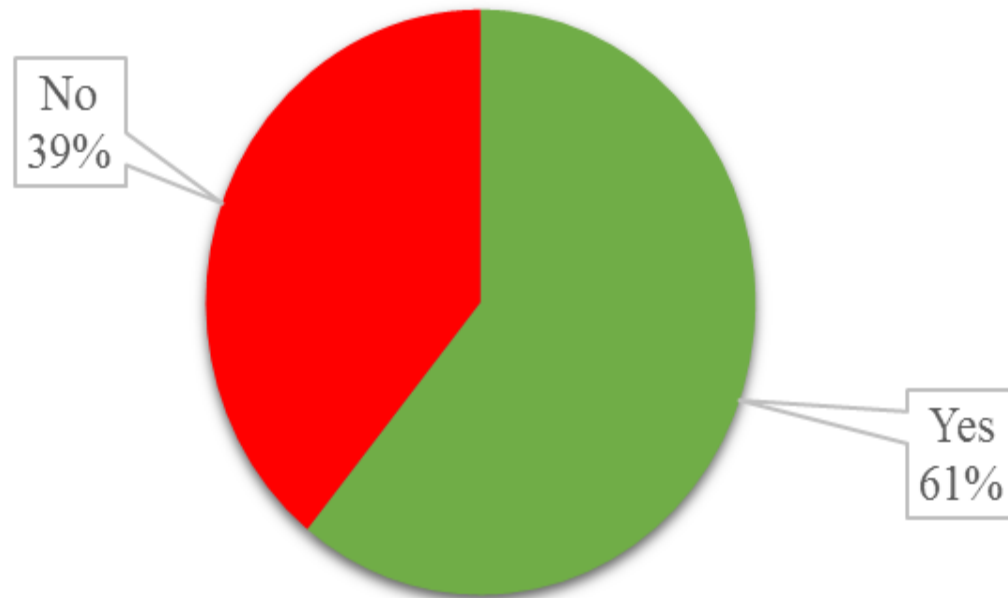
- **STUDY DESIGN:** ANALYTICAL, CROSS-SECTIONAL.
- **SAMPLE SIZE:** FOR THE SURVEY, 23 CLIENT KNOWLEDGE GUIDES (CKGS) FOR DIFFERENT CLIENT TEAMS WERE CONTACTED.
- **SAMPLING TECHNIQUE:** CONVENIENCE SAMPLING WAS EMPLOYED.
- **SAMPLE SELECTION:** THE STUDY WAS CONDUCTED AMONG CKGS, WHO ARE THE POC IN THE KM TEAM FOR A PARTICULAR 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 WAS ANALYZED USING MS EXCEL.
- **DATA COLLECTION INSTRUMENT:** THE QUESTIONNAIRE (APPENDIX I) CONSISTED OF 1 OPEN-ENDED AND 9 CLOSED-ENDED QUESTIONS WITH ONE OF THEIR OPTIONS AS OPEN-ENDED (OTHERS). THE QUESTIONS ANALYSED 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 WAS FOR COMMENTS AND SUGGESTIONS.

