

Identification of Gaps and Best practices across the Client Expert Guides

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Introduction – organization

- ▶ ZS is the world's largest firm focused exclusively on improving business performance through sales and marketing solutions, from customer insights and strategy to analytics, operations and technology.
- ▶ More than 3,000 ZS professionals in 21 offices worldwide draw on deep industry and domain expertise to deliver impact where it matters for clients across multiple industries
- ▶ ZS focuses exclusively on the two areas that create customer demand: sales and marketing.
- ▶ The consultants leverage the firm's deep knowledge of the range of sales and marketing activities and how they interact in order to anticipate the upstream and downstream effects of virtually any decision

- ▶ Majority of ZS clients are pharmaceutical companies.
- ▶ The working at ZS associates is divided into majorly three groups:
 - Business intelligence
 - Business capability/consulting
 - Business technology
- ▶ The Client Expert Guide forms a part of knowledge management department in 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 and their profiles.

Functions of a CEG

There are mainly three functions of a CEG team:

1. Providing Continuous Support
2. Providing Ad Hoc Support
3. Providing Project Support

1. Providing Continuous Support

➤ **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

- 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. Providing Project Support

- 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

▶ **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 collect the data by interviewing the Client Expert Guide heads
- To identify any gaps present and to record any changes those have been done in the regular client materials
- To identify the best practices by studying and reviewing the data.

▶ **METHODOLOGY**

- Studying CEG to identify the general practices followed by them
- Interviewing the CEG team heads
- Best practices identified
- Gap analysis was done for the current practices for the CEG

▶ **Sample size** – 7 CEG team heads

▶ **Sampling Method** – Convenience Sampling

▶ **Type of study** – Descriptive, cross sectional

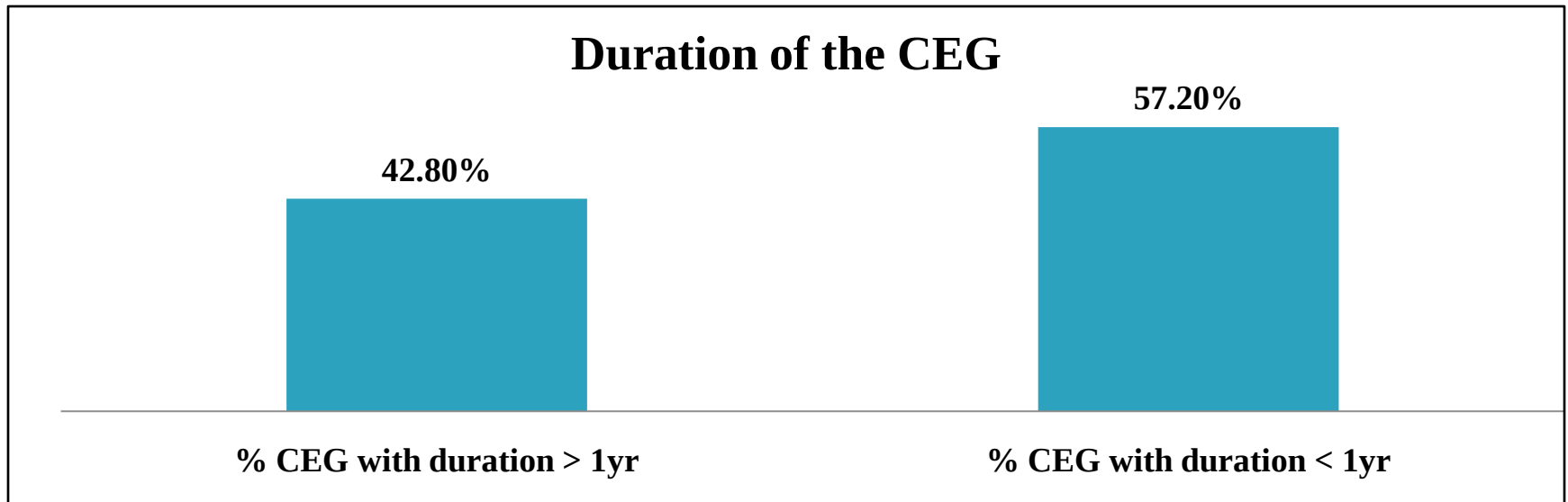
- ▶ **Data collection method** – The data is collected basically by primary research method.

Face to face interview taken by asking leading questions along with any supplementary questions and the answers noted in descriptive format

- ▶ **Data analysis plan** – 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

