CASE STUDY

INTELLIGENT REPORTING SOLUTION FOR KEY ACCOUNT MANAGERS (KAM)

50% REDUCTION IN MANUAL EFFORT DUE TO STANDARDIZED AND AUTOMATED REPORTING FOR A FORTUNE 500 PHARMA COMPANY

"…coherent, intuitive flow of information…"

"… consistent and legible with the help of text and chart expansions…"

"…help tab and contextual email trigger can answer any data question…"

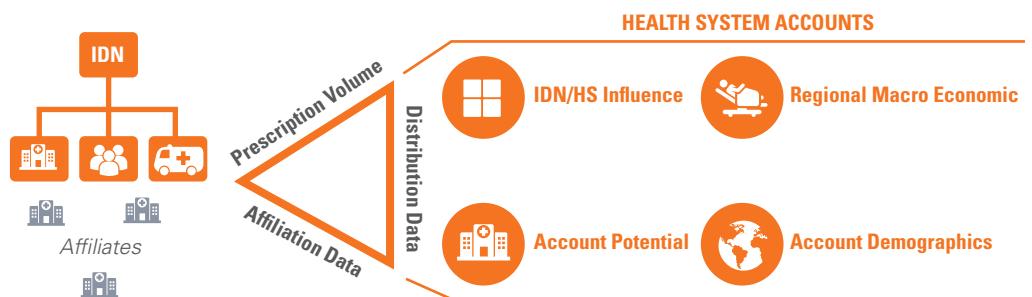**Key Client Stakeholders**

INTRODUCTION

Growing interactions between various pharma healthcare industry influencers present challenges, but more importantly, opportunities for the decision makers to better understand patients, physicians, and other stakeholders. This case study is just one example among many.

A 2014 survey of the healthcare systems of 11 developed countries found that the US healthcare system to be the most expensive and worst-performing in terms of health access, efficiency, and equity.[1]

From clinical research to commercial analytics, the emergence of technology, and a better understanding of patient journey will transform the industry, allowing us to obtain new value from new and existing drugs at a faster rate.

1 TRANSFORM HEALTHCARE ▶ **2** ADVANCE BEST PATIENT JOURNEY ▶ **3** IMAPCT HCS ECOSYSTEM

Health care systems are undergoing significant transformation led by medical breakthroughs, technology disruption, and process evolution. It has led to a strategic shift in focus, from quantitative to a qualitative assessment of interactions among the different channels. The US Health Care System is unique and complicated due to multiple factors that drive and govern decision making.

HEALTH SYSTEM ACCOUNTS

IDN

Affiliates

Prescription Volume

Affiliation Data

Distribution Data

- IDN/HS Influence
- Regional Macro Economic
- Account Potential
- Account Demographics

With rapid changes in policies and regulations, the Health Care System landscape is getting more complicated than ever before. The need for insights into the 'Health Care Systems' becomes essential for KAMs (Key Account Managers) to be successful in their accounts. Further, the traditional datasets and KPIs are no longer enough to provide insights into ever-evolving and sophisticated health systems that offer a 360-degree view.

For ensuring consistent alignment with the overall strategic objectives, it is crucial that the home office and leadership track performance of health systems at different levels, i.e., regions, system types, franchise, and national.

AXTRIA
INGENIOUS INSIGHTS

BUSINESS SCENARIO

One of our Fortune 500 clients wanted to develop an integrated portfolio tracking solution for them to be successful in their respective health system account because of the change in the healthcare landscape, where large providers are consolidating to create bigger IDNs, and C-suite is driving the system-wide decisions.

Our client had identified ~30 Health Care Systems (HCS), each with higher revenue and significant growth potential, that were to be serviced by ~10 Account Managers (AM) covering more than 15 brands. Thus, the need for a portfolio level comprehensive reporting solution comprising key 'activity and performance' metrics aligning with 'overall business objectives' was strongly felt.

The solution would aid tracking goal, performance, growth, benchmarking, and subsequently facilitate decision making or course correction at account manager and executive level. It required a thorough understanding of:

- Health systems environment and landscape

- The complexity of selling models in HC systems

- Key performance indicators aligned to business objectives, brand/ franchise objectives that drive incentives for account managers

- Several data sources required for analytics and reporting (not limited to the mentioned sources):

  – Sales (prescription data)

  – EMR/EHR

  – Affiliations data

  – Formulary data

Axtria worked closely with the client to understand their objectives and define critical strategic initiatives surrounding payers, IDNs, and specialty pharmacies. To achieve overall business objectives, Axtria leveraged internal-external data assets, account intelligence, and brand objectives to show KPIs that measure performance, growth, and goals for products and therapy areas. Dashboards and reports developed during this engagement focus on a comprehensive analysis of sales, activity, C-level connects, targets, and drug pathways.

