

AKTANA

Knowledge When It's Needed



Veeva CRM Suggestions

Lessons from Real World Experience

Veeva European Commercial Summit

Madrid, Spain

Agenda

Applying CRM Suggestions

Austin Wilson, MSD

1. MSD Situation
2. MSD Use Cases
3. KPIs and Early Returns
4. Next Steps

Powering CRM Suggestions

Ywan Karlen, Aktana

1. Data Access & Application
2. How We Work – Product
3. How We Work - Approach
4. Best Practices

Orchestrating an Omni-Channel Experience via our Reps is Complex!

Strategy Challenges



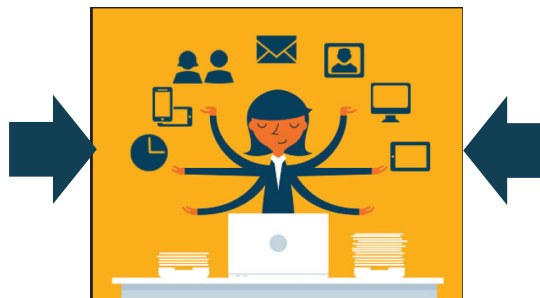
- Define the right mix, pacing and sequence of channel engagements
- Maintain and iterate on strategy
- Gather **Customer Insights**

Relevant

- on-strategy
- contextually aware

Concise

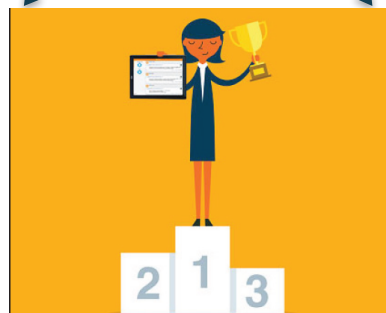
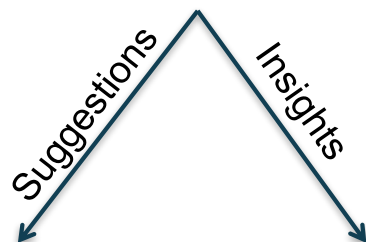
- what's important
- what's new



Execution Challenges



- Need to **manually trigger** coordinated engagements
- **Coordination** with other MSD representatives
- **Representatives** are already overloaded with data and information



Current

- fresh data
- as needed

In workflow

- obvious
- easy to act upon



Why MSD partnered with Aktana?

SIMPLICITY

30 completed
customer projects
to date

SPEED

3 million
suggestions provided
in 2016 so far

FLEXIBILITY

EXPERIENCE

3,000
reps in largest
customer deployment

Blended Model Execution

Reminders when you are off pace re: blended model targets

Insights to remind you of # calls YTD

Insights on Consent

Dynamic Sales and Marketing Insights

Suggestions / Alerts when key market changes occur

Pre-synthesize key insights in one place on HCP profile:

Co-ordination and Follow-ups

Suggestions to make a follow up call when an HCP attends an event

Suggestions to send follow up Approved Emails when an HCP attends an event and when you have consent

