

## Axtria SalesIQ™ Fall '24 Release Notes

The Fall '24 release is packed with cutting-edge innovations designed to transform sales operations, boost sales efficiency, and elevate the user experience.

A key feature in this release is the debut of GenAI Copilot Assistants. These GenAI-powered assistants will revolutionize how your teams manage operational tasks, offering descriptive analysis and streamlining workflows. Beta testing is available in key areas, including territory design and DANI for field users, enabling your user's early access to this game-changing functionality.

In addition, the release integrates GenAI and advanced analytics more deeply into field operations, enabling insight-driven, real-time decision-making that accelerates actions and enhances overall performance. To further elevate transparency and control, the release also introduces features like reimagined incentives jobs and comprehensive audit logs for data processing, providing more robust operational monitoring and accountability.

### What's New in the Fall '24 Release?

The Fall '24 release introduces transformative enhancements across incentives management, self-service capabilities, advanced territory design, and GenAI-powered Copilot Assistants, delivering improved transparency, operational monitoring, and a more intuitive user experience for both home office and field teams.

- **Enhanced operational efficiency:** The release transforms incentives management by reimagining incentives jobs and introducing audit logs in data processing. These enhancements promote greater transparency and provide deeper operational monitoring.
- **Augmented Self-Service:** New self-service capabilities and enhanced design functionalities empower users to streamline workflows, and a new simplified next gen incentive plan administration is now available for beta testing. The improved territory design with PRO features and upgraded analytics delivers a more intuitive user experience and stronger decision support.
- **GenAI-Powered Copilot Assistants:** GenAI is a value accelerator revolutionizing how both home office and field force teams interact with Axtria SalesIQ™. Our newly introduced Copilot Assistants streamline operational tasks and provide descriptive analysis across a wide range of use cases, depending on the licensed modules. Beta testing is available for territory design in the home office and DANI for field users, setting the stage for even more complex insights and automation in future updates.

### A. Next-Gen Incentive Compensation

The Fall '24 release aims to improve operational efficiency with a revamped incentive jobs process and a more robust data validation framework and a new self-service IC administration module. We've also added advanced audit logs for enhanced transparency and monitoring of data processing.

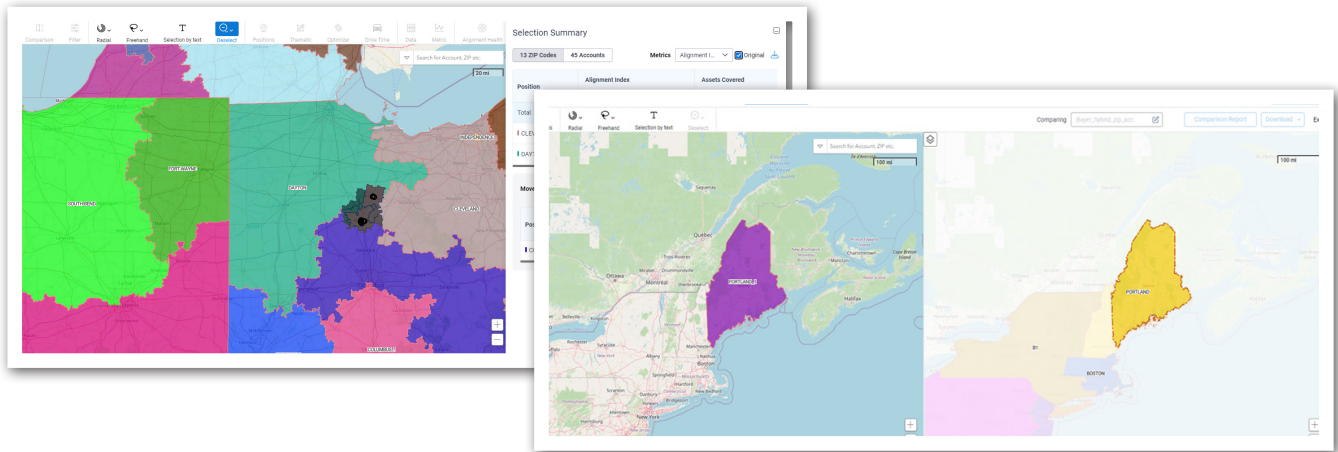
- **New IC Plan Administration:** A new self-service incentives administration module that offers a drag-and-drop canvas, along with pre-built components for workflow creation, goal tracking, and commission-based structures is in beta testing with a limited set of customers. This new feature streamline plan configuration and allows users to create new IC plans in minutes.
- **NextGen IC Operations Cockpit:** The operations dashboard now supports bulk uploads and delivers faster performance, making it easier to manage incentive operations at scale.
- **New Features in Quota Setting & Refinement:** We've removed marker setting limitations and introduced new analytical chart types, empowering HQ users to set fair quotas faster. In Quota Refinement, new custom validation options ensure more comprehensive rule coverage for global customers, and improved zero-sum validation enhances the accuracy of quota adjustments.

