

Proxima Cloud CRM

Implementation – Enterprise Package



CRM SYSTEM CONFIGURATION:

- **Loading and deployment of Proxima Cloud CRM, language selection.**
- **Dataset configuration. Loading initial client data:**
 - 1) User list
 - 2) Regional structure
 - 3) Brand portfolio
 - 4) Formation of target groups
 - 5) Visit activity plans
 - 6) Samples
 - 7) Promotional materials
 - 8) CLM materials
 - 9) Sales data
 - 10) Territories/Bricks
 - 11) Visit history (loading client native data in text file format and/or standard connector with SF-based CRM), excluding M&C.
 - 12) Creation and population of custom directories with values for further editing.
- **Dataset configuration. Data integration with Proxima Cloud CRM:**
 - 1) Integration of HCP/HCO databases - Axioma DB.
 - 2) Drug database integration.
 - 3) Integration with retail data: pharmacy inventory.
 - 4) Integration with Distributors: prices, stock levels, online ordering (available from 25.10).
 - 5) Integration with Distributor and Pharmacy chain reporting (available from 25.10).

- 6) Integration with Event-machine for conducting events.
- 7) Integration with Photo AI recognition module.

- **Configuration of standard CRM functionality according to customer requirements:**

- 1) Role delimitation
- 2) Field configuration (visibility, name)
- 3) Validation rules configuration
- 4) Trigger creation
- 5) Communication channels setup
- 6) Creation of an alpha name
- 7) Setting filters/parameters in GeoForce
- 8) Setting filters/parameters in PAS

REPORTING AND ANALYTICS:

- **Configuration of the Manager and Medical Representative start page.**

- **Configuration of basic reports:**

- 1) Plan-Fact Sales
- 2) Plan-Fact of visit activities
- 3) Coverage of the doctor and organization database
- 4) Statistics on synchronization dates and software versions
- 5) Mailing report
- 6) Sales plan execution report for MP territory

- **Deployment of BI-analytical dashboards:**

- 1) Visit activity
- 2) Plan-Fact of visit activity

- 3) Plan-Fact promotions
- 4) Coverage of the doctor and organization database
- 5) Statistics on double visits
- 6) Task Dashboard
- 7) Synchronizations
- 8) GPS CRM Report
- 9) Expenses (promo/samples) CRM Report
- 10) CLM Report
- 11) Plan-Fact sales
- 12) Agreements with Doctors
- 13) Content of pharmacy visits
- 14) Survey Report
- 15) Mailing status
- 16) Sales plan execution report for MP territory

TECHNICAL SUPPORT AND DOCUMENTATION:

- **Dedicated Implementation Manager.**
- **Up to 8 meetings to agree on system settings.**
- **System configuration within 15 working days after receiving a completed Brief.**
- **30 days 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
- **Transfer of the project to further support by Customer Success Manager.**

** - The package includes standard exchange configuration*

*** - Data provided by Proxima Research company*

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