



Youreka

CONSUMER GOODS

The Healthcare Industry has a Rx for you

How top Consumer Goods organizations can leverage advanced concepts and technologies from the innovative healthcare space.



The Old Way May Not Be the Right Way

Joan is a 76 year-old Medicare recipient living in urban Baltimore and Joan is sick. In fact, Joan is really sick. Each week, on multiple occasions, Joan feels like she is breathing through a straw. She is afflicted with chronic asthma, a difficult and debilitating condition for many elderly patients.

For Joan, her battle with asthma is exhausting and has diminished her quality of life. For her care team, Joan's

asthma presents a confounding and frustrating situation without a simple solution. New or different types of inhalers seem to work for short intervals, but invariably Joan ends up back in the emergency room. Joan's physicians are at a loss for a new course of action and suspect she must not be taking her medication as prescribed. This presents a frustrating and costly cycle for Joan, her doctors and the health system as a whole.

Make Everyone An Expert

Now meet Tim, Joan's home health nurse assigned to her case. He visits her home in Baltimore with a smart assessment loaded on his tablet and the goal of solving the asthma challenges that stumped her team of physicians, all without access to the sophisticated resources available at a hospital.

Right from his tablet, Tim is guided, step-by-step, through Joan's assessment to capture data about her medical situation and her home environment, a unique step that can only be taken in the field. In Joan's bedroom, he notices an air vent above her bed. With a small flashlight, he shines a light to check the quality of the vent and winces at what he sees. He captures a photo on his tablet and writes a few notes in his

assessment, then confidently informs Joan that her new care plan won't involve a new inhaler. Instead, Tim will be scheduling a specialist to visit in the next week to clear the black mold from her vents.

Joan's traditional treatment regimen couldn't offer the insights needed to improve her health. Consistently inhaling black mold spores only worsened and perpetuated her condition and without Tim's field insights, her physicians would have held fast to their care plans. But Tim's tablet was equipped with an intelligent assessment designed by his Chief Medical Officer and team of expert clinicians who know to search for and document environmental conditions that contribute to poor health.

The ability to compress this level of intelligence and make it available on Tim's tablet is called operational intelligence. It's allowed health plans and providers to **improve their results by as much as 600%** and it's now shifting the way that leading consumer goods companies engage with their retailers and consumers, focusing on real-time recommendations and next steps while reps are out in the field.

The remainder of this article will share how leaders of consumer goods organizations can learn from healthcare organizations like Tim's and about simple, rapid ways to operationalize intelligence with their field sales and service teams.



Create a Foundation, **In the field**

As was demonstrated with Tim's process, if you aren't capturing information about the world your consumers live in, you are not getting a complete picture. Are consumer goods leaders truly empowering field sales and services teams with the necessary tools for accurate, orderly and timely data collection? While sections of the industry broadly adopt mobile technologies, some are still stuck using pen and paper. Paper forms are static, easy to lose, prone to error and almost always require duplicate efforts when entering information.

Best in class consumer goods companies are seizing the opportunity and investing in mobile applications that extend their CRM systems. For organizations that are ready to take a leadership position, here are a few simple rules to follow when providing digital tools to your field users:

Availability

Reps can't always count on a cell signal or Wi-Fi to complete their jobs. Digital tools need to work 100% of the time, online or offline.

Efficiency

The more time reps spend keying or rekeying known information, the less time they spend on valuable interactions with retailers.

Simplicity

Make the process streamlined and easy to follow and provide an intuitive user interface to encourage tool adoption.

Consistency

Provide a single solution that offers the same experience and data set whether you are on a laptop, a tablet or a smart phone.



If you do not have a mobile solution already, then good news, this is low hanging fruit. There is a new class of mobile retail execution applications to help you accomplish this first simple step of collecting data. If you're not building a foundation with data today, odds are you're falling behind.

Figure Out What's Working

With your field reps collecting valuable information about retailers, shelves within those retailers, displays, promotions, deliveries and service calls, the next step is understanding how to use that data to positively influence your team's behavior while they are in the store. The first step is to explore the blueprint for an operational intelligence strategy that's both easy to create and manage.

Take a moment to consider what it is that your most successful reps are doing. Do you know the questions your best reps ask, including when and why they ask them?