## B. Next Gen Territory Design

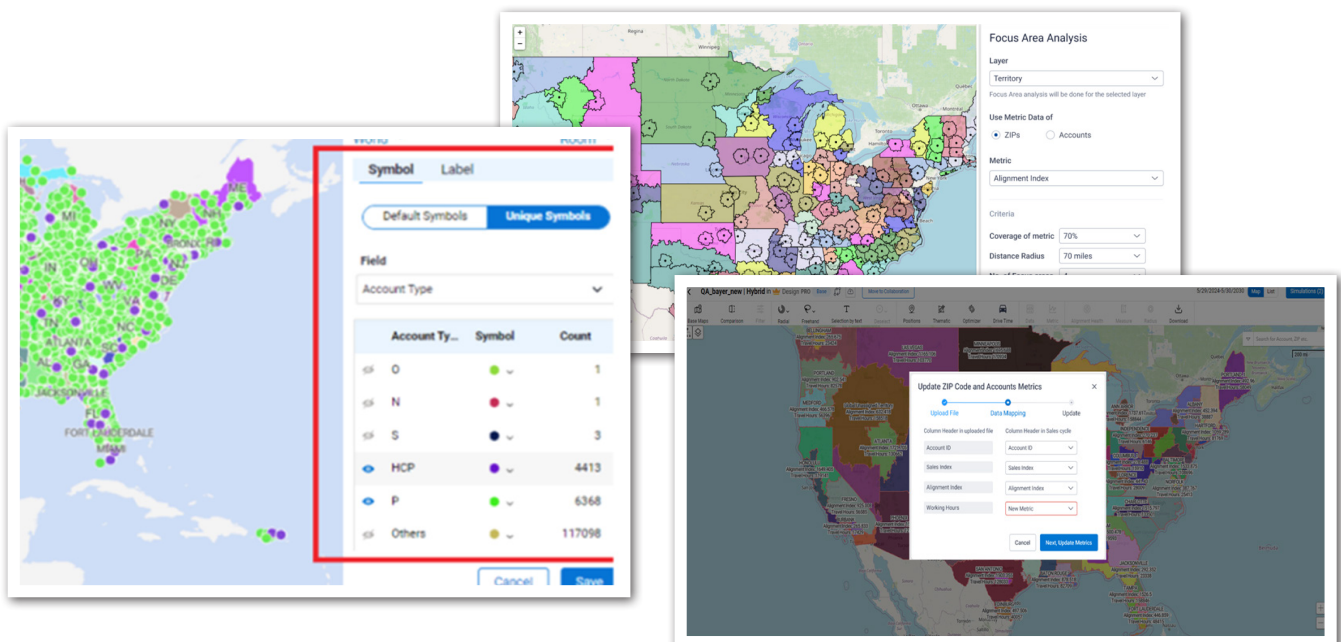
With the Fall '24 release, users get enhanced territory designing with PRO features, upgraded analytical and GenAI capabilities, improved self-service, deeper design functionalities, and streamlined decision-making with next-gen alignment management.

### Enhanced Territory Design Functionality

- Advanced Change Impact Panel:** This new feature helps users visualize impacts on multiple metrics, compares original values, and offers drill-down insights. The side-by-side view allows precise alignment comparisons for better decision-making. The Territory Optimizer has an upgraded engine with improved clustering for enhanced alignment and consensus results.



