

AKTANA

Knowledge When It's Needed



Veeva CRM Suggestions

New Countries, New Therapies, More Results

Veeva European Commercial Summit

Madrid, Spain



Applying CRM Suggestions

Leigh Tyrer, MSD

1. In The Last Year...
2. Pilot To Scale
3. Lesson Learned
4. 2018 Roadmap

Powering CRM Suggestions

Ywan Karlen, Aktana

How We Work - Approach

Market Readiness Factors

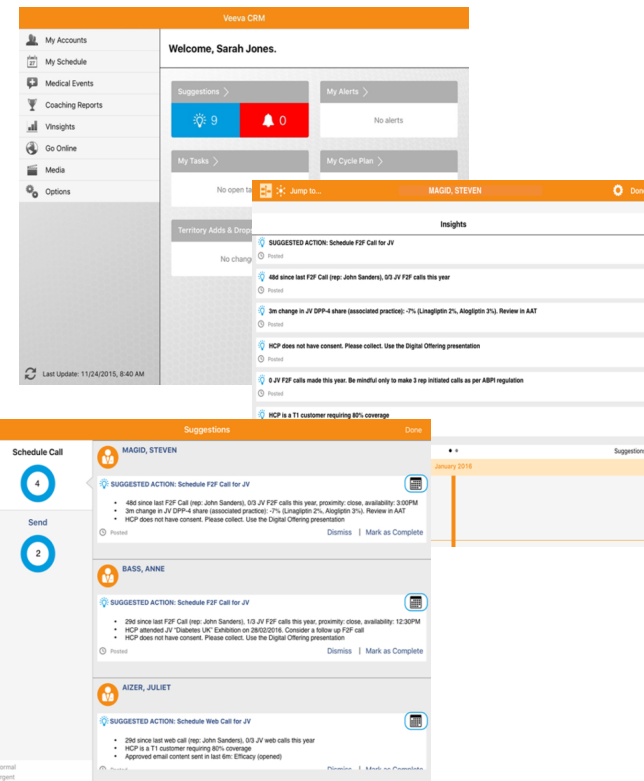
Best Practices

Machine Learning for Pharma

Smart Suggestions Value Proposition

Bridging marketing strategy and sales execution through actionable recommendations for sales representatives

- Align sales and marketing activities
- Simplify pre-calling planning
- Leverage data for suggestions/insights
- Optimize coverage and frequency
- Encourage reps to leverage other channels
- Learn from feedback and preferences



