

# EFFECTIVE SAMPLE REPORTING

HOW PHARMACEUTICAL COMPANIES ARE USING COGNOS ENTERPRISE BUSINESS INTELLIGENCE SOLUTIONS TO IMPROVE BUSINESS PROCESSES AND IMPROVE PERFORMANCE.

Major pharmaceutical leader  
manages drug samples with  
Cognos

Increases efficiency, ensures FDA compliance,  
and gains control over product samples.

# The **CHALLENGE:** Tracking millions of transactions

Like all pharmaceutical companies, this leader in the industry relies on product samples (known as *starters*) or product vouchers as an important way of introducing drugs to physicians. Distributing samples via the field sales force is an effective way of showing the effectiveness of a particular medication, particularly new drugs. However, it raises major tracking and monitoring challenges—both for external regulators and internal groups that need access to information.

## **Tracking samples is a mission-critical process**

On the external side, the Pharmaceutical Marketing Act of 1997 establishes tight controls over pharmaceutical distribution aimed at eliminating diverting and other misuses of controlled substances. Complying with all FDA regulations is crucial and requires fast response to all requests, sometimes as quickly as 48 hours. Tracking samples is also important from an internal perspective, since it enables the marketing group to see where samples

are going. This ensures that samples are being distributed to the right physicians. Analyzing the flow of samples provides a wealth of valuable information that the sales and marketing team, key executives, and others can use to fuel sales and growth.

## **Millions of transactions**

The sheer volume of transactions complicates the challenge of tracking and monitoring samples. The company must monitor a wide range of transactions—including:

- visits when sales representatives left samples with physicians
- shipments from a company warehouse to a representative
- a sample return from a physician or representative
- transfers between representatives
- miscellaneous adjustments.



These transactions may involve multiple products, further adding to the data load. In short, the company generates millions of transactions every year.

### Analyzing data via ad hoc queries

The company's current system enabled a baseline level of sample tracking and provided regular, standard reports for core administrative purposes. However, ad hoc requests for specific sample information (i.e., sorted by a specific region, product, physician, or other factors) required extensive searching and sorting by the sample administration team. These ad hoc requests—from the marketing, sales, and executive teams—were crucial to the company's ability to know what was going on in the field. But they were difficult to fulfill. "In some cases, specific requests took days or even months to respond to," recalls a senior executive. "In 2003, we decided to look closely at our sample administration system, because clearly our ad hoc querying functions were getting out of control."

### About the customer

This pharmaceutical company has asked Cognos, an IBM company, not to use its name for competitive reasons. However, it is important to note that it shares many of the same challenges as other pharmaceutical organizations. Its sales force is distributed throughout the U.S. It is dealing with many products, including controlled substances. It must be compliant with FDA regulations. And it must interact on a daily basis with thousands of physicians in the field. All of these forces and more make administering samples a major challenge for any pharmaceutical organization—and point to the need for a robust ad hoc reporting solution.

### Executive Overview

A large, diversified pharmaceutical company\* taps the power of IBM Cognos ReportNet® to create an efficient pharmaceutical samples tracking system—to help it track and manage thousands of drug samples distributed to physicians.

- **FDA compliance.** Ad hoc reporting enables the company to meet FDA regulations for tracking samples—providing fast access to millions of transaction records from a three-year period.
- **Greater responsiveness.** IBM Cognos ReportNet provides a user-friendly solution for generating ad hoc reports and responding more quickly to requests from senior management and other stakeholder.
- **Proactive monitoring.** Cognos enables closer tracking of samples so the sample accountability group can spot

anomalies (for example, too many samples allocated to one physician) before they become a problem.

- **Increased efficiency.** In the past, creating ad hoc reports was a time-consuming process for the sample accountability group. With IBM Cognos ReportNet, efficiency is increased—freeing up personnel to do more strategic work.
- **Better decision-making.** Accurate, timely data from the field enables managers to make better business decisions in a shorter time.

Cognos business intelligence components play a crucial role in monitoring distribution of samples, providing fast ad hoc reports, ensuring compliance with federal regulations, and empowering a range of users to know more and know it sooner.

