

Identification of Gaps and Best Practices Across the Client Expert Guides

By

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

Academic year, 2014-2016



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This is to certify that **Dr. Devanshi Ahuja**, student of MBA Hospital and Health Management from The IIHMR University, Jaipur has undergone internship training at ZS Associates, Gurgaon from February 8th 2016 to April 30th 2016.

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 future endeavors.



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& Best Practices across all Client Expert Guides
..... and submitted by (Name) DEVANSHI AHUJA
..... Enrollment No. 0140 under the
supervision of Dr. Alok Mathur for award of
Postgraduate Diploma in Hospital and Health/ Pharmaceutical / Rural Management of the
University carried out during the period from Feb 8, 2016 to April 30, 2016
embodies my original work and has not formed the basis for the award of any degree, diploma
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DISSERTATION

INTRODUCTION

In today's fast-changing global markets, failure or success is no longer tied to the traditional inputs of labor, materials, or capital. What a company knows—and how it leverages that knowledge—has never been more essential for success. Knowledge is thus a significant organizational resource. The most common components of the frameworks and models consist of a series of processes, such as creation, storage/retrieval, transfer, and application. The people must collaborate with each other for the effective sharing of the knowledge and the driving of the company and its clients further ahead in the race.

The working of ZS associates is divided into majorly three groups:

- Business intelligence
- Business capability/consulting
- Business technology

The Client Expert Guide forms a part of business capability/consulting group.

Client Expert Guide

A CEG is a team within the knowledge management team for a particular client which carries almost all information on the client starting from the basic such as a company overview to the high level such as that of defining the competitive landscape of the company, their profiles.

Role of a CEG

The main role of a CEG is to provide a comprehensive knowledge to a new member who joins in the client team.

Functions of a CEG

There are mainly three functions of a CEG team:

1. Providing Continuous Support: This includes –
 - **Knowledge Sharing**
 - Public and internal news analysis
 - Synthesis of client investor calls/financial updates
 - Therapy Area and Country Knowledge
 - **Collaboration**
 - Leveraging Opportunity to support client teams
 - Intra team collaboration using a common company webpage
 - Sharing Best Practices
 - **Account Support**
 - Onboarding documents for new joiners
 - Creating team member Bios for Proposal
 - Maintaining Repository of client knowledge within ZS
2. Providing Ad Hoc Support: This includes-
 - Quickly finding and downloading the exact needed Reports from the Databases
 - Getting the Clinical trial, launch date , loss of Exclusivity information of the drug which may be marketed or in the pipeline
3. Project Support: This includes-
 - Leveraging Knowledge Management resources for project Execution
 - Keeping the team abreast
 - To quickly update the internal onboarding member on the client
 - Building relationship with client
 - Conducting trainings

- A Unique platform for engagement for client information. This includes creation of a web page on which the prepared CEG material is put up.
- Project support & ad-hoc requests

My role in the CEG – the major role was of support. The support in –

- Preparing the onboarding material , which included:
 - Preparation of the **Company Overview**-
 - Company’s profile
 - Its complete product line (both marketed and pipeline)
 - Analyzing the future strategies of the company
 - Its complete competitor landscape
 - Preparing **Therapy Area Overview** for the indications company is focusing on. This includes-
 - A brief overview of the disease, its symptoms, causes , risk factors
 - Epidemiology of the disease
 - Diagnosis and treatment of the disease
 - Market dynamics-
 - Product Sales (historical and forecasted)
 - Profile of the pipeline products –
 - Product launch
 - its patent expiry
 - its competitors, their sales force, its other indications
 - SWOT analysis of the product

(This helps us to identify the areas where the company can connect with the client to provide consultancy)

- Preparing a **ZS-Client Engagement profile**. This included-
 - Extracting and preparing an organogram of the company
 - Analyzing the client team structures and the professionals working for different groups such as sales and marketing , operations, their focus areas
 - Identifying the individuals with whom ZS has worked before
 - Identifying the areas where ZS has engaged and helped the client before
 - Profiles of the individuals working for the client which has information on their skills and areas of expertise in relation to the client

(This helps the ZS client team members to identify the client professional to connect with. Also keeps information on the areas the company has worked with the client and discovers more areas)

- Editing the newsletter which contains the latest news on the company so as to keep everyone updated on the developments regarding the company
- A webpage was created on which the above made material was uploaded. This served as the common platform for the ZS members to get the information on this client

All this gave an understanding how the CEG works.

