SYNCHRO

SYNCHRO: Frequently Asked Questions (FAQs)

The following Q&A is based on the questions asked at the SYNCHRO deep dive training and are grouped under the following headings:

1. Transition - MRTS
2. Transition - Training
3. Transition - Users
4. Roles & Responsibilities – Super-Users
5. Roles & Responsibilities – Project Owners
6. Process - PIT
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13. Confidentiality and User Access
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15. Fieldwork Agencies
16. Reporting & Cost Visibility
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19. Version Control
20. Other

1. Transition – MRTS

Will there be an automatic transfer of projects from MRTS to SYNCHRO as part of the transition?

No – the process will be manual. Rationale is that there is a lot of poor quality information in MRTS. We want SYNCHRO to be populated with good quality information.

Do we have to manually transfer all of the MRTS history? Will there be any central support?

No – you will need to manually create only projects that are happening in 2014 and beyond. End Market teams should be able to manage this transfer in a relatively short amount of time. If you have concerns about this then please contact Tim Carey. We will not transfer projects which happened before 2014.

When does the MRTS manual transfer to SYNCHRO need to happen by? When can we start?

You can start once SYNCHRO goes live (19 May) and it needs to be completed by 20 June.

For projects that will be commissioned before 19 May do we still need to report them in MRTS or can we wait for SYNCHRO?

You will need to report them in MRTS and then create them in SYNCHRO after 19 May. Hopefully this will not be for too many projects and the amount of information required has been minimised. Again if you have concerns please contact Tim Carey.

2. Transition – Training

When will Train the Trainer materials be available for deployment in my End Market?

We will send these to Super-Users by the end of April.

Will it be possible to access a test server to practice using the functionality and to aid End Market training?

No – at this stage we anticipate that the Training materials supplied will be sufficient to ensure that you can use SYNCHRO directly after go-live (19 May).

3. Transition – Users

Do we need to prepare a list of End Market users now? When do they need to be set-up?

End Market Super-Users will need to identify End Market users for SYNCHRO. These users will be from SPI, Product, Marketing, Legal, Procurement etc. Each user will need to complete an Excel Form. This is a BAT IT/Legal requirement. We will need Super-Users to manage this process and ensure that Forms are sent to assistance@batinsights.com by 8 May.

After go-live how will someone get access to SYNCHRO?

You can use the "Wish You Were Here" functionality to invite someone to request access. They will be sent a link to PRISM where they can find and complete the Excel Form and send this to assistance@batinsights.com.

It is also possible for someone to directly go to PRISM to find the Excel Form.

Who approves a new user's access to SYNCHRO and the level of access they should receive?

The relevant super-user will be able to approve new access rights. For agency teams this should be directed to the agency super user who will then request access via their BAT counterpart. For BAT staff access at end market level will be approved by the end market super user. For above market requests these will have to be approved by Tim Carey.

4. Roles & Responsibilities – Super-Users

Is it possible to have more than one Super-User?

There needs to be at least one Super-User per End Market. There is no maximum number, but only the larger End Markets should need more than one Super-User.

Can only a SPI Super-User create a Project (eg PIT)?

No – any SPI user can do this.

5. Roles & Responsibilities – Project Owners

Can SPI also be a Project Owner?

Yes – this is likely to be the case for certain research projects eg GCS. It is possible to set up the same person as the Project Owner and the SPI Stakeholder.

Is it possible to select more than one Project Owner? Eg for a KLT/TRACK?

No – the project owner in SYNCHRO should be the person with the budget to pay for the research. This should be one named person.

6. Process – PIT

Who can create/edit a PIT?

We recommend that SPI create a PIT to ensure this first important document is correctly created.

Can we delete a PIT? For example we have accidentally duplicated it or we are planning not to do the research anymore.

You will need to request SYNCHRO Admin to delete a PIT. It is possible, but not part of the functionality for a normal user. You would request this if for example you had a duplicate. There is the option to hold or cancel a project within the PIT process stage and this should meet the majority of needs.

If I do not know the exact methodology for my project can I say this? Or do I have to pick a methodology?

It is possible to select “I don’t know yet”.

7. Process – PIB

Who can create/edit a PIB?

A lot of the PIB content will come directly from the PIT. It will not need re-keying.

SPI and the Project Owner should jointly write the rest of the PIB. Usually the Project Owner would complete four sections only: Business Question, Research Objectives, Action Standards and Stimuli Material, (plus Product Specification – for Product Test research only). SPI would complete the rest.

SPI ultimately have responsibility for the final PIB before it is sent to the Agency(s).

Can SPI edit/change what the Project Owner has written?

Yes – ultimately it is SPI which sends the final PIB to the Agency(s). It is SPI who needs to ensure it is fit for purpose. However we would suggest that you speak to the Project Owner about any changes you make!

Who has to sign-off the PIB?