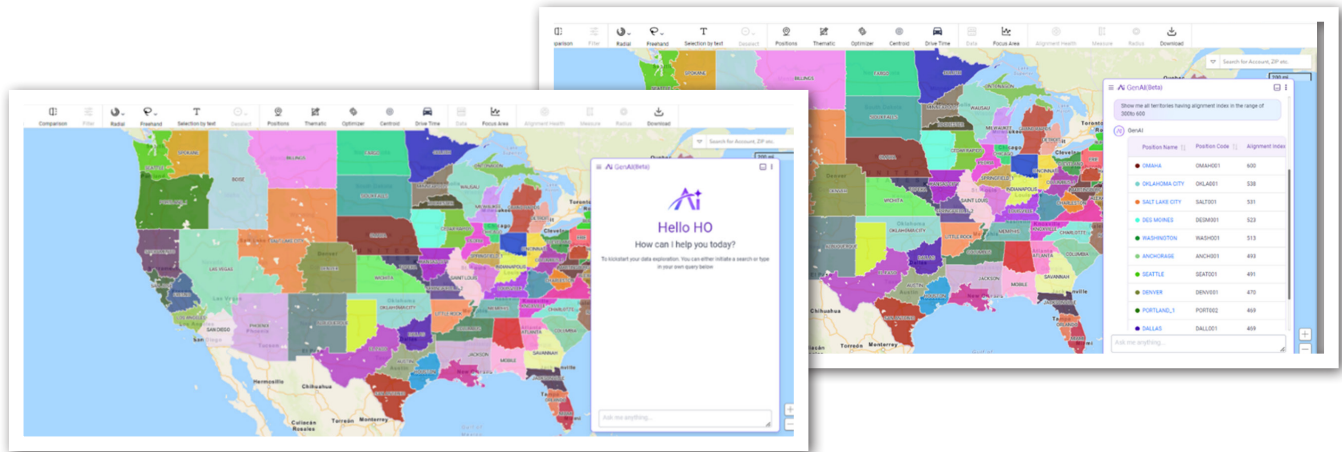
- Focus Area Analytics:** This helps users in analyzing the territory shapes to identify pockets of utmost customer concentrations. It also helps users in modifying their call plan by analyzing if proper calls are being assigned to areas that are of focus within a territory.
- Metric Management:** This capability empowers users by giving them full control over adding and refreshing metrics within their scenarios, without the need to recreate them.
- Workload Centroid Analyzer:** This capability helps users to improve territory design by identifying imbalances and help in people placement for optimized travel.
- Dynamic Labels:** This feature simplifies the decision-making process by keeping critical data upfront and easily accessible. Users can immediately view crucial information such as alignment index, sales figures, or workload without needing to click on individual territories, saving time and effort.