Across the knowledge management there are various CEG which have been involved with the client teams and the clients which are in different stages.

A CEG is a dedicated team that is working as the expertise center for the client and client team members for information on any subject. These are evolved as per the needs of the members of the global client team which is working with the client. Some of the CEG's have reached a different level while the other teams are still in their nascent stage.

The involvement of the top management members with the CEG's is one of the key factors for the development of the CEG. The more they are involved i.e. the more they are needing the CEG will make them more evolved. Hence, it becomes crucial to work in an efficient manner and showcase the capacity of the CEG in helping the client, so as to make the CEG more evolved.

The evolution here refers to:

- Duration of CEG
- Amount of material they are putting up
- The frequency the material such as the onboarding presentations, newsletter were rolled out
- Frequency of the meetings held
- Frequency of the client requests
- Frequency the ad hoc request comes in

RESEARCH METHODOLOGY

RESEARCH QUESTION

Are there any gaps prevailing in the perception of the global team and the actual delivery by the off shore Client Expert Guide (working as an expertise center)

LITERATURE REVIEW

Knowledge Management is a set of processes that govern the creation, distribution, and utilization of human intellect. In the face of communication and data overload, it is important for making decisions, building the business, and cultivating a strong company culture.

Knowledge is not valuable in and of itself. It does not exist in a void. It's like that whole "tree falling in the forest" question. Whether or not it fell is irrelevant because nobody knows the answer. Information becomes valuable when it is communicated -- and yet, research shows that communication remains a major challenge for a majority of organizations. What kind of research?

According to a study by SIS International Research, 70% of small to mid-size businesses cite ineffective communication as their primary problem. A business with 100 employees spends an average downtime of 17 hours per week clarifying communication. This translates to an approximate cost of \$530,000 a year. In another study, Fierce, Inc. found that 86% of employees and executives cite lack of collaboration or ineffective communication for workplace failures. Businesses lose tens of billions of dollars a year by failing to share knowledge.

The first thing to consider is how knowledge flows through the organization. No matter the size or sector, knowledge flows through existing paths. These paths must be traced in order to identify information source points, critical functions that lead to knowledge creation, and risky bottlenecks that impede the information flow to the point of use. You need to create a map, or delegate a Knowledge Manager to create one. This provides a blueprint from which to make changes and improvements.

For example, if a goldmine of information is held in a Wiki that no-one visits, then it is time to explore ways to make it more accessible. Maybe that information is relocated

someplace else. Maybe the Wiki is not advertised prominently enough. Maybe the login process is laborious and a more streamlined access point is needed. Whatever the case, effective Knowledge Management starts with an accurate and nuanced understanding of the way information of various types is communicated throughout the business

In the current digital based economy a large amount of information is available in the form of textual data which can often be used more easily if it is categorized or classified into some predefined classes . In any business or industrial environment corporate information may be available in multiple different formats about 80% of which is in text documents. This information exists in the form of descriptive data formats which include service reports about repair information, manufacturing quality documentation and customer help desk notes. It is also often in the form of concise text formats, containing many industry specific terms and abbreviations. Both technical and manual efforts are needed to handle these information sources, to unearth the patterns and discover useful knowledge hidden within these resources.

Transformation of these useful sources of information into usable formats will help to improve future product or service quality and provide solutions to project management issues. Decision makers or knowledge workers may therefore be assisted and business decisions improved through the discovery of useful knowledge patterns. Identified knowledge can also be transferred from one project to another. This will ultimately help to cut the overhead costs of product or service quality improvement and project management. Therefore the purpose of these studies is to try to improve any business context where useful knowledge of previous experience can be discovered in reports or other documents. For example, if customers' needs can be identified and classified then better future decisions can be made resulting in improved levels of customer satisfaction. The overall process of knowledge discovery in databases (KDD) is the identification of valid, novel, potentially useful and ultimately understandable patterns in data.

