

Proxima Cloud CRM

Implementation – Advanced Package



CRM SYSTEM CONFIGURATION:

- **Installation and deployment of Proxima Cloud CRM, language selection.**
- **Data set configuration. Uploading client's initial data:**
 - 1) User list
 - 2) Regional structure
 - 3) Brand portfolio
 - 4) Formation of target groups
 - 5) Visit activity plans
 - 6) Samples
 - 7) Promo materials
 - 8) CLM materials
 - 9) Visit history (upload of client's native data in text file format and/or standard connector with SF-based CRM), excluding M&C.
 - 10) Creation of user dictionaries and populating them with values, with the possibility of further editing.
- **Data set configuration. Integration of data with Proxima Cloud CRM:**
 - 1) Integration of HCP/HCO databases - Axioma DB.
 - 2) Integration of drug database.
 - 3) Integration with retail data: pharmacy turnover, pharmacy stock levels.
 - 4) Integration with distributors: prices, stock levels, online orders (available from 25.10).
 - 5) Integration with distributor reports and pharmacy network reports (available from 25.10).
 - 6) Integration with the event management module - Event-machine.

CONFIGURATION OF STANDARD CRM FUNCTIONALITY ACCORDING TO CLIENT REQUIREMENTS:

- 1) Role differentiation
- 2) Field configuration (visibility, name)
- 3) Configuration of validation rules
- 4) Trigger creation
- 5) Connecting communication channels
- 6) Creation of alpha names

REPORTING AND ANALYTICS

- **Configuration of the manager and medical representative's homepage.**
- **Configuration of basic reports:**
 - 1) Plan-Fact sales
 - 2) Plan-Fact visit activity
 - 3) Coverage of doctors and organizations
 - 4) Synchronization date and software version statistics
 - 5) Mailing report

DEPLOYMENT OF BI ANALYTICAL DASHBOARDS:

- 1) Visit activity
- 2) Plan-Fact visit activity
- 3) Plan-Fact promotions
- 4) Coverage of doctors and organizations
- 5) Statistics for double visits
- 6) Task dashboard

- 7) Synchronization
- 8) GPS CRM report
- 9) Expense report (promo/samples)
- 10) CLM report
- 11) Plan-Fact sales
- 12) Agreements with doctors
- 13) Content of pharmacy visits
- 14) Survey report
- 15) Status report for mailings

TECHNICAL SUPPORT AND DOCUMENTATION:

- **Dedicated implementation manager.**
- **Up to 5 meetings to agree on system configurations.**
- **System setup within 5 days after receiving the filled-out brief.**
- **30-day Hyper Care period after system launch - support and coordination during the implementation phase, including user testing.**
- **Preparation of technical documentation describing the system configuration:**
 1. User manual.
- **Handover of the project to the Customer Success Manager for further support.**

** Standard exchange settings are included in the package*

*** Data provided by Proxima Research*