CASE STUDY

IMPROVED TARGETING AND MARKETING THROUGH AXTRIA'S CLOUD-BASED FIELD APPLICATION FOR ACCOUNT MANAGEMENT

ENABLING REDUCTION IN SALES INEFFICIENCIES AMID THE UNCERTAINTY SURROUNDING COVID-19

INTRODUCTION

COVID-19, truly a black swan event of this century, has pushed global economic activity into a tailspin. The continuing impact and its aftermath facing complex businesses, such as the pharmaceutical industry, has been unprecedented. While the pandemic has forced patients, physicians, and pharmaceutical companies to alter their modes of engagement, the in-person experience is still perceived as the most significant by the parties involved. However, the in-person interactions have been impacted primarily at two levels:

1. **Healthcare Professional (HCP) - Patient Interactions:** While patients are increasingly adapting to virtual care, a recent Accenture report indicates 62% of patients are feeling overwhelmed with information. Humanizing technology and virtual healthcare are becoming more pertinent to ensure superior patient care[1].

2. **Account Access Restrictions:** Interactions between the physician and the sales representative have reduced drastically as many Healthcare Organizations (HCOs) have placed sweeping restrictions on sales representatives from entering offices and hospitals to meet HCPs. Recent research by Ipsos Healthcare shows that close to 66% of HCPs still prefer the traditional in-person channels, and 50% of those prefer detailing by a sales representative[2].

As the lockdowns ease up, HCOs are lifting access restrictions, allowing sales representatives to reinitiate in-person detailing. Though a welcome development, pharmaceutical companies are now faced with the challenge of accurately identifying the status of their accounts in real-time to adequately equip the field in planning and managing their HCP interactions. While pharmaceutical companies may use social mobility data or state guidelines to deduce this information, these data sources cannot explicitly inform if accounts are open for sales representatives.

This case study illustrates Axtria's innovative cloud-based application, designed specifically for a global pharmaceutical client, to identify key account statuses in real-time for efficient account management.

BUSINESS SCENARIO

- With COVID-19 related access restrictions and limited HCP-patient interactions in place, a top 30 global pharmaceutical client approached Axtria seeking a solution that would provide real-time and accurate access restriction information across their major target accounts.

- The company sought this solution in the wake of two major product launches that hit the market right before the pandemic, seeing a sharp decline across the product portfolio, with e-detailing proving to be not effective enough.

- The client already had a customer relationship management (CRM) system that enabled sales representatives to share feedback on account status, but the process was time-consuming and not very user-friendly.

- The market scenario was changing rapidly during the pandemic, impacting the sales representatives' access to most accounts. There was an urgent need for a new application where sales representatives could provide feedback in an organized and efficient way.

OBJECTIVES

The client sought an application that would allow the following:

1   **Data integration:** The client's CRM application was the sales representative's primary source of information about customers and accounts. The client required an application that would allow the field's input to be integrated with the CRM application, allowing the sales representatives to have the latest information no matter where they looked and avoid mismatches and confusion in the field.

2   **Update of account status (open vs. closed):** Sales representatives were required to update the status of their accounts, irrespective of their established relationships with the accounts. For this purpose, it was essential to communicate clear definitions of open and closed accounts to the sales representatives.

3   **Real-time updates of shared accounts:** Real-time, consistent status updates of shared accounts for all sales teams were required.

4   **Efficient user interface (UI):** The client wanted a user-friendly application where sales representatives could quickly and efficiently provide their feedback. While sales representatives had the option to update the status of their accounts in the CRM system, it was a cumbersome process. They had to search for each account and update each record one at a time.