The key objective was to achieve a 'one-stop shop' for relevant and comprehensive business insight and collaboration around BUs marketing for KAMs, franchise teams, and executive leadership with the following key features:

- **A holistic view of the key accounts:** Assess and obtain more information about the account sales and potential for KAMs and franchise teams to create a more comprehensive look of their key accounts and enhance decision making across brands

- **Reduce manual interventions** in the process of data entry, status/progress updates, and fragmented communication, which would minimize low-value manual processes and time demands on KAMs

- **Better insights:** Provide a seamless interface with a single source of information, collaboration, brand planning, account objectives to harness and institutionalize better insights (e.g., digital insights, impactful initiatives to scale x-accounts)

CHALLENGES

The organization faced several challenges, which included:

Challenges	Effects
Disparate data and in-efficient data onboarding	The process of obtaining the data required for specific business and research questions was time-consuming and inefficient due to the varied file types, unstandardized sharing, and inability to analyze the unstructured data.
Manual data processing	Data consolidation and preparation for franchise reviews were being done offline, which required KAMs to enter data manually in multiple excel sheets.
Limited insights	The existing KPIs for brand performance, account performance, and activity insights had many gaps like BU sales, GPO / payers, and market potential, which required more in-depth thought process to generate relevant ideas for effective decision making related to the key accounts.
Restricted collaboration	Critical processes like brand planning and goal setting were delinked, and users had to access multiple documents/applications to connect the dots, which was extremely time-consuming. There was no existing platform to collaborate and share, which resulted in the isolation of users and loss of productivity as they couldn't share their analysis within their teams.

AXTRIA'S APPROACH

Axtria team focused on the process of using the existing data and developing reports on the comprehensive analysis of sales, activity, C-level connects, targets, and drug pathways. Axtria team took three vital steps for the development process:

A) KPI DESIGNING

We utilized Axtria's KPI framework, which is based on a thorough understanding of the business decisions while designing KPIs. Some of the critical steps taken were:

- Identify stakeholder's needs through well-planned interviews of key stakeholders and users

- Understand and document KPIs to be reported

- Define and design standard reports to be configured – KPIs, users, security, functionality, and business rules

- Review and obtain sign-off on mockups and BRD

B) REPORT CREATION

Axtria team adopted a two-step approach for report creation:

i. Data processing

Fast, efficient, and flexible ingestion, storage, and access of data is the pre-requisite of analytics, especially when dealing with an unstructured and large volume of data. Successful tool selection comes from significant research and experience in cloud and distributed technologies. In this project, SAS was used for faster data processing to feed the dashboards.

ii. Dashboard development

Tableau was the preferred tool because of its usability across enterprises, interactive insights generation, intuitive graphs/dashboards, and reports available on time. The solution was designed such a way that it has a role-based four unique views, each view having multiple screens to cover actionable insights and enable critical decisions –

BRAND VIEW

- ✓ Sales and volume trends
  - By brand over time
  - Comparison to competition
  - Actual vs. forecast
  - By channels & sub-channel
  - Percentage growth / share trend
  - Time – R3M, R12M, & YoY
  - By geography
- ✓ Reach and frequency trends
- ✓ Patient trends

ACCOUNT MANAGER VIEW

- ✓ Performance at Health System level
- ✓ Percentage growth, % share, trends
- ✓ Sales by geography
- ✓ Comparison of volume and sales trends to national avg.
- ✓ Formulary information
  - Payment type
  - Avg. out of pocket cost

HEALTH SYSTEM VIEW

- ✓ Views by every Health System
- ✓ Account profiles
- ✓ Parent – child affiliation
- ✓ Breakdown of sales / Rx by products
- ✓ Product wise tier info overtime
- ✓ Diagnostic tests information

EXECUTIVE VIEW

- ✓ Product sales / Rx by account managers / accounts / types (% share / % growth)
- ✓ By geography (% share / % growth) in map
- ✓ Attributing product performance to market events

C) STRUCTURED GOVERNANCE

Axtria leveraged its well defined and robust governance processes to ensure appropriate
program oversight during this engagement. We followed the three key steps –

- Project planning
- Collaboration
- Project oversight

CLIENT BENEFITS

Key benefits delivered to the clients were:

