

There's an Elephant in the room, but your staff isn't: Connecting and collaborating with your off-shore team

A Contributed Paper for the Special Libraries Association Annual Conference
in San Diego

June 2013

Helen Poot

Manager, Business Research
PricewaterhouseCoopers

Outsourcing research is here to stay, whether through offshoring, nearshoring, or inshoring. Managers are running departments where the bulk of their staff or team is somewhere else, in captive or outsourced organizations. Outsell found in 2010 that about 20% of secondary research was outsourced or offshored, with another 6% planning to do so.ⁱ Despite this high number, the literature around this new model is limited, reminding us of the idiom, "There's an elephant in the room." We have issues to discuss, but perhaps we'd rather not. How do you build a team from a distance, particularly when team members come with different cultures, perspectives and objectives? How do you ensure high quality, timely responses across time zones and geography? When do you "let go", and allow your offshore team to respond more independently?

Over the past five years, I've had the opportunity to create and manage both captive and outsourced research teams, both in India. In this paper, I'd like to share some of the practices which worked, and some of the challenges creating a collaborative, productive, and effective offshore team.

Some Mechanics

Creating a working, collaborative relationship with your team is the foundation of any successful outsourced operation. Time zones, language differences, the transactional nature of an outsourcing arrangement, all contribute to a "them versus us" relationship. Everything we suggest requires that you make full, complete, and creative use of the technology available to you within your organization.

- Use instant messaging or chat to converse with your team, to solicit and respond to questions. Be as accessible to them as you would be if they were in the cubicle or desk next to you.
- Schedule virtual meetings on a daily or weekly basis to discuss current projects and to plan for upcoming ones. Use these to provide additional trainings, and to gather suggestions and feedback.
- Utilize any collaboration platforms (eg: Sharepoint) available to you
- Conduct surveys of the team and their management to gather feedback
- If budget allows, make on-site visits

If you focus on the relationship and common goals, the deliverables will follow. Remember that these are useful mechanics; do not forget to inject into them as much as possible your own personality or touch. Make sure that you use these tools in a way that conveys who you are. Provide a flavor of your culture and language, but not so much that you create misunderstandings.

- Don't avoid slang or colloquialisms, but flag them. We want our team to be comfortable with the way our clients speak so their responses will be on target and clear. We also want our clients to feel comfortable communicating with us. In exchanges with our offshore team, I try to use quotation marks around any idioms and slang. It helps the team learn, and would probably make our eighth-grade English teachers happy as well.
- Recognize but embrace the difference. Try to understand your offshore team's colloquialisms and expressions. Your conversations and exchanges will be more relaxed and collaborative. My lead manager in India, for example, regularly responded "Hmmm", in our instant message conversations. For quite some time I felt he was hesitating, and not necessarily agreeing with what I'd said. Then I learned that "hmmm" to him indicated a casual "yes". Now we jokingly ask for clarification: Is this an Indian "hmmm", or an American one?

Scaffolding: How We Got Here

For context, let me describe the organizational model we developed. We have a small U.S. team, supported by a larger offshore team. That team consists of one lead manager, two midlevel managers who also act as quality assurance leads, and about ten researchers.

To build our global team, as with any large construction project, we needed a scaffold, a structure to hold the nascent organization in place as components were added.

Scaffolding is in fact one of the key concepts in early education: you provide structure and support as tasks and concepts are introduced, and gradually remove them as these tasks and concepts are learned. Scaffolding tools may include guides, templates, and coaching.

Scaffolding is also often discussed in the context of problem-based learning. And, what is the true essence of a research center, but as the "go to place" for clients and constituents to resolve their research problems?

This scaffolding approach has worked extremely well in our development of an offshore research center. The basic progression was as follows:

Stage One: This is What We Do

We provided an overview of the firm and its value proposition to its clients. This provided our team with the proper context for conducting research. We also instructed the team in the mechanics of our workflow tools: how requests were submitted, assigned and answered.

We presented detailed instruction on the most common types of research questions: company profiles, industry overviews, best practices, and IT research. For each we introduced the primary research tools used to answer them, and provided in-depth training in their use.

Stage Two: Let's see what we can do.