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SURVEY RESULTS

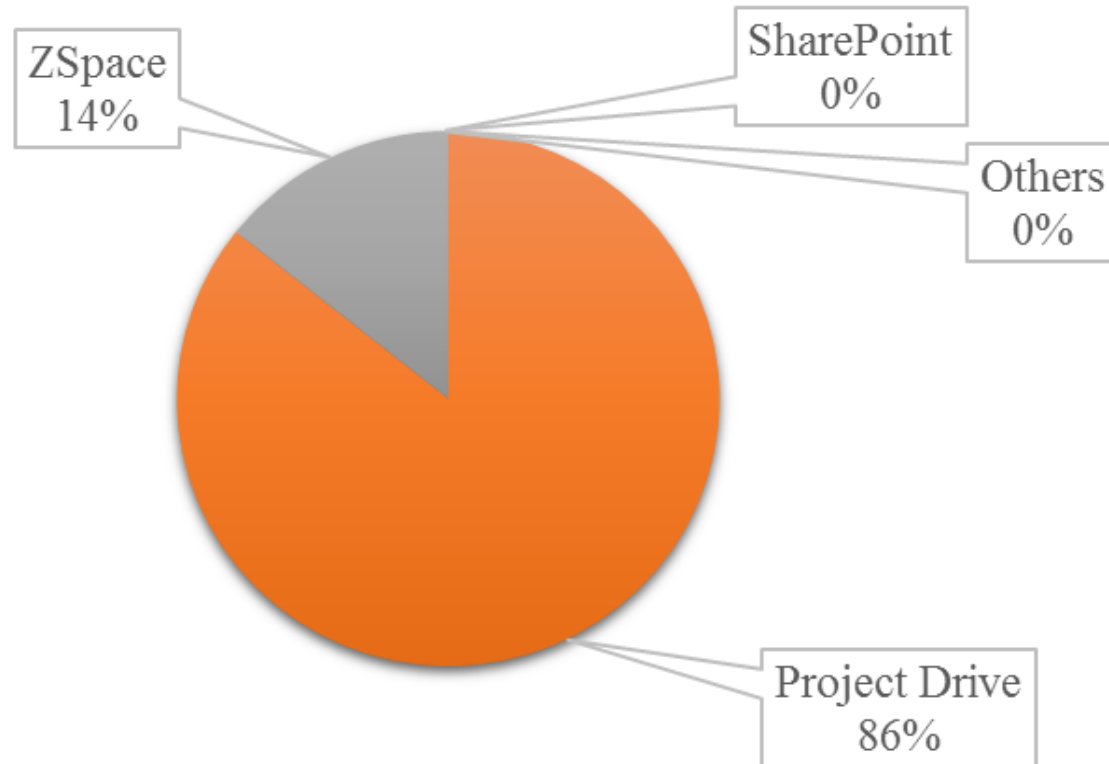
QUESTION 1 (N=23)

Does the client team you represent have a repository?



QUESTION 1.1 (N=14)

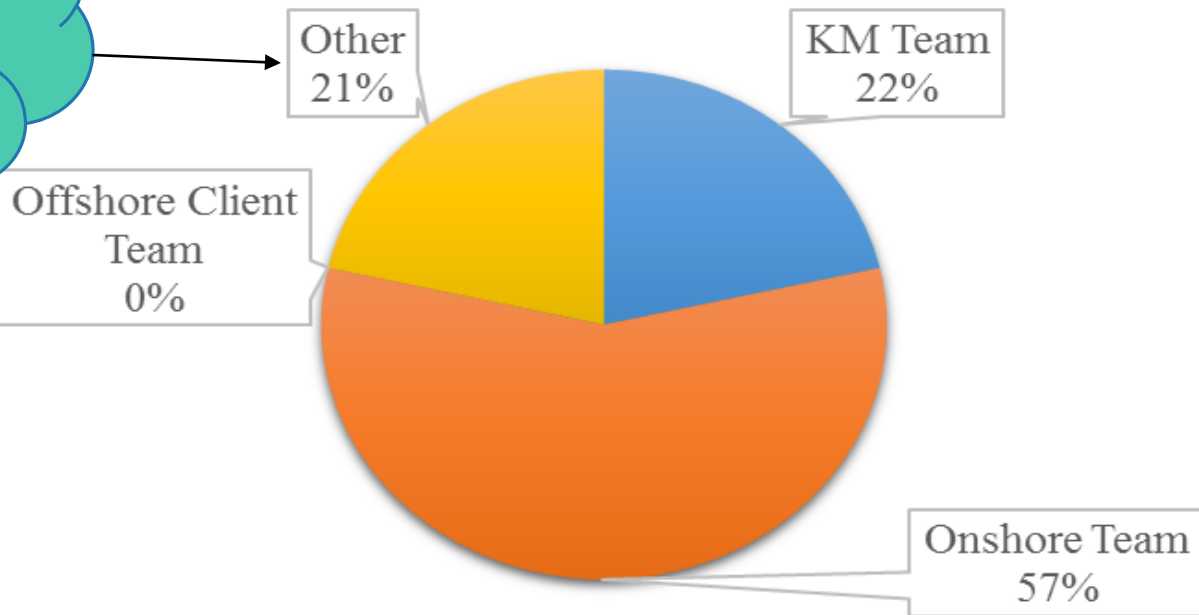
If yes, what is the platform for project repository?