The term knowledge discovery from textual databases (KDT) is a little different to the general form of KDD and can be defined as discovering useful information and knowledge from textual databases through the application of data mining techniques. However it shares the common methods of collecting information as raw data and

processing it through the application of data mining techniques. Indeed, a three step process of data collection, pre-processing and applications of text mining techniques is required. Text classification is an important approach to handling textual data or information in the overall process of knowledge discovery from textual databases. It has been a most promising area of research since the inception of the digital text based economy. It is mainly used to classify text documents into predefined categories or classes based upon content and labeled training samples. Text mining techniques have been widely used in various application fields like e-mail filtering, document management, Customer needs identification, etc. It can therefore be concluded that the use of this Technology can help to access information and manage it for better use in future, applications. Applications of data mining techniques have long been seen to improve predictive and classification methods and have widely been used in different subject areas ranging from finance to health sciences. Quite a few applications of these techniques have been reported in manufacturing or construction industry environments. There may however be problems of non-availability of data due to some confidentiality, proprietary and sensitivity issues. Hence, there are not many examples of exploitation of data mining techniques to handle textual databases reported in the literature

The CEG works in close collaboration with the consulting teams and other groups within the firm to help acquire, retrieve, organize, and analyze the knowledge that enables the company to deliver superior business value for its clients. Its role is to be a trusted partner and catalyst for all parts of the company in facilitating the development of knowledge as a core competitive advantage and building the firm's reputation as a global leader in business consulting. Ultimately, its efforts create a firm-wide culture of knowledge sharing and collaboration

Since no two organizations are same, each organization has its own different knowledge sharing system. Since, these are different for different clients in the company, the CEG's for the clients are also different.

AIM

To study and analyze the working of client expert guides across the KM and identify the gaps and best practices employed and unify them

OBJECTIVES

- To identify any gaps present and to record any changes those have been done in the regular client materials
- To identify the gaps present and the best practices by studying and reviewing the data

METHODOLOGY

- Interviewing the CEG teams
- Regular meetings were held to see the working of in progress CEG's
- Gap analysis was done for the current practices for the CEG
- Best practices identified as recommendation

Sample size – 7CEG team heads

Sampling Method – Convenience Sampling

Type of study – Descriptive, cross sectional

Duration of Study – 1 month

Data collection method – The data is collected basically by primary research method. An open ended questionnaire is prepared and interviews are taken face to face.

Data analysis plan – Based on the indicators the answers are analyzed

Limitations –

- a) Sample sizes taken was small
- b) Time constraints limited the various activities of the project
- c) The other team, the global team, which is the one CEG work in alliance were not available and hence their view wasn't recorded.

Ethical Considerations–

- Informed consent will be taken from respondent
- Purpose and objectives of the research will be explained before to the respondents
- Privacy and confidentiality will be maintained

Based on the factors and the questionnaire, a dashboard was created with the following indicators for analysis:

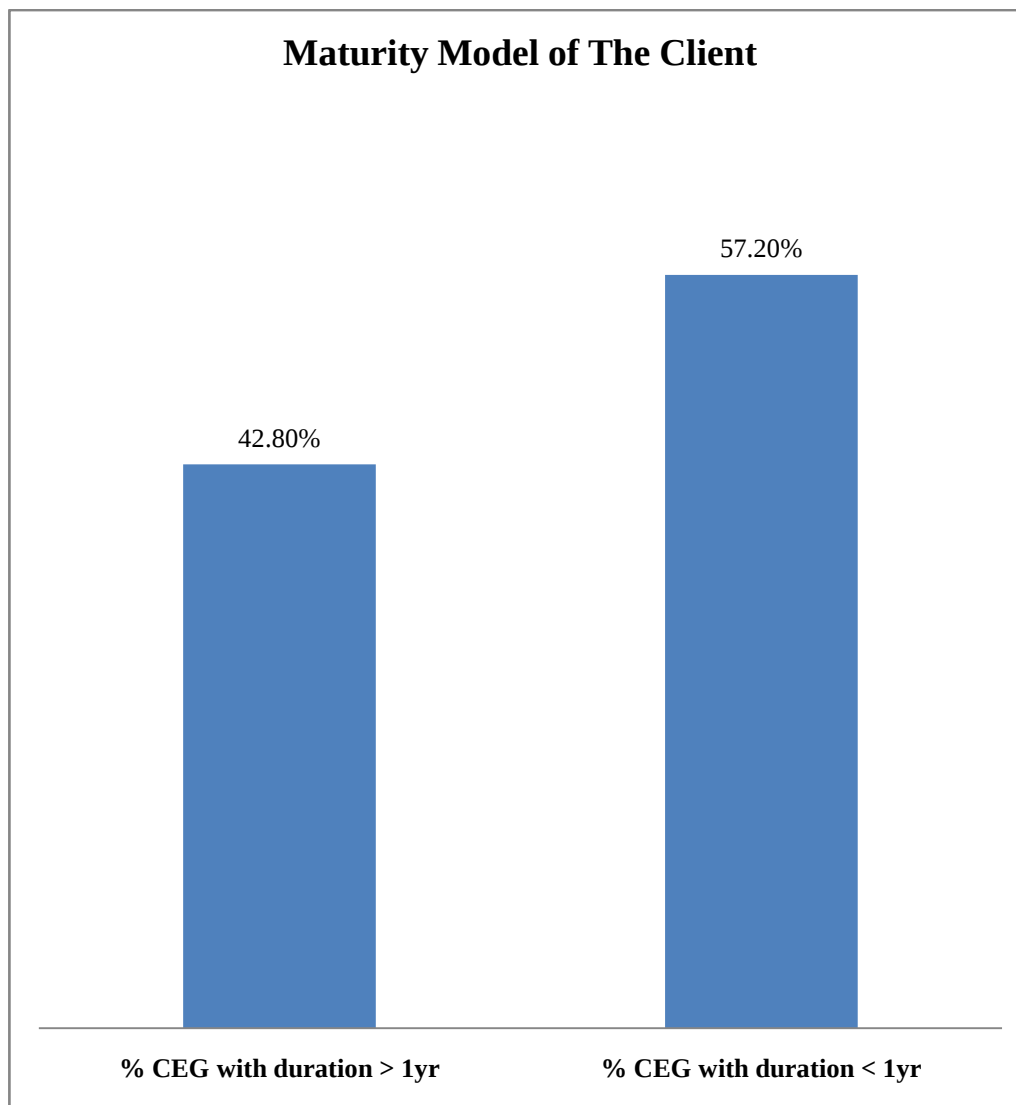
- The maturity model of the client expert guide
- Frequency of meetings
- Key challenges- which are also identified as the gaps
- Unique practices followed by a CEG
- Involvement of the global teams

CEG Maturity Model

The client maturity model considers the size of the client, which is measured in terms of the revenues it brings when engaged with ZS.

The duration of time from the inception of the CEG till date is the main thing considered.

The following graph shows the maturity of the CEG's on the basis of their duration:



Graph.1

Duration of the Client Expert Guide across the CEG's

CEG	Duration
CEG 1	0-1 yr
CEG 2	>1 yr

CEG 3	0-1 yr
CEG 4	0-1 yr
CEG 5	>1 yr
CEG 6	0-1 yr
CEG 7	>1 yr

Table 1. Duration of the CEG

The more the CEG's have evolved depends on the time these have been in there in the team working with the global team to promote the activities of the Client teams

Inference: Many CEG's have been developed as and when the need had arrived

These CEG's have also proved their metal as these have only progressed because of the information it brings in.

Frequency of the newsletter and onboarding material updation

	Newsletter	Overview
CEG 1	monthly	quartely
CEG 2	monthly	0
CEG 3	monthly	0

CEG 4	monthly	0
CEG 5	Weekly	on demand
CEG 6	bimonthly	under creation
CEG 7	monthly	half yearly

Table 2. Frequency of the newsletter and overview

The frequency of the rolling out of the newsletter and the updating of the overview material determines the activeness of the CEG as to how proactive it is to capture the news and any latest development on the company and keep the global team abreast of that.

Frequency of the ad hoc requests

The frequency of the ad hoc requests determines how often the CEG's get a sudden query from anyone on the global client team or the client itself. This relates to the request regarding need of any knowledge or information on any matter the teams are stuck upon.

CEG	Ad hoc
CEG 1	daily
CEG 2	2-3 per week

CEG 3	0-1 per week
CEG 4	Daily
CEG 5	
CEG 6	as and when needed
CEG 7	Daily

Table 3. Frequency of the Ad Hoc requests

This gives the CEG a natural chance to showcase its capacity initially. This is how a CEG gets the attention of the client by doing good and in time work.

Although later on the adhoc requests have been shown to increase in the number, hence increasing the workload on the CEG team members.

