Understanding Key Factors to Assess Globalization and Localization Providers

White Paper by the Supply Chain Assessment Project (SCAP)
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The group of experts that created the list of dimensions detailed in this white paper collaborated extensively, and the work cannot be attributed to a single author or “authoritative” researcher. Please refer to the Credits section for an alphabetical list of contributors, researchers, and authors.

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Executive Summary

The supply chain for translation, globalization, and localization confounds many organizations seeking the support of language service providers. Even companies with dedicated and experienced procurement staff face challenges in understanding the complexities of pricing, supplier types, services, subcontracting relationships, and specializations available in the global marketplace.

Many companies attempt to address this challenge by creating new Requests for Proposal (RFP) or Requests for Information (RFI) for each project. But most RFP/RFIs are only marginally useful in helping to evaluate service providers. Due to the lack of consistent ways to evaluate vendor capabilities across the spectrum of business needs – for project management, financial management, technology support, quality control, and the like – a true comparison of vendors is difficult. And without an authoritative source of standards, large and expensive challenges in procuring globalization and localization services can arise, from determining what languages are needed, to ensuring competent resources are available, to identifying the technologies necessary to ensure proper management of the project, and more.

To address this complexity, language industry experts from GALA’s Collaborative Research, Innovation, and Standards Program (CRISP) formed the Supply Chain Assessment Project (SCAP) working group and carried out research to determine the fundamental parameters by which service providers can be measured and compared. The result was a list of twelve key dimensions in three main areas with a set of questions for each that can help procurement staff compile clear data for evaluation and comparison purposes.

The project explored the dimensions most relevant to assessing a vendor’s capability to execute large language industry projects. While the dimensions can and often do apply to smaller providers, the working group focused on those deemed most important for managing large projects such as those that involve a significant volume of multilingual work outsourced to one or more suppliers.

The dimensions identified within can provide a useful foundation for developing RFP/RFI and for evaluating language service providers. They are a first step toward developing industry standards for supply chain assessment and evaluation.

### Organization and Operations
- Capabilities: History, Reputation, and Key Personnel
- Service Level
- Capacity: Size and In-house Resources
- Global Translation Supply Chain
- International Vendor Management
- International Accounts Receivable and Accounts Payable

### Quality
- Global Linguistic and Technical Quality Assurance
- Quality Management
- Quality Control

### Processes and Technology
- Translation Processes
- Global Automation Solutions
- Global Terminology and Language Moderation
Using Dimensions to Evaluate Globalization and Localization Services

Streamlining the many potential factors for evaluating globalization and localization service providers begins with looking at how they can be applied in your own procurement processes. Begin by determining which of the dimensions are relevant to your approach – you may wish to assign weights to them. (Some factors may be unimportant to one organization’s projects but are critical to others.) For example, while maturity, a strong reputation, and the existence of formal processes might be critical to one company, it may be less important for another who requires other qualities in their service provider.

Note that these dimensions include both subjective and objective factors, and that sources of data include vendor-supplied information, background checks, and evaluations of publicly available information such as the vendor’s website. Few dimensions can be categorized only with a “yes” or “no” (or binary) value. Many require samples and summaries that the vendor provides.

Also note that Quality Management and Quality Assurance overlap to a certain degree but they have been separated here to distinguish between quality of the vendor deliverables, and internal management of the materials supplied to the vendor. (Remember that evaluating how vendors structure their QA process to be independent from production is crucial to reducing risk.)

Keep in mind that for long or high volume projects, capacity evaluations become critical. The dimensions include clear distinctions between peak, regular, and vacation-time productivity. The dimensions also review capacity in terms of in-country, expatriate, and non-native translation resources because translators living outside of a target country for five or more years do not stay up to date on the contemporary lingo/terminology, cultural specifics, or legislative changes that occur in the targeted region. This could affect the quality and accuracy of translation and its perception by the in-country audience.

Finally, note that automation solutions by themselves do not affect the translation process or quality. But large, challenging projects, involving hundreds of individuals around the world are impossible to execute without a certain level of automation.

