



Implementation of our comprehensive CRM
Solution saves costs and yields multiple
Benefits

Business Context

A leading Pharma Company with over 1400 field force needed to automate end –to-end CRM process with features like planning calls, tracking daily customer visits, sample issues, to monitor and guide the sales team improve their efficiency and productivity. Additionally the client wanted near 100% automation of Travel expense for the field, with little or no intervention manually

Challenges faced

The major challenges the client faced

- Not having one solution which is meeting all their requirements
- The client had a complicated process for travel expense calculation. This was being done manually as their existing solution could not satisfy their requirement, leading to errors.
- Lack of quick assistance /support from existing CRM vendor

Limitations in customization from existing vendors

Our Solution

We have 12 modules in our product meeting the complete requirement for implementation of CRM for the field force in that Pharma Company. This helped the client to get one solution for all their needs.

We did a complete study of their processes in Travel expense computation and customized our module accordingly. Some of the unique requirements of the client were:

- Automation for all levels including zonal managers and above
- No deviation allowed from the standard fare chart. System has to look at all possible combinations in the route plan and arrive at the applicable fare and allowance.
- The standard route plan keyed in by the MR had to be inherited in the manager plan. Additional routes can be keyed in by the manager
- Google maps interface for building fare charts

We analyzed the challenges and made the required customization in the product to map it with their business processes and needs, mainly in T and E

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related data capture and computations. Our product architecture allowed this.

We also added more user-friendly reports based on customization carried out.

Modules required by the client could be configured for them. The features enabled for the client are:

- Master data management
- Monthly Call Planning
- Daily Call reporting
- Sample Management
- Leave Management
- Travel and Expense Management
- Dashboards and Reports
- Notifications & Alerts
- Corporate communication

The above features were rolled out in a phased manner with well-defined training at regular intervals. The application support team was strengthened with complete end-to-end process to solve tickets within target turnaround times.

Benefits from our Solution

The major benefits for the client are:

- Elimination of errors associated with manual processes in the travel expense computation
- Quick data capture from field, accurate & real time reports generation for analysis & planning of corrective actions
- Since the solution meets all their current needs, they can deal with one vendor resulting in less application administration costs.
- Our unique “one-click” reports

- Zero errors in computations
- Lower application administration costs