JSM 2013 Presentation

The general goal of this session is to learn from other consultants' successes and failures, so I am going to basically read the list to you and add some personal experiences.
Hopefully you can learn from my mistakes and mistakes by others I've encountered.

SECRET #2: Maintain a professional attitude throughout the consulting process.

- <u>Don't make excuses.</u>

We all have lives and "adventures" that interfere with accomplishing our tasks.
During the past 6 months or so,

- I moved from NJ to NC with my girlfriend, I'll call Vicki.
- Bought a house (PNC Mortgage Company made it hard.)
- She lost her job a couple of months ago.
- Our dog Sprite was put down. She was with Vicki for 14 years…..
- The list is long (taxes, INC,..)– my time today is short.

These are "good" excuses, but they don't directly affect the goals of my clients.
The only effect that they can have is DELAY.

One consultant who worked for me didn't attend a TC regarding his project. I asked why.
I really didn't care unless it was a good reason. It was an empty excuse.

- <u>Follow through on promises.</u>

My word is my bond.
When I tell someone when something will be ready, I say "I plan to have it done by Monday".
If it's late, it's one strike.
If I promise, it's two strikes.

However, I still do whatever I can to have it done when I "plan" to have it done.

- <u>Be punctual for your meetings.</u>

One clinical VP would take out his watch and shut the door at the planned start time.
(Remember watches?)
Did you ever attend a meeting when someone is late? They are wasting your time.
Don't waste the time of other people – RESPECT!

- <u>Answer e-mails and phone calls promptly.</u>

I try to have 0 emails in my inbox or calls in my voicemail. If it was important enough for an email to be sent, it is important enough to be answered quickly.
(Know deadlines!)

- <u>Confirm everything in writing.</u>

Avoid misunderstandings.

- <u>A sincere apology is sometimes appropriate.</u>

Life does get in the way and it doesn't always go as planned.
The point isn't necessarily why – just that it happened and needs to be resolved.
Apologize and propose resolution.

Example: Attorney: At closing, amount on form was wrong and I noted it. The attorney assured me that the numbers were correct. I checked later and found the error. His response was that we were on "different pages" and suggested that I resolve it with the seller's agent. An appropriate response would be: I'm sorry that I made that mistake and I will do what I can to correct it.

I had a consultant apologize for missing a timeline and it would be delayed a few days. Then he told me that he was working on an important project for another client (BMS). Sometimes keeping it short is appropriate. His apology was empty.

- <u>Respect the client's expertise in their field.</u>

I have worked in several therapeutic areas. But I am a statistician and clinical trialist.
Client will appreciate endpoints that have worked for other clients, etc. Details of the study are important but not how to make assessments.

Do you like to be informed how to statistics by a non-statistician?
A non-statistician saw a KM curve with largest observation observed, ie not censored. He had not seen such a KM curve, and loudly criticized me and told me that it was not a KM curve – in a live meeting. I lost respect for him.
They will typically lose respect for you if you criticize. If you see something that looks strange, point it out as a question. If there is no problem, they will be happy to explain the misunderstanding; if you are right, you gain respect for your insight and approach.

- <u>Aim to under-promise and over-deliver.</u>

Not much else to say – except that life gets in the way – DON'T PROCRASTINATE!

- <u>Maintain your professional standards and integrity.</u>

Maintain appropriate attitude and *appropriate* sense of *humor*. Don't criticize!

A client needed another statistician for DSMB (DAG).
The candidate was sent a copy of the SAP I had written, and became very critical of the methodology for IA based on Conditional Power. If he had contacted me to discuss it, I would have appreciated it. Instead he sent his criticism to the client's upper management team, with counterexamples and references. I had worked with the client for several years, who sent his comments to me for explanation. I had to defend my procedure, with background and references. He didn't get the job, I got paid for the explanation, and he lost respect from me and the client.

SECRET #4:
Ask the client to explain the importance of the project to them or their company.

- What is the bigger context?

Of course it's important; asking shows respect and concern.
It is necessary to know why it is important.
It won't affect the quality of my work or the appropriate methodology, but will impact the presentation.
A small Phase 2 dose-ranging was a response to a letter from FDA regarding the protocol for the Phase 3 study.
A Phase 2 study with several endpoints was to develop a composite endpoint for Phase 3.

SECRET #6: Confirm time estimates and deadlines with the client.

- Break the project down into several manageable tasks.

This is always a good approach to any project

- Be accurate in your assessment of how long each task will take to complete.

Accuracy may be a confidence interval, or a range.
This doesn't work for bids. (I work on an hourly basis whenever possible.)

- Allow for the possibility that things will take longer than expected (assume that if anything can go wrong, it will).

This goes back to life's adventures.
Example: I specified the model. But there was failure to converge. Missing data, outliers

- Allow for back-and-forth communication with the client.

One-way communication is not "communication".

- Factor in all other current demands on your schedule, as well as any future demands.

Previous comments cover this point.

SECRET #11: Provide regular updates to your client on the number of hours spent working on the project.

3 examples:

1. A client (CRO) wanted the table shells constructed for SAP, with a lot of tables, already started and not well done. I told second in command in biostatistics that it wasn't reasonable to have me do it (long hours, not requiring my skill set, big consultant bucks) and to get a junior person at the company to complete the work. She said that it had to be done and everyone else was too busy. OK – I did it and sent the client an invoice for a very large amount at the end of the month. They said that if they have to pay this, I couldn't work for them any longer. I insisted, got paid, and lost the client.

2. A client (CRO) wanted a methodology for simultaneous equivalence of two treatments at several timepoints and determination of sample size. I told them that the problem was non-standard and, as far as I knew, it had not been solved. I was told to solve it. It reminded me of something like quality control chart. I researched the topic and developed a couple of procedures, especially bounds that would be independent of correlations. I performed literature searches, etc.,… and sent the client an invoice for a large amount at the end of the month, even though I didn't have the same size problem completely solved. They told me that they didn't pay for background research and only hired experienced consultants. I insisted, got paid, and lost the client.

I got paid but would have rather been paid for an appropriate amount of work and continued working with those clients. I should have checked in after X hours.

Success:
Recently I was working on SAP for a protocol another statistician had written. I think the data is to be over-analyzed, but that's just a difference in philosophy. There were >500 tables proposed, and I wasn't finished yet. Programming is paid per table. I checked to be sure that I understood. There were, and will be, more meetings to discuss structure and number of tables.