



Market analysis & sales representative effectiveness

(Medical equipment company)

Developed an opportunity score metric for practitioners to identify high value practitioners that can be targeted by the sales representatives and created a practitioner - facility - representative mapping to track the effectiveness of the sales representatives

Market analysis and sales representative effectiveness

Situation

- Client had an opportunity to identify high-value practitioners that can be targeted by Sales Representatives based on market data and the practitioner's exposure to the client
- Partnered with the client to create a prioritized list of potential practitioners that can be targeted and helped them in tracking the effectiveness of the sales representatives which was difficult due to gaps in the data and a high turnover environment.

Accordion Value Add

- Developed an Opportunity score metric for each practitioner/facility by combining the overall volume of the patients being referred by the practitioner/facility and current share of the Client business to identify high value targets
- Build Tableau based dashboards of the prioritized list of Regions, Facilities and Practitioners by their Opportunity score for the Sales Representatives to target.
- Scrubbed data from client's CRM and billing tools and created a mapping of Practitioner - Facility - Representative to better track the efficiency of each Sales Representative and represented this on Tableau dashboards

Impact

- Tableau based dashboards enabled the sales team to plan and prioritize their meetings with the high-value practitioners based on their opportunity score
- Our analyses and dashboards provided the sales team a clear visibility on Sales Representatives performance enabling them to better allocate appropriate commissions based on their contribution to sales

Marketing analysis

Prospective Leads

State

Practitioner City

Hospital City

Zip Code

Actual Ratings/Opportunity score

Range

Order Deliver Date

Prospective Practitioner Leads (Opportunity score)

Practitioner NPI	First Name	Last Name	Address	Practitioner City	Phone	Hospital City	Order Counts	PC1 Ratings	PC2 Ratings	PC3 Ratings	PC4 Ratings	PC5 Ratings	Total - Ratings
130013001	Robert	Machuga	3001 2nd Ave	Brooklyn	7183333001	BROOKLYN	77	7.00	1.00	9.90	9.92	10.00	28.82
130013002	MUHAMMAD	MAHAMMAD	1800 1st Ave	Brooklyn	7183333002	BROOKLYN	200	9.00	1.00	9.90	9.92	10.00	29.82
130013003	Robert	Smith	1800 1st Ave	Brooklyn	7183333003	BROOKLYN	10	10.00	1.00	9.90	9.92	10.00	30.82
130013004	Robert	Smith	1800 1st Ave	Brooklyn	7183333004	BROOKLYN	10	10.00	1.00	9.90	9.92	10.00	30.82
130013005	Robert	Smith	1800 1st Ave	Brooklyn	7183333005	BROOKLYN	10	10.00	1.00	9.90	9.92	10.00	30.82
130013006	Robert	Smith	1800 1st Ave	Brooklyn	7183333006	BROOKLYN	10	10.00	1.00	9.90	9.92	10.00	30.82
130013007	Robert	Smith	1800 1st Ave	Brooklyn	7183333007	BROOKLYN	10	10.00	1.00	9.90	9.92	10.00	30.82
130013008	Robert	Smith	1800 1st Ave	Brooklyn	7183333008	BROOKLYN	10	10.00	1.00	9.90	9.92	10.00	30.82
130013009	Robert	Smith	1800 1st Ave	Brooklyn	7183333009	BROOKLYN	10	10.00	1.00	9.90	9.92	10.00	30.82
130013010	Robert	Smith	1800 1st Ave	Brooklyn	7183333010	BROOKLYN	10	10.00	1.00	9.90	9.92	10.00	30.82

Please click on the practitioner NPI (or any cell in that row) from the above table to view their Referral details.

Referral details

Practitioner NPI	Organization NPI	Organization name	Client or Competitor	PC1 - ReferralShare	PC2 - ReferralShare	PC3 - ReferralShare	PC4 - ReferralShare	PC5 - ReferralShare
130013001	130013001	ADDITIONAL MEDICAL INC	competitor	100%	100%	100%	100%	100%
130013002	130013002	ADDITIONAL MEDICAL INC	competitor	100%	100%	100%	100%	100%
130013003	130013003	ADDITIONAL MEDICAL INC	competitor	100%	100%	100%	100%	100%
130013004	130013004	ADDITIONAL MEDICAL INC	competitor	100%	100%	100%	100%	100%
130013005	130013005	ADDITIONAL MEDICAL INC	competitor	100%	100%	100%	100%	100%

Primary Affiliated Hospitals

Practitioner NPI	Primary Affiliated Hospital	Hospital Address	Hospital ZIP Code	Hospital City	Hospital State	Phone Number	Hospital Type
130013001	MANHATTAN MEDICAL CENTER	400 TENTH AVENUE	10011	BROOKLYN	NY	7183333001	Acute Care Hospital

Option to toggle between the actual ratings and Opportunity score (adjusted for referral share)

Product Categories

Referral share by Product categories

Sales representative effectiveness

Facility Name Scrubbed (All) Primary Mkt Rep (Multiple values) Referral Doctor NPI (All) Deviation % 10% Product Report Group (All) Sales Region (Multiple values) Month of SO Create DT January 2019 November 2019

Sales by Market Rep

Sales Region	Primary Mkt Rep	Facility Name Scrubbed	Referral Doctor NPI	Line Item Count Total	Line Item Count										
					Jan'2019	Feb'2019	Mar'2019	Apr'2019	May'2019	Jun'2019	Jul'2019	Aug'2019	Sep'2019	Oct'2019	Nov'2019
Bayer	John Wayne	Adventist Health	1912170114	16	2		4		8			1			1
		Agape Internal M	1013995830	81	17	2	12	24	14	2	3		3	3	1
		Agape Medical Gr	1215132074	119	19	10	19	10	26	8	2	8	2	9	6
		Albion, St Andrew	1801355301	6				6							
		Alvington Height	1500005990	4					3	1					
		Alvington	1700452064	26	3	4	5	8		5				1	
		Arvidiana	1901462491	36	11			4			8			12	1
		BAFFLE HEALTH	1427062066	4											4
		LEXINGTON	1700000900	8							5			3	
			1730964353	9							3		6		
		Baylor Scott &	1501058990	7							7				
		Vinny Ali Sports	1506152064	12		1	8	3							
		Blackburn Cancer	1529045116	10				10							
			1548028901	52		1		8	17	10	5	5		6	
			1750448040	7				7							
			1811179001	11											11
			1811182094	28	3		4	7		4		8	1	1	
		Deborah E. Smith	1487154129	24		6							4	7	7
		Deborah Internal	1504793798	7			3				3				1
		Deborah	1509480711	4		4									
		Deborah Family	1700428112	241	46	19	34	29	19	9	20	16	25	18	6
		Deborah	1700338998	172	37	7	22	20	25	13	9	14	4	7	14
		Deborah Clinic	1711180901	130	11	11	12	20	7	19	17	10	5	18	
		Deborah Senior	1711176941	15			8	7							
		Deborah Clinic	1711176941	36	3	9			4	3	10	3	4		
		Deborah Clinic	1711176941	105	15	6	25	15	2	6	5	10	5	5	1

Primary Sales Representative for each Facility

Primary Facility for each doctor

Number of orders