Better
Reporting with the iPad

White Paper

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Introduction

Good reporting is an essential tool for managing your business. This reporting needs to be focused and actionable – focused in that it addresses the key business questions you face; actionable in that it helps you answer these questions and make decisions.

Too often reporting fails to meet this requirement. Many well-known factors contribute to this failure – from incomplete or poorly integrated data sources, to information overload from a proliferation and duplication of reports. While these are important factors to address they are not the focus of this paper – we focus on technology as a factor that too often has enabled bad habits in reporting, and argue that the iPad provides a device with features that can help address these bad habits and foster better reporting.

Bad Habits Enabled by Technology

"The ability to access more data at greater speed should result in better reporting capabilities – but too often just results in more reports"

Technology should be a driver of better reporting. The ability to store ever larger amounts of data and access that data at ever greater speeds should open up new capabilities. Unfortunately, these new capabilities in many cases result in more data and more reports. State of the art BI systems make it easy to link up another source of data, generate another version of a report, drill down to another level of granularity. While the user has access to more information, can navigate that information in more ways, and create graphs in endless varieties, they are further from understanding what it really means. The features of the iPad create an opportunity to break this cycle.

Better Reporting with the iPad

Moving reporting to the iPad brings a new user-centric mindset to reporting, and imposes a new level of discipline on report design. This is accomplished due to several attributes associated with the iPad.

- A high bar for user experience

- Mobility

- A need to curate information

- An expectation of collaboration

A High Bar for User Experience

"On a device that can deliver Angry Birds for 99 cents, the user has wholly different expectations for visualization and navigation"

The first and most powerful element the iPad brings to reporting is a change in mindset and expectations. When opening a report on your laptop in Excel you expect to encounter a sea of columns and rows. A report containing a few embedded drop-down lists to filter information and a dynamically updated graph is viewed as a stand-out.

No-one accepts this on the iPad. In an environment where Angry Birds can be downloaded from the App Store for 99 cents, the user has a wholly different expectation on visualization, navigation and design of the interface. This expectation is very welcome for reporting – it shifts the focus of the report design from the data to the user. Too many reports force the user to adapt to the data – the capabilities of the iPad, and the expectations that come with it, compel us to adapt the data to the needs of the user.

Mobility

Good reporting will not have an impact if not put to use. The mobile nature of the iPad brings reporting to where it is needed, from a management meeting, to a sales call with a potential customer, to an informal collaboration between colleagues. This recognition that reports will be available on-demand in these situations helps re-frame the report design effort, moving it away from an all-too-common focus on data and calendars (e.g., 'weekly share report'). Instead, report design focuses on the business situations where the report will be used (e.g., pre-call planning report).

Case Example: Integration and Rationalization of Reports for Key Account Managers

Key Account Managers in the pharmaceutical industry have responsibility for a set of accounts that often include health plans and provider groups. They must achieve market access for their company's brands, and see that the opportunity created by this access is realized. Managing these accounts requires in-depth information by account, across their portfolio of products, including competitor information. Often the availability of data is at odds with this need for information. Data is often captured and reported at a therapeutic area and brand level, not across the portfolio. Information on various data elements such as formulary status, product rebates, and competitor prescribing are typically not well integrated. The ability to tie data to an account, and channels within an account (e.g., commercial, medicare) is a challenge.

Our client, a global pharmaceutical manufacturer with a diverse portfolio including both specialty and primary care products, sought to provide their Key Account Managers with a comprehensive view of their accounts to help them better manage their business. Historically, various elements of information by brand, region, etc., were fragmented across multiple reports and platforms. A Key Account Manager would need to reference 17 separate reports to get a comprehensive view of their business – no one had time to do this, resulting in frustrated account managers who knew they could be more effective with better information.