QUESTION 1.2 (N=14)

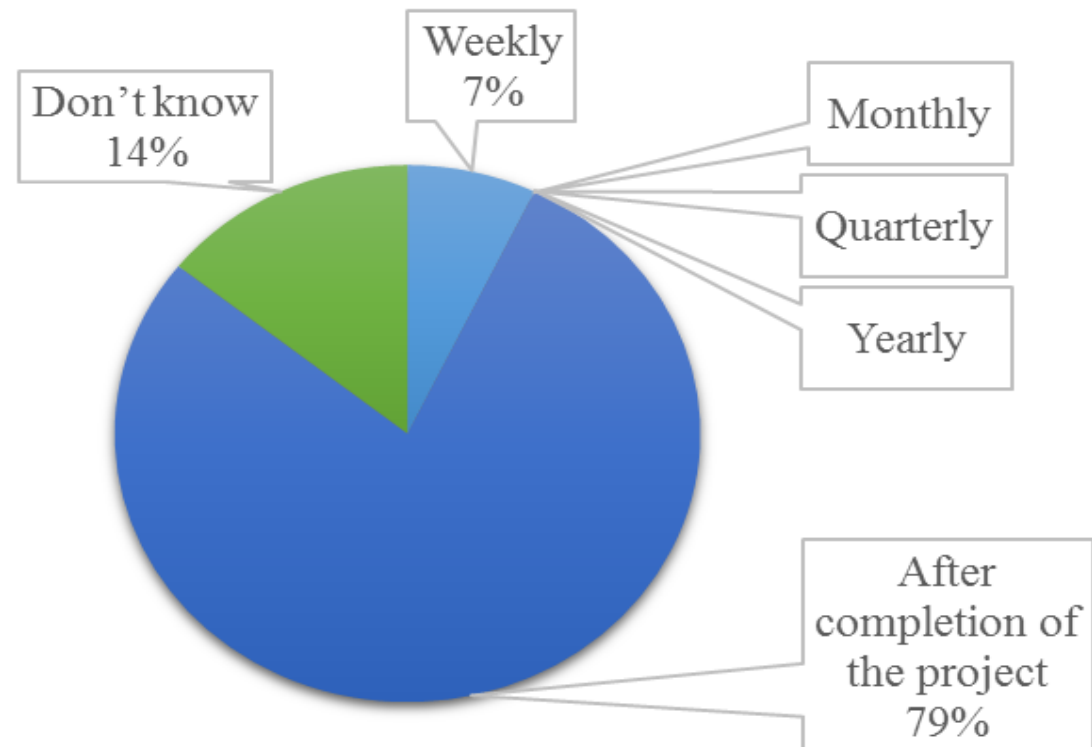
Who is the Person Responsible for Uploading Project Materials?

- “Whoever has the deliverables”
- “Project teams themselves”



QUESTION 1.3 (N=14)

