

Overcome CRM Adoption challenges caused by data issues



Client Success Story



Industry

Life Science

Client

One of the leading global life science company

Challenges

Global Life science company completed their first global CRM launch and moved all field sales reps to iPads for a fully aligned Customer Sales approach. After deployment, they discovered local, regional and global business reporting was inaccurate causing a loss of confidence in both the new CRM and all downstream system reports.

- The field teams created xls files to track all their transactions and the back-office team was overwhelmed in manual processing and reconciling correct Discounts, Rebates, and field rep payouts for sales performance
- Legal and regulatory issues were raised by numerous countries as common definitions of data fields were not in line with some local laws and regulatory bodies

Solution

- Initiated a global deep dive approach to identify CRM fields that were possibly impacted by Legal and Regulatory bodies
- Facilitated data segmentation for localization of reporting on KPI's that are unique by country including Time on Territory and proper accounting for Weekend & Holiday work
- Developed and implemented regional roll ups accounting for differences in legal, regulatory & compliance differences while still providing overall performance visibility
- Implemented Data Dictionary and Business Glossary
- Introduced Change Management & Communications process & tools

Benefits

- Global roll up with a **clear view of key performance** including drill down capabilities into Sales, Reps, and Products across species
- Reestablished **business trust in CRM**, Data and reporting
- **Eliminated manual processing** of transactions and payouts
- **Back-office** employees **workload became manageable**, and customer focused
- Leveraged to establish Global Data Governance Data Dictionary and Data Glossary. Later used to **introduce Data Lineage mapping** across systems