

CASE STUDY

DATA ANALYTICS-DRIVEN ROSTER AND ALIGNMENT OPTIMIZATION FOR A MAJOR MEDTECH COMPANY

AXTRIA SALESIQ™: ENABLED, AUTOMATED AND REAL-TIME INSIGHTS FOR SWIFT DECISION-MAKING AND INCREASED PRODUCTIVITY



BUSINESS SCENARIO AND REQUIREMENTS

A leading medical technology company's sales organization struggled with unstructured and disconnected data and black-boxed systems and processes. These foundational shortcomings severely impacted the sales organization's understanding of employee information, customer allocation, and overall performance dynamics. The roster and alignment processes were most affected by prevailing complications, and the sales organization's performance was underwhelming. Some of the critical pain points of the business were.

1. No single source of truth for data

- Unstructured and disjointed data across organizations, systems, and processes
- Outdated customer data in the customer relationship management (CRM) database
- The employee database was black-boxed and was not centrally maintained

2. Roster and alignment inefficiencies

- A fully manual roster and alignment due to the lack of a unified, integrated system and collaboration
- Delayed and incomplete insights from unstructured and disjointed data
- Low confidence in business decisions, as current and accurate data did not support decision-making

3. More time spent on administrative tasks than sales activities

- Manually maintaining spreadsheets to report data in the absence of connected systems
- Coordinating with multiple teams and stakeholders to collect and structure data for a basic understanding of the business
- Juggling with various systems to collate business activity information and data for organization-wide consumption

The prevailing shortcomings needed attention because they hindered the sales organization from assessing its current business state. The current system did not give sales leaders a clear picture of the number of aligned and unaligned accounts, the fairness and equity of geographical alignment, and the current number of sales reps with detailed information on recruitment and attrition. All these problems would potentially lead to revenue loss.

CRITICAL BUSINESS QUESTION: "How can the sales organization sell more, drive productivity, and perform fewer administrative tasks?"



A ROBUST SOLUTION BACKED BY AXTRIA SALESIQ™

Axtria deployed an Axtria SalesIQ™-based software-as-a-service (SaaS) solution for the MedTech company. As part of the solution, Axtria delivered two primary modules.

1. Alignment management
2. Roster management

Both application modules could readily integrate with the MedTech company's systems and provide a strong foundation for all their roster and alignment processes.

Axtria's SaaS solution provided:



A detailed data framework to map out an end-to-end and best-in-class data architecture to support the roster and alignment activities. This framework would form the foundation of the sales organization's ongoing processes.



Axtria SalesIQ™'s ability to synchronize data and automatically make data-driven insights available in real-time to sales leaders. The solution helped define and create the data architecture and flow to make all systems talk to each other for alignment and roster processes.



The consultative element of the SaaS solution helped map and align business leaders' requirements and fine-tune the data framework

[Click here](#) to learn more about the Axtria SalesIQ™ product suite and dive deep into its offerings and capabilities.



BENEFITS

One of the MedTech company's home office users said, "We are super happy! We can now drive confident data-driven decisions, which we never could before."

The successful implementation of the Atria SalesIQ™-based SaaS solution provided the following business benefits to the MedTech company:



1. **Connected and automated data integration across all systems for alignments and roster processes:**

The solution centrally connected all siloed data, automatically making the same data version available to all sales organization business teams. It directly connected the central data to data sources and worked without roadblocks. All changes were made to the source data and reflected seamlessly across all systems. As a result, business leaders and sales reps had all relevant, accurate data at their fingertips in real time.

2. **Automated and swift data-driven insights for confident decisions:**

Connected data enabled the application of advanced analytics to answer business questions for multiple user groups within the sales organization. These insights were swift and were made available to the teams in real time, significantly improving routine decision-making. Making decisions about rosters and alignment is now quicker because the information is readily available on the following:

- Account reassignments when reps leave or join the organization
- Identifying the accounts that need help
- The customer understood how realignment decisions would impact the base territory, the revenue of the new territories, sales rep quotas, and old account relationships.

3. **Visual representation of data, insights, and alerts:**

The sophisticated business intelligence component of the SaaS solution visually represented all relevant data for different user groups. That allowed sales leaders to understand critical information quickly, including:

- The accounts within the territories they and their teams owned
- Areas of concern such as:
 - ▶ territories that don't have representation and need to be filled
 - ▶ territories that are too large or too small and need to be balanced

4. **Increased productivity of the entire sales organization:**

The automation driven by Atria SalesIQ™ eliminated the sales team's need for manual intervention and administrative involvement. The sales team could now focus on their core competencies and be more productive in sales planning and operational tasks. The sales team, which didn't have time for critical processes earlier, could now focus on value-added analytics to drive informed decisions.



ADDITIONAL OPPORTUNITIES UNLOCKED



The Atria SalesIQ™-based SaaS solution delivered promising benefits to the sales organization and unlocked several opportunities for further business efficiencies beyond the scope of the initial business requirements. These additional benefits include:

1. More thorough alignments were possible by ensuring maximized sales rep productivity.
2. Other business processes within the incentive compensation sphere were optimized, including payouts, fair compensations, goal and quota setting, etc.
3. The IT team can now rethink the MedTech company's entire data architecture to support future sustainability and scalability.

The MedTech company significantly benefitted from the Atria SalesIQ™-based SaaS solution. It no longer struggled with unstructured and disconnected data and black-boxed systems and processes and realized high-value optimization across the alignment and roster processes. Atria's experience with this engagement emphasizes the power of product-based sales optimization solutions to improve sales rep productivity, process improvement, and data-informed decision-making capabilities.

Founded in 2010, Atria is a global provider of award-winning cloud software and data analytics to the life sciences industry. Atria's solutions are used to digitally transform the entire product commercialization process, driving sales growth, and improving healthcare outcomes for patients. Our focus is on delivering solutions that help customers complete the journey from Data-to-Insights-to-Action and get superior returns from their sales and marketing investments. Our cloud-based platforms - Atria DataMAx™, Atria SalesIQ™, Atria InsightsMAx™, Atria MarketingIQ™, and Atria CustomerIQ™ - enable customers to efficiently manage data, leverage data science to deliver insights for sales and marketing planning, and manage end-to-end commercial operations.

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