Medical Rep CRM System Design

# Introduction:

Our Base idea is to implement this system with consideration of the following facts:

1. Implement the basic CRM concept inside this system
2. Customize the interface to match Medical Rep Activities by using their terminologies while designing the GUI labels.
3. Doing the Medical field customization should not affect the CRM Concept and its business process management … as we targeting to do very small efforts to sell this system for another business fields.

# System Information:

## Organization Chart

This will be done as tree implementation as we should give the possibility to system admin to customize the Company tree and assign each specific job title to specific users on the system – to achieve best implementation for Authentication and Authorization Hierarchy, at the same time we should do custom handle for certain job titles in the org chart which direct affect our CRM Concept like (Sales Manager, Marketing Manager, Sales Rep, …)

­­­­­­Most of Pharmaceutical companies divide their org chart in two ways:

1. Two basic tree Branches one for Sales Manager and the other for Marketing Manager and these two arms handle all resources in the company including all company products
2. Divide the company into Business units each product will have its separate tem (marketing manager – Sales manager, and reps ...)

Based on the previous we need to do best handle for the tree implementation concept to be capable of handling all variation in company chart.

## List of Contacts

Contacts we have divided into two types:

**Doctor:** (Class type – Specialty – AM Places – PM Places – Contact info )

**Hospital:** (Name – Contact info – Specialty - …)

**Clink:** (individual clink or multi مستوصف - …)

Doctor <-----many to many------🡪 Hospital

Doctor <-----many to many------🡪 Clink

## IMS system

IMS system dividing the 27 governorate in Egypt to certain number of bricks

We will feed our system with the IMS data sheets as basic information will work regarding it .

Samples from IMS system data needed

# System Key Players

# Sales Rep

* Each sale rep in the system will be assigned to work with certain contacts in the system … each sales rep have the possibility to have his contact list as one choice from the following:

1. Hospital or many hospitals ( this will include all doctors working in these hospitals .. he will be responsible for covering all these doctors )
2. Brick or Many Bricks ( this will cover all hospital in his assigned area as AM visits and all doctors clinks as PM visits )
3. Key Account Manager (KAM) (this will include random selection for some contacts doctor / hospitals .. for special handling )

* Sales Rep should plan for certain period for visits (AM – PM) and system will reserve the planed visits in repository different than the actual visits will be done... because we need to compare actual visits vs. planed visits ( and if sales rep needs to change the plan .. this must be approved from his direct manager first )
* Visit location GPS to assure the actual place for sales rep.
* Actual Visit Details :

1. Products ( force [important products] – Reminding products ) these items should be specified from the Marketing Manager
2. Samples and Giveaway ( this should handle **samples inventory** as each sales rep should receive fixed amount from samples and giveaway and should be decreased from the inventory when release some of them )
3. Services ( this include two types )
4. Marketing initiate the services offers -> sales offer to doctor -> Actual service done.
5. Doctor Request Service -> Marketing requested to approve -> approve budget and do the service
6. Doctor Request Service -> Sales budget can cover it -> Actual service done.