To start building the foundation for operational intelligence, ask these questions within your organization and use what you learn to form an initial set of requirements. Once identified, you can start to build them into whichever tool your retail execution team uses to facilitate each and every retailer interaction.

Unsure where to start? As mentioned, paper is not a scalable solution. But these critical questions may already exist today in the form of store audits, checklists, account reviews and other forms of sales collateral. As you begin the process of identifying this information, focus on the

questions you or your team of experts might ask to identify an opportunity to cross-sell or upsell a product. Differentiate which answers would lead a rep to proceed with a sale versus following up with additional questions.

As we identify these various flows within interactions, we can bake them into workflows within your retail execution tool to create a scenario where all reps follow a standardized process. As your team begins to leverage the updates to your retail execution tool, another opportunity emerges. Your insights will show what does and doesn't work, and then offer the ability to use that feedback to adjust and improve processes. These same steps can even memorialize the conditions that exist when reps should suggest a new display or the opportune situation to push a new promotion.

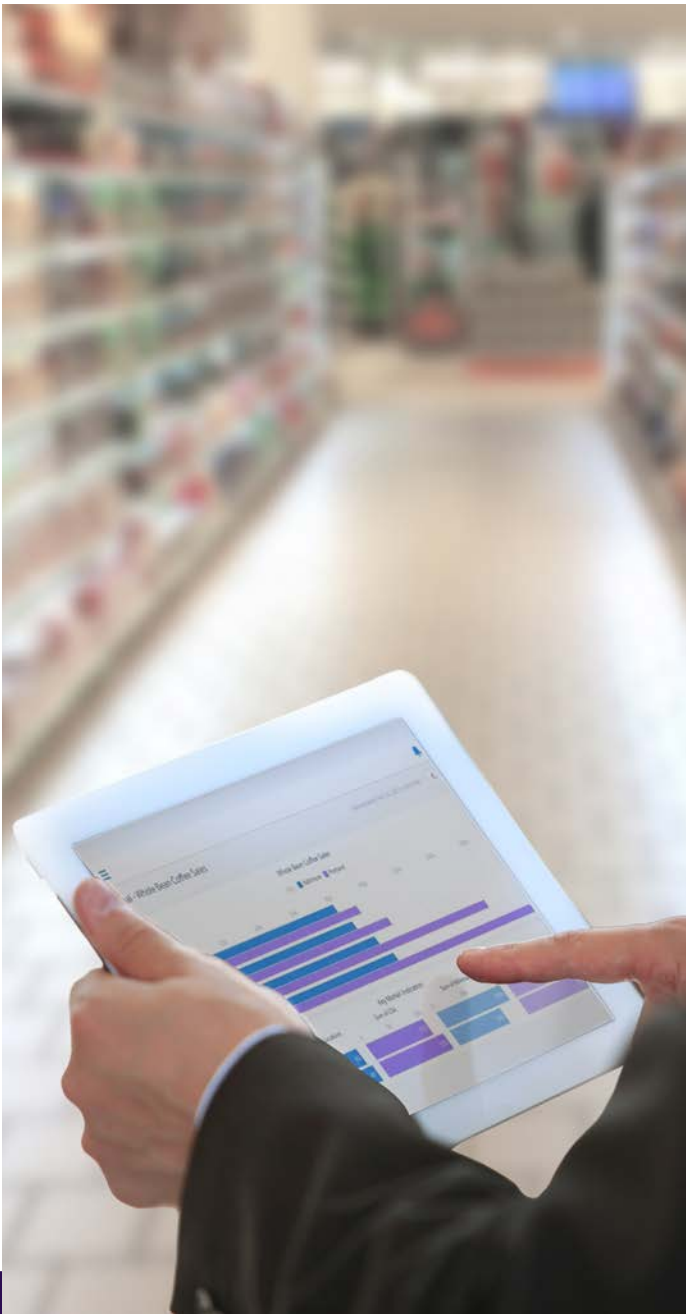
Operationalize your company's knowledge

It wasn't a lucky guess by the home health nurse Tim to check for mold in Joan's vents, nor was he an environmental specialist or even an expert on asthma. Tim simply did what his Chief Medical Officer would have done in the field, all without the need to gather a team of experts to review a summary of Joan's history, her medication usage, or background on her home. Tim achieved the same results faster and more efficiently.