Please note: certain elements included within the dimensions apply mainly to large software localization projects. These elements will be marked with a * for easy identification.
Understanding Key Factors to Assess Globalization and Localization Providers

Globalization and Localization Supplier Dimensions

Organization and Operations

Capabilities: History, Reputation, and Key Personnel
Assess the vendor’s overall approach to doing business including reputation and capabilities of key personnel that would interact with the project under consideration.

1. Number of years in business
2. Senior management and other key personnel (industry and business background)
3. Participation in industry organizations, forums, or initiatives
4. Key references (3 to 5 current customers and contact information)
5. Past performance (summarize 2 projects within the last 2 years of similar size and complexity to efforts under consideration)
6. Quality of marketing/branding information (website and collateral presentation of services, solutions, and features/benefits)
7. Peer feedback (gathered from direct communications or conference/forum participation with peer organizations)
8. Third-party feedback (from other vendors, suppliers, or others that interact with the supplier)
9. Negative feedback (identify patterns to negative feedback such as supplier interactions and payment history)
10. Compliance with supplier/subcontractor payment terms

Service Level
Assess the breadth and depth of services the vendor can provide in relation to the requirements of the project under consideration.

1. Services provided
   - Translation
   - Software and firmware localization
   - Standalone editing
   - Terminology development/maintenance
   - Global quality assurance
   - Software engineering*
   - Functional and localization testing*
   - Page-setting (DTP) and artwork
   - Multimedia voiceovers
   - Multimedia subtitling
   - Sound pre/post-processing
   - Graphic design
   - Other (please list)

2. Staff augmentation services (for clients who need specific, authorized, pre-trained, or pre-approved resources)
   - Resumes of qualified individual resources available upon request
   - Direct contact with the resources assigned to the projects
Organization and Operations

3. Technology platforms supported (for testing of content development and behavior)
   • Operating systems for all devices on which content will be viewed (PC, tablet, mobile phone, etc.)
   • Other (client-specific)

4. Customer-facing reporting (types, formats and frequency)
   • Status reports
   • Issues and problems identification and escalations
   • Recommendations or process improvement suggestions
   • Achievements
   • Other (client-specific)

5. Project reviews, evaluations, and/or post-mortems
   • Standard formats and documentation provided
   • Reporting on progress and action items

Capacity: Size and In-House Resources
Collect objective fiscal and project-related data to assess whether the vendor is the right size to manage the project in question. Larger vendors may not prioritize projects appropriately, while smaller vendors may not be able to handle the volume.

1. Vendor yearly revenue for the last one to three years compared to yearly spend
2. Yearly spend of vendor’s two or three biggest customers
3. Attributes of three biggest projects the vendor has completed
   • Word count
   • Number of language combinations
   • Approximate timeframe (number of months, excluding idle periods)

4. Capacity versus workload: Peak weekly translation throughput for all languages in question for the following:
   • Long (multiple months) with an advance warning (4+ weeks)
   • Long (multiple months) with no advance warning
   • Medium and short projects (2-4 weeks)

5. Peak weekly capacity by function (project management, engineering, etc.) dedicated to the project*

6. Comparative allocation of in-house resources to outsourced resources (percentages)
   • Project management
   • Desktop publishing (DTP) and artwork
   • Software engineering
   • Software and localization testing
   • Multimedia work (besides voice recording)

Global Translation Supply Chain
Evaluate the extent of the vendor’s supply chain including selecting and qualifying reputable resources. The production chain can only produce consistent quality if it is relatively short, transparent, and tightly controlled.

1. Is subcontracting without vendor or client knowledge allowed?
2. Methods to prevent unauthorized subcontracting
3. Transparency of supply chain (sub-vendor level) to the end client
Organization and Operations

4. Number of suppliers for each language offered
   - In-house suppliers
   - Subcontracted vendors/teams
   - Subcontracted individuals

5. Total yearly capacity (adjusted words) of in-house teams and subcontracted suppliers
   - Peak
   - Regular
   - Holidays and vacation periods

6. Actual yearly average volume (adjusted words) translated/localized by the vendor into each language of interest for the last one to three years

7. Process to manage workload backup by primary and secondary suppliers (to the individual level during peak, regular, and vacation periods)

8. Reliance on sources for translation, editing, and language quality assurance
   - Native speakers residing in respective countries/regions
   - Native speakers residing outside of home countries/regions
   - Non-native speakers
   - Markets for which reliance on expatriates is significant (e.g., 40% of resources or more)