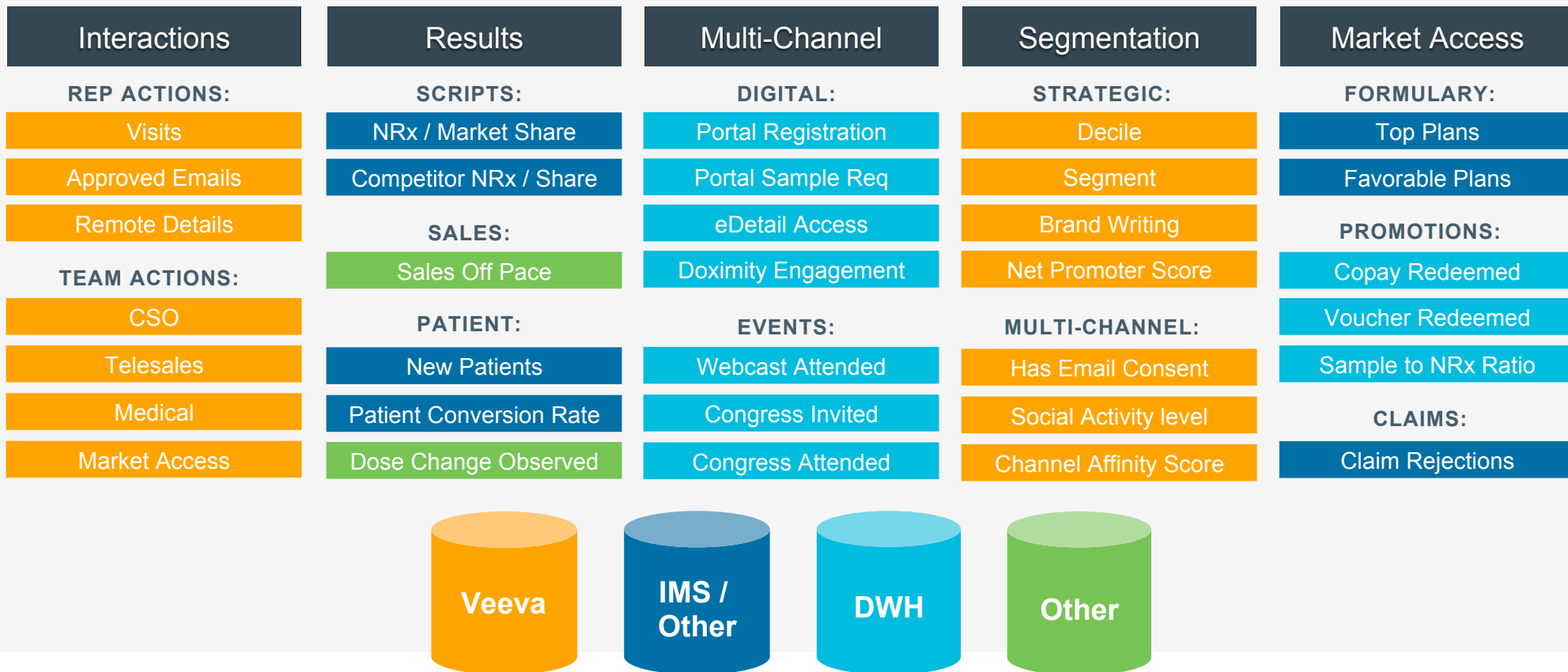
Strategic Messaging

Messaging insights to remind you about core brand messages

Reminders about recently discussed topics

Reminders about HCP segmentation

Data is imported and transformed into metrics



KPIs in focus to measure pilot success:
Qualitative / Strategic / Adoption

**Qualitative Representative
Feedback**

Business Outcome
strategic driver I: (coverage &
frequency goals)

**Increase access & overall
rep driven activity level**

Business Outcome
strategic driver II (blended model):

**Increase non-F2F share of
actions in the engagement
mix**

**Suggestion adoption by
Representatives**

KPI

Pre-Pilot Satisfaction, ease of use and
business benefit

Post-Pilot Satisfaction, ease of use and
business benefit

KPI

F2F Call Coverage and -frequency

of total rep activities (F2F, MSD Link
call, rep email)

of consent captured

KPI

Non-F2F share of Representatives
activities

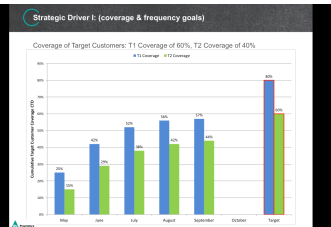
KPI

- No. of Syncs per Rep
- Suggestion acceptance

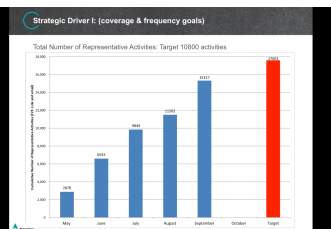
MSD Smart Suggestion Early Performance Indicators

Progress To Target

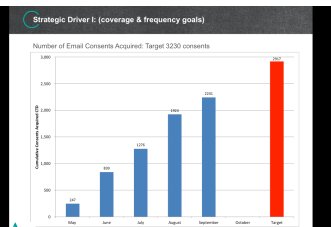
**Top Customer
Coverage /
Frequency Growth:**
ON TARGET