As you incorporate new questions, workflows, and recommendations into your retail execution tool, your team will experience one of two results. In the first scenario, you will find that existing questions, steps and processes work seamlessly and you're not missing a single opportunity to pitch a product, a display or a promotion. In other cases, you may find that some of the questions asked need adjusting to help better identify the right situations and times to sell.

While the first scenario is preferable, the second still offers valuable return – your organization is learning. You're learning about what your retailers care about and how your vision aligns with what's really going on out in the field. With that new knowledge, begin to make improvements to both the sets of questions your team is asking and the selling suggestions your tool is making. Over time, the tool will become better than your best rep, allowing you to meaningfully reduce the traditional performance gap that plagues any field sales or service organization. Begin to drive towards the panacea where even brand new employees ask questions and act like industry veterans. Moving to a system that memorializes and facilitates best practices helps remove the risk that a successful store visit is predicated on whether or not a rep slept well the night before or missed their morning cup of coffee. Operational intelligence drives predictable and systemic performance at an enterprise level.





Make the Right Thing Easy To Do

Let's take a minute to discuss guidance in the field. There is a lot of buzz in the market about providing analytics at the point of need, which for consumer goods organizations means out in the field. Arming reps with relevant data is a positive development, but there are still significant gaps to be addressed. Unfortunately, most great sales reps achieve their status by working hard at sales. Few of them are well versed in analytics or have an interest in becoming a statistician, which creates a problem. Putting real time reports and dashboards in the hands of field reps is great IF you can rely on the field rep's ability to interpret and act on those reports and charts.

Will they understand and be able to interpret outcomes, for example, when chart A is above average and chart C is below average? Furthermore, is it realistic for that same rep to be able to digest that information quickly, in front of a customer, and then make an on-the-fly call as to which promotion would work best to impact the trends they're seeing without negatively impacting all the things that are working well with that retailer? Sound tough? That's because it is.



We need to drive action. We need to guide reps on next best actions by recommending steps to take given the specific set of events at that point in time. They should know to pitch promotion A in the same way that Tim knew to check Joan's vents for mold. It's like putting a tiny version of your best and brightest right on all your reps' shoulders.



Achieve Perfection... Eventually

By incorporating the concepts provided in this article, you will find that even the most intelligent teams will discover new and valuable lessons to learn and opportunities to improve your business. Furthermore, you have an opportunity to provide your reps with a stream of new information around the right conditions for introducing a new promotion, display or product. Prepare for continued learning and set the expectation that everyone in your organization plays a part in getting this right.

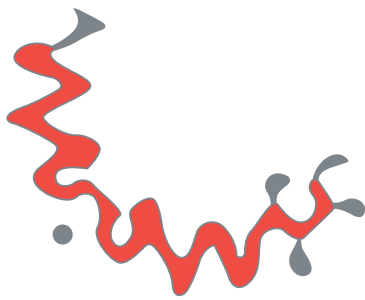
To recap, we need to start capturing data on interactions with retailers, then consolidate our sales collateral and review those materials with our internal experts. We then need to identify how retailers might respond to sets of questions or conditions in a way that indicates we should pitch a specific offering or service. Those requirements need to be memorialized in a retail execution tool and your theories need to be tested, monitored, and revised according to what is learned. Follow this process for a few months and, much like Tim and Joan, you'll be surprised at what you learn and the results you can achieve.

Ready to create a blueprint for your own operational intelligence strategy?

[See what a guided and successful implementation looks like here](#)

Want to see this in action?

[Check out a brief demo of operational intelligence driving retail execution](#)



About Synaptic AP and Youreka

Synaptic AP specializes in the development and deployment of enterprise applications on the Salesforce.com® platform for organizations worldwide. Our team of technical experts work closely with our customers to give life to their vision by building systems that make the right thing easy to do.



Youreka, Synaptic AP's innovative mobile assessment solution, is transforming the way Consumer Goods organizations approach retail execution. With roots in healthcare, helping field-based care teams perform home health visits, Youreka is now assisting field sales and service teams implementing retail execution strategies. From optimized account planning, to store visits, audits and even consumer engagement surveys, Consumer Goods organizations can depend on Youreka for efficient data collection, accurate insights, and recommended next steps when and where they need them.

Contact us today to learn how Youreka could work for your organization

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