

# Doing Library Business in India: A Success Story

A Contributed Paper for the Special Libraries Association Annual Conference in  
Seattle  
June 2008

Larisa Brigevich  
Director, Global Research Library  
Franklin Templeton Investments

*This paper is dedicated to Franklin Templeton's Global Research Library, a team of forward thinking, results-driven, information professionals whose work makes a difference.*



Offshoring library jobs to India is a sensitive topic in the library circles, often generating images of downsizing or even closing corporate libraries in the U.S. But this is not always the case. As this paper demonstrates, librarians can turn challenges of globalization into opportunities for themselves and their clients. While managing multi-cultural libraries is a hard work that involves risks, the benefits are significant, including:

- More well-rounded teams with global mind-set and local perspectives.
- Better access to business critical information for globally dispersed clients.
- Expanded service hours due to different time zones.
- Collaboration that results in increased efficiency and productivity.
- Innovation.

In addition to professional growth, working on a global team can provide huge personal rewards and a way to contribute to building a better, more interconnected world. This paper concludes (see Appendix) with personal reflections and memorable moments shared by the U.S. and Mumbai librarians regarding how working on a global team has changed their lives.

# Building Business Case for Global Research Library

## Old Paradigm

Templeton Research Library was established in the mid 1990s to support the Global Equity Group (GEG), one of the many portfolio groups at Franklin Templeton Investments, a premier global investment company. Located in Ft. Lauderdale, Florida, the team of four staff members provided library services to research analysts and portfolio managers in Ft. Lauderdale (Florida), Nassau (Bahamas), Toronto (Canada), Edinburgh (Scotland), Melbourne (Australia), Singapore and Hong Kong.

Initially, the library was set up to organize and manage publications and paper-based archives. With the addition of professional librarians with MLS degrees in 1996-1997, the library re-focused its efforts from administrative services to value-added services, which included searches for different types of information using LexisNexis, First Call, Bloomberg and other online services. Within a few years, librarians completely transformed a primarily paper-based library into a high-tech world-class business information center.

Major accomplishments during this period include:

- Established close working relationships with clients. Reorganized library work processes to better align with and make it more relevant to investment research process.
- Developed professional library services with focus on customization and personalization.
- Championed transition from paper-based sources to online sources.
- Achieved annual cost savings of \$3 million through vendor contract consolidation worldwide.
- Pioneered customized Intranet-based LexisNexis search forms to simplify access to company, industry and country specific research and information.
- Actively participated in strategic technology-driven projects, such as Templeton Research Portal, Virtual Library and Document Repository, to provide seamless access to internal and external content from a single access point.
- Designed and implemented Marketing Literature Database, an online repository for sharing portfolio managers' investment insights.
- Relocated the library in Ft. Lauderdale to a new space to be in close proximity to library clients.

The library's innovative practices were recognized both internally and outside the organization. In 2003, the library was featured in *Information Outlook (Information Centers that Innovate: Six Librarians Provide Secrets to Success)* by Jill Konieczko and Cynthia Powell. *Information Outlook*, January/February 2003). Library Manager frequently made presentations at professional conferences, sharing the library's best practices and lesson learned with colleagues:

- *Making Content Work for the End Users or the Benefits of Customization*. Information Online, Sydney, Australia, 2005

- *Building Virtual Library for a Global Corporation*. Information Online, Sydney, Australia, 2005
- *Virtual Library: Managing Information Assets in a Global Company*. InfoToday, New York, 2003
- *New Uses for Content and New Business Model*. Leadership Symposium, Santa Fe, 2002
- *Online Opportunities and New Roles*. InfoToday, New York, 2001
- *Boosting Business: Electronic Resources*. Florida Library Association's Annual Conference, Tampa, 2000

National and international recognition from the library profession helped our librarians to increase visibility and clients' interest in professional library services. By 2004, the library began receiving requests from other groups in the organization who expressed strong interest in integrating library services in their research processes. At some point, librarians were no longer able to accommodate all who needed assistance with information research.

## **Driving Change**

Librarians saw the rapidly growing global demand for library services as an opportunity to take the library to the next level. In 2004, library leaders presented a conceptual framework for transitioning the library to a global platform, leveraging best practices developed by the library in Ft. Lauderdale for the benefit of all portfolio groups in Franklin Templeton. Key arguments in favor of a global library platform included:

- Increasing regulatory challenges and pressure to outperform markets put more stress on research analysts and portfolio managers than before. Investment professionals have to work harder and therefore need more tools and support.
- Diminished value of broker research led to increased importance of original in-house research.
- Information overload is getting worse. Many studies show that employees spend 16% of the workweek looking for information. 416 hours annually lost per person.
- Working with the Global Equity Group, librarians helped their clients save time and effort by providing highly relevant filtered information. The less time research analysts have to spend on searching for information, the more time they have to generate new investment ideas.
- Implemented on the global scale, library services will help to increase efficiency and productivity of investment professionals across the entire portfolio complex.

The first critical step towards a global library was the establishment of library services in San Mateo, California. A professional librarian was hired to support local groups. This move was a major breakthrough but it was still not enough to accommodate the growing global appetite for information and library services.

In the early 2000s, Franklin Templeton launched its India Global Sourcing Program to support the company's global growth. It was this program that allowed the library to add more librarians and expand its services globally.

## **India: Planning and Implementation**

### **Franklin Templeton's Global Sourcing Program**

Different companies use different strategies for sourcing offshore. Common business models include:

- Third party outsourcing
- Global sourcing (do-it-yourself)
- Joint ventures
- Hybrids

In the early stages of the offshore sourcing “movement”, cost-cutting was the main reason why companies moved their primarily back-office functions such as data entry, transaction processing and call centers to “lower-wage” countries. Today, in addition to cost reduction, more and more companies consider offshoring as the only way to better manage risks, enhance productivity, improve services and grow market share globally.

Franklin Templeton's global sourcing is a do-it-yourself model. The company has built a strong business presence in India since 1995, long before India was recognized as the next emerging economic power. Franklin Templeton has offices in 33 Indian cities including Mumbai, Hyderabad, Chennai, Bangalore, New Delhi and Kolkata. The main difference between global sourcing and outsourcing is that the company has total control of business strategy and priorities, proprietary technologies, processes and resources, human capital, etc., which can be leveraged across the company's many subsidiaries.