Smart Suggestions Market & Sales Line Expansion



First BioPharma to Implement
CRM Suggestions in EU

First MSD market with Suggestions
implemented to complete sales force

Expansion across continents
and Veeva/Aktana capabilities

2016

1 Country

1 Therapy

2017

3 Countries

9 Therapies

2018

7 Countries

12+ Therapies

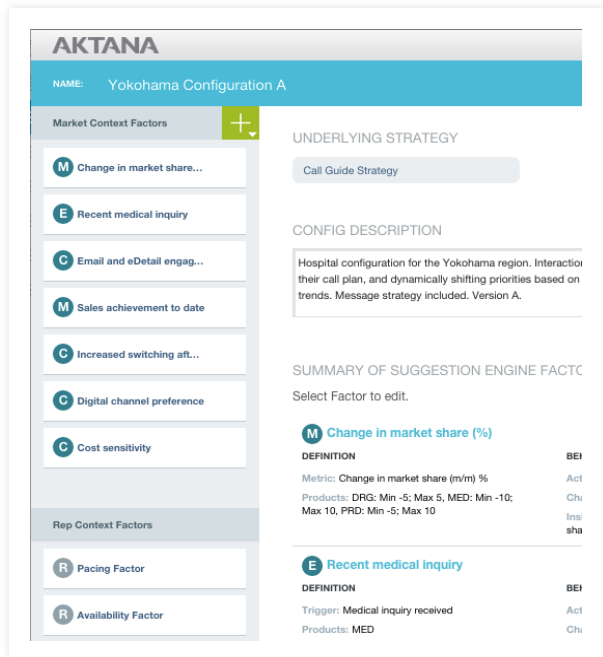


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Aktana's Approach



DECISION SUPPORT ENGINE

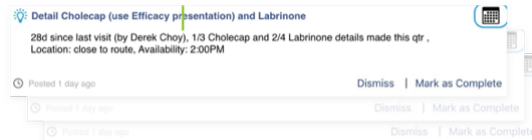


COORDINATED CHANNEL OUTPUTS

Non-Personal Channel Actions



Next Best Actions For Reps



Physician

LEARNING PLATFORM

REPORTING PLATFORM

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Smart Suggestions – Productizing the Approach to Scaling



Project Setup

Requirements
& Use Cases

Deep Dive Use
Cases Workshop

System
Configuration

UAT/Training

Deployment

Project Setup

- SteerCo
- Charter
- R&R
- Change Management
- Comms plan
- KPIs



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Smart Suggestions – Productizing the Approach to Scaling



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Requirements & Use Cases

- High level use cases
- Prioritization
- Rep Interviews
- Technical approach



Smart Suggestions – Productizing the Approach to Scaling



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Deep Dive Use Cases Workshop

- Cross Functional Team
- Brand Strategy to Suggestions
- Content Mapping
- Data Points
- Prioritization

KEY MILESTONE

**Business requirements
and use cases signed off**



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Smart Suggestions – Productizing the Approach to Scaling



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System Configuration

Configuration of rules engine, data integration, testing alignment for launch approach



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Smart Suggestions – Productizing the Approach to Scaling



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UAT/Training

- Cross Functional Team
- End to End Integration testing
- “Feel Right” rep tests



Smart Suggestions – Productizing the Approach to Scaling



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Deployment

- Representative training

KEY MILESTONE
Launch

KEY MILESTONE
Smart Suggestions “go live”



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European Market Readiness



Strong team sponsor

(min 25% allocation 1st 3 mos)



Brand strategy with a
clear, measurable goal



Engagement increase
across multiple channels



Three to five “quick win”
use cases



Desire to drive Veeva
adoption beyond CRM



Accessible, yet
underutilized data

Lessons Learned



Ownership

- Sponsor support
- Brand and Sales leadership ownership
(*Not IT or capability teams*)
- Communication and change management

Evolution

- Start with foundational, plan for sophisticated
- 80:20 rule
 - recreate foundational use cases across sales lines and countries
 - expand quickly with customization based on sales line needs & market conditions

Adjustment

- Monitor and be guided by KPIs
- Expect to see anomalies in rules and suggestions themselves
- Remedy quickly, communicate often
- Coach and be coached

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Knowledge When It's Needed



Machine Learning for Pharma

Machine Learning for Pharma



Omni-channel modules



Optimized Targets

Identify optimal level of engagement with each HCP, based on responsiveness to marketing and sales activity



Channel Affinity

Personalize channel mix and preferences to ensure messages are delivered via the preferred platform for each HCP



Message Sequence Optimization

Identify the best messages to deliver next, on single or multiple channels, to achieve a higher engagement from the HCP based on historical behavior



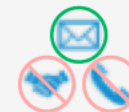
Time to Engage

Determine the optimal timing delivering a message while maximizing impact and engagement of providers



Location Anchor

Predict the rep's location for any given day, allowing generation of more accurate suggestions aligned with the predicted route



Rep Engagement

Tailor suggested actions to best fit the rep's goals and typical behavior (as observed over time)