Frequency of the Client Projects

	Duration	Client projects
CEG 1	0-1 yr	2

CEG 2	>1 yr	2
CEG 3	0-1 yr	limited
CEG 4	0-1 yr	2
CEG 5	>1 yr	2
CEG 6	0-1 yr	limited
CEG 7	>1 yr	3

Table 4. Frequency of the client projects

The above table shows that the CEG's which are more than 1 yr old are the ones which receive the client requests, while the ones which are less than 1 year old are still working internally to help the global team. Thus, a correlation is observed between the client projects and the duration of the CEG

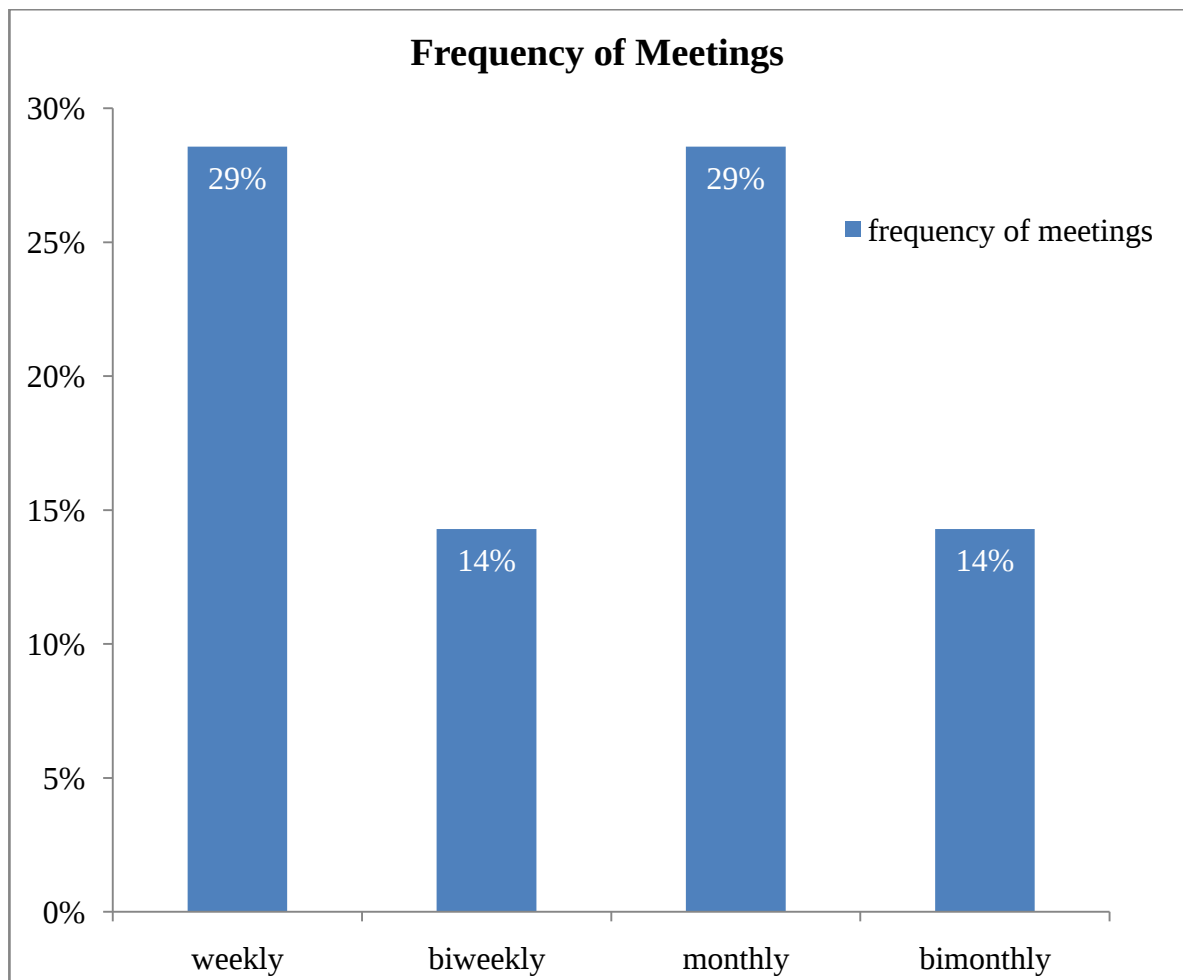
Frequency of the meetings

CEG	Meetings
------------	-----------------

CEG 1	weekly
CEG 2	monthly
CEG 3	0
CEG 4	bimonthly
CEG 5	monthly
CEG 6	biweekly
CEG 7	weekly

Table 5. Frequency of the meetings held

The meetings held have been a crucial point of contact for the CEG's which are new (majorly), as well as the matured ones. While interviewing, a very important came up here, which is the CEG's here ask for some time to present their insights on the client which are very useful for the client teams. Thus, a meeting is a platform for the various CEG's to show and help the client teams.



