# NOVO NORDISK - OZEMPIC

## PATIENT CASE MANAGEMENT PROJECT

**Deloitte.**

# AGENDA

Current State Analysis

Suggested Approach

Implementation Timeline

Analytics Dashboard Mockup

Metrics Benefits

Next Steps

Q&A

# CURRENT STATE ANALYSIS

- **Lack of System Integration**:
  - The current systems are not unified, leading to inefficiencies and difficulties in communication between different functionalities.

- **Manual Intervention in Workflows**:
  - Case Assignments and Approval processes involve manual steps, which the company wants to automate to improve efficiency and accuracy.

- **Challenges in Data Consolidation**:
  - The company struggles to consolidate patient data to get a holistic view of the patient journey, including feedback, issues, and product usage.

# SUGGESTED APPROACH

- Automated Case Creation

- Automated Case Assignment

- Unified Communication Platform

- Real-Time Data Analytics Reporting and Dashboards

# IMPLEMENTATION TIMELINE

1. **Month 1-2:** Requirement gathering, data model design, and initial setup of Salesforce environment.

2. **Month 3-4:** Development of automated intake processes, knowledge management setup, and basic UI enhancements.

3. **Month 5-6:** Testing, user training, and initial rollout.

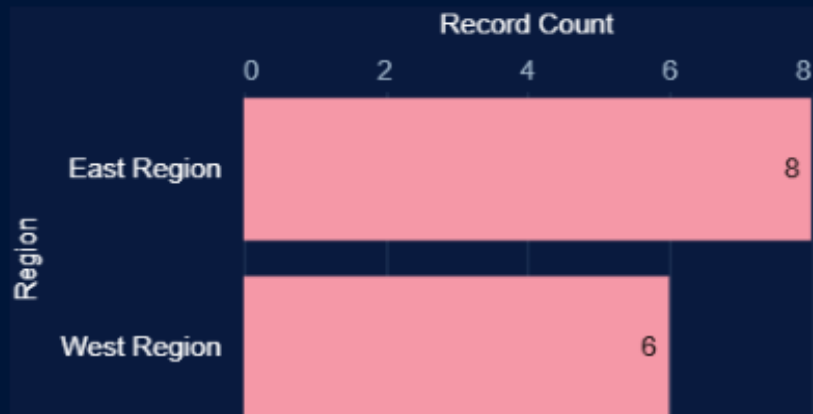4. **Month 7:** Go-live and post-implementation support.

# ANALYTICS DASHBOARD MOCKUP

# Case Managment - Weekly Report
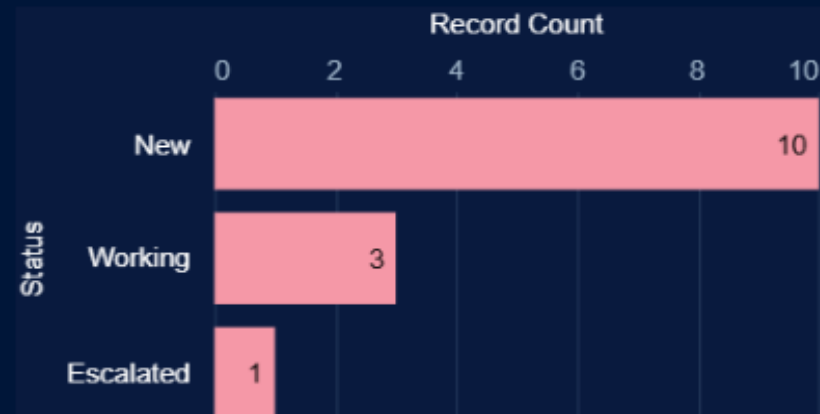
## Total Open Cases

# 14

View Report (Cases)

## Total Open Cases by Region

Record Count

| Region | |
|---|---|
| East Region | 8 |
| West Region | 6 |

Scale: 0, 2, 4, 6, 8

View Report (Cases)

## Open Cases by Status

Record Count

| Status | |
|---|---|
| New | 10 |
| Working | 3 |
| Escalated | 1 |

Scale: 0, 2, 4, 6, 8, 10

View Report (Cases)

## Total Open Cases by Type

Record Count

| Type | |
|---|---|
| Medication Inquiry | 2 |
| Adverse Drug Reaction | 2 |
| Prescription Assistance | 2 |
| Product Availability | 2 |
| Financial Assistance | 1 |
| Medication Errors | 1 |
| Other | 2 |
| Usability | 2 |