\* Name withheld by request for competitive reasons

# The SOLUTION:

When looking for a solution for ad hoc reporting, this major pharmaceutical company turned to **FYI Technology Solutions**, a trusted partner that it had worked with in the past on a similar challenge—field sales force activity management reporting. FYI worked closely with a team of business and IT clients to determine requirements, assess solutions, and implement a robust ad hoc reporting solution that met a wide range of reporting needs.

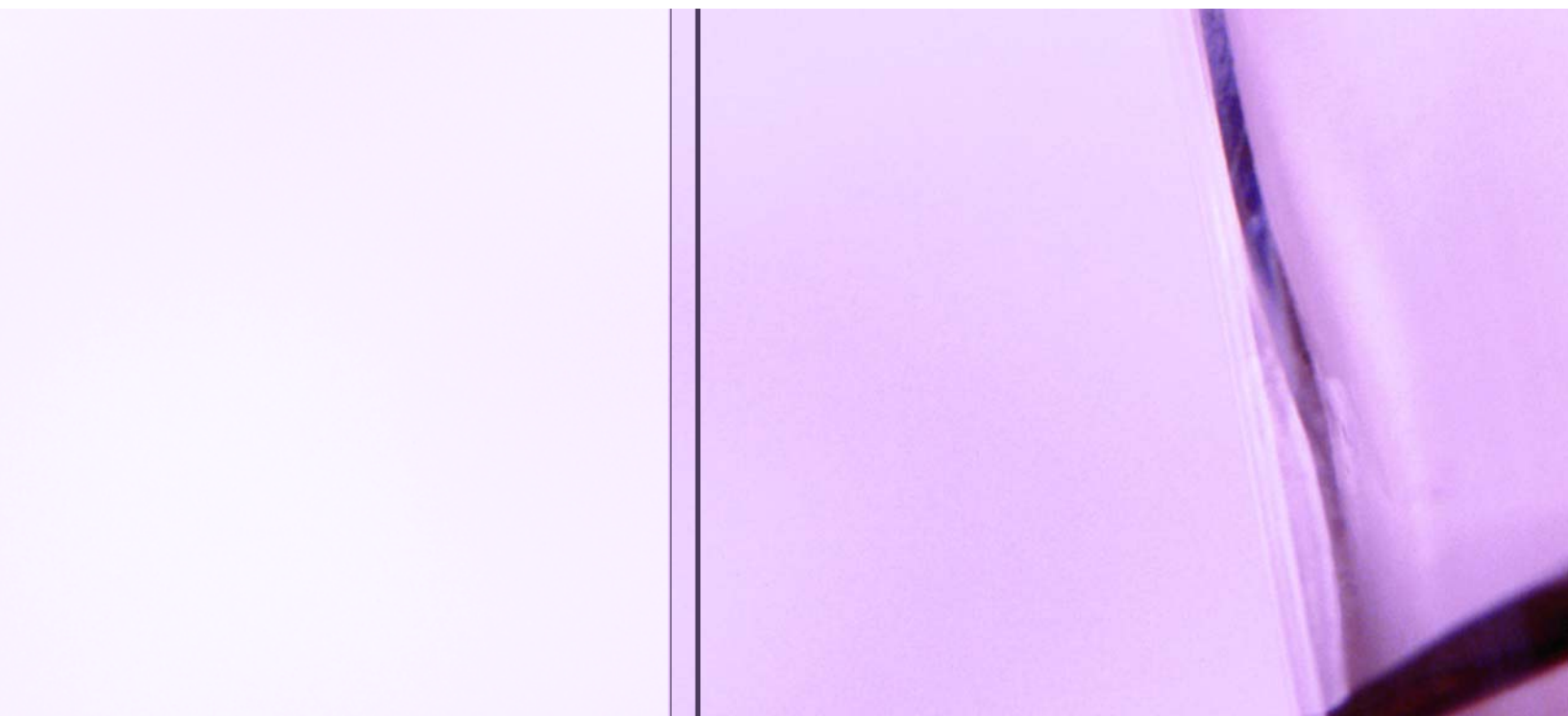
## **IBM Cognos ReportNet provides the right capabilities**

After evaluating a short list of other solutions, the team selected IBM Cognos ReportNet—comprehensive but easy-to-use reporting software. IBM Cognos ReportNet was the right solution because it could adapt to meet current and future requirements. It could scale to handle the customer's high (and ever-increasing) data volumes. And it had the flexibility to meet projected system enhancements. Moreover, IBM Cognos ReportNet's ease of use appealed strongly to the user base within the sample administration group and other areas, including non-technical business users.

