

CASE STUDY

NEXT-GEN CLOUD-BASED AFFILIATION MANAGEMENT PLATFORM FOR CUSTOMER AFFILIATIONS

SPREADING ACROSS MULTIPLE BRANDS AND THERAPEUTICS AREAS PROVIDING A SINGLE SOURCE OF TRUTH TO CALL PLANNING, DATA GOVERNANCE, AND FINANCE TEAMS



Axtria built a Next-Gen Cloud-Based Affiliation Management Platform for Customer Affiliations spreading across multiple brands and therapeutics areas for providing a single source of truth to call planning, data governance, and finance teams.

INTRODUCTION



The traditional customer engagement model of pharma companies is undergoing a paradigm shift due to the evolving dynamics between healthcare physicians (HCPs), healthcare organizations (HCOs), and integrated delivery networks (IDNs). While the engagement preferences of HCPs are changing, the role of physicians has also evolved significantly over time. As physicians are now getting aligned to IDNs and becoming employees, the decision-making power for brands to be prescribed based on value-based contracting has also shifted and become centralized within the large health systems, such as IDNs.

Given this new paradigm, it is imperative for the pharma companies to know the HCP-HCO-IDN affiliations and incorporate this into the customer engagement strategy and operations. Affiliations can significantly help with targeting, communication channel enablement, performing advanced analytics on account-based sales, and intelligent segmentation. In essence, knowing the decision-making structures can help the pharma commercial teams identify decision-making structures and stakeholders within IDNs – an important ingredient for commercial excellence.

To leverage the affiliations, pharma companies need to maintain high quality and updated information about HCPs, HCOs, and their affiliation with IDNs, group purchasing organizations (GPO), distributors, and key influencers of purchasing decisions. What makes this challenging is that these affiliations are in a state of flux due to churn in the system. Therefore, a robust, scalable, and dynamic affiliation management platform that provides a 360° view of the affiliations starting from level 1 (HCP) to level 4/5 (IDN/Corporate Parents) is needed to help unlock the true value.

More often, companies need a next-generation affiliation engine to process data from multiple sources efficiently and make sense out of it. To derive business value, pharma CXOs must invest in developing scalable and agile data management systems to gain effective outcomes.

The following narrative depicts how Axtria helped a top 10 global pharma create a streamlined corporate affiliation management platform while increasing substantial business value by clearing out unnecessary information, prioritizing affiliations based on business rules, and reducing manual effort by producing one clear hierarchy.

BUSINESS SCENARIO



Evolving healthcare portfolios and the client's strategic move into new therapy areas prompted the need for a scalable, robust, dynamic, and reliable **Customer Affiliation platform** to serve as the single source of truth across business processes and various client brands. Growing portfolios increased the complexity and volume of data beyond the limits of existing data management technology and software capabilities.

The lack of a solution to ingest data from various vendors, retain field inputs, and generate a consolidated result of all the affiliations with clear demarcation of the strongest affiliation hierarchy was required.

Program Objectives:

- Implement a next-generation cloud-based corporate Affiliation Management platform for the top brands to reduce data complexities, increase decision-making speed for teams such as call planning, and reduce dissatisfaction from field force and overall cost.
- Create affiliation ranks, identify the strongest/best affiliations and demonstrate a reliable affiliation hierarchy from level 1 (physicians) to level 4/5 (IDN/Corporate Parents)

CHALLENGES



Onboarding of new data sources and the consolidation of legacy master data management (MDM) data

- The existing system used to maintain the affiliations was inefficient as it was not flexible enough to onboard new data sources and retain inputs from the field forces, resulting in missing data and incorrect affiliations, and impacting the targeting and segmentation.

Manual processes

- Key teams were working manually to consolidate data from multiple data sources, resulting in a huge effort, time, and cost investment along with compromising data quality.

Lack of ability to perform advanced analytics on account performance

- Advanced analytics on account performance is a key factor for commercial strategies. The absence of correct account affiliations with IDNs and corporate parents adversely impacts the ability to perform advanced analytics. With the legacy system, it was becoming difficult to discover weekly, monthly TRx of affiliated HCPs with accounts, resulting in inaccurate account performance reporting.

