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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).

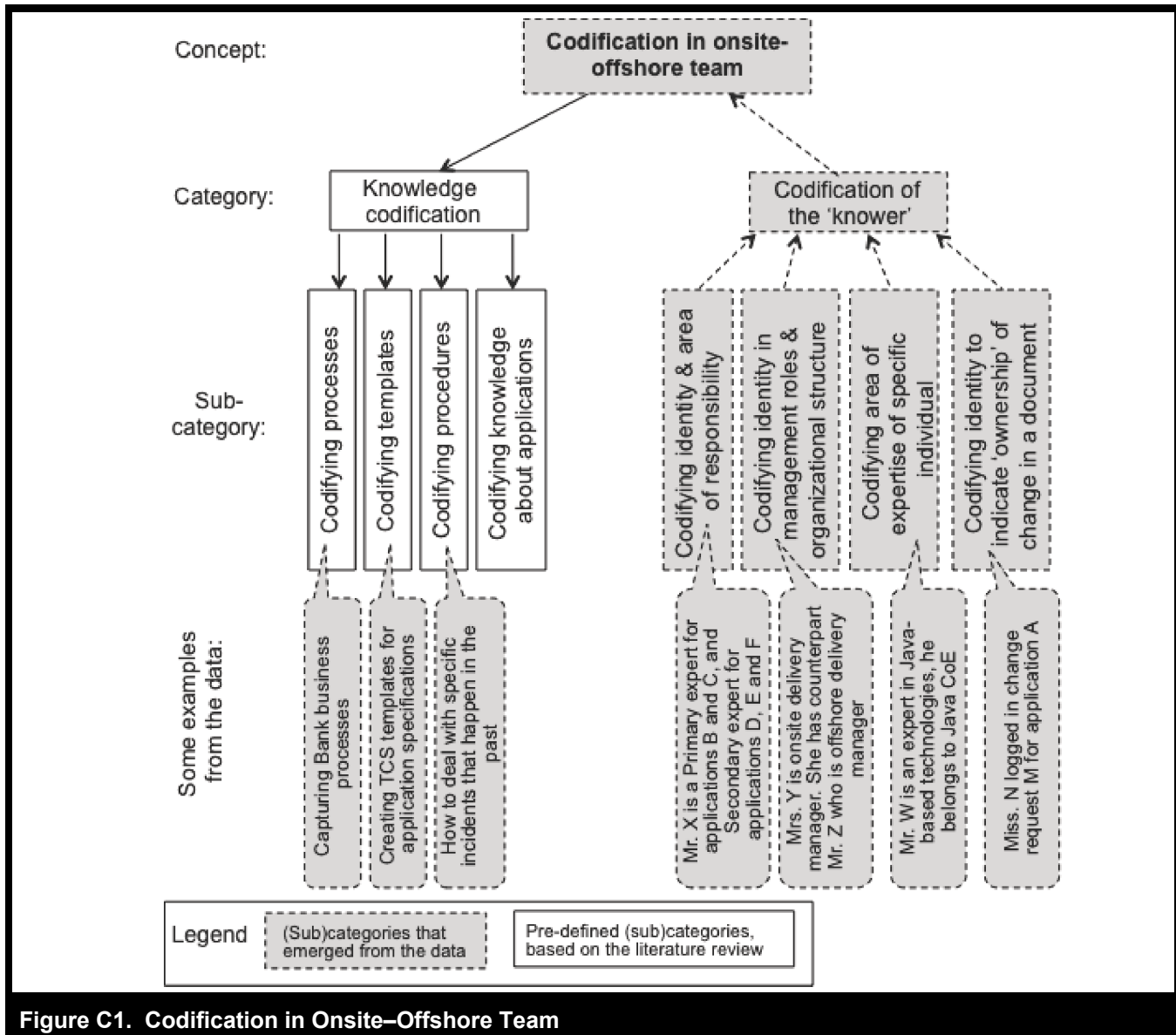


Figure C1. Codification in Onsite–Offshore Team

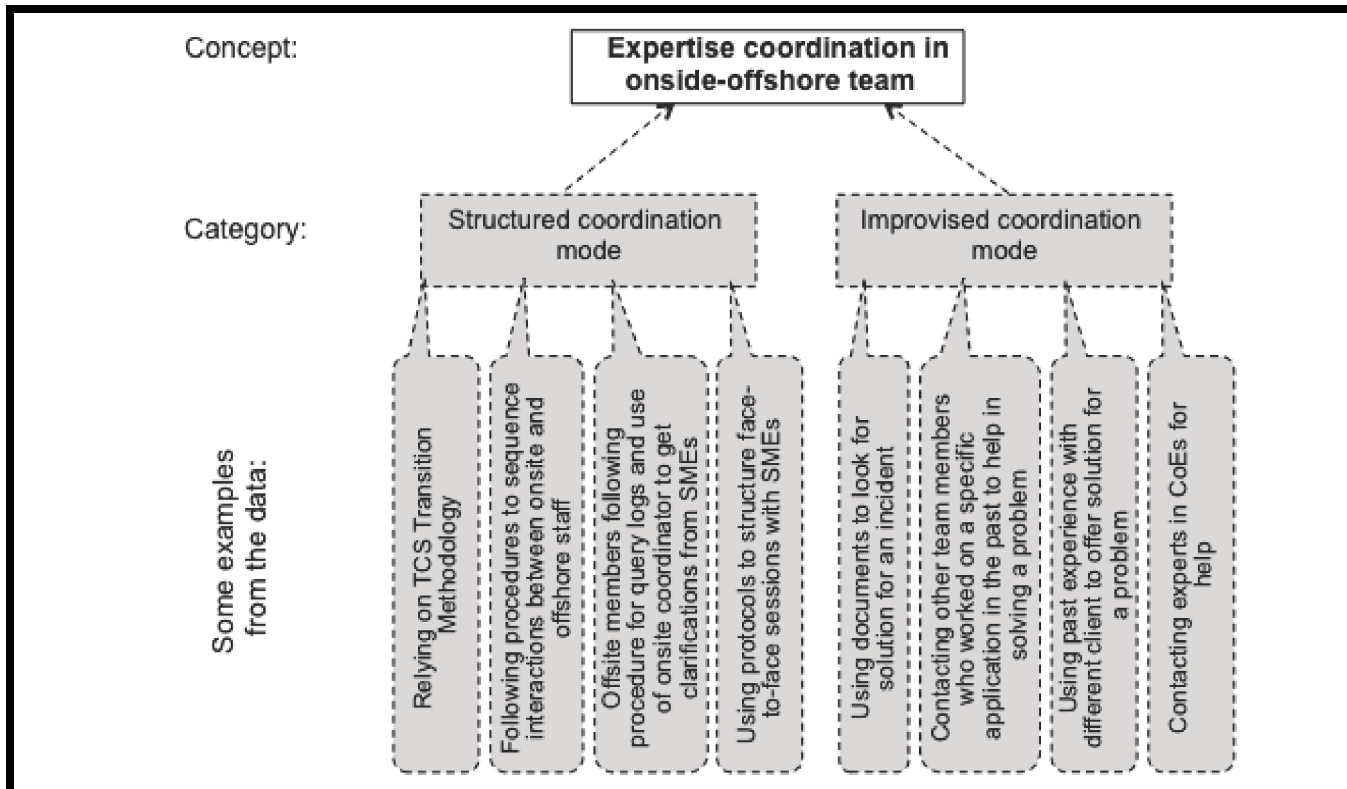


Figure C2. Expertise Coordination in Onsite–Offshore Team

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

