

Pharma

Categorization of physicians

Version 7.17



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Categorization of physicians

Information about a doctor's potential significance in terms of pharmacy product promotion is critical for choosing a proper communication strategy with the doctors. In Creatio, this information is available on the doctor's contact page, in the [*Potential*], [*Loyalty*] and [*Category*] fields.

The [*Potential*] field contains doctor's estimated potential, which is an indicator of doctor's capability to promote pharmacy products. The doctor's potential is based on the number of patients with specific diagnoses ("nosology" or "ICDs") that a medical rep recorded during last visit to that doctor. The number of patients is compared with the values in the [*Doctor's potential setup*] lookup.

The [*Loyalty*] field contains a general estimation of doctor's loyalty towards your brand. Loyalty is an indicator of how actively the doctor promotes your products. By default, the loyalty can range from "1" (highest) to "3" (lowest). The loyalty value is calculated based on the actual prescriptions of your products by the doctor. The number of prescriptions is compared to the values in the [*Doctor's loyalty setup*] lookup.


The values in the [*Potential*] and [*Loyalty*] fields are calculated automatically during doctor categorization.

The regional manager analyzes the "potential" and "loyalty" indicators and assigns doctor's category.

Information about previously assigned categories is automatically saved on the [*Categorization history*] detail on the contact's page.

Set up calculation of a doctor's potential and loyalty indicators

A doctor's **potential** indicator depends on the number of patients with various diagnoses who visited the doctor. To set up calculation of the doctor's potential:


1. Open system designer. For example, click the  button.
2. Go to the [*Lookups*] section and open the [*Doctor's potential setup*] lookup.
3. Add new lookup records and specify the values of doctor's potential in the desired format. By default, there are three levels of potential (from highest to lowest): "A", "B" and "C".
4. Select the doctor specialty, for which the potential value is relevant.

Note. Set up separate rules of calculating potential for different doctor specialties.

5. Assign the value range for the number of patients that visit a doctor of the selected specialty between the measurements (usually taken by a medical rep during visits).

Note. To let medical reps enter data for calculation of potential, set up a connection between the doctor specialties and diagnoses (nosology) of the patients that visit each type of doctor. To do this, edit the records in the [*Nosology*] lookup.

The doctor's **loyalty** indicator depends on the number of prescriptions for the promoted products the doctor makes between the medical rep's visits. To set up calculation of the doctor's loyalty:

1. Open system designer. For example, click the  button.

2. Go to the [*Lookups*] section and open the [*Doctor's loyalty setup*] lookup.
3. Add new lookup records and specify the values of doctor's loyalty in the desired format. By default, the loyalty can range from "1" (highest) to "3" (lowest).
4. Select the doctor specialty, for which the potential value is relevant.

Note. Set up separate rules for calculating loyalty for different doctor specialties.

5. Assign the value range for the number of prescriptions that a doctor of the selected specialty issues between measurements (usually taken by a medical rep during visits).

Note. To let pharmaceutical reps enter data for calculation of doctor's loyalty, enter the list of the promoted products in Creatio. You can do this by adding the products to the [*Promoted products*] detail on the [*Products*] tab of the doctor's contact page, or by adding doctors to the [*Contacts*] detail of the product page.

Perform doctor categorization

Doctor's category is assigned by a regional manager and is based on analysis of the doctor's potential and loyalty indicators. The doctor's potential and loyalty are calculated based on the information about the number of doctor's patients and the number of prescriptions of the promoted products issued by the doctor. The information is gathered by medial reps during visits. Creatio automatically assigns the doctor's potential value if the number of patients is within the range specified for this value in the [*Doctor's potential setup*] lookup.

To perform doctor categorization:

1. Select one or more doctor records in the [*Contacts*] section.

Note. You can also run the categorization action from the contact page, if a contact with the "Doctor" type is opened.

2. Click the [*Actions*] button and select [*Categorize*].

As a result, doctor's potential and loyalty indicators will be calculated. The categorization will run on the background, and you will be notified when it completes.

3. Select doctor's category based on the calculated potential and loyalty indicators. Information about previously assigned categories is automatically saved on the [*Categorization history detail*] on the contact's page.

Note. You can set up the list of categories in the [*Contact category*] lookup.