Impact on field users

- The legacy system could not retain inputs, resulting in missing affiliations in the MDM data. This caused an aggravated field force because it impacted their incentives.

Duplicates in legacy MDM data

- Inefficient matching or technical challenges in the legacy MDM system resulted in multiple records for the same entity.

AXTRIA'S APPROACH TO THE SOLUTION

- Data points and process steps were assembled to understand existing process inefficiencies, decision system challenges, and business needs to enable a cloud-based solution to host a corporate Affiliation Management platform.
- A clear hierarchy was defined by dividing HCOs into levels having a clear demarcation between the same as shown in the below diagram:

There was a careful consideration for onboarding new data sources with minimum effort and retaining field inputs.



Logical Groups					
Level 5	Corporate	Other-L5			
Level 4	Insurance	IDN	GPO	Other-L4	
Level 3	Nursing Home	Hospital	Other-L3	Exclusion-L3	
Level 2	Clinic	Group Practice	Medical Group	Other-L2	Exclusion-L2
Level 1	HCP (Physicians), NP/NP (Mid levels), Pharmacists, others				

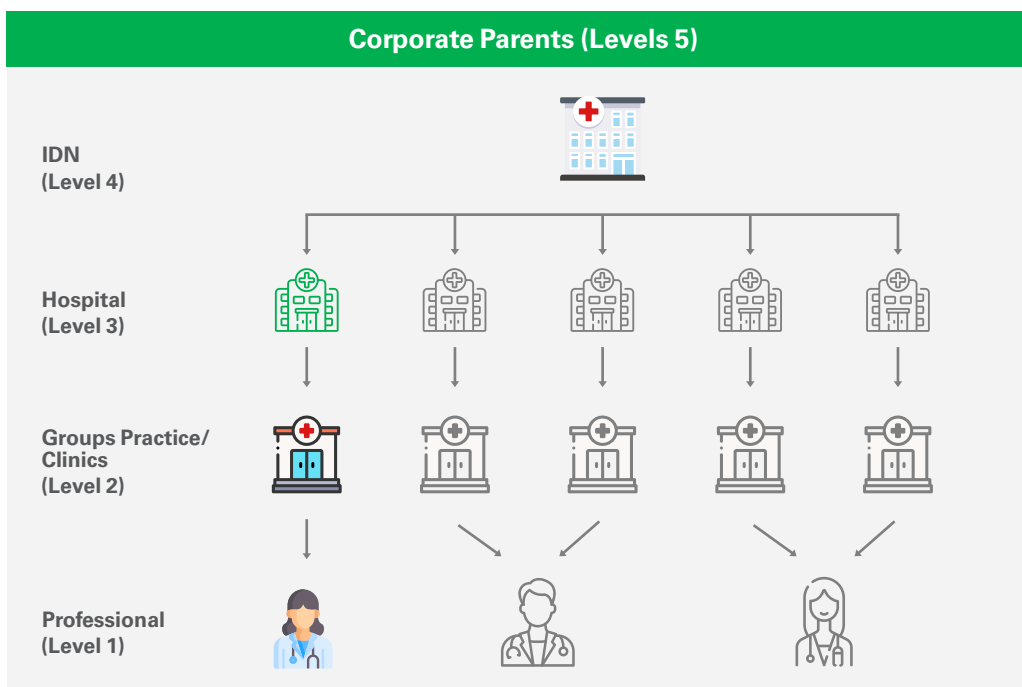


Figure 1 – **Logical Groups of HCOs**

- An affiliation engine was created to perform the external matching activity between external sources vs. legacy MDM data, thus removing duplicate profiles, accounts, and hierarchies.
- A separate module was created to address feedback received from various teams and field users and retain as many iterations of the engine as required.
- Multiple iterations on the match rules were performed to achieve the best match results without having over-matches.

