# Sales Force Automation System

# 1   Introduction

Please read document "Overview of the Pharma industry and how IT can be used to automate it" before reading this document.

The SFA (Sales Force Automation) system is primarily built to automate the functions of the MR to make him more effective.

A pharma company assigns a list of doctors, chemists, and stockists to a Medical Representative (MR) for his personal visits. MR visits Doctors, Chemists, Stockiests for performing different jobs.

SFA helps the MR in two broad aspects.

## 1.1   Planning

At the beginning of the month, the MR can create plans for all the days of the next month. In the plan, he can specify what doctors, chemists, and  stockists he will visit. The system can help him by grouping geographically close stockists**(doctor, chemist)** together, for easier selection.

For each visit, the MR can select the samples and brand recall inputs to be taken to the doctors.

The plan can be forwarded to his manager for approval.

## 1.2   Execution

When the MR sets out for the day, he can carry a wireless device that helps him execute the plan. Before checking out of his place, the MR can check out the plan for the day. He can visit the doctors for the day, the stockists for the day, the chemist for the day etc. By clicking on any doctor, stockist, or chemist, he can view the profile of the person, the summary of the last visit to that person etc

The MR can view the brand recall inputs and the samples to be carried on that day. He can ensure that he has taken all the samples and the brand recall inputs.

Before a visit, the MR can take a look at the doctors profile. He can take a look at the product profile for the products that he wants to detail. He can create rebuttals – points where the product is better than the competitors. He can take a look at the summary of the last few visits to the doctor and make the appropriate pitch.

After the visit, the MR can enter the summary of the visit. The MR can also enter details of the expenses incurred during the trip.

All these features can save a lot of time for the MR and allow him to concentrate on the main task at hand. Also, doctor profile, last visit summary, product profile etc are tools that can be used to arm the MR and make him more effective.

## 2   System overview
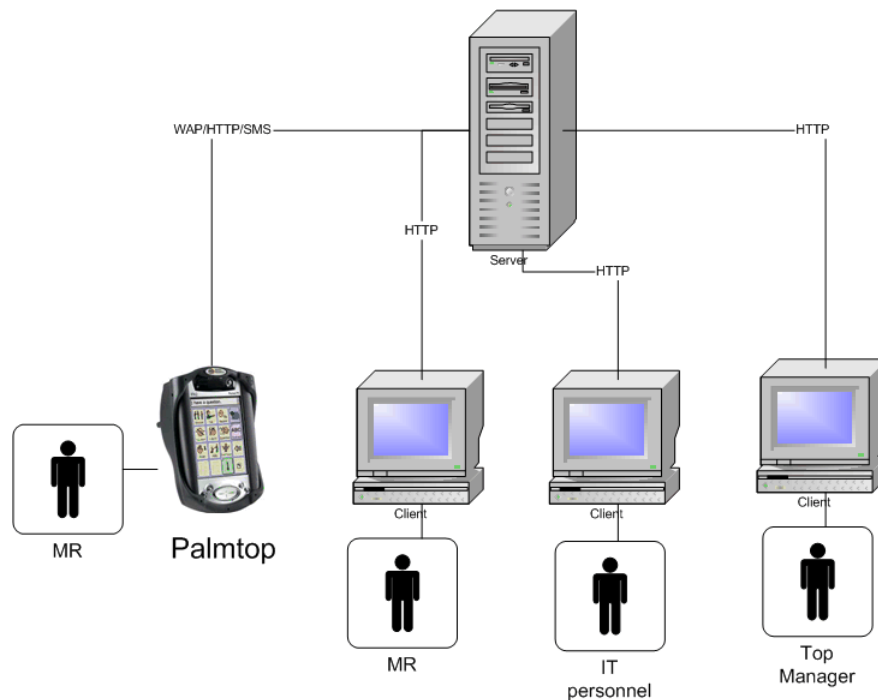


The SFA system consists of a Server component, a web based client and a PDA component. The MR will access the Server component via a browser for planning. The MR will access the palmtop component for day-to-day functioning.

The IT personnel administer the Server component via a web browser. The Management accesses the Server component for monitoring and analyzing data.

The workstation clients access the Server over HTTP. The palmtop device component accesses the Server Component over HTTP.

The Server component will be referred to as Website.