Availability of the Global Sourcing Program was a decisive factor for the library to move forward with a global growth plan. The Global Sourcing team provided administrative and technology support, and guided us through many planning and implementation phases. They helped to build a cost/benefit analysis and acquire funding, provided recruitment support and office space planning assistance. Experts with global connections, they put librarians in touch with the right people making transition easier.

### **Planning**

The planning phase took about 4 months. Library leaders had to think through and ask a lot of questions, including:

- Can India meet the library's staffing needs?
- Is there an adequate talent pool for research librarians?
- What processes will be moving to India?
- Which client groups will India librarians support?
- What is the time line?

- Where will the India library be located?
- What hours will librarians work?
- How will librarians in India and the U.S. communicate and collaborate?
- Will job descriptions in India be the same as U.S. librarians? Do they need to be translated for the Indian market?
- Is there anything within the job description that should be highlighted as a specialized skill?
- Will a library position in India map to an existing job or will it be a subset of a current job?
- How many positions are needed?
- What will be a reporting structure?
- Who will be a local supervisor?
- Which online sources will Indian librarians have access to?
- How will Indian librarians be trained?
- How will the quality of Indian librarians' work be assured?
- Who are the people in the India Services Company that library leaders need to partner with to ensure effectiveness of the India library operation?
- What are the roles and responsibilities of all participants involved in the Global Sourcing Program?
- How will success be measured?

## **Implementation**

Limited knowledge and uncertainty regarding what it is like to establish a library operation in India prompted library leaders to implement expansion in phases, starting with a three-person pilot. Mumbai was chosen as a library site for its status of India's financial capital. There are better chances finding librarians with the investment research background in Mumbai than in other Indian cities. Franklin Templeton had already had an office in Mumbai, which was a big plus. The hours of operation were set up from noon to 9 p.m. Mumbai Time, Monday through Friday.

It was decided that Indian librarians' responsibilities would be the same as those of U.S. librarians, and they would be engaged in the same processes, only handling it remotely, including ad hoc searches, industry and country information packages, current awareness and news alerts.

Closely adopted from the U.S. training program, learning activities for the Indian librarians were structured to facilitate gradual integration of new hires into key work processes. This way, they begin contributing within a month from a starting day by participating in basic research requests and gradually move towards fulfilling more complex requests. Mumbai librarians received extensive 6-month training and coaching from U.S. librarians and online information providers, including:

- Knowledge of library processes, procedures, tools, standards of performance, best practices, business insight.
- Knowledge of online sources such as LexisNexis, Factiva, Thomson One Analytics, Thomson Research, FactSet, Bloomberg, etc.

- Knowledge of different client groups and their investment processes and specific information needs.

To facilitate knowledge transfer and get Indian librarians up to speed, each librarian in Mumbai was paired with a librarian in the U.S. In the first couple of months, coaching sessions took place almost every day.

Commitment from the both sides ensured the pilot's successful outcome. As a result, a manager and 3 more librarians were added to the Mumbai team. Another librarian was added in New York to support local information needs. At the same time, the library's technology-based projects required higher level in-house expertise. The Technology Solutions team was established and two Information Specialists were hired in Mumbai to support this function.

In the first phase, the library focused on expanding its capacity for the purpose of rolling out existing library services to more clients. During the second phase, encouraged by the pilot's success, the focus shifted to process improvement and developing new services.

## **Key Challenges**

### **Recruitment: Finding Best Candidates**

The library found out that multinationals in the financial sector typically hired candidates with an MBA degree for business information centers in India. Contrary to this common practice, library leaders put an emphasis on professional research librarians or power searchers with equivalent experience, arguing that librarians are more well-rounded and adaptable for the job, and not limited by business models and theories of the formal business education.

Finding research librarians in India was the library's first biggest challenge. Back in 2005, Indian recruiters were more accustomed to deal with IT-related and call-center jobs and business analyst positions, being largely unfamiliar with a job market for librarians and information professionals. This required a lot of back and forth communication, clarification and patience. It is important not to assume that recruiters can fully understand job requirements outlined in a job description. Managers need to be proactive and educate recruiters about positions, clearly stating their expectations.

Interviewing candidates over the phone can be frustrating, especially when a candidate is calling on a mobile phone – all kinds of sound and static can make understanding very difficult. In addition, language differences and lack of face-to-face interaction make candidate screening a daunting task. Body language that plays an important role in “reading” people is not available and in its absence, interviewers have to ask a lot of probing questions, and rely on intuition.

## **Problem of Talent Retention**

India job market is turning into a war zone as supply of qualified workers cannot meet the exploding demand for best talent. Despite its over 1 billion population, India faces worker shortage, and the demand-supply gap is rapidly widening. In order to attract and retain employees, the companies need to raise salaries, as much as 15% - 20% per annum. With attrition rates in some sectors at nearly 40%, it is quite typical for Indian workers to expect quick and frequent promotions and 40% plus bonuses.

To boost retention, it is important to raise awareness among Indian colleagues about all benefits, not just salary compensation, that come with employment, including:

- Job security that comes with working at the established global company.
- Health insurance for employees and their families.
- Pension and investment plans.
- U.S. and Indian holidays. Family days.
- High caliber of colleagues to work with.
- Extensive training and development program. Advancement opportunities for talented employees.
- World class office buildings.

There are other effective ways to keep talent. Many job applicants indicated during job interviews that their current or previous jobs were not interesting enough and often boring. Also, many were not allowed to communicate directly with information requesters, only through supervisors. From the very beginning, the Mumbai librarians have been an integral part of the entire library group, and not as a peripheral office for handling lower-value assignments. They communicate directly with library clients and their search assignments do not differ in scope and complexity from assignments handled by the U.S. librarians.

## **Cultural Differences and Communication**

Too often, cultural differences are being blamed when things go wrong. Nevertheless, it is true that cultural misunderstandings can create substantial obstacles to effective teamwork. Both U.S. and Indian librarians attended mandatory cultural awareness programs that help to avoid business misunderstanding. But rather than focusing on differences, the team concentrates on what librarians have in common (passion for work, creative thinking, team assignments, etc.) and how to use everybody's unique skills, backgrounds and perspectives to achieve excellent results.

