Sales Data Analyst Assessment

Please send all answers and files to ryanp@amopportunities.org, ann@amopportunities.org, and ashley@amopportunities.org.

You have 3 tasks for your assessment.

1. Data Upload Prep
2. Extraction
3. Strategy/Assessment of Data

Data Upload Prep

- We need to update some data in HubSpot
- You are being given 3 csv files and need to prepare data to update HubSpot with updated data.
    - File named "9.27.22_Physician_Group_Updates_Final"
        - This updated data has been pulled recently from our healthcare database, called Definitive Healthcare. This is the file that would be uploaded to HubSpot
    - File named "HubSpot"
        - Contains Data from HubSpot
        - Contains known Definitive ID and Record ID (HubSpot ID), along with Company Name. This is how we will match the two databases up. Record ID is the constant in HubSpot, Definitive ID is the constant in Definitive.
    - File named "Specialty Reference Sheet"
        - Is a manual reference sheet made to match up specialties
        - Some specialties we do not want to upload – those are labeled "DO NOT UPLOAD" – If that is the case – we will not upload the associated company into HubSpot
        - HubSpot only matches up specialties if they match exactly in text.
        - Column A is how Definitive names the specialty.
        - Column B is how it is labeled in HubSpot
- Using the data provided, fill in Colum B (Record ID) and Column E (Main Specialty (HubSpot)) on the file "9.27.22_Physician_Group_Updates_Final"
- Also, remove any (FKA XXX) or (AKA XXX) in the group names on Column C
- Note – Not all companies will have a Record ID – those have either never been uploaded/skipped prior OR are new records. You can ignore those/leave those records on the file.
- <mark>**Send the updated/prepped file to ryanp@amopportunities.org ann@amopportunities.org and ashley@amopportunities.org**</mark>

Extraction

- The team would like to target residency sites/specialties that did not fill all their residency slots in 2022. Using this link to "Program-Results-2018-2022.pdf" create a list of unmatched residency sites.
- **Send that file to ryanp@amopportunities.org ann@amopportunities.org and ashley@amopportunities.org along with a plan on getting this data matched up to our existing data in HubSpot.**
- Additional Information/Help-
  - This shows that Baptist Health-AR did not fill all their residency seats at the North Little Rock Location in 2022 for Family Medicine and Transitional Residency Programs.

Baptist Health-AR

North Little Rock	Program Code	2022 Quota	2022 Matched	2021 Quota	2021 Matched	2020 Quota	2020 Matched	2019 Quota	2019 Matched	2018 Quota	2018 Matched
Family Medicine	2198120C0	12	11*	12	12	12	12	12	12	--	--
Internal Medicine	2198140C0	12	12	12	12	12	10*	12	12	--	--
Psychiatry	2198400C0	4	4	--	--	--	--	--	--	--	--
Transitional	2198999P0	12	6*	12	6*	--	--	--	--	--	--

Strategy/Assessment of Data

Please describe how you would use data and reporting to help answer the following scenario. A narrative description is fine, any visuals you would like to include are welcome as well, e.g an example report (data and visuals can be made up as proof of concept). Feel free to be creative!

The CEO has challenged all departments to come up with ideas to increase AMO's revenue stream. Revenue comes from selling programs to students or schools. Clinical Partnerships wants to test the values of the different kinds of capacities they recruit, e.g sites with residencies, sites without residencies, rural hospitals, and smaller physician-led clinics. Different clinical sites have different values to the audiences AMO serves. The audiences AMO serves can be broadly divided into international schools and students and domestic schools and students as well as different learner types-MDs, DOs, Nursing, and PA students. For students, a site with a residency might sell better among the international audience than a site without a residency, but there might be no difference between the two among domestic DO students, meaning non-residency sites are better targeted towards a domestic DO audience than an international audience. How would you use data and reporting to help test the Clinical Partnership team's hypothesis?