

Implementation of a seamless interface for  
Travel and Expenses at a large multinational  
Pharma company which has deployed a US  
based Pharma specific CRM Product



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## Business Context

A large multinational Pharma company with a field strength of 1200 people in India recently implemented a US based CRM Vendor's E-detailing solution worldwide. This CRM product currently focuses only on the core process of E-Detailing and several surround processes are not handled. One such surround process is Travel and Expenses (T and E) tracking. The company had already deployed our T and E solution in India, which had earlier been integrated with our own SFE (Sales Force effectiveness) solution.

Since our T and E is a strong and comprehensive module, the client was keen on continuing this, with new interfaces with the new CRM product.

## Scope and Challenges

The company's expectation was to make sure that our T and E still runs smoothly, with Expense reimbursement cycle being fortnightly. All our business logic processes should continue like before, with field activity data flowing from the CRM application every day. This called for a complex interface layer connecting the CRM product (an SFDC application) with KEA's T and E module (a .Net application).

### Challenges:

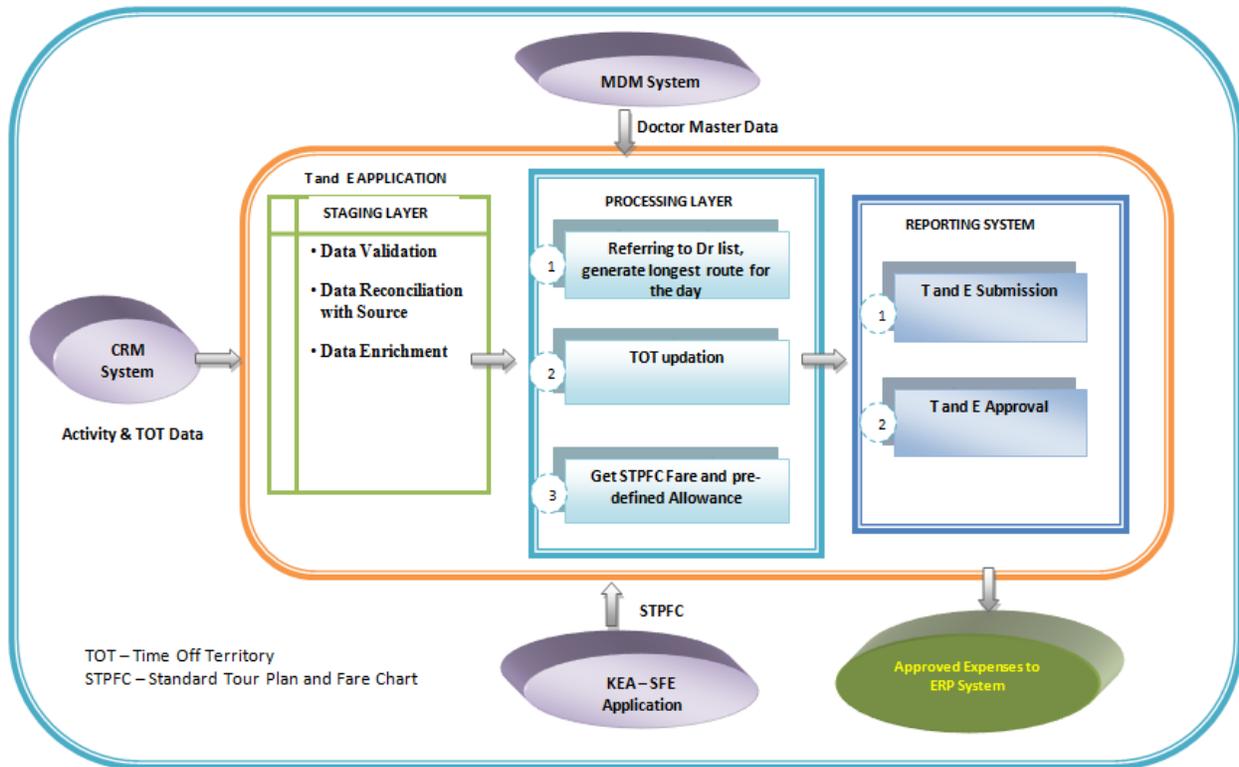
- The CRM product's field activity capture is a local application on i-pad and data is synced with the central server periodically leading to significant user education challenges and data flow gaps.
- The data generated from the CRM application is in formats which are standardized for this client for multiple countries-not necessarily meeting India processes.
- The CRM vendor was not open to customize the solution for India-which meant that our interface had to take care of all the gaps in data.
- Considerable data elements mapping challenges

## Our Solution

Our solution had to consider 3 main aspects:

- A strong ETL process, with built in data validations, harmonization, even some enrichment, and finally very thorough data reconciliations
- Modifications to our T and E solution to handle the data flow variations
- The solution had to cater to several risk mitigations: for example, the EXE that runs the first step of data movement had to have in-built capability to run multiple files on a day.

The following diagram illustrates the data flow architecture.



The solution was implemented in a month. We also set up a trained Help Desk that could handle the field concerns on time.

### Benefits to the Client

- The interface and the solution on T and E handle expenses reimbursements of the order of USD 6-10 Million a year accurately and on time.
- The client was pleased that they could continue to use a successfully running T and E instead of having to implement an expensive Third Party solution that the CRM Application normally works with
- Substantial analytical information is now available linking expenses with field activity.