



***Reaching expected reporting compliance in a SFE solution implementation-a case study***

## Business Context

A pharma company approached us for implementation of our SFE/CRM solution. We jointly worked with the company to reach expected compliance. The various challenges were overcome for a successful and fast implementation

## Challenges

- Users will have resistance to any new system. This becomes even higher if the company is transitioning from a manual to online reporting or when they upgrade to a state of art solution. In this case the company was moving from manual to online reporting
- It is not easy for all users to adapt to a new system immediately
- There might be some initial teething issues in the application that will need to be overcome
- Benefits are not always fully clear to the users, since many implementations tend to be top down

**To achieve near 100% Compliance in pre agreed time frame, the following were done**

- A dedicated sales force admin (SFA) executive was designated by the client
- When the field users are finding any difficulties, immediate support was given by the SFA and us , so that they continue to report.

This is especially needed in the very initial phase

- The SFA should try and understand the issues from the user point of view and give a prompt solution This was done by our client and even suggested some minor changes to us which will make it easier for the end users
- Taking a live session through team viewer or any such tool and showing the user on how to use the system will help any training shortcoming
- Bring in work discipline in the system to ensure that entire salesforce does the reporting in the system.
- Mail communication form the HO where needed to speed up the process.
- We solved any application related issues within minimal turn around time
- Auto/manual mails on the various key data were sent by us to the end users to help them appreciate the solution.
- Auto Mail to managers on the status of reporting of their reporters were sent from our application, which helped improve compliance
- A group of the end users, admin and users formed in one of the social networking tools. It was very useful to share problems/clarifications, give resolution and get confirmation. Solution provided in the group helped others the next time they have the same problem

## Benefits

**A fast implementation will mean the company can reap the benefits of an SFE solution faster, thereby increasing the Return on Investment.**

Few key benefits are mentioned below:

- Electronic reporting (mobile app) on every day task.
- For Better Enhanced Communication.
- Greater efficiency
- Improved Analytical Data and Reporting.
- Maximize upselling and cross- selling.
- Optimized Marketing.
- Increased sales due to anticipating needs based on historic trends
- Identifying needs more effectively by understanding specific customer requirements
- Cross-selling of other products by highlighting and suggesting alternatives or enhancements
- Identifying which of your customers are profitable and which are not.