FYI created a customized proof-of-concept approach to demonstrate a completely Web-based approach that met the company's need for flexible ad hoc reporting. In designing the system, FYI optimized the solution to provide results quickly without taxing the production database of the existing operational Oracle database—which would continue to provide standard reports.

## **How it works**

With the new system, data is sourced from the Oracle database on a UNIX server and replicated to a separate Oracle server, enabling an optimized solution that didn't impact the existing operational reporting system. FYI designed the solution to leverage the ability of IBM Cognos ReportNet to support additional data sources, should the company's needs change in the future. FYI also customized the user interface using Cognos Connection—the Cognos portal product—to provide a consistent look and feel with the operational system. Finally, FYI addressed security needs by using authentication profiles stored within the database for validating users.



### **An enthusiastic response**

A select group of business and IT users participated in a pilot project prior to deploying the final system. The response was very positive. “Everybody loved the system right from the start,” says the senior executive. “We had great support from Cognos and after a little training, everyone felt very comfortable with the tool. In just a short time, they were able to do pretty complex queries.” Primary users are now focused within the sample administration group, which fields requests for information from a wide array of departments throughout the organization, as well as external requests. The company envisions empowering other groups—such as sales management—with the advanced ad hoc reporting capabilities of IBM Cognos ReportNet.



# The **BENEFITS:**

## Saving time and enhancing decision-making

The Cognos-based samples tracking system brings a wide range of benefits to this organization, which—like all pharmaceutical groups—must operate as efficiently as possible to stay competitive. “The most important value that our new reporting system brings to us is the ability to let any users slice and dice the data the way that they want it, then present it to management and others in a graphic format *and* in a timely manner,” says the senior executive. “In the past, we couldn’t do that.”

- ***Faster response***

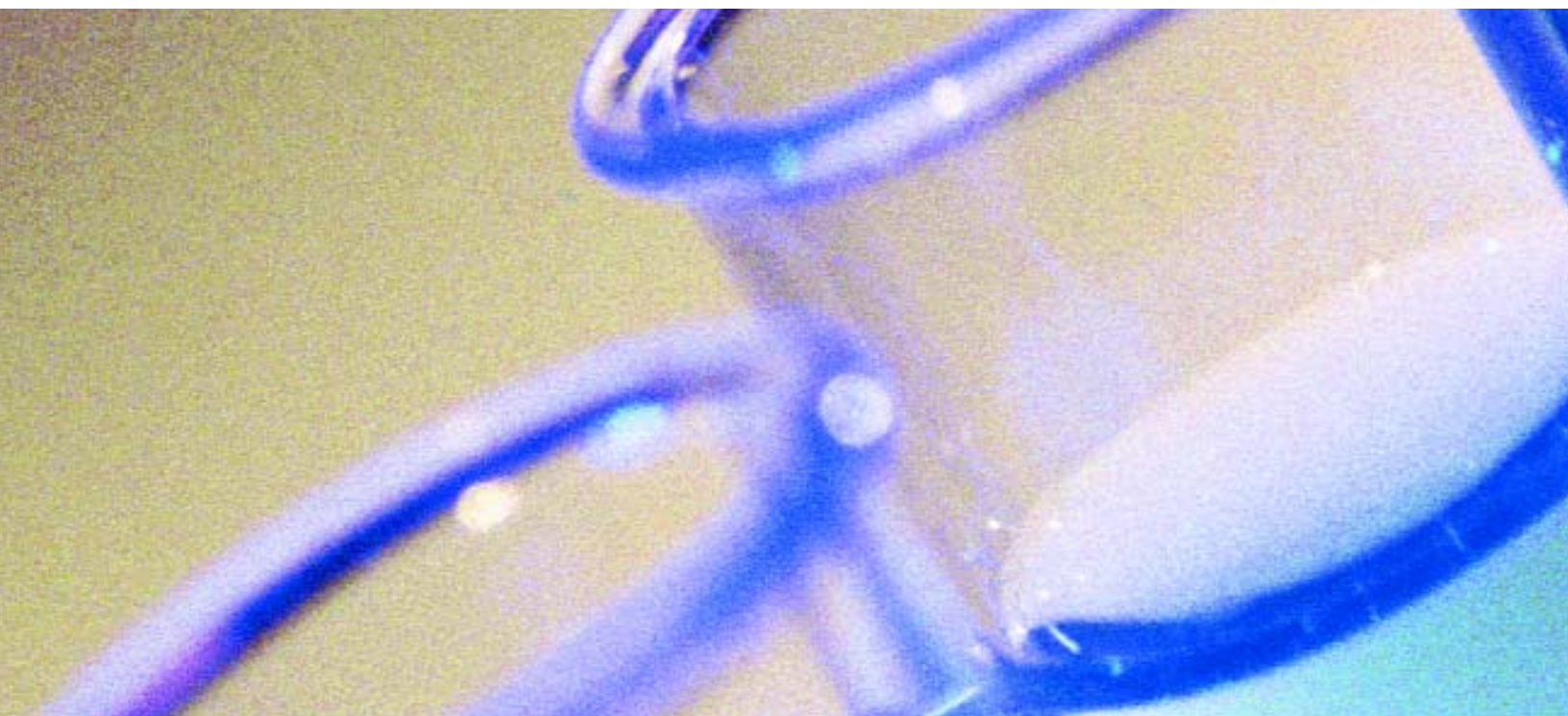
Responding to requests quickly is vital, whether they come from senior management or the FDA. With Cognos, the sample administration group can cut response time from weeks and days to hours. For example, the group recently received a request for an ad hoc report from the vice president of sales. The request came in at 10:30, and he needed the report by 11:30. “We weren’t sure if we’d be able to do it,” recalls one member of the team. “But we ran the request through IBM Cognos ReportNet and we had what he needed in half an hour.”