9. In-country terminology and/or subject matter experts for all requested languages (list languages without in-country expertise)

10. Subject matter experience and resources in the industry/subject area in question
    - Long-term (one year or more) clients in the same or similar sector/area/industry
    - Similar projects completed within the last three years

11. Proprietary tools expertise
    - List of proprietary tools
    - Trained resources with hands-on experience
    - Allowable alternatives and limitations/risks

International Vendor Management (VM)
Evaluate the vendor’s ability to manage its own vendors and resources. Demonstrated experience in selection and management of resources provides a higher confidence level in the vendor’s overall capabilities.

1. Dedicated VM department or team to support project managers
   - Project managers (PMs) access to the full supplier database
   - Guidelines for PMs to select resources/suppliers from the supplier database
   - Access to supplier performance information

2. Locating new resources
   - Process for identifying new resources
   - Standardized tests/questionnaires to screen new resources

3. Standard documents to engage resources: a contract/agreement, and a non-disclosure agreement (NDA)
   - If customized contracts are in use, what is the breakdown between standard contracts and customized contracts?
   - Validation of signatures prior to engagement of subcontractors
   - Frequency of contract and NDA review and renewal
4. Collection and analysis of subcontractor project-related feedback and performance-related data
   • Process for analysis of subcontractor performance
   • Process and frequency of publishing or discussing performance improvement (PI) with subcontractors
   • Method for tracking progress on PI cases
   • Success rate of PI process

5. Management of supplier/subcontractor feedback:
   • Process to collect and respond to data updates, requests, complaints and other feedback
   • Average response time for simple or urgent queries
   • Conflict resolution process, including escalation points and final decision-maker

6. Supplier/subcontractor access to online information
   • Vendor’s address, contact information, decision maker list, payment credentials, and other business-level data
   • Negotiated rates
   • Current and past projects and their specifications
   • Current and past purchase orders, invoices and payments
   • Mechanisms to track address or payment credentials updates (including compliance with bank templates)

7. Subcontractor rate negotiation
   • Currencies supported
   • Frequency of rate negotiations

International Accounts Receivable (AR) and Accounts Payable (AP)
Assess the vendor’s accounts payable and accounts receivable processes. Comprehensive AR/AP policies, procedures, and performance (diligence, organization, and efficiency) generally indicate the vendor’s overall performance as well as a loyal and stable vendor base.

1. Subcontractor/supplier submission of invoices
   • Online (web entry)
   • Email
   • Regular mail

2. Approval/rejection and exception handling for incoming invoices (including turnaround)

3. Follow-up/resolution process for payment-related queries and complaints (including returned payments or wrong payment credentials)

4. Supplier/subcontractor payment methods supported:
   • Wire transfer
   • Electronic payment systems
   • Checks
   • Credit/debit cards
   • Other

5. Payment currencies supported
   • Handling payments to developing countries
   • Handling small payment amounts (where wire fee is comparable to the amount itself)
Quality

Global Linguistic and Technical Quality Assurance
Determine availability and assess the vendor’s linguistic quality assurance (LQA) and technical quality assurance (TQA) processes. Vendors that offer LQA and/or TQA services generally have a formal approach and more advanced quality processes.

1. Does the vendor offer LQA services?
2. Does the vendor offer TQA services?
3. Is QA structure independent from production?
4. Formalized quality requirements and expectations for quality assessment
   • Publicly available quality system or methodology in use
5. Description of quality model approach
   • Pass/fail rating
   • Combination of pass/fail criteria and a quantitative rating
   • Single, unified ratings
   • Categories, error weight, and/or priority levels
6. Ability to apply customized weights/pass/fail criteria to different types of materials
7. Standard QA evaluation/results forms
8. Ability to convert QA results to client-preferred formats
9. Reconciliation (including arbitration) processes to manage disagreements between the translation team and QA team

Quality Management
Asses the vendor’s overall approach and processes to ensure quality of the materials the vendor produces.