In this second stage, basic requests were assigned to the offshore researchers, but were closely managed by the U.S. team. The basic workflow was as follows:

1. Research requests were first discussed in a group setting, ensuring the requestors' needs were understood and initial search strategies agreed upon. Assignments were given to individual researchers
2. The instructor coached individual researchers throughout the research process.
3. In a group, team members discussed their individual results and any problems they had encountered; the instructor critiqued their approach, and other researchers from the outsourcing team offered suggestions as well.
4. Individual researchers drafted responses to their assigned requests.
5. The instructor edited these responses and sent them on to the original requesters, copying the researcher on those responses.
6. Researchers compared their drafted responses with the final versions, and discussed differences with the instructor.

The fact that we were on-site with our contract team during this stage was extremely helpful; we were able to use assignments which were real and real-time, without compromising the results our constituents would receive. This mentoring stage can be conducted at a distance, but may require some "staged" requests initially which are not to be sent out, as well as some creative scheduling given time zone differences.

By the time we returned to the U.S., we were ready to remove in-person, real-time coaching from our instructional scaffold, relying instead on virtual, distance-learning tools.

Stage Three: Assess, Assign, Review, and Deliver

In this next stage, each request submitted to the department was first assessed by senior U.S. researchers as to whether or not it could be handled by the offshore team. Responsibility for more complex types of questions, as well as for those requiring more specialized data bases, was still retained by the U.S. staff.

Requests appropriate for the offshore team were posted in our workflow tool as "Contractor: To be assigned". A U.S. researcher would be flagged as the "lead" for each request. The U.S. lead would post any specific suggestions or recommendations on how to proceed to the research request record.

The offshore manager would assign requests to specific researchers, and provide initial quality review of draft responses, which were then posted in a shared workspace. At this point it was flagged for review and edit by the U.S. team. The U.S. team would still send out the actual response.

The offshore researcher who had drafted the initial draft would be copied on the final response, which provided a model of the best, most appropriate response. In addition, comments and feedback were posted to the research request record. Quality ratings were assigned based on both the accuracy and completeness of the response content, as well as the language and presentation of the email "cover letter".

Stage Four: Assess, Assign, and Follow Up if Necessary

Six months into the process, our contract team was handling about 55% of our requests. The time required to complete the requests was still longer than our seasoned U.S. team would have needed, but well within the margin of acceptability, especially given the buffer that the almost eleven-hour time difference provided. We were also able to expand our portfolio of offerings to include detailed company briefings and data pulls which we had not had the bandwidth to provide before. Since we started outsourcing, our overall volume has doubled.

At this stage it became evident that some of our offshore researchers no longer needed all the supports we were providing. Their responses no longer needed review by the U.S. leads following the "QA" provided by the offshore manager.

In another three months, the contract team was handling 65% of our requests, and our overall volume continued to grow. We determined that results from the offshore team as a whole were solid enough that most responses could be sent out without initial U.S. review. This significantly improved the speed of our responses, as time differences and the actual time required to review and edit each response could cause significant delays.

High profile requests would still be reviewed before being sent out. We would still follow a scaffolded approach for assignments which required new skills or approaches.

As the schedules of the U.S. leads permitted, we still reviewed the rest of the responses, typically within 48 hours, sending out any additional materials necessary. We still assigned a quality rating to each response.

We found at this point that the offshore research team rarely provided "bad" or incorrect information; rather, theirs were occasional "sins of omission", where a source was overlooked, or a particular element of the request missed. In these cases we found that

requesters were happy to receive the lion's share of the results quickly, and to receive additional, follow-on material later (later being, actually, in less than 48 hours). There was actually a sense that we were giving ongoing, more complete attention to their needs.

Stage Five: Assess, and Follow Up if Necessary

About 15 months after the launch of our outsourced Research Center, almost all support beams were removed from our training scaffold. The quality of the team's responses was high enough, and consistent enough, that we felt immediate review was no longer necessary. Feedback would be gathered from requesters themselves, on a periodic, ad hoc basis, as is done with our U.S.-based team. This has afforded our lean U.S. team the ability to focus on creating new research opportunities for the team at large, and to address higher level, more value-added requests.

Stage Six: True Collaboration

Almost 70% of requests to our Research Center are now handled offshore. The volume of requests we handle has more than doubled since the offshoring process began.