Language related differences is the most common source of complaints. English language fluency gives Indian workers a great deal of advantage over other emerging countries but a unique Indian accent often makes it difficult to understand, especially over the phone. Like with any other skill, people can train their ears, and after a couple of months understanding an accent becomes a non-issue. To learn faster about a new hire's speech and voice personality, some of the U.S. librarians put a picture of that person in front of them during a teleconference. It is important to note that the Indian colleagues face the same challenges and go through the same

adjustments. All team members are encouraged to and do ask questions to avoid misunderstanding.

Because Mumbai librarians contact internal clients directly, and most of the time it happens via email, writing skills are paramount. They receive intensive on-the-job training, both through online training courses and from colleagues. A particularly challenging task – even for some U.S. librarians - has been writing succinct source descriptions and annotations that help clients to quickly navigate through and identify the most important pieces of information in the information package. To mitigate that, virtual clinics have been set up where everybody can dial in and discuss specific issues. A lot of requests are time sensitive, and to increase process efficiency librarians can use communication templates that can be further customized for specific client needs.

In a virtual workplace, when face-to-face interaction is missing, misunderstanding and misinterpretation are common even among native English speakers. According to change management consultants, communicating new initiatives that involve change requires repetition up to 6 times. It is important to always follow up with team members either via email (discussion summary) or on the phone (questions and clarification) to ensure that everybody is on the same page. Another way to minimize misunderstanding is to have clearly defined and mutually accepted ground rules, processes and communication guidelines.

## **Key Success Factors**

### **High Performing Team**

**Strong bond:** The library's four locations are closely interconnected and interdependent. Librarians keep in touch and exchange thoughts and ideas through weekly staff meetings, regular project status meetings and simply by picking up a phone and calling a colleague.

The library team is relationship-oriented rather than task-oriented. Building relationships takes time. It takes deep conversation and it takes active listening. To build connections and understanding between U.S. and Indian librarians during the initial stage, a mentorship program was established, pairing each Mumbai librarian with a librarian in Ft. Lauderdale. This program played a key role in knowledge transfer and getting Mumbai librarians up to speed faster, but most importantly, it helped to establish relationships and build trust between the team members.

It's become a tradition to bring the team together for an annual library meeting held in the U.S. where people can meet face-to-face and talk with each other. Connecting on a personal level helps build trust and enhance relationships. People exchange their personal news such as births of babies, books they read, trips they take, etc. They support each other during hard times such as family losses. The team's Fun Committee sends out personalized birthday cards and party photos to celebrate memorable moments.

**Collaboration:** Like in the orchestra, music is incomplete if any one instrument is missing. Similarly, success of the library team largely depends on each person's contribution. The team's

relatively small size makes it agile and quick to address and solve timely issues. Mini-teams consisting U.S. and Mumbai librarians can be formed on the fly to handle a time sensitive request. Many of the library's key services and products are a result of close collaboration. For example, many librarians are involved in the production of the literature guides, a library newsletter, special research projects, etc.

**Culture of learning and sharing:** By the nature of business, librarians don't stop learning, and it is not just through vendor training. Every search may result in a discovery of a new source or web site or a great search string. Interaction with clients may produce interesting insights that can lead to development of a new service. Sharing knowledge with other team members has been a common practice. Team leaders keep the team informed about changes and trends that affect client groups. Team members regularly share best practices, client testimonies and lesson learned.

## **Achieving Superior Results through Innovation**

The library consistently receives high marks from its clients across many geographies for innovative services that help them do their job more effectively. The client testimonies list that librarians often use for marketing purposes is over 50 pages and keeps growing. Since 2005, when the India team was established, the number of information requests skyrocketed from 113 per month to 4260 per month in 2007.

Franklin Templeton has a strong client-focused culture. Librarians too are service-driven going far and beyond to meet and exceed clients expectations. Through creative use of technology, innovative approach and "can do" attitude, librarians transformed the way many Franklin Templeton's investment professionals across the globe access and use business information.

Some of the key innovations include:

### **Weekly Global News**

Distributed every Monday, this service helps investment professionals keep abreast of business and financial news and trends with little effort. Librarians compile headlines from five of the most popular business publications (Barron's, Economist, Business Week, Fortune, & Forbes) and distribute them via a single email with check boxes next to the headlines. While cover-to-cover perusal of multiple newspapers, magazines, and journals requires time, electronically distributed headlines are easy to scan and compare for trends, and one can easily request selected full-text articles from librarians by clicking on the Submit button. On a typical day, requests are filled within 24 hours.

### **Easy To Use Information Request Forms**

Most portfolio groups have dedicated librarians Ft. Lauderdale, San Mateo, New York and Mumbai whose work is closely aligned with the groups' specific goals and objectives. At the same time, librarians are a part of the global network and investment professionals in over 20

countries can leverage library expertise. To accommodate clients who don't have librarians on site, the library has created an easy way to submit information requests from anywhere in the world through interactive web-based forms for company, industry and country specific information. Available 24/7 on the library web page, the forms offer a list and samples of external sources the library can provide. Using check boxes, analysts can select sources they are most interested in, add comments and deadline, and submit a request within a few minutes.

## **From Information Retrieval to Professional Information Advice**

In the course of daily searches for individual analysts or portfolio managers, librarians come across of interesting and valuable research and news that may be of great interest to many people in the organization. Access to various types of information from hundreds of sources makes it easier for us to spot emerging trends or important events that influence investment world. Librarians share these findings with portfolio groups through the two literature recommendation services.

Interesting Finds is a monthly industry-focused compilation of noteworthy market, academic, government and broker research discovered by librarians. In FY07 the GRL distributed 2361 unique research pieces to more than 500 library clients. Nearly 100% of items listed on Interesting Finds have been requested at least once.

Literature guides focus on emerging trends or events. Most often, literature guides include academic and government research, independent research, news and articles from various business and trade publications, and broker research. Example of the most recent literature guides include: 2008 Outlook and Trends, Emerging and Frontier Markets, History of Global Financial Crisis, Subprime Impact, Accounting Standards and Changes, and Climate Change.