- ***Compliance with federal regulations***

One of the top benefits that IBM Cognos ReportNet brings to this company is the ability to comply with any and all federal regulations. In an era of increasing regulation, IBM Cognos ReportNet gives this company the confidence that comes from knowing that they can search and sort years of records and turn them into extremely effective reports. Better reporting means lower risk at all levels.

- ***Better visibility into field operations***

With IBM Cognos ReportNet, the sample administration team can spot anomalies and other issues—i.e., uneven distribution of samples—before problems become acute. This enhanced visibility into field operations raises efficiency in the field and ensures that all samples are well-managed and accounted for. The ability of IBM Cognos ReportNet to track millions of transactions—and run queries against the entire database—is particularly impressive.



- ***More efficient use of resources***

In the past, the samples administration group spent a great deal of its time searching for data and responding to requests. Since IBM Cognos ReportNet streamlines this process, they can turn their time and energies to other challenges. “Now we can shift resources from day-to-day processing to more strategic projects within the organization,” says one senior executive. In all, the company estimates that it has improved efficiency in this key area.

- ***Better decision-making***

Armed with accurate, timely information from the field, the sales management team can make better decisions about product strategies and more, and make them more quickly. “Because we can see the data faster, we can react in a more timely fashion and decisions get made more quickly,” says a senior executive.