The decision to handle a request on- or offshore is based on timing (is it due before the offshore team comes online?), the sources required (is this source available to the offshore team?) and the level of research complexity (does it require the particular expertise of a seasoned researcher?) Managing the queue is shared by both teams, based on who is "on duty." This is in turn simply a function of schedules and time zones. The fact that the offshore team can now take requests directly allows us to respond more quickly, as we no longer need to wait for the U.S. team to come in to make assignments.

Both teams are working collaboratively to raise the research support we provide to the next level. This is not to say that we have abandoned formal training. We hold monthly training videoconferences covering such topics as specific industry overviews and the best sources for researching them.

Much of what we provide now is informal "modelling" of what to do in any given situation. While perhaps 80% of our research questions may be covered in formal training sessions, those pesky esoteric, uncommon questions still persist, as well as those for which the answer is, "there is no answer." For these, a searchable archive of our responses has proven invaluable. We also maintain a set of standard responses to common questions, including those where the only response is to refer the requester to someone else. This has been extremely helpful when the offshore resource, for cultural or other reasons, is not comfortable with pushing back on a request or not sending something. Our clients do not have the time to work through marginally tangential material; everything must be on target

and relevant. We will also copy the offshore team on our responses to unusual or challenging requests which by themselves would not have fit into or warranted a training session.

The volume and complexity of our requests increased to the point that we were concerned about being able to maintain what we had achieved, as well as being able to expand and enhance our services further. We respond to the majority of our requests in 48 hours or less. At the same time we are now receiving more large requests which require the input of multiple researchers to complete on time. Our success has become our next challenge.

Provide a clear structure: the checklist

Atul Gawande, a surgeon at Brigham and Women's Hospital in Boston, and a regular contributor to the *New Yorker*, has written a great deal on process improvement, primarily in medicine, but also in general. He noted in his *Checklist Manifesto* that "...We have accumulated stupendous know-how. We have put it into the hands of some of the most highly trained, highly skilled, and hardworking people in our society. And, with it, they have accomplished extraordinary things. Nonetheless, that know how is often unmanageable ... And the reason is increasingly evident: the volume and complexity of what we know has exceeded our individual ability to deliver its benefits correctly, safely, or reliably."ⁱⁱⁱ

Gawande could certainly be describing the outsourced, dispersed corporate research center fielding dozens of questions a day with turnaround times of 24 hours or less.

His response: the checklist.

We created a standard checklist for the most common types of requests. The Checklist has two parts: Research and Response. The Research section (Figure 1) covers the most common types of requests: private and public company profiles, industry analysis, executive biographies. For each request type, appropriate and available sources are listed, which the researcher checks off as each is used.

Figure 1: General Research Checklist: Research

General Research Checklist: Research

Research: I have

Read the question thoroughly

Read any BIS Notes on the request

Identified appropriate key words, jargon, etc which will help in search

Checked Archive for similar requests

Checked standards for common requests

Selected appropriate sources

Ifnews: Factiva Nexis

IFT Research Forrester Gartner IDC Computer Economics Datamonitor

If Industry specific IBISworld S&P ISI BMI SNL

OneSource Associations Trade Journals Govt sites Health specific (*)

If Case Studies Ebroohost Nexis (ab/inform) Nexis (RDS B&M) AQPC

If Bios BoardEx Co Websites Nexis Factiva SGA (Nexis)

If Competitive Intelligence: Kennedy Competitor sites M&S on MyKCune

Searched sources mentioned in graphs & charts

Searched PwC Knowledge Gateway

Provided the latest data / report

Compiled a list of what was not available

When information is not available, Identified SMS who might be able to help Knowledge Manager R&A

The response section (Figure 2) lists the steps to be followed in building a response and the elements which should be included. Some steps are very broad, such as summarizing the findings, explaining what we did or did not find. Others are very basic, such as checking links/URLs and attaching any documents.

Figure 2: General Research Checklist: Response

General Research Checklist: Response

Response: I have

Explained what we found

Explained what we did not find

Checked links/URLs

Attached all documents

Reminded users if they have direct access - provided guidelines

Included all copyright/usage guidelines

Checked spelling, grammar and language

cc'ed all those listed in request

Most of our communication with our clients is by email. We need to get it right the first and every time to ensure deadlines and needs are met, and to present the best possible image of the department. Because the researchers may not be writing in their primary language or may not be familiar with standard American "speak", this "pause and verify" step for the actual response is in many ways just as important as the research itself.