## **Developing Sector Expertise**

To better support the sector research process in various portfolio groups, the library has launched the Industry Knowledge Base Initiative, which focuses on developing industry-specific information research expertise among librarians in Mumbai.

As industry-specific information requests become more complex, fulfilling them requires new levels of skills. This can be achieved by developing each librarian as a specialist in particular sector(s). By dividing sector responsibilities, each librarian builds in-depth knowledge of industries in the assigned sector(s) and provides higher quality services. Other advantages include:

- Expert knowledge of industry-specific sources
- Ability to identify emerging industry trends and proactively alert industry analysts
- Increased relevancy of the industry information packages and industry news updates
- Faster request turnaround

## **Conclusion**

Globalization presents a tremendous opportunity for the library profession. In the 21<sup>st</sup> century, having global skills is key, and it will be difficult for librarians and information professionals to succeed in this more and more interconnected world unless they develop a high degree of confidence and comfort for working in the global workplace. We hope that the experience shared in this paper will be useful for many librarians who consider expanding to India or any other country. It is also our hope that this paper will open a dialog and trigger more discussions in the profession about best practices and lessons learned from implementing global library strategies.

## APPENDIX



Establishing a library branch in Mumbai three years ago was a big paradigm shift for both library staff and library clients. Today, we can proudly say that the creation of the U.S.-Mumbai team has been a great success. Read staff members' personal reflections and memorable moments regarding what it is like to work on a global team.



**QUESTIONS:**

**What does it mean to you to work on the US-India team?**

How has working on the US-India team changed your professional and personal life?

List three or more things you've learned from your colleagues in the other country.

What have been your most memorable experiences/events so far?

Name three or more challenges of working on the international virtual team.

How would you describe our team?

What do you think makes us successful?

QUESTION: What does it mean to you to work on the US-India team?



**Larisa Brigevich:** Globalization is an economic, political, social and cultural phenomenon changing the way people live, work, think and interact. As a global team, it feels great to be a part of this phenomenon and contribute in our small way to building a better and more interconnected world.



**Lisa Testa:** Overall, it is rewarding to work on an international team, despite some of the challenges that come with remote teams. Rewards come in the way of experiencing new and different perspectives or ideas from colleagues, as well as, knowing we have each other to turn to as a back-up whenever additional support is needed. Being part of a US-India team gives me a feeling of being part of a global family which, for some reason I can't quite explain, is very meaningful to me.



**Pramod Eknath Adsule:** Great learning opportunity and cross cultural understanding.





**Carol Rinaldi:** I love working on a team that spans the globe. The world has gotten smaller and smaller, and working with a cross-cultural team gives me many opportunities to examine the world from different perspectives. It forces me to think in ways that I may not previously have considered. As has been the case with other friends and colleagues who are from other countries, my India colleagues exhibit far more awareness of current events in the U.S. than is the reverse. It has been tremendous to hear first hand their views about political and economic events in the U.S., and how they see the events' impact on a broader scale. It brings the research we do every day in support of PMs and research analysts down to earth, and makes it very immediate.



**Prakash Doraswamy:** It has been a rewarding opportunity for me to work on global, intellectually challenging projects while enjoying a way of life based in India.



**Heather Astarita:** It has been very interesting and challenging. It has provided a lot of new learning experiences. I am proud to work on such a successful international team.



**Safique Hazarika:** I feel proud to be a part of such a diversified team which is geographically challenged, yet seamlessly contributes toward a common goal to provide information services to clients across the globe.



**Martin Wood: It means more.** More educated minds to find solutions with. More hands to contribute to a project. More teammates that I can partner with. More effort that can be put into getting results. More people to share successes with. More people to work together to overcome obstacles. It means what we do ends up being better and more innovative than it might be by one person alone.



**Jay Rawal:** Coping with different time-zone, collaborating with US team members on a regular basis for assigned task and enjoying their company even though miles away from them.





**Sangeeta Chauhan:** First thing that comes to my mind is confluence of two different cultures and talent. In a broader sense it also means time management, language adjustment, and understanding each other in the work environment.



**Anil Pal:** Working on the US-India team is very exciting as well as challenging because of cultural differences and different working styles. It is a great learning experience for me working with the U.S. team and I still have a lot to learn while working in coordination with the global team. Some of the things that I learnt here have helped me in my professional as well as personal life.

The U.S. team is very good with communication especially, Larisa, Lisa and Martin and I am lucky as I worked closely with Larisa in a one-to-one environment as I was one of the founding members of the Mumbai Team and so I learnt much more than anybody else from Larisa. I also got a chance to work with Martin and Lisa very closely and that provided me with an opportunity to improve myself in the area of communication. When I look back, I find myself altogether a different person when it comes to my communication skills.

I have seen a big difference in working style as it relates to the planning and completion of projects. While working with the US team, I have seen whatsoever they do; they focus much on planning but in India, our focus always remains on execution. Initially, it was difficult to understand why US team put so much effort in planning when we can execute the project easily and quickly. But later, I realized the importance of planning and this was a great learning experience for me.

Another difference was, replying to clients when I worked with an Indian company. Everybody wanted information instantly at my previous company and after sending an e-mail, the clients used to come to my desk in order to get their request completed quickly, sometimes within a few hours. It was very difficult to say no as they always threw their weight around to get their request completed but here at Franklin Templeton it is different, whatsoever we do, we do it in a planned way with only some exceptions.



**Vaibhav Rankhambe:** Feels great working on an international platform.



**Madhavi Gaitonde:** It has been a good experience working with the US-India Team, especially in the way of communication, getting acquainted with a new culture, and understanding each other as a team.



Establishing a library branch in Mumbai three years ago was a big paradigm shift for both library staff and library clients. Today, we can proudly say that the creation of the U.S.-Mumbai team has been a great success. Read staff members' personal reflections and memorable moments regarding what it is like to work on a global team.



**QUESTIONS:**

What does it mean to you to work on the US-India team?

**How has working on the US-India team changed your professional and personal life?**

List three or more things you've learned from your colleagues in the other country.

What have been your most memorable experiences/events so far?

Name three or more challenges of working on the international virtual team.

How would you describe our team?

What do you think makes us successful?