1. Application of formal quality requirements to materials being produced
   • Global, semi-objective quality indicators, such as accuracy and readability
   • Objective quality indicators, such as terminology correctness and consistency, grammar, spelling, technical correctness of the files
2. Publicly available quality system or methodology used in production
3. Method to adjust production stage quality criteria to material type and/or customer expectations
4. Stages and extent to which quality assurance is applied in production processes
5. Collection, analysis, storage, and end-client access to internal quality assurance results
6. Issue resolution during production
   • Country standards and Style Guides
     a. Date/number formats, units (including monetary), separators, etc.
     b. Major grammar, capitalization, and punctuation rules
     c. Locales, fonts, broken, or incorrect encodings, etc.
     d. Deviations from the style guide provided by the client
   • Terminology and brand name issues
     a. Incorrect terminology
     b. Inconsistent terminology
     c. Incorrectly translated brand/product names and trademarks
• Over- or under-translation
  a. Untranslated or partially translated strings (strings that appear translated but contain some words in the source language)
  b. Over-translated strings (strings that shouldn’t be translated)

• Inconsistent translations
  a. Locating strings or terms with the same source translated differently
  b. Strings or terms translated similarly where source strings are different
  c. Checks for correctness and consistency of firmware or software references and messages in help, content, and user assistance files

• Technical issues*
  a. Broken or missing regular expressions (parentheses, tags, placeholders, formats, full stops, etc.)
  b. Incorrect, conflicting, or missing hotkeys or accelerators
  c. Incorrect file formats, code pages, or language scripts

7. Completeness and consistency of files being returned

Quality Control
Assess the specific ways the vendor checks for and resolves quality issues on materials that are supplied to them (by subcontractors, outsourced resources, or the client) before incorporation into the deliverable to the client.

1. Compliance enforcement processes and tools
   • Glossaries
   • Style guides
   • Country standards
   • Client-provided materials or instructions

2. Linguistic and technical quality control procedures or tools
   • Automated and manual checks (glossary adherence, terminology consistency, etc., across the whole set of project materials)
   • Automated bug reports*
   • Process to globally and quickly fix non-language-dependent errors in multiple files*

3. Independent quality assurance checks (performed by teams not involved in production) on selected samples for large or ongoing jobs (include size of sample)

4. Reconciliation process to manage disagreements between the reviewer(s) and client representative(s)
**Translation Processes**
Assess the vendor’s capabilities on typical projects, with focus on standard and critical processes.

1. Project and deliverables handoffs—processes and tools to:
   • Verify completeness and correctness of files, instructions, and translation memories
   • Perform file conversions, splits, or modifications
2. Capabilities to fine tune processes to client requirements and specific needs
3. Translation: language and technical self-checks
   • Those outsourced to translators
   • Checks after receipt of files from translators/editors
   • Formal process descriptions and specific requirements
4. Editing processes
   • Use of separate reviewers or editors (outside translation process) to fix translated texts
   • Use of specialist editors (scientific editors, content editors or other experts) to validate adequacy, accuracy, readability, completeness of translated materials

**Global Automation Solutions**
Assess the state of the vendor’s automation with regard to partner relationship management, project management, and financial management portals and applications.

1. Solution to automatically track POs, invoices and payments and fiscal statistics in real-time
2. Solution to provide customer views of their projects, POs, invoices, payments, and partner data (specify third-party hosted or in-house developed)
3. Live project tracking 24x7 for customers with large or lengthy projects (specify third-party hosted or in-house developed)
4. Terminology management system (TMS) solutions supported
5. MT systems in use (include demonstrable gains or usability limitations for each)
6. Live rate maintenance (that handles thousands of price points) for both clients and suppliers
7. Solution to automatically link actual rates to project tracking, and manage specifications and quotes (include monthly capacity)
8. Solution for online in-country review
9. Other global solutions
   • Purpose and function of each application.
   • Benefits in the areas of process improvement, productivity, quality, turnaround time, savings, etc.

**Global Terminology and Language Moderation**
Offering of these services (in-house or outsourced) generally indicates high maturity level and competence.

