Aligning Clinical Research Careers & Resource Management

Erika Stevens, MA

ACRP NY Metropolitan Chapter
Annual Fall Symposium
Keynote
October 26, 2018
Disclosures

I have no relevant financial relationship in relation to this educational activity.
Agenda

- Define career planning and resource management
- Analyze methods and practices for career development and resource management
Career Planning
CR Professionals Expectations:

1) Apply the framework of scientific research to CI studies, employing principles of good clinical practice to produce valid data;
2) Confirm that ethical principles and values are upheld in human studies research;
3) Assess and apply regulatory processes and procedures to the clinical research conduct;
4) Use statistical knowledge and methodology to design, implement and assess clinical research;
5) Communicate effectively, both orally and in writing, with others in the CI profession.
Where Do You Want to Go?
Career Planning

- Critically examine what skills you have now
- Assess where you need to grow
- Develop long range plans
  - Discuss your ideas
  - Internal training
  - External short term targets
  - Additional academic work you need
  - Rotations within your organization
  - Consider strategic career moves
  - Small companies vs. Large companies
Career Planning
Six Stages

Assessment
Investigation
Preparation
Commitment
Retention
Transition
## Career Planning

### Education
- BA/BA
- Graduate Education
- Licenses
- Certifications

### Employment Experience
- Research Asst
- CRC
- PM

### Preferences
- Innovative segment, business impact

### Values
- ROI, Collaborative...

### Limitations
- No travel, remote...

## Short Term vs Mid Term vs Long Term

<table>
<thead>
<tr>
<th></th>
<th>Short Term</th>
<th>Mid Term (2-5 years)</th>
<th>Long Term &gt;5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Work</strong></td>
<td>opportunity with career ladder/growth potential</td>
<td>Mid-level management role</td>
<td>Head of program</td>
</tr>
<tr>
<td><strong>Home</strong></td>
<td>e.g. Travel abroad</td>
<td>Life event e.g. wedding</td>
<td>Support family/transition</td>
</tr>
</tbody>
</table>

## Current Competencies, Capabilities, Experience
- Analytical, logical, project management, etc.

## Development needs/ skills required
- Graduate program/degree, certification, new venture

## Action Plan
- Internship, flex role, move, etc.
Resource Management
Resource Management

Assessment, allocation and re-alignment
Resource Management

Development of an organization's resources - when/where they are needed

- People - human, workforce
- Physical - space, inventory/equipment
- Financial - fund allocation/distribution
- Information Technology (IT) - networks, applications

Assignment/ Deployment of available resources-scheduling of activities in alignment of projects (project-time)

- Estimation based
- Prioritization driven
- Functional versus cross-functional
Process/activities for determining achievability—expense and confirmation that appropriate resources are dispersed according to project prioritization.
Demand Management:
Common Issues

- Projects staffed with unavailable resources
- Competing projects/bottlenecks, creating delays
- Abundance of projects, many unfeasible
- Missing process for learning or improvement
Resource Management:
Capacity Planning (Review of Key Roles)

Process/activities for determining skillset of personnel resources- hiring impacts operational cost and performance

- Cost
  - Volume of hires
  - Level/Role

- Performance
  - Staff Profile
  - Deployment/Productivity

Staffing Assessment: Tied to role

https://scm.ncsu.edu/scm-articles/scm-terms
Capacity Planning:

Common Issues

- Assigned resource availability impacts delivery
- Misalignment skills impacts proficiency / success
- Improper mix of personnel creates redundancy and budget overage
- Low utilization/ over utilization (demand & capacity mismatch)
- Lack of capacity planning strategy
Capturing time/effort of personnel and expense tracking—measured against forecast and projected budget.
Time Tracking:

Common Issues

- Forecasting Issues: diminished accuracy, misrepresentation
- Tracking tools (time sheet/systems) specificity (lacking detail/too detailed)
- Personnel noncompliance with estimating/tracking process
Alignment
Alignment

- Change in organizational structure
- Growth
- Reduction in workforce
- Going ‘lean’
- Going ‘virtual’
35% of employees make a decision in the first month whether they will stay or not with their new employer.

Organizations with a resource management process experience 54% greater new hire productivity, along with 50% greater new hire retention.
Workforce Retention Errors

Treating Everyone Equally

Focus on high performers over low performers; some categories have greater importance.

One Size Fits All

No ‘ONE CURE ALL’ approach. Success in retention is 1:1 engagement with each employee.

Neglecting the First 90 Days

Have a plan/schedule, implement ‘buddy’ system for new hires, engage, regular communication, clarify expectations, provide and request feedback.
Letting them Leave

**Focus retention efforts** on medium/high performer resignations.

**Speak with the employee immediately;** ask reasons for leaving and communicate that they are valued, ask if you can respond, propose solutions.

Turning your Back

**Unable to retain the employee:** keep resignation positive, thank them for contributions, follow-up contact 30-60 days and periodically.

**Look for themes in resignations** in order to prevent other employees from resigning.
Your Management Development

- Critically examine what you have now
- Assess where you need to grow
- Develop long range plans
Career Opportunities

- Executive Management
  - Vice President
  - Executive/Senior Director
- Director
  - Program, Department, Regional Office
- Manager
  - Project/Study
  - Training
  - Quality
  - Regulatory
  - Data
  - Operations
- Clinical Research Associate (I, II, III, Sr. Principal)
- Clinical Trial Assistant

- Research Site
  - Manager
  - Research Administrator
  - Director
- Independent
  - Project Manager
  - Auditor
  - Regulatory Consultant
  - Trainer
  - CRA
  - Consultant
Ways to Achieve

Experience in all aspects of the work
Leadership and interpersonal skills
Mentored opportunities
Likely more school....
Sometimes strategic career moves
Long range planning
Summary

- Critically examine current capabilities and develop actions
- Assess management of resources to effectively meet competing clinical research activities
- Active engagement drives alignment
Oh the places you’ll go!
Questions and Discussion