**QUESTION:** How has working on US-India team changed your professional and personal life?



**Larisa Brigeovich:** My life changed dramatically since the library's transition to a global platform three years ago. The work in general has become more challenging and demanding but at the same time very interesting and intellectually stimulating. It's been a tremendous learning opportunity enriching every aspect of my existence. Uniting colleagues around the world to achieve common goals together is very meaningful and energizing. Helping team members to grow and excel professionally is the most rewarding experience worth the time and effort that goes into it. Outside work, Indian themes have seamlessly intertwined with Russian and American ways of life. I can easily order dishes in Indian restaurants and occasionally cook malai kofta and korma at home. Beautifully embroidered kurtas are a part of my wardrobe. When I need to calm down, I listen to ghazals, special songs given to me by Pramod. It is normal for me to read Indian books, news, and watch Indian movies. I strongly recommend Shantaram by David Gregory Roberts and Namesake movie by Mira Nair. I have a few cherished Indian possessions at home including an exquisite Tree of Life Kashmir rug and a hand-crafted bed spread embellished with little round mirrors that dazzle when exposed to light. On special occasions I wear a necklace set made for me by Prakash's wife Vani. I have mehendi substitute set from Sangeeta to decorate hands in intricate patterns – I am still waiting for the right time to show it off.



**Lisa Testa:** On a personal level, sharing the love of music has been a plus for me working on a US-India team. I have shared my favorite flamenco music and in return have received some of my Indian colleague's favorite Indian music.

On a professional level, I have had the opportunity to mentor and develop some Indian colleagues and this has been a rewarding and important learning experience for me.



**Pramod Eknath Adsule:** Global platform helps to groom ourselves professionally; professional growth helps to raise personal life standards.



**Carol Rinaldi:** Working with the India team has made me more aware of the global nature of our company and makes me pay attention to events in other parts of the world. As a small example, when there is a flood in Mumbai, I immediately wonder what impact it might be having on our coworkers--are they safe? Do they still have transportation? How are they coping? It also makes me aware of the importance of a business continuity plan.



**Prakash Doraswamy:** Demonstrate my mettle on a global pitch, developing subject knowledge, which has been extremely beneficial and has been a worthwhile experience till now.



**Heather Astarita:** In school I studied International Relations, but haven't had an opportunity until now to work in an international environment and apply some of what I learned.



**Safique Hazarika:** With GRL and prior to GRL I have more than three years experience in a US-India set up. This has a significant impact on the overall personality as I become more thoughtful and logical. With this I am able to lead both my professional and personal life better than ever before.



**Martin Wood:** A day does not go by that I don't learn something new and discover something that amazes me. It may be something I see in a colleague, who comes up with a new idea, approaches a problem from a fresh perspective, or simply inspires someone else to do something great. Sometimes it is something I discover in myself. Because I believe we have built an ongoing concern as a team, I find myself reflecting on my days, and always looking for that next step to make sure that we remain an ongoing concern. I spend less time on those things that I cannot change, and more on those things that I can.



**Jay Rawal:** My communication skills have improved to a great extent which further helps me in dealing people both professionally and personally with confidence; I was a bit of an introvert but after interacting with US colleagues on a daily basis, I've become more open in terms of communication.



**Sangeeta Chauhan:** Value addition to responsibility, adaptability in professional front. In personal front the interaction with different people has boosted my confidence and level of social awareness.



**Anil Pal:** As far as professional life is concerned, I learnt a lot from US team and some of the examples are planning, communication, and how to give feedback and all of these things have had an impact on my personal life as well. For example, you can't do anything well without proper planning but previously, I used to focus more on the execution of a project/work and less on planning.

Communication is such a vital thing in every aspect of work, whether it is professionally or personally, you can't survive in the real world without being a good communicator.



**Vaibhav Rankhambe:** Improved my communicational skills.



**Madhavi Gaitonde:** While working on US-India team, I have become more optimistic, confident, and responsible and it has made me realize the importance of time - time management while meeting deadlines.



Establishing a library branch in Mumbai three years ago was a big paradigm shift for both library staff and library clients. Today, we can proudly say that the creation of the U.S.-Mumbai team has been a great success. Read staff members' personal reflections and memorable moments regarding what it is like to work on a global team.



**QUESTIONS:**

What does it mean to you to work on the US-India team?  
How has working on the US-India team changed your professional and personal life?

**List three or more things you've learned from your colleagues in the other country.**

What have been your most memorable experiences/events so far?

Name three or more challenges of working on the international virtual team.

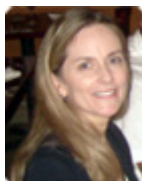
How would you describe our team?

What do you think makes us successful?

QUESTION: List three or more things you've learned from your colleagues in the other country.



**Larisa Brigeovich:** I've learned to be a better communicator, especially listening skills as it is a tremendous challenge to discuss and understand concepts over the phone. I found many similarities between India and Russia (in the movie *Namesake*, the main character got his name Gogol in honor of the great Russian writer), which I believe made it easier for me to connect with my Indian friends. I learned a lot – and still learning - about Indian history and culture, which makes me grow as a person. Perhaps the most profound was my experience of Bharathanatya, a classical Indian dance from which Spanish Flamenco dance was supposedly originated. I learned that Lord Shiva created this world simply by the act of dancing. This reminded me what Maurice Bejart, a brilliant Swiss choreographer, said once about dancing: *“When people dance, there are no wars”*.



**Lisa Testa:** I have learned more about Indian culture, it's richness in history, architecture, religion, food, and jewelry! I've gained some local perspective on some of their leaders and government. I've gained a better sense of what the city of Mumbai is like.



**Pramod Eknath Adsule:**  
Collaboration, participation, presentation and also language skills.





**Carol Rinaldi:** First, I have learned how effective direct communication can be; our India coworkers are not afraid to pick up the phone and call me whenever we are working on a project and they have a question that cannot be resolved through email. A short conversation by phone will generally clarify the issue in very little time.

Secondly, our colleagues in India have also been very generous in sharing pictures of the Mumbai campus and of team events in Mumbai. It helps to see the pictures and hear from them about the environment in Mumbai because it strengthens the connection between our various locations.