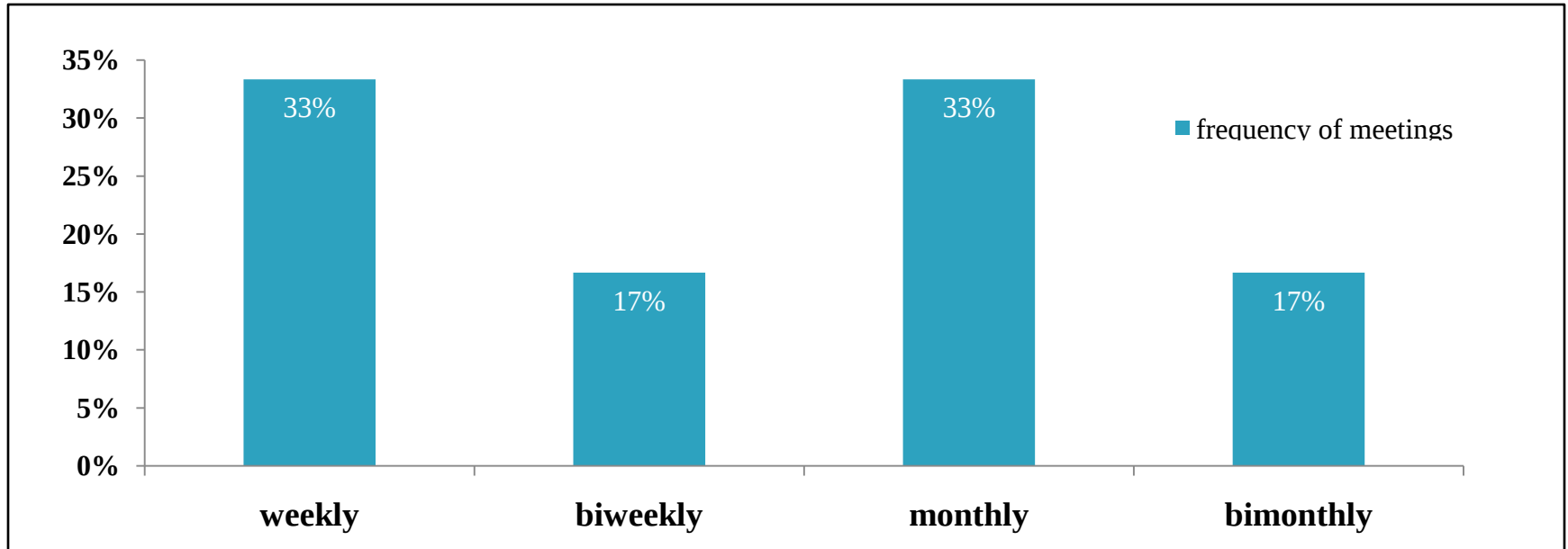
Tool used: Excel

Maturity model of the client



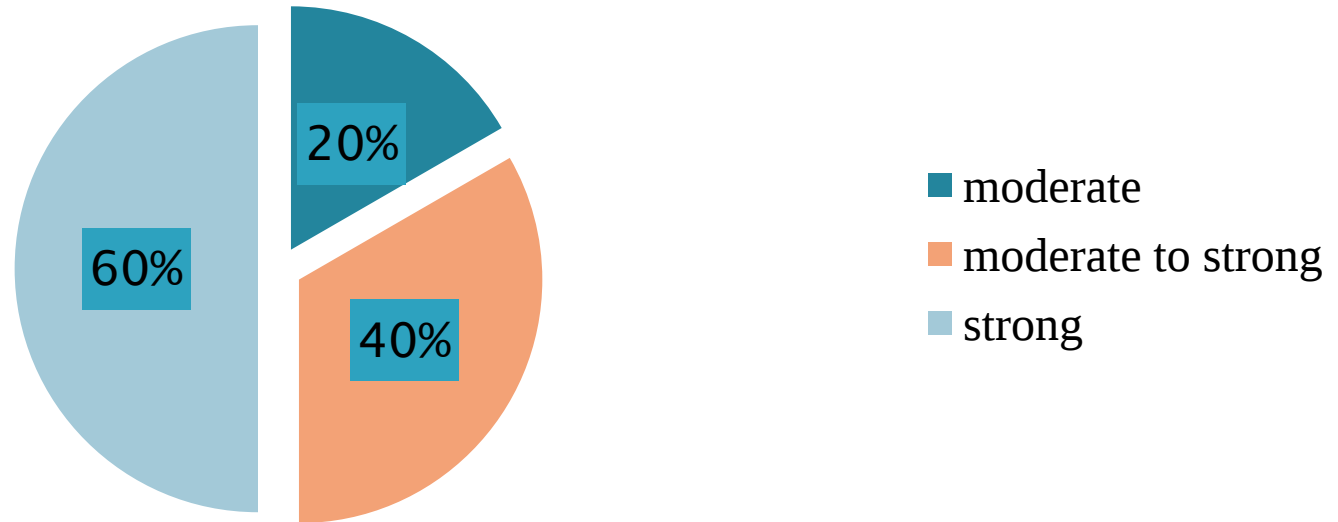
- The more the CEG have evolved depends on the time these have been in there in the team working with the global team to promote the activities of the Client teams
- Many CEG have been developed as and when the need had arrived
- These CEG have also proved their metal as these have only progressed because of the information it brings in.

Frequency of the meetings held



- 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



- The support from the global team is required to move ahead with the work and display efficiency of a CEG
- This plays a major role for the evolvement of the CEG in its role for working to support the teams

- Adhoc requests consume a large amount of time
- The staffing is to be at the right time
- The timeline to be reached is difficult sometimes
- The reach of the CEG to the global team members
- Time/ work stretch
- Risk of monotonous work

Best/Unique practices identified

- Communicating effectively with the client teams about the work and its management
- Coverage of the investor calls / reaching the team with key development within 48hrs
- Interview of a senior leader in the newsletter/quiz section regarding the client:
- Proper expectation setting in terms of costing, timelines and scoping assessments

Gap Analysis Template

	Current	Desired	Gap
Skill	On an average, the skills required for pulling the task are proactiveness, analysis, communication	Good research , communication 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 must 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
Frequency of meetings	33% of the CEG have meeting weekly	Weekly meetings should be there for good communication	Present
Involvement	strong involvement	strong involvement	Absent

Suggestions

- ▶ Unifying the best practices across all the CEG's
- ▶ Reaching out to the team leaders for the presentation of the work
- ▶ Proper communication with the global teams as to whether there are satisfactory and workable resources present to complete a request
- ▶ The staffing of the CEG to be improved
- ▶ A brief time period can be allotted after the request has been made, which is the preparation time

THANK
YOU!