An iPad-based reporting application helped our client achieve their objectives by delivering the following features:

- A 'dashboard' approach to presenting information. Upon launching the app, Key Account Managers first see a dashboard with a comprehensive view across their accounts, with the ability to drill down to relevant detail
- Integration of data across brands, across provider and payer accounts, including information by channel and data on market access

- Relevant benchmarks for account performance, allowing Key Account Managers to proactively identify problem areas and opportunities in specific accounts, geographies and brands

- Full availability of information in off-line mode, which was essential for account managers who spend the majority of their time in the field

- Solution implemented in a leading enterprise BI platform with native iPad capabilities, allowing full utilization of the iPad's navigation features

A Need to Curate Information

"The size constraint inherent to the iPad introduces a healthy dose of discipline on the design of reports"

Using the iPad for reporting imposes constraints on how much data can be accessed. To fully exploit the iPad's capabilities users will want data stored locally on the device – this enables access anywhere even if not connected, allows full use of the iPad's native features, and maximizes speed and performance for the user. In this era of big data and Google, where we expect all information to be accessible all the time, imposing a size constraint on reporting would seem unacceptable.

However rather than a limitation, we believe this size constraint introduces a healthy dose of discipline on the design of reports. Anyone who's created a PowerPoint presentation (or has been on the receiving end) knows that 5 well constructed slides are much more impactful than 50, but also much more difficult to create. Likewise with reports. Too many organizations suffer from report proliferation and information overload. Managers spend too much time sorting through information to get to what matters. Reports should not be tools for exploratory analysis – good reports will provide this synthesis for the user, and guide the user through information that is relevant for the business issue at hand. These reports impose structure on information that adds value by reducing and simplifying to what is important. If a report is too big to fit on an iPad, it likely suffers from a lack of focus and synthesis.

An Expectation of Collaboration

"The big win is movement towards a 'common language' across the organization"

Along with demands for a better user experience, the iPad brings an expectation of collaboration – information can be annotated and shared, comments can be received back from others. Placing reports on the iPad does not necessarily increase the amount of collaboration, but it can allow that collaboration to be more fact-based. The ability to bring the right numbers into a discussion can help a group get to consensus faster, and be more data driven in decisions. The big win is a movement towards a 'common language' across the organization, where people are using the same metrics, with a shared understanding of their meaning, to make decisions.

Case Example: Map-Based, Location-Aware Reporting for Pharmaceutical Sales Reps

Pharmaceutical Sales Reps face the daily challenge of how best to allocate their effort across a vast array of physicians in their sales territories, and how best to tailor their interactions to each physician given the physician's needs and the market opportunity for the Sales Rep's products. This becomes all the more challenging given the many dynamics influencing physicians and their prescribing decisions, from their patient's managed care plans to their own affiliation with provider groups and IDNs.

Our client, a leading specialty pharmaceutical manufacturer, wanted to provide their sales reps with information at their fingertips in the field to help make these decisions. The focus was providing the rep the information needed when 'walking into the physician office' in a user-friendly format that would work effectively in the field.

An iPad-based reporting application was a highly effective solution. Several factors contributed to this success:

- Choice of a map-based user interface. This was an intuitive way to display information for reps, and well suited to helping reps locate the highest value physician opportunities near their current location, which was identified as a frequent need

- Careful screening of content. The criteria that only information needed when 'walking into the physicians office' was rigorously applied. This led to exclusion of many 'nice to have' items, such as incentive compensation reports and data on aggregate performance. This in turn allowed for inclusion of granular information the reps needed in order to understand their most important physicians in detail

- 'Wow' factor. An unintended benefit of the map-based interface was the level of excitement this new tool generated among the sales reps. The user experience was new and so much superior to previous reports that rep adoption was immediate with very high penetration

Technology should be a driver of better reporting. Unfortunately, the ability to store ever larger amounts of data and access that data at ever greater speeds has in many cases resulted in more data and more reports, but not more insight. The iPad provides a device with features that can help address these bad habits and foster better reporting. The result is reporting that is focused and actionable, with movement towards a "common language" across the organization to help managers make better, data-driven business decisions.

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