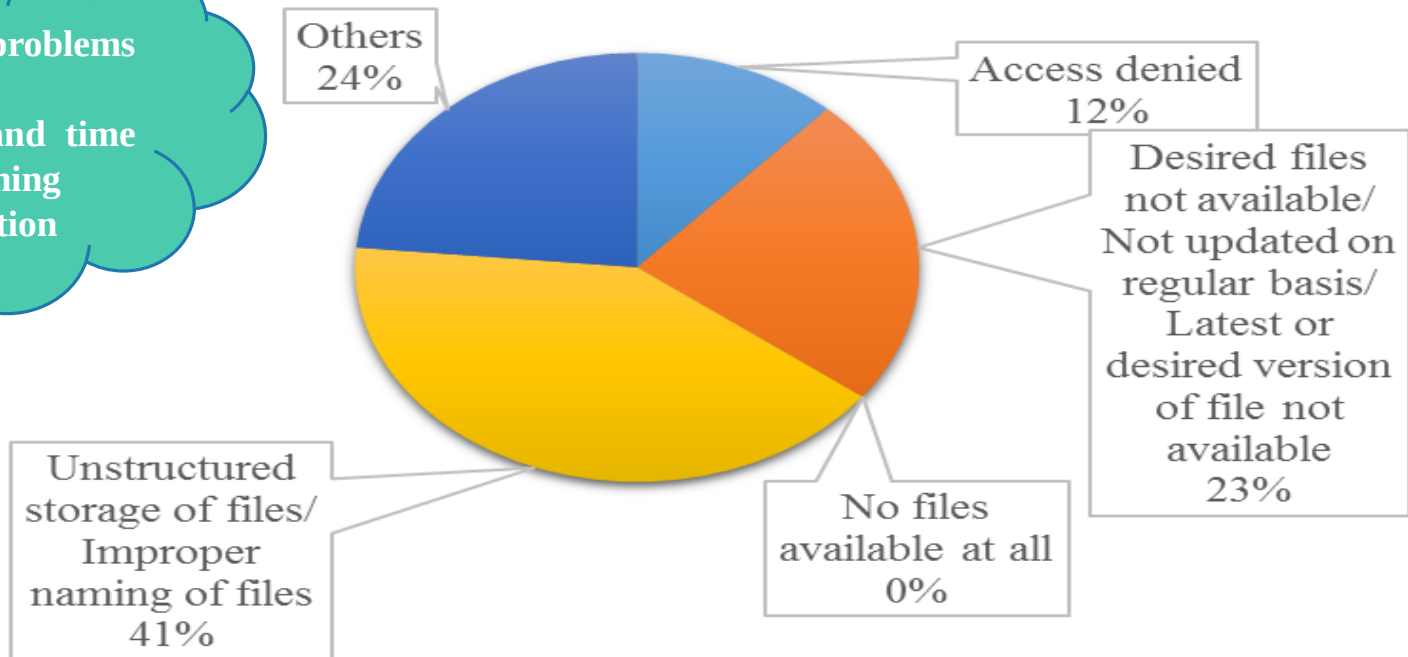
How often is the project material uploaded to the repository?



QUESTION 1.4 (N=14)

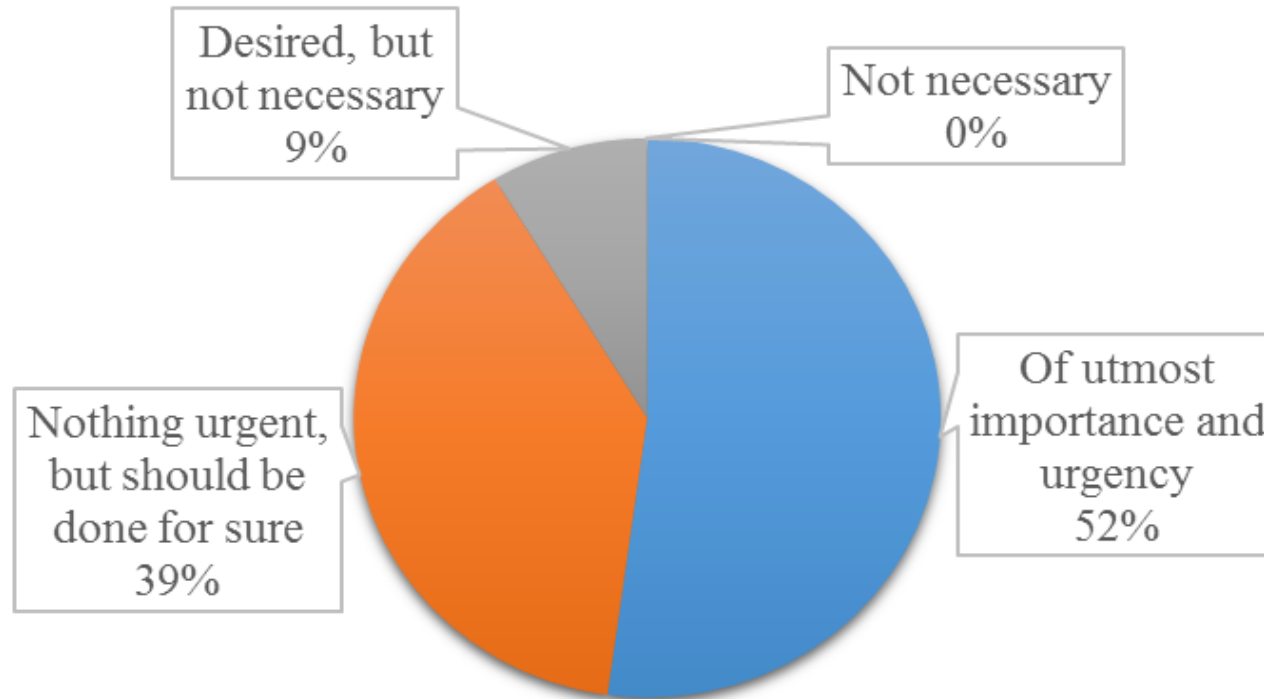
What are the problems you face while accessing/ navigating through the repository?