Graph 2. Frequency of the meetings conducted

These meetings are referred to the getting every member of the team working on the client together and give their opinion on the projects. These are basically conducted by the CEG as, a CEG is one single point of contact for every individual working on the client.

Inference: The frequency of the meetings is an indicator of how involved the global team members are with the CEG's. The more the number of meetings gives a fact that how much the global team wants the CEG to help them out and make requests for the work and information.

Involvement with the global teams

	Involvement with the global teams
CEG 1	strong
CEG 2	strong
CEG 3	moderate
CEG 4	moderate to strong
CEG 5	strong
CEG 6	strong
CEG 7	moderate to strong

Table 6. Involvement with global teams



Graph 3. Involvement of the CEG with the global teams

The involvement of the global team is huge factor for evolving the CEGs as it is from them that the work flows.

Inference: This is a major factor for the evolvement of the CEG in its role for working to support the teams.

Gap Analysis–

There are three main important components of gap analysis–

1. **State description-** Current state and future state
2. **Bridging the gap-** Identifying the gap, Gap description
3. **Factors and remedies-** Factors responsible, remedies, actions, proposals

Using the four steps in gap analysis methodology, (understanding the surrounding environment, taking a holistic approach to understanding the environment, determining a framework for analysis, compiling supportive data), one can obtain important information about key areas to focus on in the process or quality improvement project.

Since the current condition of the CEG is now known, there are some gaps that are identified.

The gaps identified are considered as the challenges faced by the CEG's. These are:

1. The adhoc consume large amount of time
2. The staffing is to be at the right time
3. The timeline to be reached is difficult sometimes
4. The global team members which are leading the team must be engaged in a well manner which determines the reach of a CEG
5. Time/ work stretch
6. Risk of monotonous work

1.Adhocs consume a large amount of time: The adhoc requests come all of a sudden and these have to be managed. These can be well managed by the CEG members if the staffing is proper.

2. The staffing is to be at the right time: One of the reasons is stated above as to why the staffing should be done at the right time at the right place.

3. The timeline to be reached is difficult sometimes: The timelines are difficult to achieve with the workload already present.

4. The reach of the CEG to the global team members: The members leading the team must have good rapport with the CEG members and encourage the work these are doing for the team, which in turn motivates the team and drives them to do better

5. Time/ work stretch: Due to the above mentioned reasons, the work stretch becomes a bit too much. Thus, it has to be managed.

6. Risk of monotonous work: Since, majority of the work is done regularly at very fast pace and repetition of the processes occur. Thus, it may become monotonous.

Since, the global team was not available; the desired performance was only given by the perception of the members which they hold for their desired performance

Here is the gap analysis done for all the CEG's:

	<u>Gap Analysis Template</u>		
	Current	Desired	Gap
Skill	On an average, the skills required for pulling the tasks are upto the mark	Good research and data analysis skills needed as secondary research is the main research done by the CEG	Absent
Time	Time becomes less for the adhocs rolling in and also simultaneously managing it with client projects	Precise time to be availed for the requests	Present

Resources	Taking average, there are approximate 1 Associate Consultants and 1 Associate that is allotted to the CEG	Although it depends on the client size, there can be 2 Associates	Present
Effort	Here the extra efforts are put in by AC and Associate allotted	Precise amount of efforts must be allotted	Present
Involvement	strong involvement	strong involvement	Absent

Table 7. Evaluating the gaps present

BEST PRACTICES IDENTIFIED

The best practices identified across the CEG's are various. These are:

1.Communicating effectively with the client teams about the work and its management: Since CEG's are the single point of contact for the various client teams, the information has to be transferred effectively. Also it is to be looked upon and communicated as to whether the request can be done or not, with the available resources.