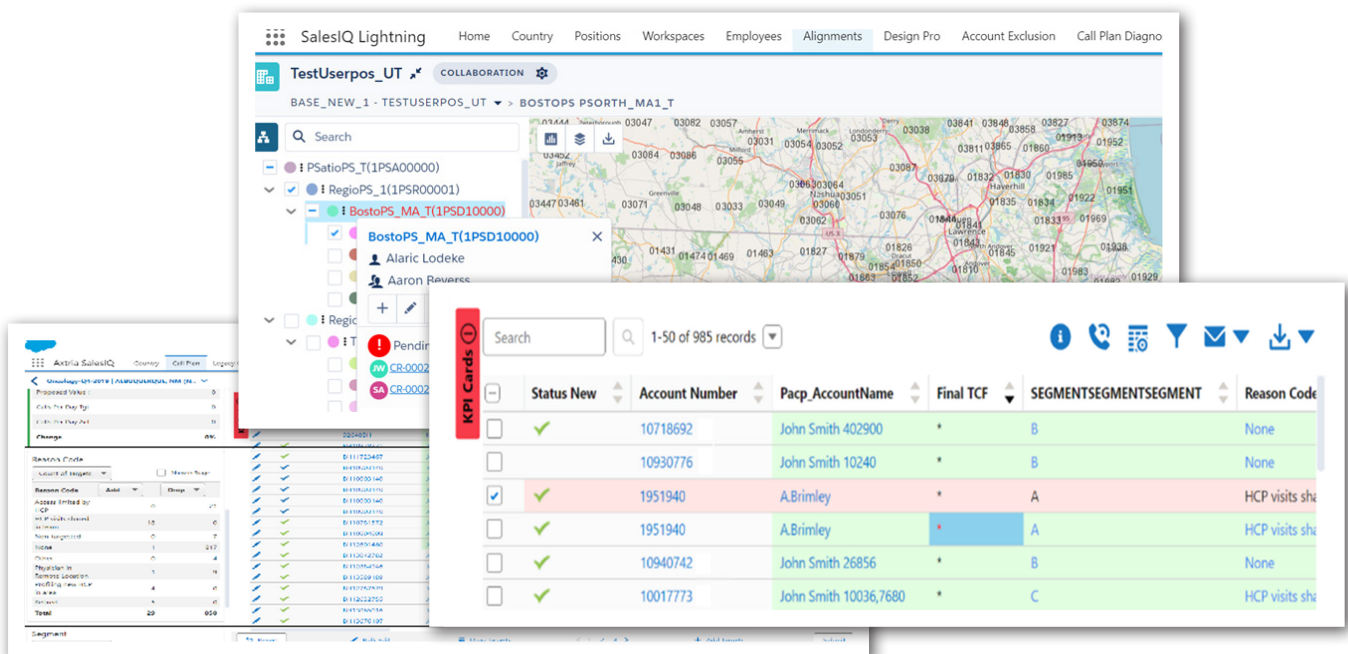
## New GenAI Copilot Assistant

We are pleased to announce availability of beta version of GenAI based copilot for territory design functions. In this release, the following features are supported to provide a sneak peek to territory design GenAI features.

- **AI-Assisted Advance Search:** Chatbot assisted filters for map and list views, allowing users to get to relevant entities and KPIs faster enabling better decision making.
- **Workflow Automation (Text-to-Task):** Enables users to trigger functions like heatmap plotting and zip movements using AI assisted prompts and commands.



- **Alignment Roster:** Displays metric information at the zip level on maps, enhances bulk movements of zips, and allows efficient removal of positions with automatic metric updates for overlay teams. This also improves employee hierarchy visualization on the alignment page and ensures automatic data reversion during team restructure failures.
- **Call Plan Feedback:** KPI cards show the sum of calls and HCP counts in absolute values and percentage changes, highlighting errored records when validation is enabled. Additional features include data masking based on user conditions, guardrails for proposed KPI values, retention of sorting preferences, and configurable column descriptions.
- **Role-Based Reassignment of Change Requests:** This feature streamlines the process of reassigning change requests based on user roles, enhancing collaboration and management efficiency.