Scale: 0, 0,5, 1, 1,5, 2
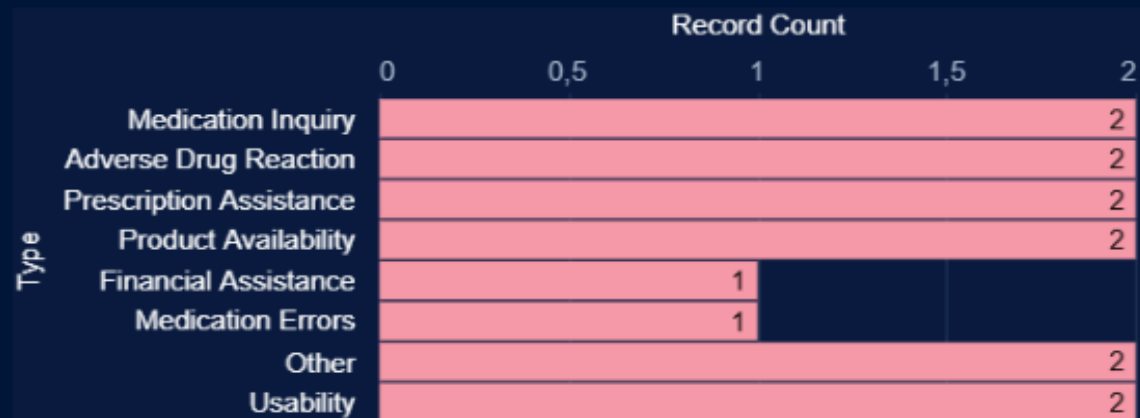
View Report (Cases)

## Open Cases by Origin and Priority

Record Count

Priority: High, Medium, Low

| Case Origin | Priority | Count |
|---|---|---|
| Phone | High | 1 |
| | Medium | 1 |
| | Low | 2 |
| Email | High | 1 |
| | Medium | 1 |
| Web | High | 1 |
| | Medium | 4 |
| | Low | 3 |

Scale: 0, 1, 2, 3, 4
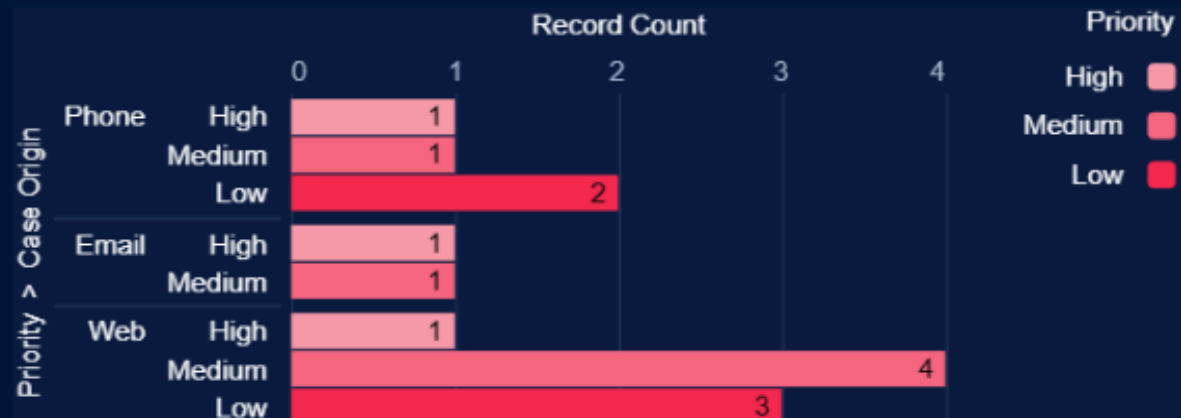
View Report (Cases)

# BENEFITS OF INTEGRATED DATA VISUALIZATION

- **Data-Driven Decision Making:** Regular reporting on key performance indicators allows making informed decisions.

- **Performance Monitoring:** Weekly reports should focus on metrics such as the number of cases, average assignment time, case resolution time, status changes, etc., to identify areas needing improvement.

- **Agent Performance Metrics:** Number of Cases handled, average resolution time and customer satisfaction scores, to identify areas for additional training or support.

# NEXT STEPS

- **Pre-built Templates:** to quickly set up key performance indicators (KPIs) for case resolution times, first contact resolution, and more.

- **Advanced Analytics:** Utilize Tableau CRM's advanced analytics capabilities to derive insights from large datasets, such as patient demographics, prescription trends, and product performance.

- **Predictive Analytics:** Implement predictive analytics to forecast demand, identify potential issues, and suggest proactive measures

# Q&A

# THANK YOU

Stella Durante, Salesforce BA

stelladurante@gmail.com