Finally, our colleagues have visited the Fort Lauderdale office a couple of times, and each time they brought homemade snacks from home, which they generously share with their U.S. team members. Indian food has always been a favorite of mine, but I have learned how delicious authentic and homemade Indian cuisine can be!



**Prakash Doraswamy:** I have been able to improve my communication, organization and motivational skills.



**Heather Astarita:** I have learned a lot about our different communication styles. India has a very friendly, family-oriented culture. I have learned a lot in general about life in India, their culture and the challenges and opportunities that the country faces.



**Safique Hazarika:**

- Communicate effectively and confidently
- Separate professional life from personal – respect for individual skills and difference
- Eye for details and work in a organized manner



**Martin Wood:**

**Patience:** When you are working with a team of people of which half are on the opposite side of the world, you have to cultivate patience in order to see things through. Meetings can't always take place on the same day they are scheduled. Assignments can't always be completed by the end of business the same day. Sometimes, you have to be patient to let great things take place.

**Tenacity:** Nothing is ever easy. Things that are built to be lasting, memorable icons of an individual, a team, and a company come together through planning, discipline, and a steadfast ability to never give up. Great things are not achieved by shying away from obstacles; they are achieved by taking advantage of those obstacles, learning from them,

developing partnerships, and moving to the next stage armed with more knowledge, skill, and experience than the last.

**Knowledge is Entertaining:** Our colleagues in Mumbai bring a different perspective to our group. Though we certainly have things in common, we often have different approaches to the challenges we face. Learning from each other, coupled with what we learn from the work itself, provides for an entertaining learning experience for all. As Walt Disney said, *“We have always tried to be guided by the basic idea that, in the discovery of knowledge, there is great entertainment.”*



**Jay Rawal:** Email etiquette, verbal communication skill, their work ethics, and their culture.



**Sangeeta Chauhan:** Being precise and to the point in your verbal as well as written communication. Professionalism, overall presentation and demonstration of your capability in front of people (in meeting/ discussions).



**Anil Pal:**

While working with a Global team, I have learnt a lot of things, a few are given below:

- Planning
- How to communicate in Global Team
- To be generous in motivation
- Taking criticism constructively



**Vaibhav Rankhambe:**

- Effective communications
- Timeliness
- Being specific



**Madhavi Gaitonde:** I learned that when in doubt, we need to ask questions, clarify things on time. Give yourself sufficient timelines and to go the extra mile – occasionally. Learn to say NO when piled up with work and you can't take it anymore, be frank enough, rather than having so many things on your plate and not doing enough justice to any.



Establishing a library branch in Mumbai three years ago was a big paradigm shift for both library staff and library clients. Today, we can proudly say that the creation of the U.S.-Mumbai team has been a great success. Read staff members' personal reflections and memorable moments regarding what it is like to work on a global team.



**QUESTIONS:**

What does it mean to you to work on the US-India team?  
How has working on the US-India team changed your professional and personal life?  
List three or more things you've learned from your colleagues in the other country.

**What have been your most memorable experiences/events so far?**

Name three or more challenges of working on the international virtual team.  
How would you describe our team?  
What do you think makes us successful?

QUESTION: What have been your most memorable experiences/events so far?



**Larisa Brigeovich:** There are so many... Thanks to Alok Sethi, I was lucky to be invited to two Arangetrams, which is a solo performance by a graduating Bharathanatya student. It was an experience of a life time, truly eye opening. An interactive tour of Mumbai guided by Anil, Prakash and Pramod during my first visit was a lot of fun. Yoga sessions with an authentic yoga instructor arranged by Anil – it's unbelievable what we can do with our bodies! Night viewing of Golconda with Manmeet Bedi was magical. During busy days in Mumbai, we shared meals including aloo paratha prepared especially for me by Anil's wife Renu and sweets from Madhavi's mother (who, sadly, is no longer with us) – that was very special. On my first night in Mumbai, Girish Karnwal arranged for dinner at Out of the Blue, a trendy restaurant where East meets West; and over the generous portions of westernized dishes – Girish's successful attempt to make transition easy for me - we all felt reconnected and united. Hearing Jay singing; later we exchanged music that we listen to daily. I still keep a red ribbon of friendship that Vaibhav tied around my and other librarians' wrists during my last day, as a symbol of our connection.



**Lisa Testa:** My favorite experiences with my Indian colleagues are when we are able to meet in person during our Librarian's Onsite meetings. Though we keep busy with work, planning, T&D and team building activities, we seize the time to go out and eat, sightsee around Ft. Lauderdale, eat, shop, eat, talk, eat....It is so nice to have the opportunity to socialize and be with our remote colleagues out-of-context from the work environment and on a more personal level. I believe it really helps to enhance our ability to connect and communicate better with each other.





**Pramod Eknath Adsule:** Trip to the U.S. office and meeting with my team members, meeting with Cindy Sweeting and Phil Portera, and Family day celebration at Alok's place.



**Carol Rinaldi:** Meeting our colleagues face-to-face at our annual meetings have been the most memorable experiences for me. I have a large van, and one day I was transporting several of my India colleagues to a staff luncheon; on the way to the restaurant, they were marveling at the size of the vehicle, and we had an interesting discussion about the size and prices of cars available in India. After that lunch, we continued to have many great discussions contrasting and comparing life in India and the United States, and I learned a great deal.

(Later, after my colleagues had returned to Mumbai, they sent us snapshots of their trip to Fort Lauderdale. Along with the pictures of the ocean and staff outings and events, I was so surprised to see two pictures of my van!)



**Prakash Doraswamy:** Professionally all my experiences are incredible. But the most memorable I remember is a personal interaction with Carol on my second trip to U.S. I was looking for a stethoscope by Littman, which I wanted to give my family doctor who is also a close friend.

I did everything to locate it around FTL. I explored all shopping malls to find it. I did a search on the internet to locate it, but in vain. Almost 12 days passed and it was our last working day in office. I lost all hopes of finding it. Then in the evening Carol came to me with an address to find it and told me, she would accompany me to the place. We drove many miles to the store and after reaching there, we discovered the location of the store had changed. I gave up the thought of buying it. But then Carol insisted that we should try one more time. We then went there, and eventually we located the shop and I was able to buy the stethoscope.

