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COORDINATING EXPERTISE ACROSS KNOWLEDGE BOUNDARIES IN OFFSHORE-OUTSOURCING PROJECTS: THE ROLE OF CODIFICATION

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Appendix A

Interview Participants

| Amsterdam: Interviewees | Mumbai: Interviewees |
|--|--|
| ABN AMRO executives and managers | Global level TCS executives |
| Managing Director, Group Shared Services IT | VS and Global Head – Banking Practice |
| Global Head of IT Strategy & Architecture | Head of Global Learning & Development (L&D) |
| Executive Director, Global ADM Transition Manager | Head of Global Continuous Learning Program (part of Global L&D) |
| European level TCS executives | Global level TCS – ABN AMRO relationship |
| CEO Europe/Steering Committee for ABN AMRO | Global Business Relationship Head TCS-ABN AMRO Relationship |
| HR Head Benelux | Global Delivery Head |
| Onsite team members | Global Head Operations for ABN AMRO Relationship |
| Business Relationship Manager | Global Head of Infrastructure and Security for ABN AMRO Relationship |
| Transition Head | Offshore team members |
| Program Manager/onsite Delivery Manager | Two Program Managers/Offshore Delivery Managers |
| Program Manager/offshore Delivery Manager (visiting onsite team) | Offshore Quality Leader |
| Quality Leader | Four Portfolio managers |
| Cross-functional manager/interactions with vendors for ABN AMRO | Five Project Leaders |
| Two Application Development Managers | Module Leader |
| Two Portfolio Managers | Four team members |

| Amsterdam: Interviewees | Mumbai: Interviewees |
|-------------------------|---|
| Two Project Leaders | Support functions |
| Module Leader | Member of Global Program Management Office on ABN AMRO Relationship |
| Two team members | HR Assistant Manager Mumbai GDC |
| | Relationship Portal Manager |
| | Two members of Quality team |
| | Member of Corporate Program Office |
| | Head CoE of India West geography & Oracle E-Business Suite & member of Technology Change Management Group |
| | Member of CoE of India West geography & member of Technology Change Management group |

Appendix B

Interview Protocol Provided to TCS Staff¹

The interviews will revolve around knowledge and expertise management processes related to the TCS – ABN AMRO relationship, as well as to generic knowledge management processes and activities at TCS organization-wise. We will focus on the following topics in our interviews:

ABN AMRO – TCS-Specific Questions

1. Describe the organization structure involved in the work that TCS does with ABN AMRO.
2. How is the work divided between onsite and offshore locations?
3. How does TCS manage the knowledge involved in the system development and maintenance between onsite and offshore locations?
4. What are the advantages and disadvantages in managing knowledge in such a manner?
5. What kind of IT-infrastructure is needed to ensure knowledge management across the onsite and offshore location?

More generic questions, related to the ABN AMRO – TCS contract and beyond (TCS organization-wide):

6. Please describe the knowledge that client and supplier bring to bear for optimizing performance, and the people, processes, structure, work-based mechanisms and technology that enable this.
7. How is knowledge managed across various outsourcing relationships arrangements and with what outcomes?
8. Describe the unanticipated knowledge problems that arise and how these are resolved.
9. Describe the innovative and effective knowledge approaches and practices.

¹This initial interview protocol was adjusted to target specific aspects of expertise coordination as we have learned more about the offshore-outsourcing project. In this version, we deliberately used a language that would be familiar to interviewees.

Appendix C

Data Analysis Approach

Figures C1 and C2 provide rich description of the concepts of *codification* and *expertise coordination* in the onsite-offshore team. They include categories and subcategories, some of which were predefined, based on the literature (thus following a deductive approach) and those that emerged from the data (following an inductive approach to associate codes with a particular category, subcategory, and concept). We also include a table that presents evidence in support of the two expertise coordination modes. (Detailed evidence of codification, supported by quotes is included in the “Findings and Analysis” section of the article).

