

**Target is to leverage potential of Salesforce for UK set-up as well as CH/GER set-up:**

**Overall strategic imperatives:**

- Customer-focus: Enable Oviva customers & partners (patients, clinics/HCPs, payers) to have a valuable experience along the customer journey with Oviva knowing each time who is the appropriate contact, target of the contact and next step.
- Product-focus: please see below for details
- Communication/Partnering-focus (Content and Marketing): Ensure each contact receives relevant content along the customer journey and allow for a consistent brand perception at each step and contact.

**Requirements per country set-up (to be amended during scoping workshops)**

CH/GER	UK
<p><b>Sales/Customer Data management</b></p> <ul style="list-style-type: none"> <li>- documentation of "Praxisprofil" (account master data)</li> <li>- <b>adoption ladder</b> for clinics to plan lead acquisition and development to leaders</li> <li>- <b>KPIs</b> along adoption ladder</li> <li>- qualitative documentation of <b>attributes per clinic &amp; segment along the adoption ladder</b></li> <li>- Calender synchronisation (Google calendar)</li> <li>- Contact synchronisation</li> </ul> <p><b>Sales/Marketing HCP (focus: lead generation and nurturing)</b></p> <ul style="list-style-type: none"> <li>- documentation of defined attributes/reaction per call with clinics/customer</li> <li>- collection of opt-ins per customer for newsletter</li> <li>- distribution of individualized newsletter</li> </ul> <p><b>Sales/Marketing Patient</b></p> <ul style="list-style-type: none"> <li>- collection of opt-ins per customer for newsletter</li> <li>- distribution of individualized (to indication and step of customer journey) newsletter along the patient journey</li> <li>- communication via messaging (and push ?) along the patient journey</li> <li>- see also UK requirements</li> </ul>	<p><b>Sales data management</b></p> <ul style="list-style-type: none"> <li>- data from master sales tracker</li> <li>- customer journey mapping to incorporate adoption ladder and report to update wider team on progress</li> <li>- new contract set-up documentation</li> <li>- invoice tracking</li> <li>- contact tracking</li> </ul> <p><b>Sales/Marketing: commissioner/payer (lead generation and conversion)</b></p> <ul style="list-style-type: none"> <li>- documentation of sales process and needs</li> <li>- defined customer touchpoints/messaging at each stage of customer journey/adoption ladder</li> <li>- tailored and appropriate messaging (localised) for marketing campaigns</li> <li>- regular reporting on outcomes/successes</li> </ul> <p><b>Sales/Marketing HCP (focus: new patient referrals)</b></p> <ul style="list-style-type: none"> <li>- documentation of contacts/engagements to drive referrals</li> <li>- distribution of marketing materials</li> </ul> <p><b>Marketing patient</b></p> <ul style="list-style-type: none"> <li>- marketing opt-in lists for communications</li> <li>- direct to consumer email/text campaign to increase referrals (sales but held by marketing)</li> <li>- patient journey per programme</li> <li>- automation of personalised communications per programme along patient journey</li> <li>- campaign analytics</li> <li>- Social media campaigns - content and analysis</li> <li>- customer feedback leads</li> </ul>

## **Requirements from Product / Tech Team:**

### ***Non-Functionals***

#### **Global Setup**

- A global setup and using one SFDC organisation for all Oviva subsidiaries (UK, Germany, Switzerland, potentially France) is preferred as it reduces complexity for future integrations of salesforce with the Oviva backend
- This setup, however, can be questioned due to possible data locality requirements. We may need to use different instances of SFDC for different subsidiaries due to data locality requirements, especially when storing patient data. This needs to be evaluated and decided in an early step.

#### **Same data model**

- Although having local differences in each subsidiary (country), we strongly suggest to adhere to a common data model in all SFDC organisations. Why? As above, integrating the Oviva backend into SFDC will definitely become a future project and a common data model would massively decrease complexity.
- We foresee a setup using custom objects and custom fields. This the following core objects should be used and related the same way in each market:
  - Patients
    - The patient exists in all markets and is a core user object in our Oviva backend.
    - It should relate to the clinic, the doctor and the insurance object
    - Ideally, there is a common set of custom fields for patients that are used across all organisations and a set of custom fields that are organisation specific.
  - Doctors
  - Clinics
  - Insurances

#### **Data Privacy / Health Cloud**

- To be discussed during DeepDive

### ***Functionals***

#### **Patient Marketing Automation**

- If we bring patient data into SFDC, we would like to use the Marketing Cloud functionality to create and manage patient journeys to control and summarize all patient messaging (that is outside the product itself) in one place. This is especially important for new patients that have been directly acquired by us (D2P).
- Functionality needed:
  - Creation of user journeys as flow charts
  - Integration of email and SMS messaging
  - Syncing of event based triggers into SFDC via integration