- No problems faced
- Slow and time consuming navigation



QUESTION 2 (N=23)

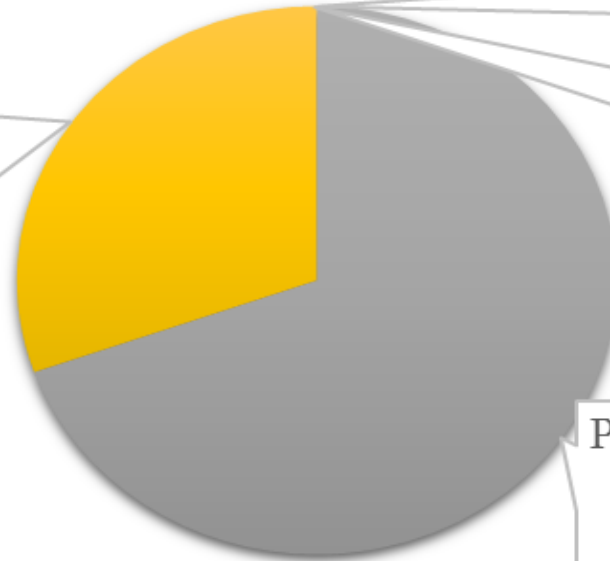
How important do you think such a repository is?



QUESTION 3 (N=23)

Which files according to you are most suitable for the repository?

Proposal/SOW
+ Pricing +
Final
Deliverables +
Interim
Deliverables
30%



Proposal/SOW
+ Pricing
0%

Proposal/SOW
+ Final
Deliverables
0%

Proposal/SOW
+ Pricing +
Final
Deliverables
70%

QUESTION 4: ADDITIONAL COMMENTS REGARDING THE REPOSITORY

- *“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.”*

OUTCOMES AND IMPLEMENTATION

Platform: Project Drive

- Consistent with survey results and also according to cost feasibility
- Would be created on ZS servers which may be accessed by specific client team members

POC for files: Onshore Team

- Consistent with the survey results, client XYZ's final deliverables were also handled by the onshore team.
- Onshore managers of various projects were contacted to acquire material.
- E-mails sent directly by the onshore (LA) team Principal to give a sense of importance.

To deal with issues: Standardized Nomenclature

- "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.

