



Implementing CRM/SFE for a Medical Device Co

Business Context

A Medical Device company wanted us to implement a CRM/SFE solution.

Company

Our Client is one of the largest medical devices companies in the country, with a leadership position in many products. They were keen on using a CRM application that takes into account CRM needs for a Medical Devices company. Our solution fitted their need best.

Challenges

There were several challenges that needed to be handled in this when compared to implementing for Pharma companies

- Segmentation** – The Medical devices industry is segmented into consumables, drug delivery assistance devices, implants and equipment. Before implementing the solution need to understand which category the company belonged to do the necessary configuration and customization
- Hospital/Account centric** – We needed to make sure that the solution focuses on relationship with hospitals, and not just doctors, as in the case of most pharma implementations. Customization – Though we have a solution which has functionalities to handle medical device company requirements, there were still many new aspects that need to be covered
- Data Migration** – Getting the data in the required template. This is always a challenge in all implementations

Each of the above had to be handled by our team with great support from the client, for a successful roll out.

Our Solution

The methodology that we adopted to mitigate the challenges were:

❑ Segmentation

- We have now worked with multiple device companies belonging to the different segments.
 - **Consumables** – Similar to pharma in many respects, with additional focus on accounts. We have configurable setting to enable handling of focus on account management
 - **Equipment** – We have an entire module which starts from the lead process to the final culmination of success or failure to get the order
 - **Drug delivery assistance devices** – Heavy focus on Hospital and administrators. The required functionality available in our medical devices version
 - **Implants** – Equal focus on doctors and hospitals as both are drivers to help get the order.
- With these functionalities, we were able to configure as per the requirement of the client

❑ Hospital/Account Centric

- Every aspect of our solution had to have the focus firmly set on accounts/hospitals.
 - Hospital Profiling
 - Hospital Master
 - Visit target for hospitals based on the classification Different types of Health Care Professionals (HCPS) to be tracked including administrators, nurses who all are influencers apart from the doctors.
 - Hospital coverage

- All of this implemented with additional modifications where needed

❑ Customization

Since our client was implementing a CRM solution for the first time, they also came up with some new needs during the discussions that our analysts had with them. Since our version of CRM for Devices industry is customizable, we could handle these needs. (For example, the client wanted a comprehensive handling of “Sales Funnel”)

❑ Data Migration

- Getting the right data in the right template meant the following process
 - The template had to be explained clearly with a set of written instructions
 - Mandatory data for the system was not available. The template was shared at the beginning itself so at the same could be collected from field users
 - Since the dependency was on the field users, constant follow up from our end and by the project owners from the client end
Was required

- ETL process was implemented to get the data into the database.
- Application was tested with the data for proper all round functioning

Benefits from our Solution

- Faster and successful implementation meant that benefits from new CRM came in quicker
- Solution provided was geared towards Devices company needs and was not just pharma version implemented as is.
- Customization kept to manageable levels, helped in keeping to the timelines and reducing errors. Our flexible approach to customization meant that the company got all the needed functionalities
- The solution helped better planning and execution of field activity.
- Greater focus on accounts meant better business focus.
- Because of this implementation, productivity improved significantly