Machine Learning for Pharma



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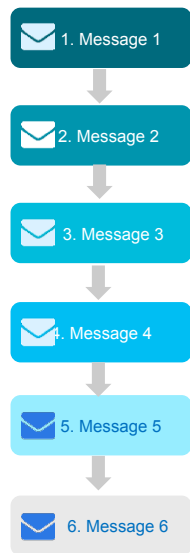
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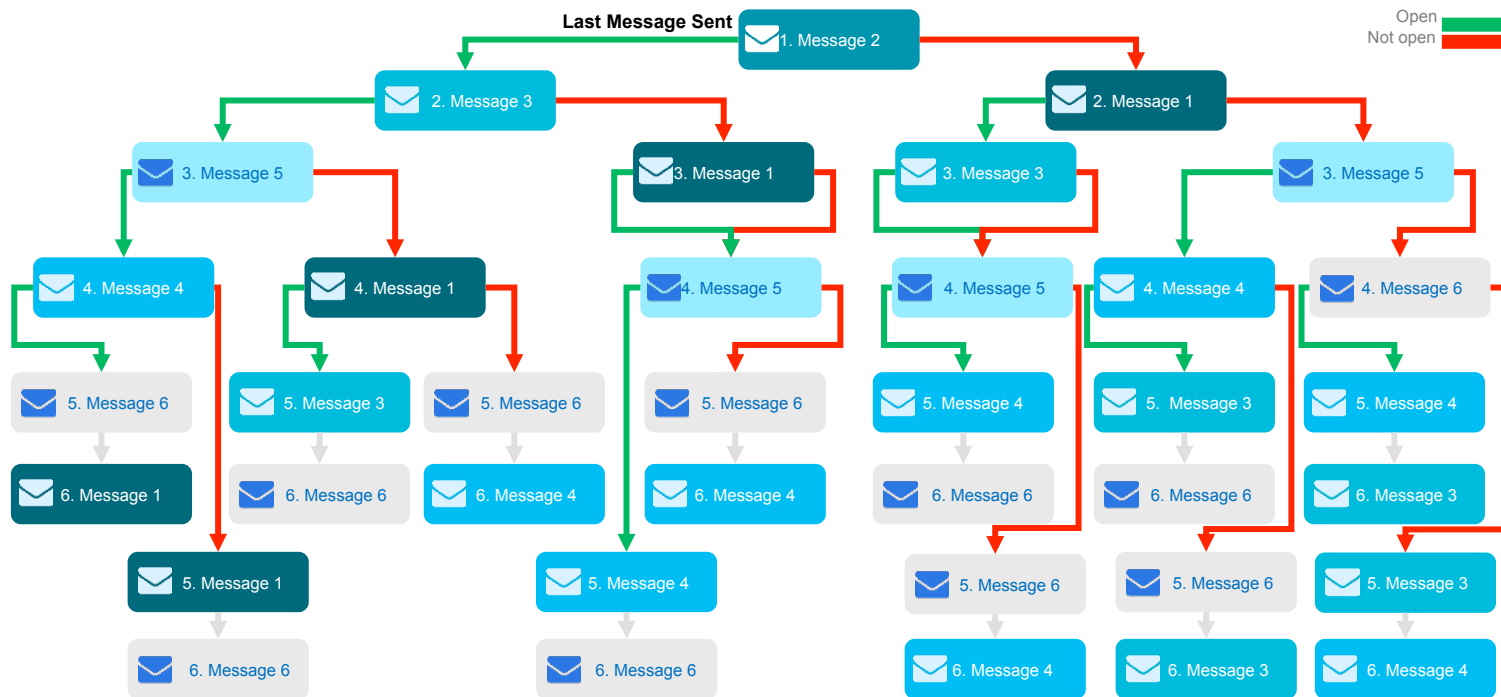
Personal promotion modules