OUTCOMES AND IMPLEMENTATION

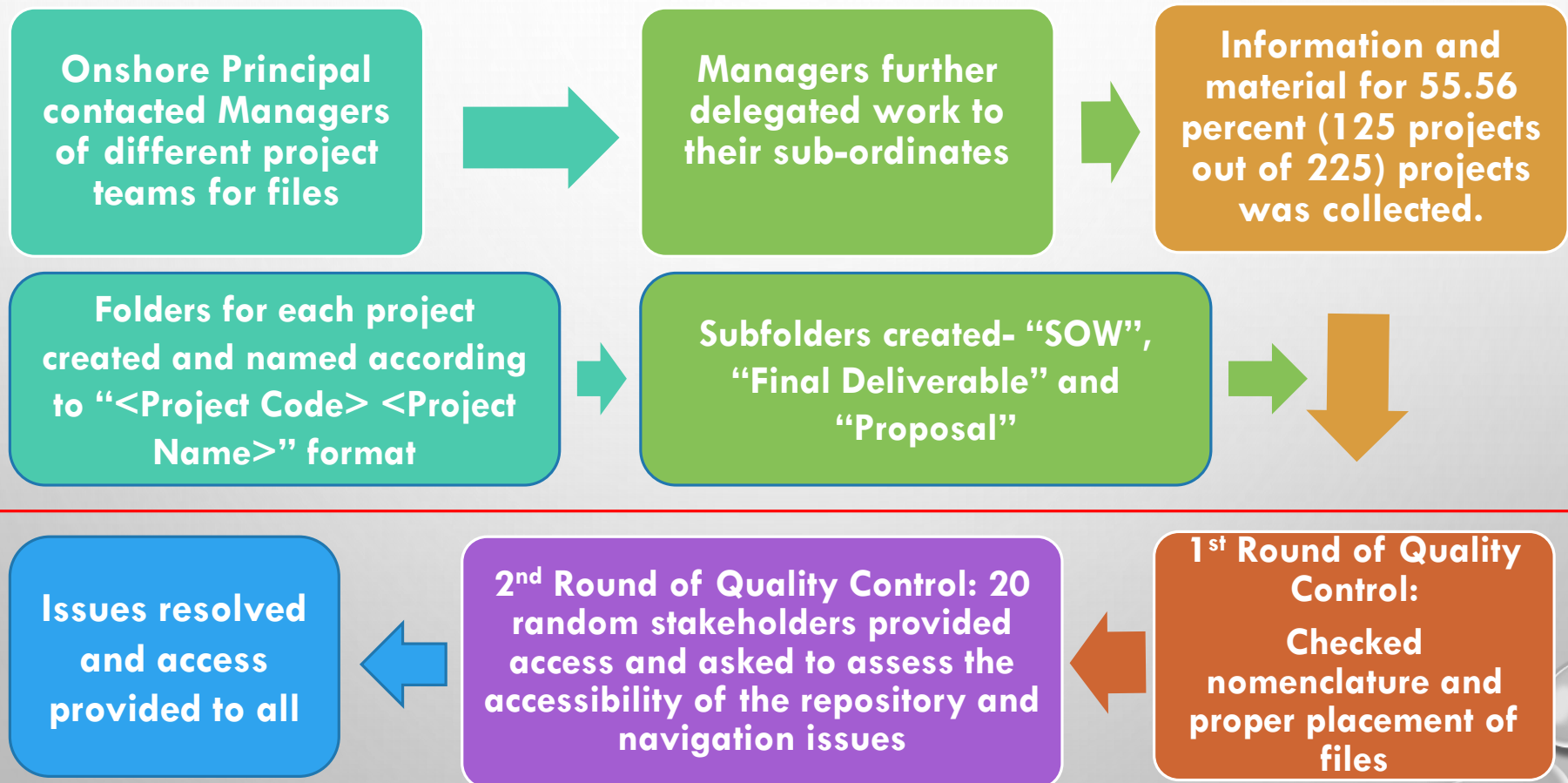
Files to be stored:
Final Deliverables

- Consistent with survey results as well as space and cost constraints.
- Also, since pricing and staffing estimates are already provided in the SOW files, pricing file of a project was excluded

Need: Utmost
Importance and
Urgency

- The compilation of the repository would be treated as a priority
- A dedicated Associate- Intern would be assigned full time for this purpose, guided by an Associate Consultant.

IMPLEMENTATION PROCEDURE (8 WEEKS)



ISSUES WITH THE REPOSITORY IDENTIFIED THROUGH STAKEHOLDERS

Slow Navigation

- Time consuming searches
- Attributed to variable internet speeds pan ZS

Access Denied

- Some files not accessible
- Issue resolved after bringing to IT team's attention

Improper Nomenclature

- Especially umbrella project codes- single project code for multiple requests
- Made opening of the files mandatory to confirm the nature of the content

Latest Version of Deliverables not provided

- Some deliverables not latest or final versions
- Immediately contacted and asked for the latest versions. For the rest, the deliverables to be reviewed by an experienced Associate Consultant over an indefinite period.

REPOSITORY LAYOUT

Repository Layout for Client XYZ

 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

Sub-folders Inside Each Project Folder in the Repository

 Final Deliverables	File folder
 Proposal	File folder
 SOW	File folder

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.

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THANK YOU