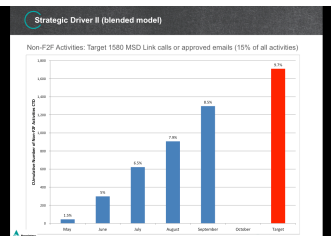
**Total Number of
Representative
Activities:**
ABOVE TARGET



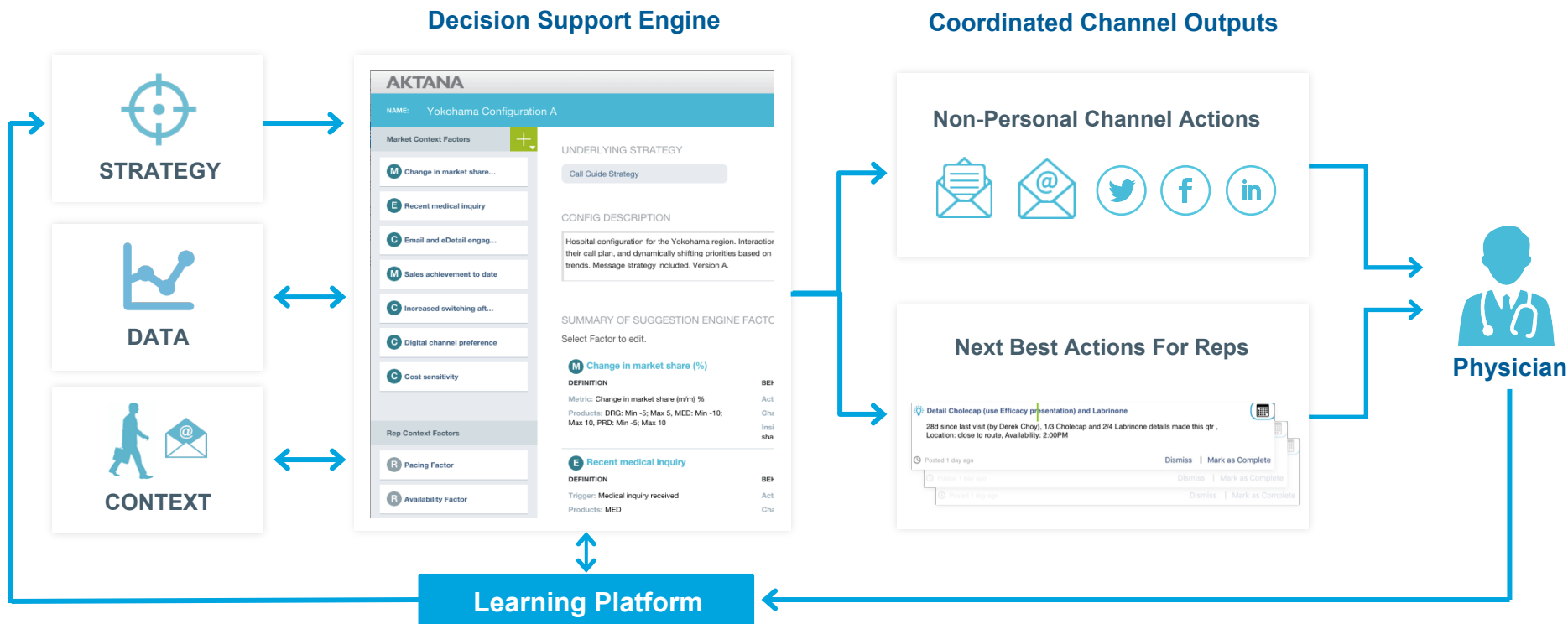
**Number of Email
Consents Acquired:**
ON TARGET



Non-F2F Activities:
ON TARGET



Aktana's approach



Aktana's capabilities supporting MSD

1. Turn Data into Action

- **Synthesizes** multiple data sources
- Easily **configure** rules
- Makes suggestions **practical**
- Supports **multiple use cases**

View Suggestions Demo

Dynamic Factors

Dynamic Factors allow you to determine specific market and account conditions that require a more dynamic response than usual. Construct Reason/Triggers test for a precise communication to the reps that are affected.