1. Does the vendor offer global terminology creation and maintenance services?
   • Source terminology development/maintenance
   • Target terminology development/maintenance
2. Summarize the vendor’s specialized, centralized process for terminology maintenance
3. Multilingual terminology maintenance
   - In-house or third-party portal
   - Change request and feedback
   - Approvals
   - Process for recruiting and training source and target terminologists for all languages offered

4. Adequacy of new term development resources
   - Trained terminologist network
   - Skills and knowledge base
   - Community management, including issue resolution
     a. Translator vs. quality assurance (QA) person
     b. Client vs. translator
     c. Translator vs. client-Initiated 3rd party check

Summary and Conclusions

Organizations seeking to procure the services of reliable suppliers for their globalization and localization initiatives should begin with a procurement process that provides meaningful guidance on what services are needed and how to compare capabilities between vendors. These supplier dimensions provide a valuable first step toward identifying which organizations can customize and refine to meet customers’ unique needs and comply with their internal processes and procedures.

This work represents GALA’s initial efforts to provide standards and consistency around the language industry supply chain. We believe that these efforts will help clients and vendors find an even more appropriate “fit” by comparing their dimensions in more thorough, meaningful ways.
Contributors

Primary Authors / Contributors

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Serge Gladkoff graduated with honors from an Ivy League nuclear science college and for more than 24 years has been engaged in the localization industry, first as a deputy director for a software distribution company, then as a localization manager of Borland International before becoming co-owner of Logrus as the on-going President for 21 years. Serge has been a speaker and presenter on many events, and was re-elected as a GALA Board member for the third time in 2014-2015, after terms in 2009-2010, and 2011-2012.

Serge has been always engaged in the Standards domain for GALA, and is currently GALA CRISP Program Lead. Serge is a co-author of the GALA Standards Whitepaper as well as numerous publications on linguistic quality and standards.

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Leonid graduated with honors from the Moscow Physico-Technical Institute (Russia), specializing in theoretical physics (plasma) and computer simulation. He started his career as an engineer at the Moscow Radio-Engineering Institute, got his Ph.D. in physics and mathematics in 1988, and by 1990 became a senior research associate.

After the demise of the Soviet Union, and during the early stages of Russian economic reforms, Leonid acquired an invaluable life experience moonlighting as a school teacher, dubbing videos, setting up computer software, and working as a freelance translator and interpreter. He joined one of the first software localization projects for the Russian language in 1991.

In 1993 Leonid co-founded Logrus, the first professional translation and software localization company in Russia, and has served as the company’s CEO since then. During these years Logrus has grown from a small SLV with three employees into a company with multiple offices and 150+ permanent employees, offering the whole spectrum of translation and localization services (including scenarios with MT usage), LQA, Terminology maintenance, software engineering, testing, DTP, multimedia and other services for multiple languages.
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With more than 25 years of leadership and management experience in a broad array of organizations, including independent consulting and training experience, Charlie is proficient in Technical, Software and Translation project management, manufacturing, training, multi-site manufacturing operations management, and business management system consulting. As a third party auditor for an international certification body, Charlie has become a technical expert for globalization and localization efforts and has drawn upon his background acquired in roles such as Management Representative, Quality Engineer, Quality Manager, Project Team Leader, Director of Continuous Improvement and Program Management for these industries. He is a RAB registered auditor for several international standards such as ISO-13485, ISO-9001, and EN15038 and has worked extensively with the American Society for Quality on various Executive Boards, as well as on National committees. He has been selected for the review of the Certified Quality Auditor Exam Committee at ASQ Headquarters in Milwaukee, and was also selected to assist in writing the exam for the Certified Quality Improvement Technician committee.

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Fluent in English, Dutch, Portuguese and Italian, Patricia applies her language and organizational skills as Localization Project Manager at Spil Games. Her main focus is continuous improvement of the processes and quality involved in Spil Games’ localization service. Her areas of responsibility range from editorial/localization software to degrees of cultural accuracy.

Patricia’s background is saturated in European language and culture. Having studied EN/PT/NL translation at the translators’ academy in Maastricht, and Portuguese language with a specialization in translation at the University of Utrecht, she was sworn in as an English-Dutch translator at the court of Utrecht in Feb 2005. In the same year she completed a language course at Siena’s Università per Stranieri, and continued into an internship as a translator at the European Parliament in Luxembourg.

Since then, Patricia has worked in several translation agencies as a project manager, and joined Spil Games in 2012.