Although this could be an ordinary instance it touched me a lot. There was no need for Carol to take the effort to find the place on the internet, print the route map, accompany me so far and then again take the effort to relocate the shop... this was indeed a memorable event for me!



**Heather Astarita:** The annual meetings.





**Safique Hazarika:** When I had to give a presentation on GRL to Jenny Bolt and Alok just three days after joining and was able to complete it on a happy note with GRL stalwarts.



**Martin Wood:** Our annual team meetings, where we have had the opportunity to interact face-to-face, have of course been highlights. Throughout our interactions the human element of working, conversing, and sharing together has left an impression on all of us. From going to the Miami Seaquarium to supporting each other through family tragedies, it is very touching to know that we are always on the minds of each other, even when we are spread out half a world away.



**Sangeeta Chauhan:** A trip by Larisa & Phil to our Mumbai office.



**Jay Rawal:** Joining GRL, working with Ashish during his short span with me, Larisa's visit to Mumbai, interaction with Phil Portera on his short visit to India, NHO in Hyderabad, having a supervisor in the form of Martin is like a dream come true.



**Anil Pal:** One of my most memorable experiences was working with Martin. It was such a pleasure to work with him and the experience gave me confidence in doing my routine job without any hiccups. Whenever I was not able to complete my work, he always helped me without even asking for help. It shows that he understood about when and where I needed help. I also like his style of providing feedback; he never tells me that I should do things "this way" or "that way". He always relates how he does things and if I like that way, then to go ahead with it; if not, I have the freedom to make any changes that make me more comfortable in completing the work.

I worked with three managers before working with Larisa and I have found everybody threw their weight around to get work done. Larisa is different. She never asks me to do the things without convincing me why she wants me to do the work in a certain way.





**Vaibhav Rankhambe:**

- FT's 60th year anniversary party where we got to see a cheerful "Hi/Hello" from every location across the globe.
- Hug by Larisa before her departure back to U.S.



Establishing a library branch in Mumbai three years ago was a big paradigm shift for both library staff and library clients. Today, we can proudly say that the creation of the U.S.-Mumbai team has been a great success. Read staff members' personal reflections and memorable moments regarding what it is like to work on a global team.



**QUESTIONS:**

What does it mean to you to work on the US-India team?

How has working on the US-India team changed your professional and personal life?

List three or more things you've learned from your colleagues in the other country.

What have been your most memorable experiences/events so far?

**Name three or more challenges of working on the international virtual team.**

How would you describe our team?

What do you think makes us successful?

QUESTION: Name three or more challenges of working on the international virtual team.



**Larisa Brigevich:** Virtual interaction by its nature creates ground for misunderstanding and it takes longer to achieve understanding and ensure that everybody is on the same page. We've learned to watch for signs of misunderstanding and address it promptly. Not being physically under the same roof means that we miss human contact and non-verbal communications that can provide clues to how our colleagues feel. Remote management requires more work, more awareness, and more proactive follow up.



**Lisa Testa:** **Communication**, of course, and the **time zone** differences, sometimes make it a challenge for us to work on many of the collaborative projects and initiatives that the library is regularly engaged in. Quick email clarifications sometimes have to be made in lieu of a live discussion over the phone which has to wait until the next day. To deal with this ever present challenge faced by remote co-workers, we have established and encouraged the practice of going straight to the source to ask questions communicating directly with anyone on the team as needed. We know through experience that having a flat structure of communication improves communication. We also hold regularly scheduled meetings, and often, stay late or come in early to have the opportunity to communicate live with each other.

The third challenge has to do with subtle **cultural differences** in communication style as well. While it may be considered to be impolite to disagree or challenge an issue directly for one culture and acceptable for another, as a team we have focused on building professional business communication styles through both training and mentoring.





**Pramod Eknath Adsule:** Coping with time zone differences and communication.



**Carol Rinaldi:** The collaborative nature of our team means that good communication is paramount. We take communication for granted when we work in the same physical location, and we are constantly discovering all the ways that information can be interpreted when we are using email and other technology forms of communication. It's easy to get off track. Without the benefit of face-to-face meetings, repetition is often needed, and more discussion and elaboration. It is also very important to be considerate and cognizant of the time differences around the globe when scheduling team meetings and training.



**Prakash Doraswamy:** Various styles of working!



**Heather Astarita:** Scheduling - we have a limited timeframe in which we can meet each day, communication challenges, and we can only meet in person or get together as a team once a year.



**Safique Hazarika:**

- Gap on communications – chances of misunderstanding while only verbal or written content is available to interpret
- Cultural difference – tendency to perceive things as per own culture rather than neutrally
- Difficult to address urgent situations, delay in decisions making



**Martin Wood:**

**Lack of face-to-face interactivity:** So much of what we learn about the world and each other is through observation. Although not impossible, it is much more challenging trying to partner with colleagues on the other side of the globe to achieve great things. We miss out on learning more from each other when we are forced to rely primarily on that which is only spoken or written.

**Time:** President John F. Kennedy said, “*We must use time as a tool, not as a couch.*” Our global team has a limited amount of time to work together each day, each week, and must take advantage of that time to accomplish great things. As John Steinbeck said, “*Time is the only critic without ambition.*” We must make the most of what little bit we have.

**Communication:** Wrapped up in all aspects of our work, being able to communicate effectively is at the heart of our progress. Although we push each other to communicate, it is always a challenge in a global environment.



**Jay Rawal:** Adjusting to time zone differences and understanding the work environment and ascent.



**Sangeeta Chauhan:** All the communication is expected through phone. So at times, expressing yourself becomes difficult. We have to co-ordinate together to successfully complete our project, which includes overcoming the time lag. Sometime it becomes difficult to maintain personal touch in communication with somebody whom you have never met.



**Anil Pal:**

- Communication
- Resolution of disagreements
- Asking the right questions with right attitude



**Vaibhav Rankhambe:**

- Time gap
- Absence of face-to-face communication
- Less popularity among the organization



**Madhavi Gaitonde:** Co-coordinating with the entire team, coming out with new innovative ideas, maintaining quality and accuracy in terms of work, respect the time of others, thinking that every task is of equal importance and be disciplined.