The only approval required is from Legal (which is done offline). Other stakeholders are included in the PIB for information – not for sign-off. Ultimately SPI will agree with the Project Owner when the PIB is ready to be sent to the agency.

Will it be obvious which sections of the PIB that Project Owner needs to complete?

At the moment all sections are shown equally – dependent on feedback after launch this functionality may be considered. However, the sections that the project owner should complete are the same as within existing processes i.e. Business Question, Research Objectives, Action Standards and Stimuli Material.

Does the SYNCHRO brief template replace all previous standard briefing templates?

Yes.

Is there a maximum file size for attachments?

Yes – 50 MB. If you anticipate that this is not sufficient then please contact Tim Carey.

8. Process – Agency Proposal

Once a Proposal has been completed by an Agency will I receive and email confirming this has happened or will I have to keep looking in SYNCHRO?

You will receive an email confirming it is ready to review in SYNCHRO

Will the Project Owner also directly receive the Agency Proposal?

No. SPI need to ensure the proposal is fine and then sends the final proposal to the Project Owner

9. Process – Project Evaluation

Will the Project Evaluation replace the 6 monthly Agency evaluation process?

No, but the project evaluation scores from all projects in that 6 month period should be used to inform the overall Agency Evaluation.

10. Process – Legal Approvals

Will legal be able to provide approvals directly in SYNCHRO (for the PIB, Project Specs and Final Report)? If not why not, surely this would be a more efficient process?

Global Legal have advised that Legal approvals cannot be given directly in SYNCHRO. SPI will need to get Legal approvals offline (eg via email).

It is possible to print out the Project documents (eg to Word/PDF) which can be sent to Legal. Legal can approve these via an email confirmation. It is possible to attached this email in the "Other Comments" section of the PIB/Project Specs. In SYNCHRO SPI will need to check a box to highlight that Legal Approval has been given and to give the name of the Legal person. The project cannot progress to the next stage without this Legal approval being obtained.

Will Legal have access to SYNCHRO?

Yes – Legal can have access to SYNCHRO. They can view projects but they cannot approve them directly in SYNCHRO. Legal approval must be given off-line. This is a Legal requirement not a SPI/SYNCHRO requirement.

Which documents in SYNCHRO require Legal Approval?

The Project Brief (PIB), each of the Project Specs individually (eg Screener, Questionnaire etc) and the Final Project Report.

In some markets for some standard research Legal Approval will not be required and you can check a box to highlight this. Contact your End Market Legal to confirm which types of projects these would be.

11.Process - Waivers

What if I do not want to do a research as per the NPI protocol? Do I need to get a Waiver in SYNCHRO for that?

No – NPI waivers are handled at the IPSG. These waivers would not go through SYNCHRO.

Take a look at the Waiver Slide in the Train the Trainer materials for more information.

What if I do not want to do other Research, eg a GCS? Do I need a Waiver in SYNCHRO for that?

Yes – You can click on the “Waiver” button on the SYNCHRO home screen and follow the instructions to create a waiver. You request this type of waiver when you plan not to raise a PIT. Your Waiver request will be handled by one of a number of people and you should receive feedback within 1 week.

How do I request a methodology waiver? For example I am doing some research but I want to use a smaller sample size as I am struggling to recruit the right number of people?

This is a methodology waiver. You can do this at the PIB stage. Click on the Request a Waiver button and follow the instructions. You will need to explain why you need a waiver. You will get a response back within 1 week.

If I request a Methodology Waiver will this hold up my project? Do I have to wait before I can send the PIB to the Agency?

This will not hold up your project. You can send a PIB to the agency even if a Methodology Waiver is pending. The agency will see that the Waiver is pending and will be able to see the details of the Waiver request. This will allow the Agency to get on and prepare their proposal without delay.

What is the difference between the Waiver button on the SYNCHRO homepage and the Waiver section in the PIB?

The Waiver button on the homepage is to request a waiver to not do certain research (eg GCS).

The Waiver section in the PIB is to request a Methodology Waiver where you want to do something non-standard (eg smaller sample size).

Take a look at the Waiver Slide in the Train the Trainer materials for more information.

Who is responsible for Waivers in Globe House, Taina?

We are looking to expand the number of people who can grant waivers so as to increase the speed of processing them. Taina will be one of the approvers.

Usually there are several approvers for a Waiver (Marketing, SPI, Brand). Who do we include in SYNCHRO?

SPI will be responsible for approving Waivers in SYNCHRO. You may need to inform other Stakeholders that you are requesting it, but they are not part of the approval process.

Some of the Waivers happen outside of SYNCHRO and the approval process is detailed in the Waiver Slide in the Train the Trainer materials for more information.

12. Process - Procurement & Tenders

Will procurement have to be notified of every research project?

No. It is optional in SYNCHRO to include a Procurement stakeholder at the PIB stage where you need the involvement of Procurement.