## C. Unified Field Experience (UFE)

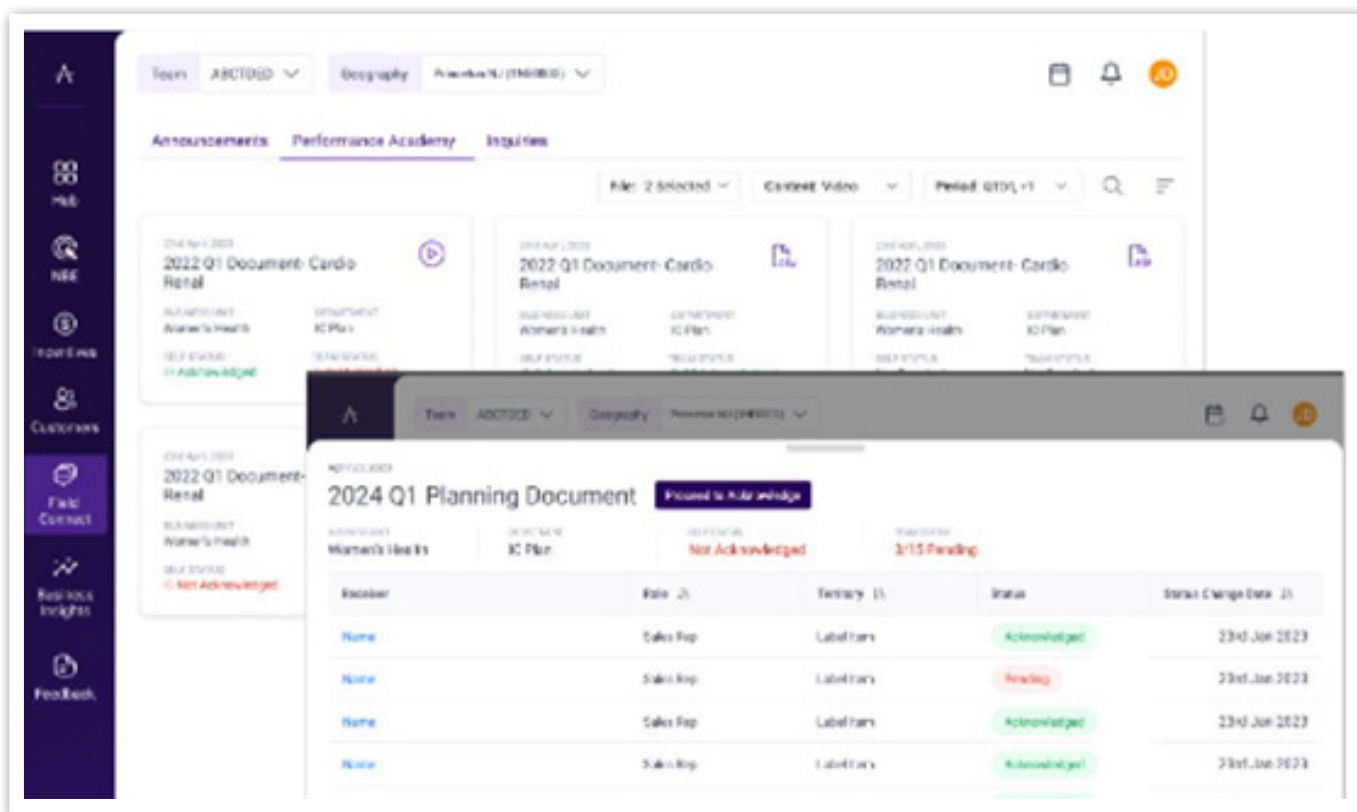
Integrated GenAI and advanced analytical capabilities empower field users with insight-driven operations and enhance workflows through instructional commands and a co-pilot framework.

### Enhanced UX and Administrative Capabilities

- **Administrative Capabilities:** Client admins can configure enable or disable modules, add theme colors and logos, add FAQs to meet geographical needs and configure custom IC dashboard.
- **User Experience:** Improved user experience through enhanced search across all columns on IC reports & managers ability to see plan document acknowledgment history.
- **Downloadable Reports, Call Plans, and Alignment:** Users can download IC performance reports, call plans, and alignment maps for easy access and sharing with teammates.
- **Performance Improvements:** Optimizations are made to improve loading times for the landing screen and embedded modules.

### Improved GenAI Functionality for Field GenAI Co-pilot (DANI)

- **Pre-Call Planning & Better Customer Targeting:** Identify and filter best customers by generating HCP insights using “Ask DANI” prompts and queries, refine your target list by applying AI-assisted filters and search options to identify most effective customers. This feature is now available for beta testing.



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### About Axtria

Axtria helps life sciences companies harness the potential of data science and software to improve patient outcomes by connecting the right therapies to the right patients at the right time. The company is a leading global provider of award-winning cloud software and data analytics to the life sciences industry. We're proud to deliver proven solutions that help pharmaceutical, medical device, and diagnostics companies complete their journey from data to insights to action, enabling them to earn superior returns on their investments. As a participant in the United Nations Global Compact, Axtria is committed to aligning strategies and operations with universal principles on human rights, labor, environment, and anti-corruption, and taking actions that advance societal goals.