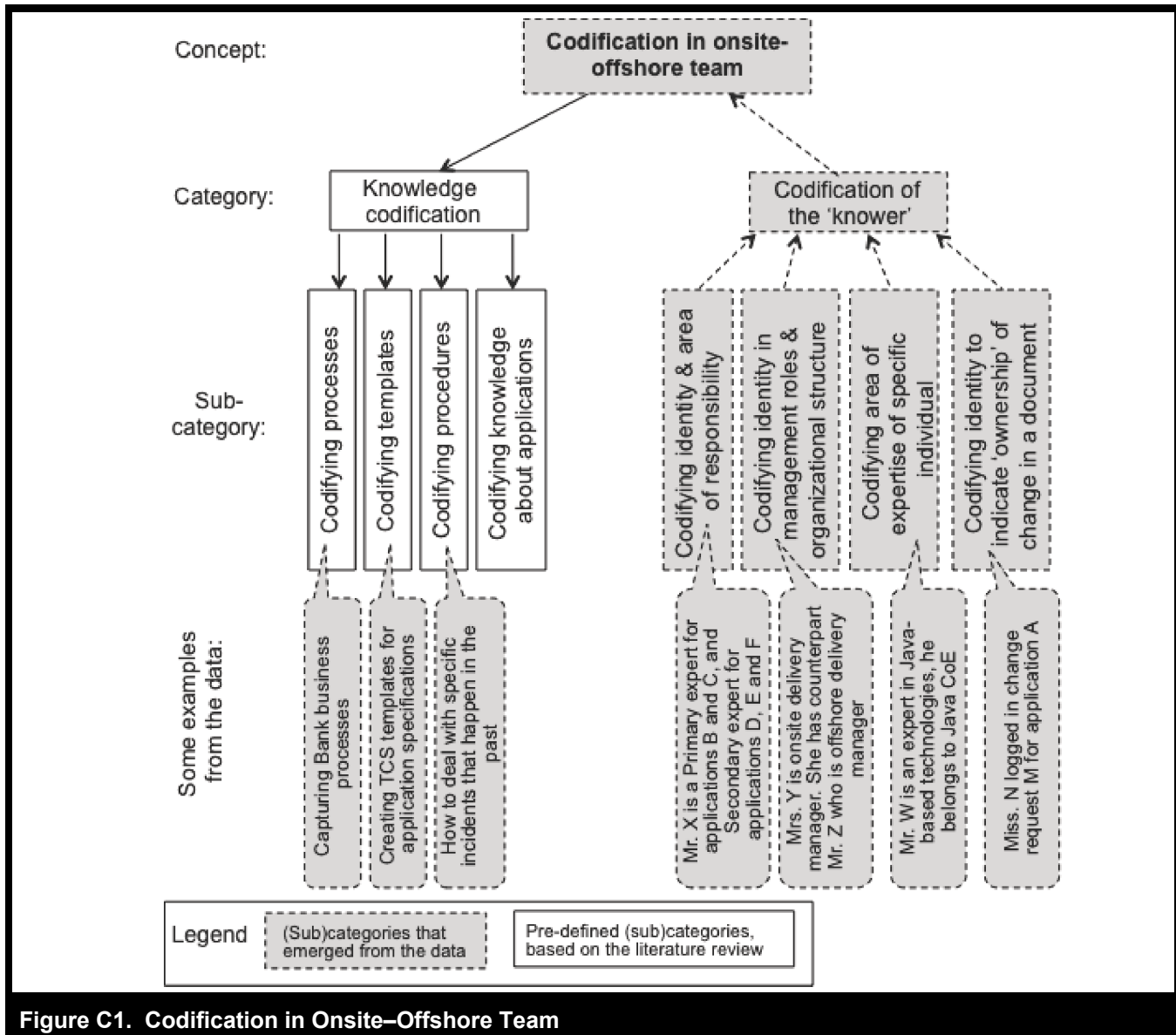


Figure C1. Codification in Onsite–Offshore Team

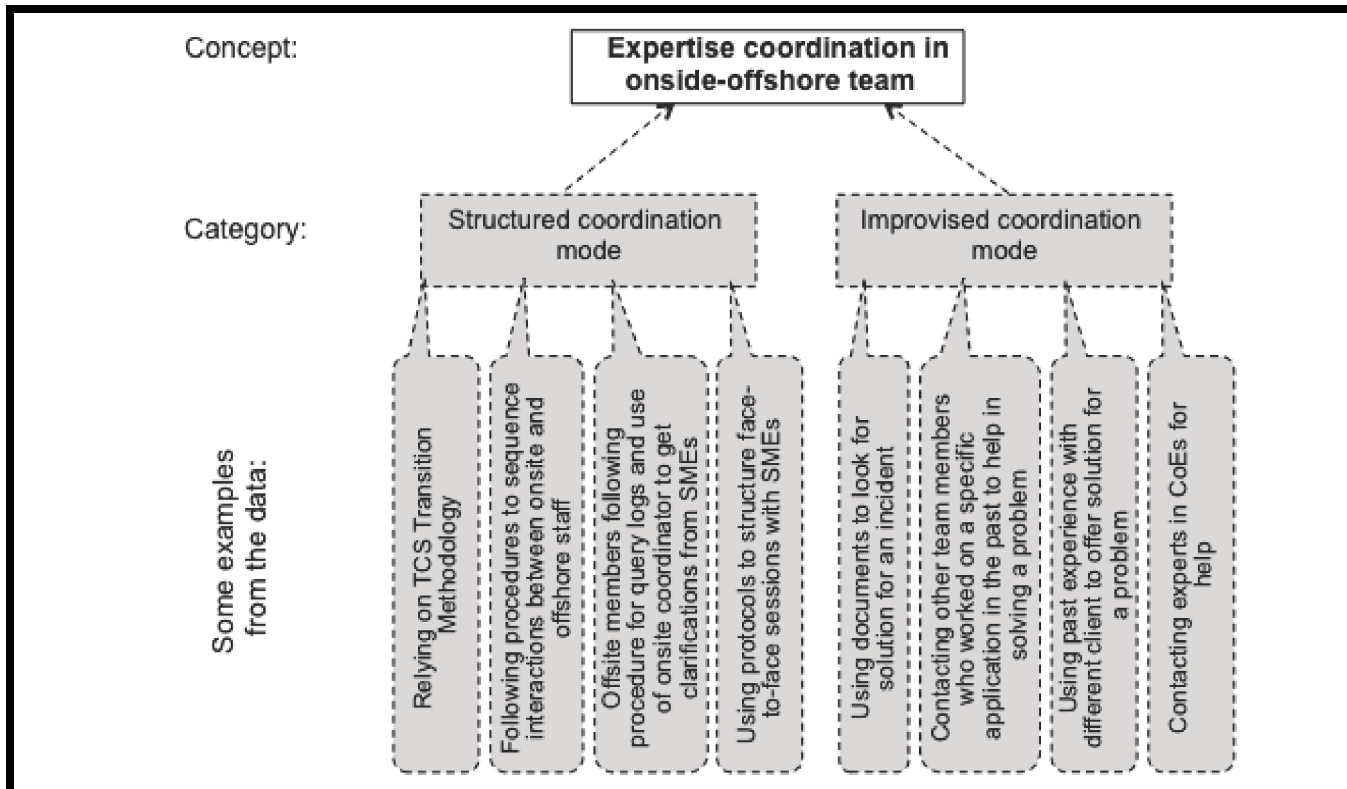


Figure C2. Expertise Coordination in Onsite–Offshore Team

Table C1. Evidence of Expertise Coordination Modes (exemplary quotes)

| Structured Coordination | Improvised Coordination |
|---|--|
| <i>We have a global relationship, people for an ABN AMRO account, so who cater to both in the Netherlands, Brazil, and private clients in other geographies. Similarly, ABN AMRO also has got a global body that actually makes sure that everywhere common methodologies are used, and all those things. So when we use our transition methodology for the Netherlands, we'd use our transition methodology for Brazil. (Sukanya, onsite Delivery Manager)</i> | <i>Sometimes we need to look for other ways to get on with Transition. Not everything can be done by the book, in particular when we are dealing with incidents that need to be resolved very quickly. (Ajit, Business Relationship Manager)</i> |
| <i>Well, before starting this transition, there is a standard thesis, a methodology I can follow, the plan based on which we divide our duties regarding how we are going to do the transition. We start with this methodology, and in the new environment we make adjustments in it and tailor it to suit the particular relationship. (Amit, Project Lead)</i> | <i>We are able to solve the problems, and when we are solving the problems or incidents, we are learning more.... On the technical front, there are some technologies on which I had not worked before, so with the help of other people in TCS, I was able to find out how to work on these incidents. (Shilpa, Application Lead)</i> |
| <i>Within TCS methodology, the activities would be the same whether I'm working in the Netherlands, or I would be doing it from Mumbai. We use same procedures in one area, as in the other. So that at the end of the day when I look at my organization from a high level, we would not find differences in the approach used anywhere else, so hence the overall organization picture is such that a single framework helps us achieve what we want to achieve. (Kamal, Transition Head)</i> | <i>If you need a very quick way to access information during incidents, you do have the TCS team and you work with them. If you don't get to know something from the Transition process, you need to start looking for people with this knowledge. (Sanjeev, team member)</i> |

Appendix D

Organizational Structure of TCS – ABM AMRO Project