Fixed set vs. Dynamic set

Predefined Sequence

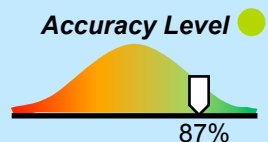


Dynamic Message Sequence: Personalized for each HCP



Model: Cholecap Journey Optimization Model

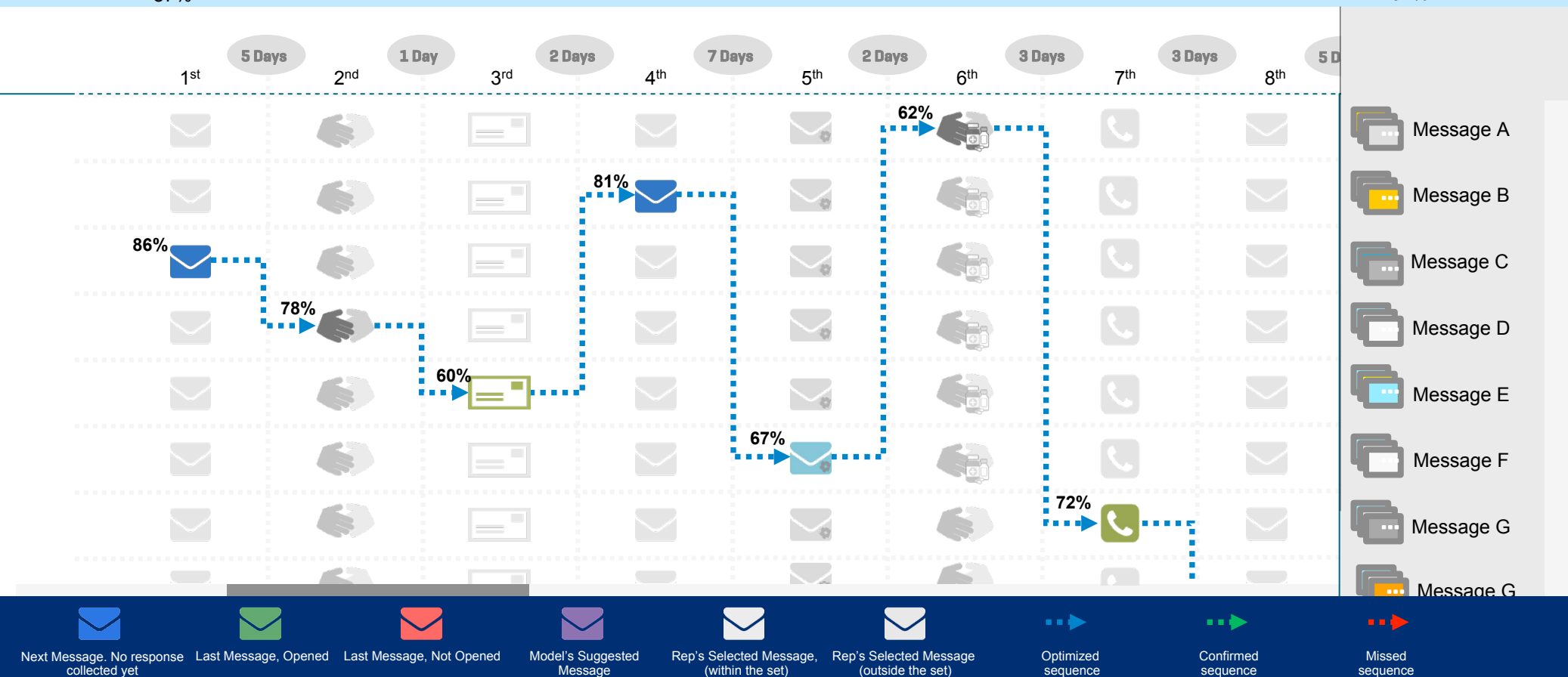
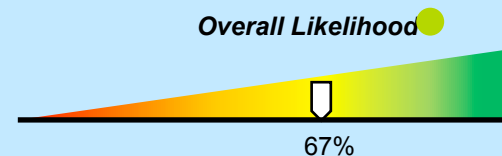
Selected Segment: Dr. John Smith



Model Name
Journey Optimiz...

Provider's Segment
Dr. John Smith

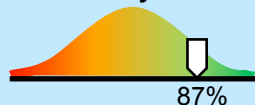
Message Set/s
All Messages



Model: Cholecap Journey Optimization Model

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Accuracy Level



Model Name

Journey Optimiz...