50% reduction
in manual effort due
to standardizing and
automated reporting

Higher user adoption
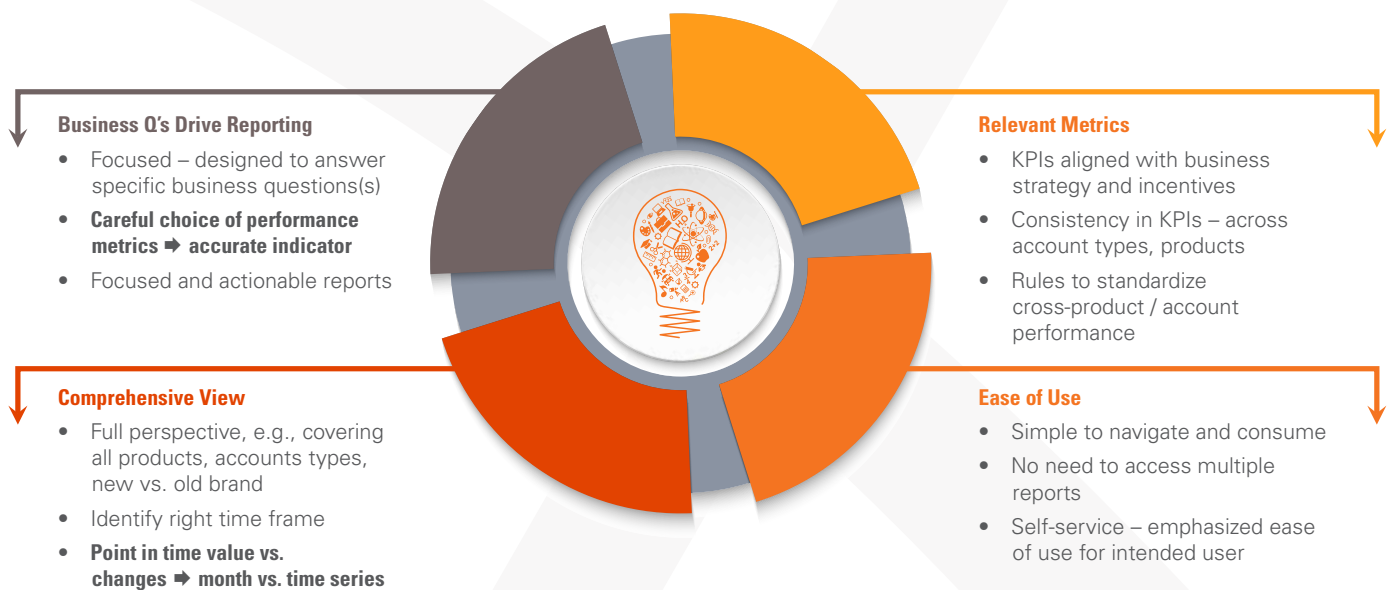because of the
360-degree view of an
account and ease of use

Scalable solution
that could easily be
extended to accommodate
additional brands and views

Interactive dashboards
with rich visualization
helped increase engagement
by account managers

The four distinct views, each had a varied degree of drop downs and information granularity, focusing on different
audience across brands and leadership. These outcomes were closely tied to the key business objectives of the
customer.

Business Q's Drive Reporting
- Focused – designed to answer
  specific business questions(s)
- **Careful choice of performance
  metrics ➡ accurate indicator**
- Focused and actionable reports

Relevant Metrics
- KPIs aligned with business
  strategy and incentives
- Consistency in KPIs – across
  account types, products
- Rules to standardize
  cross-product / account
  performance

Comprehensive View
- Full perspective, e.g., covering
  all products, accounts types,
  new vs. old brand
- Identify right time frame
- **Point in time value vs.
  changes ➡ month vs. time series**

Ease of Use
- Simple to navigate and consume
- No need to access multiple
  reports
- Self-service – emphasized ease
  of use for intended user

Axtria included and refined metrics / KPIs in consultation with stakeholders from brand and market access teams

KEY TAKEAWAYS

Axtria brought its deep expertise of the US Health Care System and leveraged its robust KPI framework to define and refine metrics in consultation with stakeholders from brand and market access teams. The qualitative feedback received from all user groups has been outstanding and has also helped us improve this solution further with time.

As we progressed on this engagement, we were able to build a deeper relationship with the customer to take this end-user experience to the next level further and enable them with operational as well financial gains, some of the key highlights were:

Effectiveness gains From insight and decision support enhancements	• Whole-BU, whole-franchise, whole-account views • Account potential, competitor brand, payer insights • Visibility into account initiative outcomes and x-account rollout • Decision support – e.g., inclusion of key digital metrics
Efficiency gain From enhancements to usability and transparency	• Single-source of information for KAMs • Enable collaboration across stakeholders (franchises, digital, IT, functional teams) e.g., for brand planning, goals / objectives • Minimize low-value manual processes and efforts required on KAMs through direct data entry and templates
Reduced risks From better collaboration and knowledge management	• Knowledge management capabilities ensuring capture of business context, insights, observations • Comprehensive view of performance and activity through added perspectives (market potential / competitor volumes, payer, OBM, and GPO) and coverage (all brands)

In this ever-changing industry, an efficient combination of data analysis and visualization tools and resources is crucial for faster decision making that empowers companies to make timely and informed decisions. Identifying the strengths, limitations, and iterative nature of these approaches is critical to the efficient usage of these tools and resources.

Beyond this project, our deep experience in pharma industry blended with active information management and analytics capabilities, helps us identify other ways pharma and healthcare industry can take advantage of big and increasingly unstructured data. For example:

• Auto-stewardship in Master Data Management (MDM),

• Marketing and salesforce empowerment with dynamic targeting,

• Automated classification of adverse events,

• Pre-screening of patients for clinical trials using NLP to enable adaptive clinical trials.

REFERENCE

1. U. S. Healthcare: Most Expensive and Worst Performing