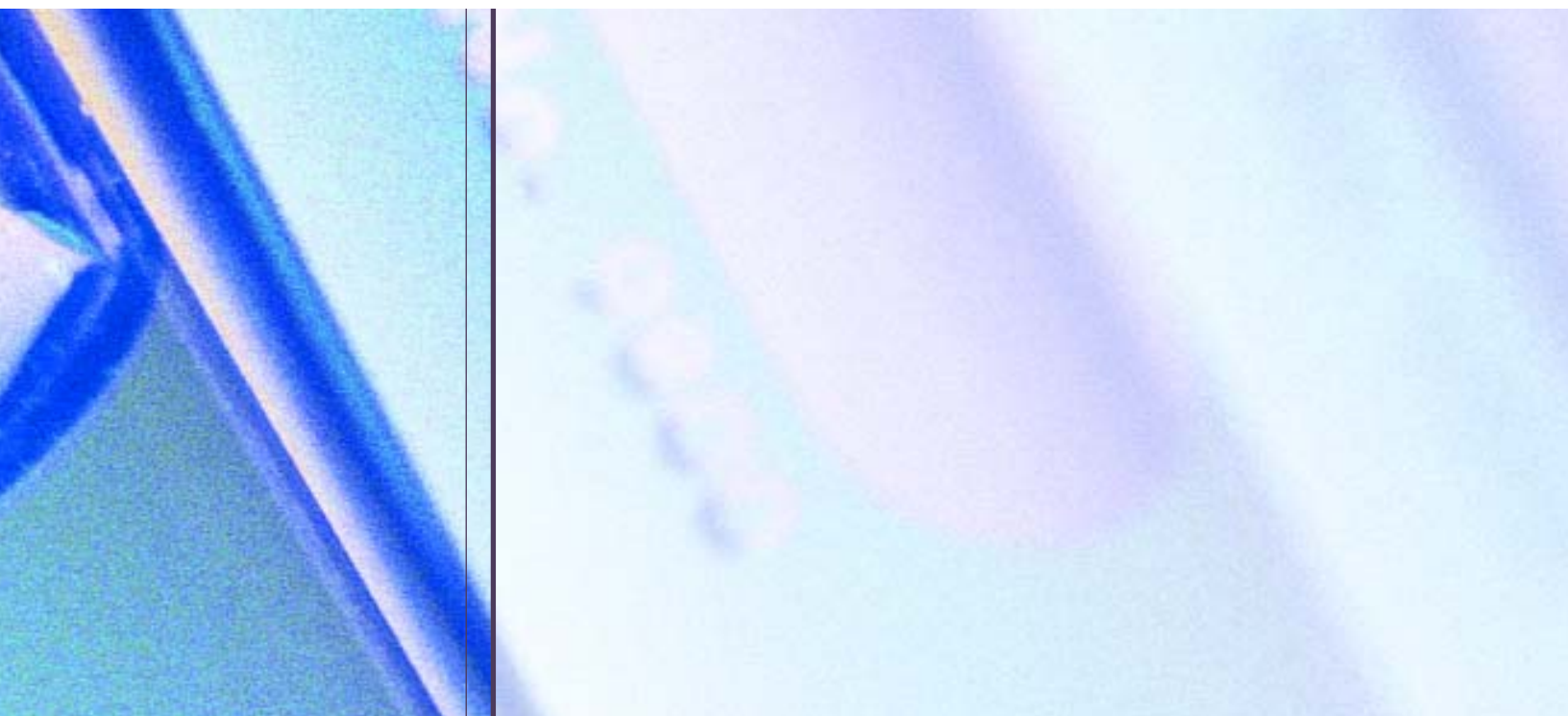
The Cognos solution has helped change the way this pharmaceutical leader manages samples—an important capability that goes far beyond ensuring compliance with federal regulations. With its new reporting capabilities, the

## **The pharmaceutical industry turns to Cognos**

This profile highlights one of the many pharmaceutical organizations throughout the world that use Cognos business intelligence to improve business processes, comply with federal regulations, increase efficiency, and drive sales and marketing performance. To find out more about Cognos, visit [www.cognos.com](http://www.cognos.com).

For more information about FYI Technology Solutions go to [www.fyi-systems.com](http://www.fyi-systems.com) or call 973-331-9050.

company can be more efficient, respond more quickly to changing conditions, and ensure that management makes decisions based on real-world data. IBM Cognos ReportNet is a key business intelligence solution that puts detailed information into the hands of those who need it more quickly than in the past. And it establishes a flexible platform that can expand and change (i.e. add new user groups or data sources) as the company continues to grow.





## About Cognos, an IBM company

Cognos, an IBM company, is the world leader in business intelligence and performance management solutions. It provides world-class enterprise planning and BI software and services to help companies plan, understand and manage financial and operational performance. Cognos was acquired by IBM in February 2008. For more information, visit <http://www.cognos.com>.

Pharmaceutical organizations worldwide choose Cognos for our unsurpassed expertise in delivering the information and insight they need to reduce costs, streamline processes, and increase profitability. Cognos has delivered solutions to 25 of the top 30 pharmaceutical firms, along with many leading life sciences and biotech companies.

### For more information

For more information on Cognos solutions for pharmaceutical and life sciences companies, please visit [www.cognos.com/lifesciences](http://www.cognos.com/lifesciences) or email [pharma@cognos.com](mailto:pharma@cognos.com)

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