2.Coverage of the investor calls / reaching the team with key development within 48hrs: This is a unique practice followed by a client expert guide. In this the members always cover the investor calls wherever and whenever these are taking place. This can be incorporated by the other CEG's as well

3.Interview of a senior leader in the newsletter/quiz section regarding the client: the interview with a team leader gives a core strength to the document. Addition of some facts about the company which can be taken as a quiz are some of the activities to make the document interesting

4.Proper expectation setting in terms of costing, timelines and scoping assessments: this is also one factor which causes the other CEG's to go in the wrong direction, for when these three are not done , certain damages can occur such as lapsing of the deadline of the project, overusage of the funds and assessing their capability to work. This also saves the CEG's from requiring staffing and completing the delivery of the work on time.

SUGGESTIONS

1. Unifying the best practices across all the CEG's
2. Reaching out to the team leaders for the presentation of the work and understanding the platform of the work
3. Proper communication with the global teams as to whether there are satisfactory and workable resources are present
4. The staffing of the CEG can be improved
5. A brief time period can be allotted after the request has been made which is the preparation time

CONCLUSION

The gaps and the best practices were identified. The Client Expert Guide has the term “Expert” in it. Also as many of the CEG’s are new and evolving and want to know as to how to go about developing their CEG’s, the best practices identified are to be shared.

The practice of knowledge sharing is a very precise one and it has to be made sure that, each and every piece of information is. This section which includes the work of the teams had no gaps found as this could have been assessed by asking the perception of the global and the client team.

Thus, there are gaps prevailing in the working of the CEG’s.

These gaps can be bridged and the working can be made smoother. The best practices identified are to be shared across the Knowledge management team and this may also help to bridge the gaps identified.

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ANNEXURE:

Client Expert Guide at Knowledge Management Group At ZS

This survey has been drafted to understand the role of a Client Expert Guide (CEG) in KM and to help identify gaps, standardize the processes and share the best practices across all Client Expert Guides (CEG). At the end of this survey, we would aim to share with you a summary based on our findings

Q1: Client Name:

- a) Client Size: ZS revenues?

Q2: Duration:

- a) 0- 1 yr
- b) 1 yr and above

Q3: What is the team structure

- a) On-shore [Roles and Responsibilities]

- b) Off-shore

Q4: What are all the components that you have included herein. Have there been some changes from the regular CEG?

- a) Newsletters [Frequency]
- b) Onboarding decks [Frequency]
- c) Quarterly Meetings [Frequency]
- d) Ad-hoc [Frequency]
- e) Client Projects [Frequency]
- f) Meetings? [Frequency]
- g) Others [Frequency]

Q5: Time Management

- a) C
- b) AC
- c) A
- d) Fellow

Q6: What is the value proposition of the CEG?

Q7: Key Challenges

a) How are you planning to optimize/ address these issues

Q8: Do you think you have pioneered in any particular task? – Best Practice

Excel data:

	Duration	Newsletter	Overview	Meetings	Ad hoc	Client projects	Key Challenges	Unique Practice/value proposition	Involvement with the global teams
CEG 1	0-1 yr	monthly	quarterly	weekly	daily	2	ad hocs consume large amount of time	single point of contact for many/strong communication	strong
CEG 2	>1 yr	monthly	0	monthly	2-3 per week	2	1.lots of ad hoc requests 2.staffing at the right time	coverage of the investor calls / reaching the team with key development within 48hrs	strong
CEG 3	0-1 yr	monthly	0	0	0-1 per week	limited		interview of a senior leader in the newsletter/quiz section regarding the client	moderate
CEG 4	0-1 yr	monthly	0	bimonthly	daily	2	reach in timeline		moderate to strong
CEG 5	>1 yr	weekly	on demand	monthly		2			strong
CEG 6	0-1 yr	bimonthly	under creation	biweekly	as and when needed	limited	reaching the managers	competitor landscape in the newsletter section	strong
CEG 7	>1 yr	monthly	half yearly	weekly	daily	3	time/work stretch	proper expectation setting in terms of costing, timelines and scoping assessments	moderate to strong

*points to be
noted:*

- 1. Client 4 has been acquired by 5 and since 5 was the client of the company, 4 automatically became one of the company's client*
- 2. Thus, CEG 4 is already very developed as it is maintained by the same group of people , though the clients are very different from each other*
- 3. The least frequency for rolling out the newsletter is noted. The
format is not considered.*

Attached herewith is the excel for data analysis:



Microsoft Excel
Worksheet