RESULTS






PARAMETER	OLD STATE	NEW STATE
 <p>Readiness</p>	<p>The legacy system could not integrate data from external sources and/or field inputs</p>	<p>The new system was flexible to onboard new data sources and retain inputs from field users</p>
 <p>Reliability & Governance</p>	<ul style="list-style-type: none"> Minimal data quality (DQ) checks were in place, which caused confusion across systems Multiple hierarchies for affiliations leading to un-reliable sales roll-ups and manual efforts 	<ul style="list-style-type: none"> Metadata-driven DQ framework to exclude data that is not standardized Reliable hierarchies and analytics for understanding the performance of accounts and IDNs Better visibility and governance of data, changes, and events
 <p>Innovation</p>	<ul style="list-style-type: none"> Incorrect segmentation Incorrect call planning and targeting activities led to confusion and frustration among the field users 	<ul style="list-style-type: none"> A single and reliable hierarchy led to a reliable segmentation exercise that helped the company perform better analysis on their current sales vs. market opportunity Automated call planning and targeting helped teams and the field to align to a single platform where feedback could be recorded and retained reliably

Table 1 – **Results and Outcomes**



BENEFITS

1. *One-Stop-Shop*

A single solution for linking affiliation data from various sources and retaining input from field representatives. This solution also helped in generating and maintaining new/missing affiliations.

2. *Scalability and future-readiness*

A metadata-driven framework allowing the Affiliation Management platform to be scalable and add any future brands with minimal changes.

3. *Flexibility/agility in business rules*

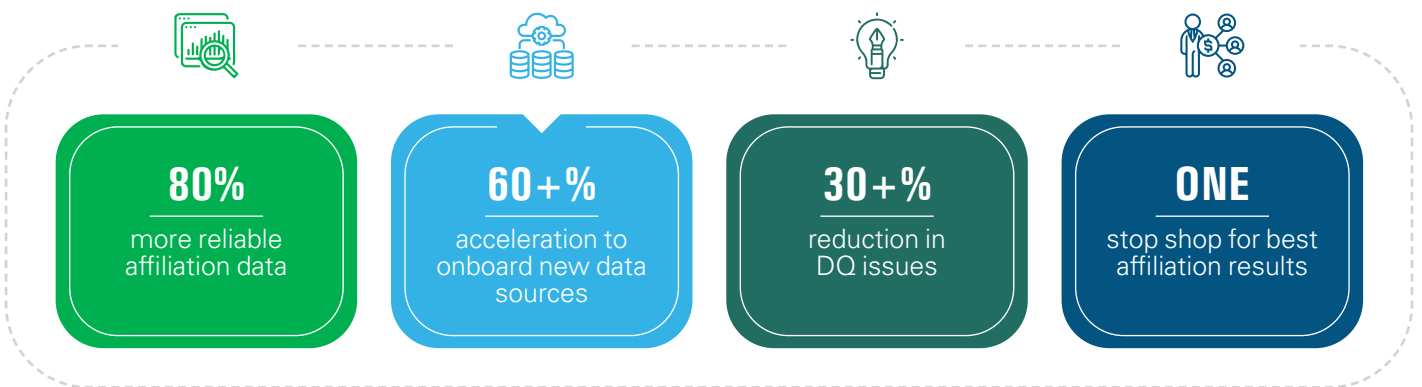
Having a configurable and metadata-driven set of business rules made it quick and easy to add new rules or update existing ones. This helped in reducing the overall turn-around time required for any changes.

4. *Advanced analytics*

The solution allowed for faster and reliable advanced analytics and account performance. Roll up for sales, up to an IDN or corporate parent level helped in better calculating the current sales vs. market opportunities.

5. *Shortened turn-around time*

Cycle time reduction to receive, configure, and retain input from field users to get best affiliations was reduced. A buffer was also available to re-run the complete engine multiple times in case of critical feedback.



CONCLUSION

Pharma companies need to critically review their customer affiliations as they are key to influencing targeting, deployment of the sales force, and facilitating advanced analytics for account performance. High-quality, appropriate customer data and their affiliations are the critical assets required by pharma companies to stay ahead of emerging healthcare ecosystem demands.

Founded in 2010, Axtria is a global provider of cloud software and data analytics to the life sciences industry. We help life sciences companies transform the product commercialization journey to drive sales growth and improve healthcare outcomes for patients. We continue to leapfrog competition with platforms that deploy artificial intelligence and machine learning. Our cloud-based platforms - Axtria DataMAx™, Axtria SalesIQ™, Axtria InsightsMAx™ and Axtria 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. We help customers in the complete journey from data to insights to operations.

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