



## **Taking the mystery and risk out of your Healthcare Engagements with EngageMate by Cresen Solutions**

Cresen Solutions was formed to provide distinct and qualified services to the life sciences industry. Our organization has a clear focus and mission to enable improved business outcomes through advanced technology solutions and analytical expertise. The leadership team is comprised of seasoned healthcare industry experts focused on enabling the technological advancements necessary in today's ever-changing healthcare landscape. Strong foundations in technology systems and solutions and the business acumen to enable predictable business results are keys to our success. Experience, quality, and innovation are the cornerstones of our team's capabilities and are applied to each engagement.

EngageMate© is an HCP/HCO engagements tool developed by Cresen Solutions that enables our clients to fully track HCP and HCO engagements throughout the entire life cycle. The system is designed to automate the business lifecycle of any fee for service engagement from business planning through close-out. It will also serve as the auditable system of record for all associated HCP/HCO fee-based contractual arrangements. There are many problems to be solved in the engagement lifecycle, EngageMate shines in the way it solves these problems.

Below in figure 1 is a diagram of the entire lifecycle that is commonly utilized within the Life Sciences Industry when fee for service contractual services are required:



Figure 1: HCP Engagement Lifecycle

All life sciences companies hire health care professionals (HCPs), organizations (HCOs), and other service providers. Engaging a service provider is often a lengthy process with many moving pieces and interactions between departments. During that time, the Compliance department is attempting to keep track of, and approve, all activities and service providers to ensure compliance with external government regulations and internal company policies. The HCP engagement process involves workflow including fair market value (FMV) assessments and exceptions, activity concept reviews, nomination review and approvals, content review/approvals, monetary spend capture, and appropriate certification and activity close-out. As an added layer of complexity, the events can be held around the globe with service providers from many countries, all of whom need their own respective cross-border workflows. While it is possible to track the engagement process via spreadsheets, word documents, and emails, this can be messy and error prone. In today's age of big data and required government reporting, the difficult task of manually tracking engagements is quickly becoming impossible. Now, more than ever, it is essential to have an easy-to-use system where a company can track and manage activities, approvals, and FMV tiers and rates all in one place.

EngageMate© is an elegant system that solves all the problems associated with the engagement lifecycle. Recently, after an unsatisfactory experience with another engagement tool, a top pharmaceutical company returned to tracking their activities with emails, spreadsheets, and word documents. Cresen Solutions was then brought in to implement EngageMate©. After gathering business requirements around workflow requirements, business rules, and input forms EngageMate© was configured to meet all of the client's policies and SOPs. EngageMate© was integrated with their customer

master to pull service provider information into the system, ensuring accurate Customer(HCP or HCO) details while limiting manual data entry. Review workflows were created for each region within the company enabling a smooth process for the activity to be reviewed by multiple departments and reviewers across the globe. After the workflows are completed EngageMate© assures proper closure and certification processes aligned with company policy. EngageMate© uses all the latest technologies and uses common open integration methodologies to enable easy interfacing with other company business systems.

From adding service providers to filling out forms and submitting activities, business users have enjoyed EngageMate's© responsiveness and ease of use. Most users were able to pick up the navigation and use of the system after one self-guided training session. Everyone, both "Submitters" and "Reviewers", receive email notifications when an activity is ready for their action. The email provides an embedded hyperlink that takes users directly to the activity they need to take action on. Additionally, upon logging into EngageMate©, users are presented with a simple landing page showing tiles that separate activities into distinct categories allowing users to see a filtered list of activities to find any activity they are looking for expeditiously. It also includes customizable dashboards that pull information from the system in real-time to provide metrics for activities, service providers used, approvals, and close-out alerts.

Given the ever-changing nature of the life sciences industry and government reporting, flexibility is a top priority for all Cresen Solutions' product offerings, including EngageMate©. It is easy to create and edit any of the system's forms and needs assessment qualifications from the user interface, including quickly changing language translations. In the most recent implementation of EngageMate©, the system is translated into Japanese, with the help of translation vendors and the users themselves. Cresen Solutions can accommodate changes or updates to the translations rapidly without downtime. Where EngageMate© shines is in the flexibility of using its sophisticated rules engine. This allows for business rules to be implemented in the system without hardcoding and interruption. With the rules engine, questions can be required, disabled, hidden, or populated with a value either by themselves or based on another question's answer. Changes in the rules engine, or the configuration of forms and questions, can be seen in real-time.

Finally, any system must have flexibility in how users are created and assigned. Even in a small workforce, changes are inevitable. This problem is compounded as the user pool grows; therefore, it is paramount to have a process in place to accommodate these personnel changes. EngageMate© allows user profiles to be easily managed by an administrator to add and remove users, change their assigned department, grant access to specific forms, and change their role in the system. Reviewers, or the administrator on the Reviewer's behalf, can delegate their role to another Reviewer while out on leave. This allows for the workflow to never get "stuck" waiting for someone's action while they are out of the office.

In conclusion, EngageMate© is a simple, yet powerful tool focusing on usability and flexibility that solves the problems presented by the engagement lifecycle. It allows for the management of the entire engagement process globally. To learn more about Cresen Solutions and its other Flagship products, [MonitorMate©](#) and [SpendMate©](#), we encourage you to visit our website at <https://cresensolutions.com/>. Here you will also find our free [PowerCMS](#) tool, a dashboard that allows you to analyze the Open

Payments data in a unique and innovative way. Sign up for free and get a taste of what Cresen Solutions can do for you and your compliance team.