Checklists were then developed for mid-level managers in the outsourcing team to facilitate their own QA review. We also added a checklist for the manager assigning the requests (Figure 3), including such considerations as whether the request actually fell within the scope of the department (if not, where it should be referred), whether or not the requester had provided enough information to proceed, or whether the request was clear.

Figure 3: Assigner's Checklist

Assigner Checklist:

Is it in our scope?
 Yes
 No If No, is there a group to whom we should refer the request?
 Group name:
 If No, send email advising requestor and cancel request

Do we have enough information?
 Yes
 No If No, send email asking for clarification
 Enter clarification response in ticket:

Can we meet the deadline?
 Yes
 No If No: send email to requestor proposing new deadline
 Or: suggest delivering information on a flow basis

Does the request have multiple parts, or reflect repeated versions of the same question (eg. several bios in one request)?
 Yes If yes, break into separate requests for multiple researchers
 No If request is part doc delivery and part advanced research, send docs list

Do I have any questions or concerns about this request before I begin?
 Yes If yes, contact appropriate US sector lead for guidance
 No If no, proceed with assigning request

Have we answered similar questions before?
 Yes If yes, advise researcher to incorporate, as appropriate, and use as guide
 No

Is there a standard?
 Yes If yes, advise researcher to incorporate, as appropriate, and use as guide
 No

We are working on quick response questions across time zones, where ongoing communication and clarification from the requester may not be feasible, Knowing exactly what needs to be done at the outset is critical.

Gawande's "Pit Crew"

In order to deal with the increasing volumes, we have begun developing specializations within our offshore team. Again, Atul Gawande provides an interesting analogy. In a commencement address at Harvard Medical School, he stated, "The nature of the knowledge lent itself to prizing autonomy, independence, and self-sufficiency among our highest values But you can't hold all the information in your head any longer, and you can't master all the skills." His response was that "We train, hire, and pay doctors to be cowboys. But it's pit crews people need."ⁱⁱⁱⁱ I suggest he could have been speaking about the corporate research function, and we need pit crews as well.

Originally all offshore researchers were expected to be able to perform all functions equally. Over time, however, we found that some had a knack for synthesizing information into our standard corporate profiles and executive biographies. Others were better at literature searches or technology questions. Although we still cross-train to ensure that we have coverage in all areas regardless of leave schedules, we now tend to specialize according

to functional (not subject) expertise. This, as Gawande envisioned for medicine, is "...a system [where] diverse people actually work together to direct their specialized capabilities toward common goals..... They are coordinated by design. They are pit crews." As a result, we have been able to respond successfully to increasing volumes while decreasing the response time per request with no loss in quality.

In our original model, before outsourcing, we operated as somewhat of a research MASH unit. We triaged the requests in queue and responded to those needing attention first. Sometimes, out of necessity, we gave requesters enough to get them started, returning with more material later after addressing the next critical request.

With our "pit crews" we are now able to work on longer-term requests, collaborating with our end users more as we collaborate with our offshore team. Where needed, we parse large requests into pieces manageable by individual researchers, collating them at the end, or responding to requesters on a flow basis with materials. We are able to redirect our efforts more easily as new findings and the projects themselves dictate.

In Conclusion

When I was a little girl, my mother made me memorize a poem a day over the summer. One was about six blind men who wanted to "see" an elephant. One felt the ear, and said the elephant was like a fan; another, feeling its side, said it was like a wall, and so on. Each was partially right, but only the sum of all their experience and knowledge gave a complete picture of what that elephant looked like. Over the last two years, our on- and offshore pit crews have accomplished an elephantine task, delivering the in-depth research people need when they need it. In the near future we look forward to offering a parade (the group noun for elephants) of new initiatives and accomplishments.

Endnotes

ⁱ Making Information Management Outsourcing Work: Success Factors and Best Practices. Outsell. 2011

ⁱⁱ Gawande, Atul, MD, The Checklist Manifesto: how to get things right. New York. Metropolitan Books. 2010

ⁱⁱⁱ Gawande, Atul, MD. "Cowboys and Pit Crews." Speech. Harvard Medical School Commencement Address. Boston. 26 May 2011. New Yorker. Web