CASE STUDY

ENABLING MULTI-CHANNEL CALL PLANNING IN DIGITAL AND TRADITIONAL CHANNELS

DRIVING SALES FORCE EFFICIENCY FOR A GLOBAL PHARMA COMPANY

AXTRIA
INGENIOUS INSIGHTS

> Digital channels present a unique challenge where tactical execution mirrors the speed of decision making

INTRODUCTION

In a marketplace teeming with new information channels, an organization leadership looks to saddle and control sales force effectiveness. Digital channels present a unique challenge where tactical execution mirrors the speed of decision making. To add, new media has led to increased awareness of drugs and markets among Health Care Practitioners (HCPs). As a result, face-to-face promotions need a very different approach today. At the recent *eyeforpharma 2018 event,* the use of Medical Science Liaisons (MSLs), webinars, telephone, remote detailing and digital channels were called out as ways to reach and react to HCPs decision making.

Multi-channel call planning (MCCP) takes cognizance of various aspects of traditional and digital channels and provides a well-balanced solution to enhance marketing potency, and enable sales teams' effectiveness.

The following illustration looks at the unique challenges that need to be addressed to manage the outcomes for leadership and sales and marketing teams during an MCCP implementation.

BUSINESS SCENARIO

A top multinational life sciences company was looking to manage and execute their call planning process across 20+ markets in EU, LATAM and US with two key objectives:

① Ensure increased efficiency and effectiveness, where the sales reps could plan calls across multiple channels themselves. This would assign more power to the reps, which could be controlled and reviewed by country teams

② Design the MCCP cycles to be user driven, enabling the country teams to manage them directly. This was strategic, as it would empower the teams and provide flexibility to manage the cycles based on local nuances

> The existing call planning processes were time consuming and involved a large amount of manual intervention and iteration

CHALLENGES

- The existing call planning processes were time consuming and involved a large amount of manual intervention and iteration including:
  - Manual preparation of diagnostic reports
  - Manual and physical review of each call plan generated by every country team
  - Feedback exchange over email – a painstakingly slow process – given everyone's priorities
- The process also had limitations in:
  - Effectively capturing local market/country teams' intelligence
  - Providing flexibility to run a limited number of scenarios for call plans

APPROACH & SOLUTION

Axtria proposed a phased implementation using cloud-based Axtria Sales IQ™ MCCP Module:

Phase 1: Pilot for a new MCCP design that would pre-empt pitfalls and play up benefits

1 PILOT		2 ANALYZE & ADAPT		3 ROLLOUT TO LARGER GROUP	
Identify country for pilot	Setup call planning module and diagnostic reports	Integrate call plan generation and call plan feedback	User training	Publish call plan for feedback to field	Cycle management & push to CRM

Phase 2: Analyze the flow and feedback, and modify the MCCP depending on need

1 PILOT	2 ANALYZE & ADAPT		3 ROLLOUT TO LARGER GROUP	
Collect and analyze feedback from the pilot phase	Identify changes and enhancements	Enhance modules & processes	Socialize pilot with other country teams	Create future rollout plans

Phase 3: Rollout to countries based on the state of readiness of country teams

1 PILOT	**2 ANALYZE & ADAPT**	**3 ROLLOUT TO LARGER GROUP**

Phased roll-out to country teams

Execute enhancements planned, if any

Illustration of Axtria solution

INPUT	Webinar	Email	Remote Detail	Phone	F2F	Call Activity, Alignment, Sales	CRM Data	Rep Workload	Home Office Inputs

PROCESS

Type of optimization

- Market potential
- Physician segment
- Physician decile based
- Other optimization rules

Generation of Call Plan

Field Feedback

- Open feedback window
- Conflict resolution
- Approval / Audit workflows
- Rollout

OUTPUT

SFTP → Axtria Sales IQ™

Integrates with CRM

Implementation of Axtria Sales IQ™ led to greater ownership and compliance of the call plans – resulting from better customer understanding

KEY OUTCOME

Axtria Sales IQ™ MCCP Module implementation enabled planning calls at individual product level across all channels effectively.

Post implementation, 100% of the sales force accessed call plans through the Axtria Sales IQ™ online portal, after review by respective managers

BUSINESS BENEFITS

- Shorter call plan cycles, meaning efficient planning and execution process saving upto 40% of processing time
- Greater ownership and compliance of the call plans as a result of better customer understanding
- Reps engage physicians who were missed entirely from call plans earlier
- Enhanced productivity with the movement of physicians from lower yield to desirable yield segments

CAPABILITY ENABLEMENT WITH AXTRIA SALES IQ™

- Accessible through iPads and mobile devices
- Supports all major browsers
- 100% of the sales force can access call plans through the online portal, post review by respective managers
- Supports custom requirements, enabling multi-tenancy, where a user can be assigned to multiple business units within a country
- Custom reports can be developed - from call plan download to change request summary, as per pre-defined business rules

CONCLUSION

Empowering the country and local teams with skills, tools and know-how are considered as key elements of success by the company leadership. To have confidence in them requires transparency of local operations and control over the outcomes. An enterprise-grade platform can resolve the hurdles of a global execution by providing the flexibility to adjust based on local market insights. It delivers better collaboration and transparency within a market and across global teams, consolidating redundant process and disparate systems to save both time and cost.