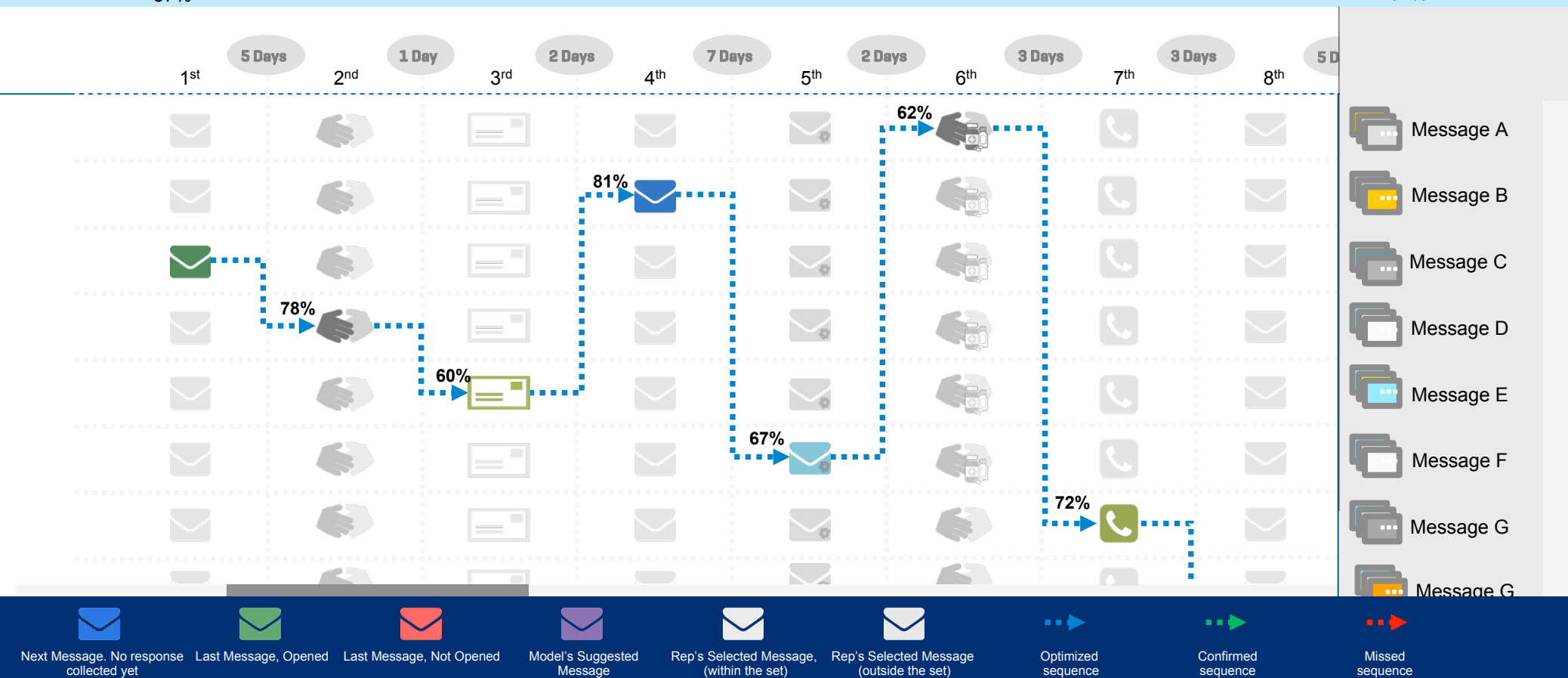
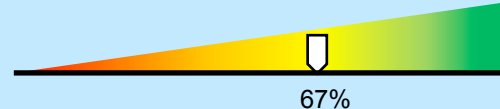
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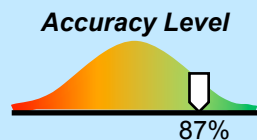
Message Set/s