5   **No downtime:** The application needed to be live 24/7 with minimal downtime as it was field facing.
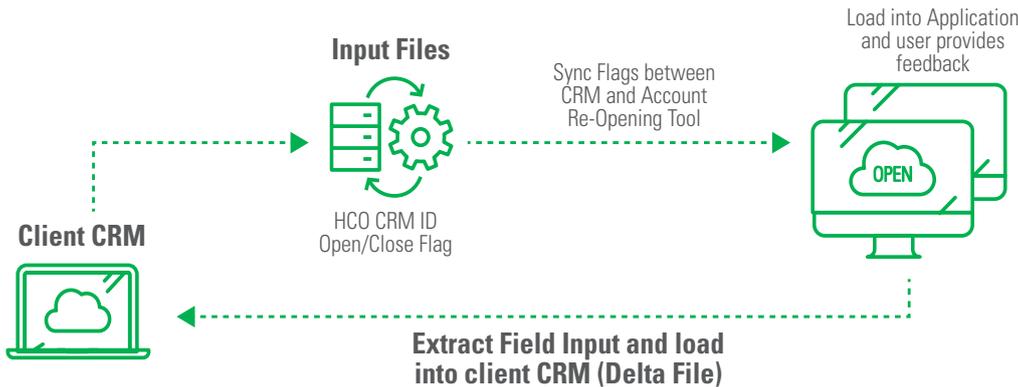
AXTRIA'S SOLUTION

As a solution, Axtria developed a cloud-based application with:

1. A simple UI and guidelines for sales representatives, which included:
   - Designing an intuitive UI that enabled sales representatives to easily change account status (open vs. closed) and/or add new accounts to their target list
   - Establishing clear definitions of open and closed accounts

2. An account status update feature that enabled updating account statuses in real-time across all the users to allow the sales representatives with shared accounts to collaborate and work efficiently

3. A *Last Modified By* field for sales representatives to discuss and share the latest information about key accounts

4. Data integration capability allowing consolidation of data across the application and the client CRM system

- Axtria accomplished this through file-based integration via extract, transform, load (ETL) jobs:

    i. *Inbound integration:* ETL jobs were developed to fetch the client CRM extract from a shared location, process the data, and push it to Axtria's Salesforce application.

    ii. *Outbound integration:* ETL jobs were developed to pull the delta changes from the application in the required format and push the changes to the client's CRM system daily.

Axtria scheduled these processes during non-working hours so that the user experience was seamless with zero downtime.

BUSINESS BENEFITS

Efficiency	The application saved time, reduced user effort, and made the field more likely to provide their input as the sales representatives could select multiple accounts and change the status of these accounts in a single update. For instance, the time needed to change the status of 15 accounts had reduced from 12 minutes previously to less than five minutes with the new application. Sales representatives could also easily search for accounts by name, address, or ZIP code.
Real-time status	The leadership and sales representatives could access the real-time status of accounts across users and territories with the last modified date to avoid conflicts and plan the call activities more efficiently.
Ease of use	A simple interface helped the field understand the application quickly and efficiently complete their tasks.
Improved targeting	Physicians affiliated with "open" accounts could be given priority, thus enabling more focused targeting. The sales representatives also had an option to add new accounts to their target list. This allowed them to call on additional open accounts while their old targets remained inaccessible, enabling the sales representatives to plan better and manage their workload.
Insights to modify incentive compensation (IC) goals	Generally, pharmaceutical companies set their IC goals before the quarter start and adjust the goals towards the quarter-end, based on the status of accounts. Hence, the client could also use real-time account status data to modify the IC goals based on the number of "open" accounts in a geography.

CONCLUSION

Axtria's cloud-based application for account management, powered by real-time data updates and data integration capabilities, provides insights for the sales representatives and sales and marketing managers to improve their targeting and marketing efforts. Using the application for account management led to increased adherence to the target list published to the field, which ultimately helped revive the brand sales to an almost pre-COVID-19 level.

What's Next: As the next steps, Axtria has recommended the addition of the following capabilities to the application:

1. Integration of the client CRM system and the cloud-based application using application programming interfaces (APIs) to sync the status of accounts in real-time with minimal manual intervention

2. Customized functionality such as usage statistics and account status change summary dashboards enabling quick view into application usage and change tracking

COVID-19 has pushed pharmaceutical companies to rethink commercial operations and marketing strategies. In unprecedented times as this, change is the only constant and innovation the sole enabler. Axtria's cutting edge solutions, coupled with our sharp focus on operational excellence, enables our clients to meet their strategic objectives in these challenging times.

To learn more, read Axtria's blog on *WILL THE CORONAVIRUS PANDEMIC FORCE THE LIFE SCIENCES INDUSTRY TO SHATTER THE SALES AND MARKETING SILOS?*

REFERENCES

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