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Enabling success factors to a Functional Outsourcing India-based Partnership in Statistical Programming

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***Successful partnering is about recognizing your differences,
yet complementing them to yield spectacular results...***



The Outsourcing of Programming

Reflect upon the following:

- Experience levels and titles differ
- Cost efficiencies are high, but so is oversight
- Geographical patterns
- Core skills exist – training to raise the bar is key
- Outsourcing to countries like India – future
- Project Management of outsourced partnerships
- Onshore-offshore very effective

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Partnership Scope and Model

- Model – dedicated FTE model:
 - Benefits in terms of training and knowledge retention
 - Learning curve is reduced
 - Team – familiar with org culture, know-how, POCs
 - Flexibility to use as required
- Resource Profiles:
 - Experience levels
 - Clinical, stats and SAS knowledge
 - Communication skills
 - Proactivity and flexibility
 - Resource planning, project management
 - Lean orientation and a culture supporting innovation

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Shared Leadership and Ownership

- A common vision, a shared goal
- Multiple Functions: procurement, management, sourcing partnership office, BD, partner management, IT
- Sponsor business sourcing partnership office – defining future structure and needs in cooperation with operations, expansion of scope, remodeling contract
- Vendor Management: local / onshore; dedicated Alliance Manager or additional oversight; Mentor – local / global
- Governance Models – leadership connect - critical to success
- Clear sponsor operating model supporting staff buy-in
- Metrics based partnership

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Staffing is Key

- Understanding client expectations and mapping roles and titles
- Recruitment timelines - need to map to business needs
- Training plans – CRO and Sponsor, ‘Train the trainer’, whose SOPs
- Documentation of training – whose forms, where will they be filed
- Buffers – to address attrition
- Retention – always jointly owned (especially with an FTE model – whose team is it anyway?)
 - Key tool – Motivation – both sides
 - Joint strategizing on growth paths, key resources
 - Incentives – Client, onsite training, cross-functional movement
 - High levels of transparency and collaboration are required
 - Recognize work well done and ensure timely feed-back

Staffing is Key

- Recruitment Challenges:
 - Experience levels
 - Core competencies
 - Multiple skill sets
 - Spiraling wage structures
 - Title alignment
 - Growth paths and career mapping
 - Geography
- Sponsor Role
 - Setting expectations
 - Patience and letting the vendor do their job (know the local market)
- Cultural Integration and Handling Time Zones



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Sponsor Staff Buy-In



- Key role of Sponsor Leadership:
 - Definition of a clear operating model
 - Definition of relevant metrics (quality, timeliness,...)
- Standardized deliverables – Ensure consistent delivery – minimizes need for interaction, less oversight cost
- Address insecurities – share long term vision
- Build confidence – Dashboards – KPIs – consistent performance
- CRO - demonstrate ownership, reduction in the need for oversight
- Both parties – drive free flow of communication between both parties

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Processes

- Sponsor or CRO? Usually sponsor on FTE model
- Training, Audits for compliance
- While outsourcing – is there internal compliance?
- Are processes structured well at the sponsor's end
- Well documented processes – minimal interaction required
- Well defined communication tools, work allocation and feedback collection processes
- Clear understanding of metrics and timelines
- Lean Six Sigma oriented process improvement initiatives
- Sensitivity at a high level – Joint RCA – should anything go wrong
- BoB and TOM - key

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Handling IT Issues

- IT POC at both ends – are they communicating
- Performance of IT systems: locally vs on sponsor's systems.
- Leased lines, Citrix servers
- erooms, VPCs, email ids (sponsor/CRO)
- Tracking down time
- Data Security
- IT audits
- Work from home
- Accesses – who will provide – time impact, cost factor (buffers)
- Collaborative tools (teleconf system, desktop sharing applications, teamsites)

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The Business Aspects

- Contract – MSA in place – saves a lot of time and effort
- Fixed FTE rate – no need to work out per project cost and put a contract in place for each project, COs also minimized
- Cost effectiveness and cost escalation needs to be factored in
- Faster project implementation
- Performance based contract - Penalty and bonuses
- Integrate incentives, management fees
- Bottom line – partnership – about ‘Us’, not ‘You and Me’..
- Share long term vision – builds commitment
- Escalation paths and Contingency Plans need to be defined
- Work towards ‘Cooperation Excellence’

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A Case Study in Successful Partnering

- Five-year old partnership
- Started - two people and one stream
- Now:
 - 30 people, seven functional streams, strategic partnership
 - Performance driven, KPIs, dashboard
 - Governance Model established
 - Global Mentor and Alliance Manager
 - Onshore component
 - Resource planning tools developed
 - Lean Six Sigma – Process optimization, VOC, QFD
 - Standardized deliverables – Process Flows, RACIs
 - One new process – majorly driven by vendor
 - Bi-annual face-to-face meetings



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- Vision, Transparency and Governance – key
- Metrics based, performance based partnership
- Standardized deliverables ensure consistent quality
- Standardized processes and communication channels minimize conflict
- Leverage capability to drive key technology as required
- Recognize potential and partner to bring it to the next level and to retain it
- Recognize that it is a partnership – only that drives success



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Questions?