All Messages

Overall Likelihood



Model: Cholecap Journey Optimization Model
Selected Segment: Dr. John Smith



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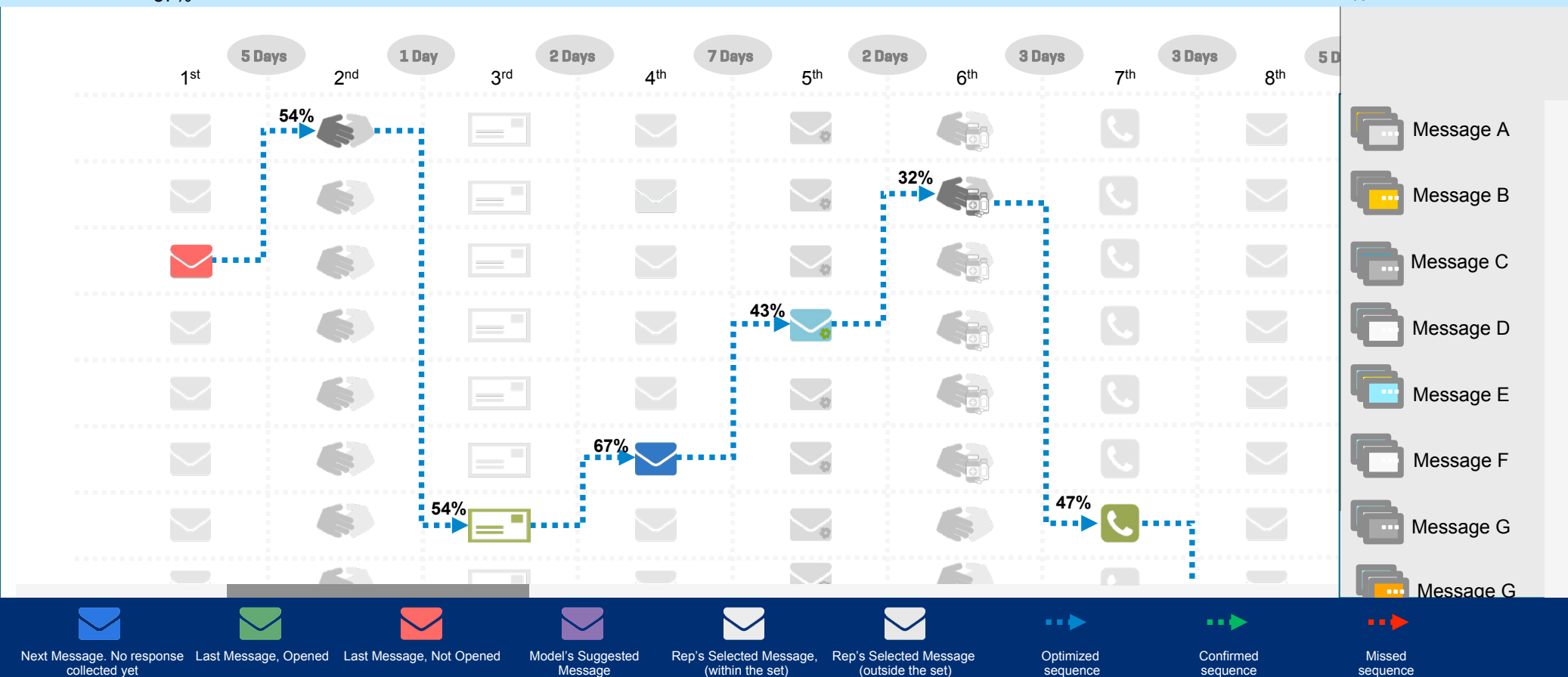
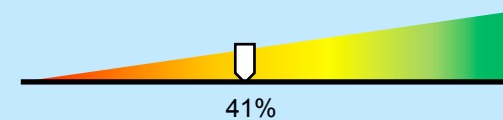
Provider's Segment

Dr. John Smith

Message Set/s

All Messages

Overall Likelihood



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MSD

Questions



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