Establishing a library branch in Mumbai three years ago was a big paradigm shift for both library staff and library clients. Today, we can proudly say that the creation of the U.S.-Mumbai team has been a great success. Read staff members' personal reflections and memorable moments regarding what it is like to work on a global team.



**QUESTIONS:**

What does it mean to you to work on the US-India team?

How has working on the US-India team changed your professional and personal life?

List three or more things you've learned from your colleagues in the other country.

What have been your most memorable experiences/events so far?

Name three or more challenges of working on the international virtual team.

**How would you describe our team?**

What do you think makes us successful?

QUESTION: How would you describe our team?



**Larisa Brigevich:** This has been the best team I've ever worked with. Hard working, innovative, passionate, very engaged, connected, overachievers, care about clients and colleagues, pleasure to work and fun to be with.



**Lisa Testa:** Kind, sincere, hard-working, funny, intelligent, talented, and musical.



**Pramod Eknath Adsule:** Process oriented team.





**Carol Rinaldi:** Intelligent, innovative, dedicated, hardworking, caring, and fun.



**Prakash Doraswamy:** As a team we are successful in all our operations. We are equally responsible for what we have achieved till now. I strongly feel we can add extra effort to build an extraordinary team with extraordinary results.



**Heather Astarita:** The first word that comes to mind is “team”. Driven, innovative, intelligent, spirited.



**Safique Hazarika:** A team with indomitable desire to take FT investment management information research to the next level.



**Martin Wood: Family:** We share in our successes and learn from our failures. We celebrate our victories and recoup our losses. We help each other when the world leans harder on us than we can push back by ourselves. We have celebrated births, and have mourned deaths.



**Jay Rawal:**

- Rocking
- Creative
- Passionate
- Workaholic



**Sangeeta Chauhan:** I work in a team which strives for excellence. Our team serves to set an excellent example of co-ordination, team spirit, innovation and creativity. Each member gets to learn a lot from one another, which is the basic team-stabilizing factor.



**Anil Pal:** Before FT, I worked with two other organizations but I found this team the most energetic, imaginative, creative and innovative. This team always tries to do something different in their day to day work and that is why we are different.

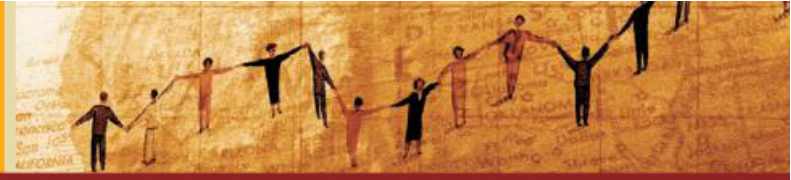


**Vaibhav Rankhambe:** GRL rocks!!!



**Madhavi Gaitonde:** I would describe our team as creative, understanding, and connected. Overall, GRL rocks!!!





Establishing a library branch in Mumbai three years ago was a big paradigm shift for both library staff and library clients. Today, we can proudly say that the creation of the U.S.-Mumbai team has been a great success. Read staff members' personal reflections and memorable moments regarding what it is like to work on a global team.



**QUESTIONS:**

- What does it mean to you to work on the US-India team?
  - How has working on the US-India team changed your professional and personal life?
  - List three or more things you've learned from your colleagues in the other country.
  - What have been your most memorable experiences/events so far?
  - Name three or more challenges of working on the international virtual team.
  - How would you describe our team?
- What do you think makes us successful?**

QUESTION: What do you think makes us successful?



**Larisa Brigevich:** The sense of togetherness. We are united by common goals and values. Each person on the team is important and without his or her contribution our success could not have been possible. We are a very diverse team, each bringing to the table different experiences and skills. Diversity also means different opinions and disagreements but because we respect and trust each other, we can address tough issues openly and constructively. We always look for better ways to support research analysts and portfolio managers and they can always count on us.



**Lisa Testa:** We sincerely like each other and enjoy working with each other both individually and as a team. As a team we have carefully planned for and invested time to train and mentor all new hires to bring them up to speed and to make them feel that they are part of the team. New hires realize our commitment towards them and our ability to provide them with the knowledge and tools to be successful in their position. We assign projects and initiatives between US/Mumbai team members to fully integrate and engage the team. This process helps remote team members to interact and get to know each other.



**Pramod Eknath Adsule:** Correctly spotting new investment trends and proactively supporting research and information to the global investment management teams.





**Carol Rinaldi:** I see many of the elements of success in our team, but I think two of the most important are the tremendous respect we have for each other and an openness to looking at different points of view. It doesn't hurt, either, to have visionary leaders who consistently motivate every member of the team constantly look for new opportunities to add value and to grow beyond our own expectations.



**Prakash Doraswamy:** We have been through roller coaster ride in the past while consistently delivering services. Real partnerships with clients and team members have greatly contributed to the team's success.



**Heather Astarita:** We work together as a team and keep the team's best interests in mind. There aren't any individuals who want to be "the star" at the expense of the team. We have a common goal of wanting to keep learning and improving the work we do for our clients.



**Safique Hazarika:**

- Ability to assess information need of our clients accurately
- Provide quality output
- Maintain strong coordination between US-India
- Work as one GRL team with strong team spirit knocking down all challenges of working in a virtual environment



**Martin Wood:** We persevere by always remembering the human element, and refusing to settle with less than desirable results when we know better can be achieved. I believe both of those things are a large part of what makes our team successful.



**Jay Rawal:** The services we provide and the way in which they are provided make us count globally.





**Sangeeta Chauhan:** Our constant efforts to serve our clients in a better way, and at the same time maintaining transparency in our work makes us different from other organizations.



**Anil Pal:**

- Confidence to disagree on critical issues.
- Good coordination while working on projects.
- Thinking differently on different issues.



**Vaibhav Rankhambe:** Rocking team, strongly bonded, with healthy communication, understanding, and commitment.



**Madhavi Gaitonde:** They say trust is promoted by delegation, transparency and encouraging ideas. And I think that our team is aware of their individual responsibilities, which has helped us achieve our goals by keeping our clients happy. In other words, team members should not work together but play together in order to function more effectively as a team. And lastly, good communication has been the lifeblood of the team.