How does the competitive tender process work in SYNCHRO?

You can select up to 3 agencies to bid for a research project. Each will receive the PIB and will be able to provide you with a proposal. They will not see who the other agencies are that have been included in the tender. They will not see our Cost Estimate nor any detail of the proposals coming back from the other agencies.

13. Confidentiality and User Access

Which projects will a user be able to see in SYNCHRO?

This will depend on your geographical responsibility. If you only work for one End Market then you will only be able to see projects for that End Market. If you have above Market responsibility then you will have access to the projects for the Markets you are responsible for. If you are Global SPI you will have access to all projects.

What if my project is highly confidential? Is it possible to restrict access to a small number of people?

This functionality will be delivered after go-live. It will only apply for a handful of projects. If there is specific need to restrict access for a confidential project prior to the functionality being available then please contact Tim Carey.

14. Non-Kantar Agencies

I often use non-Kantar agencies and/or Kantar is not in my market. Will my local agencies be given access to SYNCHRO?

For the initial rollout we will be setting up our Kantar Agencies in SYNCHRO. If you have a local non-Kantar agency that you do a lot of research with then they can also be set-up to have access to SYNCHRO.

If my non-Kantar agency does not have access to SYNCHRO does this mean I cannot use them?

You can use non-Kantar agencies. If they do not have access to SYNCHRO then you (SPI) will need to manage their process steps in SYNCHRO. For example you would need to load their research proposal, project specs and the final report. This should not be an onerous task.

Which agencies will have access to SYNCHRO? IMRB, TNS, Nielson?

Initially Kantar agencies will be given access to SYNCHRO. At a later stage others (such as Nielsen) may be added. Local non-Kantar agencies can be added if they do a lot of research projects for BAT.

How many agencies can I request a proposal from in a tender process?

You can request a proposal from up to 3 agencies.

15. Fieldwork Agencies

Do fieldwork agencies have access to SYNCHRO or only Coordinating Agencies?

Only coordinating agencies will have access to SYNCHRO and the coordinating agency will still be responsible for managing the fieldwork agency – as per current process fieldwork costs will not be shared between competitor organisations.

16. Reporting & Cost Visibility

Do we need to create PITs for all planned projects every QPR as per current MRTS?

There will not be a separate round of reporting for SYNCHRO. If all End Markets embrace SYNCHRO then all the projects should be included (in real time) and reporting can be taken directly from the system centrally without need for further data collections offline.

Can we extract the budget sum of all our projects like in MRTS?

Yes – this will be possible through one of the standard reports in SYNCHRO.

What should be included in the Total Cost figure for a project?

This should be the pure Research costs only – as it was in MRTS. It should exclude any masking, communication costs etc.

Can Marketing Finance have access to SYNCHRO or visibility of projects in SYNCHRO. It would be useful for them compiling costs for SOP forums and QPR.

It is possible for them to have access but given licence costs and system requirements for regular log ins (every 5 months) it may be more efficient to ask the SP&I Super User to email the system generated reports on a needs basis.

The Financials in SYNCHRO will not necessarily be fully aligned with the financial records. Is the audit community aware of this?

This situation already existed under MRTS and all users of the financial reports coming from SYNCHRO will also be made aware of this. To be clear the SYNCHRO system will not be used for financial auditing processes as all costs attributed to research must be contained within SAP – and a valid PO number obtained from SAP to commence projects. However full use of SYNCHRO and accuracy in recording costs will remove the need for ad hoc QPR requests and reporting.

17.Future SYNCHRO Changes

If one of my brands does not exist in the drop down list on the PIT can I request for it to be added?

If you are doing lots of research projects for that brand then you can request SYNCHRO Admin to add it to the Brand list. Alternatively just select "Other".

18.SYNCHRO Costs

What will be the cost of SYNCHRO for an End Market?

The cost is approximately GBP 30.00 per user per year. This will need to be budgeted and paid for in each End Market. Overall the cost should not be too large.

19.Version Control

What if someone prints off a document in SYNCHRO and thinks it is the final version and uses that. Eg sharing a PIB with someone? However the PIB is subsequently changed in SYNCHRO. How will SYNCHRO manage this problem?

It won't! This is exactly one of the biggest problems we have today. At least with SYNCHRO we always will know where to go to get the official and most up to date version of any Research Document. This is the key reason why SYNCHRO must be fully utilised and why agency partners have been asked to work directly with SYNCHRO.

20. Other

Where is the SYNCHRO server locater and which company is managing it?

The server is in Hamburg (Germany).

Grail (part of Integreon) manages it.

In my market all documentation is in Spanish. Do we have to translate to English before we load onto SYNCHRO? This will have added costs!

The business language for BAT is English and usually all documentation in SYNCHRO should be in English. However if your End Market has been given a specific exclusion to this rule then you can load documentation in Spanish.

For any additional questions please address these to: Tim_Carey@bat.com