EXPAND ALL PANELS

Alert - New To Brand Patients
Trigger: 1. Chirocap ID
Conditions: • Patients - New to brand patients (P%) > 0
Action: Deliver product detail to:
Reason Text: HCP has new 7 patients using Chirocap in the last week. Follow up to educate about financial patient mix.

Alert - Change Changes
Trigger: 1. Chirocap ID
Conditions: • Alert - Close Changes observed in all of the
Action: Deliver product detail to:
Reason Text: Significant change changes for HCP's Chirocap patients. Refer HCP to sharing guide.

Alert - Sales Off Pace
Trigger: 1. Chirocap ID
Conditions: • Sales - Drop off pace (days) > 14
Action: Deliver product detail to:
Reason Text: Orders by off-brand account are typically observed 7 days. Consider a follow up to understand why.

MSD - eDetail Visit Follow Up
Trigger: 1. Chirocap ID
Define Condition: Each individual data point needs to meet the criteria for a factor to fire.
Define suggested Rep Action: [Dropdown]
Define suggested message by product: [Dropdown]
Define suggested message by product detail to account: [Dropdown]
This trigger acts independent of targets
Factor prompts critical suggestions

Reason Text Edit
Personal message about about efficacy on 04/01/2016.
Consider a follow up detail

Show reason text in...
☒ Suggestions
☒ Account targets

2. Change Rep Behavior

- Power **CRM Suggestions** with real-time, HCP-level suggestions and insights

Suggestions

SCHEDULE CALL

3

Send

2

HOLIDAY, JAMES

SUGGESTED ACTION: Schedule a call to detail Chirocap (Dosing)

1st since last visit (rep: Erik Lawson), 1/3 Chirocap details this qtr, proximity close, availability: 9:00AM
Significant change changes for HCP's Chirocap patients. Refer HCP to [sharing guide](#)
Competitive risk - Chirocap stat tells market share change is -30% (vs. Hyaltral market share growth of 15%)

BASS, ANNE

SUGGESTED ACTION: Schedule a call to detail Chirocap (Efficacy)

1st since last visit (rep: Erik Lawson), 2/5 Chirocap details this qtr, proximity close, availability: 11:00AM
Received Chirocap eDetail about Efficacy on 04/01/2016. Consider a follow up detail
2 plans with favorable access have high patient usage (% of claims): United: 30%, Blue Shield (CA): 30%

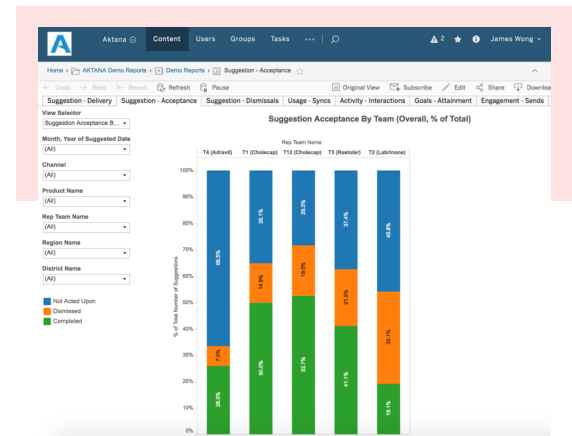
AIZER, JULIE

SUGGESTED ACTION: Schedule a call to detail Chirocap (Patient Resources)

2nd since last visit (rep: Jamie Byrd), 5/5 Chirocap details this qtr, proximity: unknown, availability: unknown
HCP is a top prescriber who has not written in the last week
HCP patient conversion rate is low (30%) and only 10% of patients are enrolled in a patient support program

3. Monitor What Works

- **Monitor** cross channel activity, suggestion usage and HCP response / results
- Analyze **trends** over time
- Near real time “Source of the truth”



DESIGNING FOR CHANGE:

Suggestions That Feel Right



Priorities



Progress



Timing



Context



Implementation best practices

ADOPTION IS CRITICAL

- design for adoption
 - less is more
 - make it real
 - keep it current
 - give ownership
- position as advice not directives
- be consistent with strategy and culture

CRAWL → WALK → RUN

- start with either
 - an easy goal; or
 - an important goal
- but cover the full decision scope (all brands & actions)

PLAN TO LEARN

- plan for use case expansion
 - new brands
 - new strategies
- plan to learn

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Questions



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