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Hans co-founded GALA in 2002 and was active in GALA leadership for more than a decade. He’s been in the language industry for over 30 years, beginning as in-house translator and interpreter. He started his own language-service business in 1994 and later was a global corporate executive at TransPerfect Translations for six years. Born in Germany, Hans speaks six languages and holds a B.A. from Princeton and an M.A.L.D. from the Fletcher School of Law and Diplomacy. He is also an Associate Fellow of the Society for Technical Communication. Hans speaks and writes extensively on the language enterprise.
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Maria Kania-Tasak has worked in the translation industry for over 14 years and has great passion for it. She is Polish-Canadian (born in Poland but grew up in Canada). She studied Rhetoric and Professional Writing at University of Waterloo, Canada. After working as a Technical Writer for Marconi/Ericsson in Montreal, she decided to move back to Europe in 2001 where she worked as a Business Development Manager and Sales Manager for various European LSPs. She currently holds a position of Strategic Account Manager at Sajan. Maria is an activist on the topic of translation services RFPs and has written articles and given presentations about it at various translation conferences. She is also a founder of the Catalan chapter of Women in Localization. Maria currently lives and works in works in Barcelona, Spain.

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Sanne LeGier grew up in Germany before moving to the US. Her bi-cultural background, paired with technical and business expertise, led her to a successful career in localization. Sanne holds a degree in Software Engineering, studied Computer Linguistics at the University of Cologne with focus on MT and is a SixSigma Green Belt. Over her 10-year localization career she worked in various positions in production, technology and management for companies like Imperia, SDL and Venga Globalization. Sanne currently holds the position of Director of Operations at Venga Globalization.

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Karin Pfetzer has a degree in translation from Heidelberg University and an MBA from Henley Management College. She has been working in the localization industry since 1995, starting out as a translator with SDL, moving to project management at UK software house Sage and then into production management at a large UK translation company, where she introduced the use of CAT tools, implemented processes and procedures and led the company to achieve ISO9001:2000 certification. In 2003, Karin was part of the team that founded Conversis; she’s responsible for all operational activities and serves as operations director on the Conversis board.
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Véronique Özkaya, Chief Sales Officer, Xplanation

Véronique Özkaya is responsible for developing and executing Xplanation’s global sales, marketing and account management strategies. Before joining Xplanation in 2012, she held senior management roles at Moravia, Lionbridge, and Stream International. She is a frequent public speaker at industry events.

Miriam Valova, Procurement Area Manager and Team Coordinator, Jonckers Translation and Engineering

Miriam has been working in translation/localization business since 2006, beginning her career at Lionbridge Slovakia as Vendor Coordinator where she was mainly responsible for Central and Eastern European languages.

In 2008, she joined Jonckers Translation & Engineering in Czech Republic, also as Vendor Coordinator. During 5 years of working experience at Jonckers, she has been promoted to Procurement team coordinator, which is also her current role. Together with my team she supports over 150 languages and...
About GALA

The Globalization and Localization Association (GALA) is the world’s leading trade association for the language industry with over 400 member companies in more than 50 countries. As a non-profit organization, we provide resources, education, advocacy, and research for thousands of global companies. GALA’s mission is to support our members and the language industry by creating communities, championing standards, sharing knowledge, and advancing technology. For more information: www.gala-global.org.

About CRISP

GALA’s Collaborative Research, Innovation and Standards Program (CRISP) offers an inclusive platform for voluntary cooperation among language enterprise stakeholders. CRISP seeks to bring together participants to produce concrete results that advance the industry and create innovative solutions for shared problems. CRISP is an outgrowth of the GALA Standards Initiative, which began in 2011 in an effort to provide a clearinghouse for information about industry standards. It quickly became evident that the GALA community and beyond wanted more than just information about standards; in addition to determining the best practices of tomorrow, they wanted to participate in creating and implementing solutions that could help them in their work today.

CRISP extends the focus beyond standards to create a collaborative framework, open to experts and volunteers, which is designed with low barriers to participation. Program projects and initiatives are driven primarily by its participants, with minimal direction and vetting.

With their direct links to the corporate language community, GALA and CRISP are uniquely positioned to gather input from companies, as well as individuals in the supply chain, and to encourage adoption of new industry standards and practices.