


PLATFORCE

CRM+CLM

for
Pharma
Life Science
Medical Devices

platformforce.io



Platforce is an all-in-one Customer Relationship Management, Closed-Loop Marketing, and Content Distribution cloud-based solution at a fair price.

Platforce is designed to help pharmaceutical, life science, and medical device companies to automate industry-specific business processes and improve customer experience.

Summary

1. Who we are
2. Platform capabilities
3. CRM
4. CLM (iOS & Android)
5. Remote calls (visits)
6. Face-to-face meetings
7. HTML5 content (eDetailing)
8. Sample management
9. Emails
10. Consents collection
11. Messengers
12. Target settings
13. GPS tracking
14. Analytics

WHO WE ARE

platformio.org

Who we are

Platforce is a **PharmaTech** company providing an efficient and highly customizable **Customer Experience Management (CXM)** solution and services around empowering pharmaceutical and life science companies in their interactions with HCPs, whether remotely or in person.



Our mission and values

Our Mission: Empower life science organizations with innovative, customizable, and scalable solutions that streamline operations, optimize customer engagement, and enable informed decision-making, ultimately fostering growth and success in the competitive global market.

Our Values:

Customer-Centricity

Prioritizing the needs and goals of our clients in everything we do, ensuring exceptional customer experiences.

Collaboration

Encouraging teamwork & open communication both within our team and with our clients, fostering strong partnerships and driving success.

Enjoying Participation

Striving to create an environment where everyone participates enthusiastically and loves what they are doing.

Living Diversity

Embracing diversity in our team and fostering an inclusive culture that drives innovation and success while enabling us to better understand and serve our global customers.

Adaptability and Agility

Continuously evolving and adapting to changing market conditions and customer needs, enabling us to stay ahead of the competition and deliver value to our clients.



Company expertise

Platforce can support your Company at any stage of its digital transformation.

We share with our partners **10+ years of expertise** in more than **70 markets** in **digital pharma marketing** and **customer relations management** to provide you with **efficient tools** and **easy-to-use solutions** to bring your company onto the **next level of digital maturity**.

- Content management
- Field force effectiveness
- Multi-channel communication
- Analytics, dashboards, and reports
- Closed-loop marketing
- Educational trainings and master classes
- Sample management
- Consent management
- Segmentation
- GPS activities tracking
- e-Detailer (HTML5) development
- Social message development
- Questionnaire (HTML5) development
- Localization and adaptation
- PDF and PPTX adaptation for CLM

Platforce global presence

-  Platforce business operation center
-  Platforce licensed customers



Secure



Platform capabilities

platformforce.io

What is inside?



Platform modules:



CRM MODULES
Sales, marketing, & management activities



EMAIL MODULE
Mass mailing and KPI tracking



REMOTE VISITS
Stay connected – any time, any place CRM/CLM)



SEGMENTATION
Separate most relevant contacts



CLM MODULE
Mobile solution for customer engagement



HR & LMS
Employees' database and analytics



ANALYTICS
Internal & external data sources with a possibility to export to Power BI



VISITS TARGET SETTING

What is inside?



Platforce modules:



**TERRITORY
VISITS PLANNING**



**SAMPLES
DISTRIBUTION**



**CONSENTS
COLLECTION**



**FACE-TO-FACE
VISITS**



**MESSENGERS
MODULE**



VOIP



GPS TRACKING



**PUSH
NOTIFICATIONS**

Visit Authentication and Monitoring Features



GPS Tracking: Accurately tracks medical reps' locations during visits, ensuring they are actually at the HCP's location.



eSignature: Validates visit authenticity by requiring HCPs to sign electronically during each interaction.



Photo & Timestamp Verification: Provides additional proof of visit authenticity by requiring medical reps to take photos at the HCP's location with a timestamp.



Radius for Planned Visits: Ensures medical reps can only initiate a visit within a set radius from the HCP's location, minimizing discrepancies.



Joint Visits: Encourages collaboration between team members to guarantee visit authenticity and adherence to ethical practices.



Customer Feedback & Surveys: Collects insights from HCPs after visits to validate interactions and continuously improve the quality of service.



Visit Time Control: Monitors visit duration, ensuring medical reps spend appropriate time with HCPs.

Platforce CRM

- Contacts
- Organizations
- Product database
- User management
- e-Detailers
- Email templates
- Social message templates
- An extended planner module
- Interactive dashboards
- Reports and sales analytics
- Target setting
- Contact segmentation
- Visit planning & approval
- Learning management system (LMS)
- Consent management
- GPS & location management
- PUSH notifications

The screenshot displays the 'My performance' dashboard for user Allen Andie. The interface includes a sidebar with navigation options like Dashboards, Clients, and Contacts. The main content area shows 'Activity statistics' with metrics for F2F (one-to-one), One to many, and Remote call. Efficiency metrics for Coverage % (50) and Frequency (78.9) are also visible. Below this is a table titled 'Actions today' with columns for ID, Type, Planning date, Completed date, Joint visits, and User. The table lists five actions, all completed by Allen Andie on 23.10.2023.

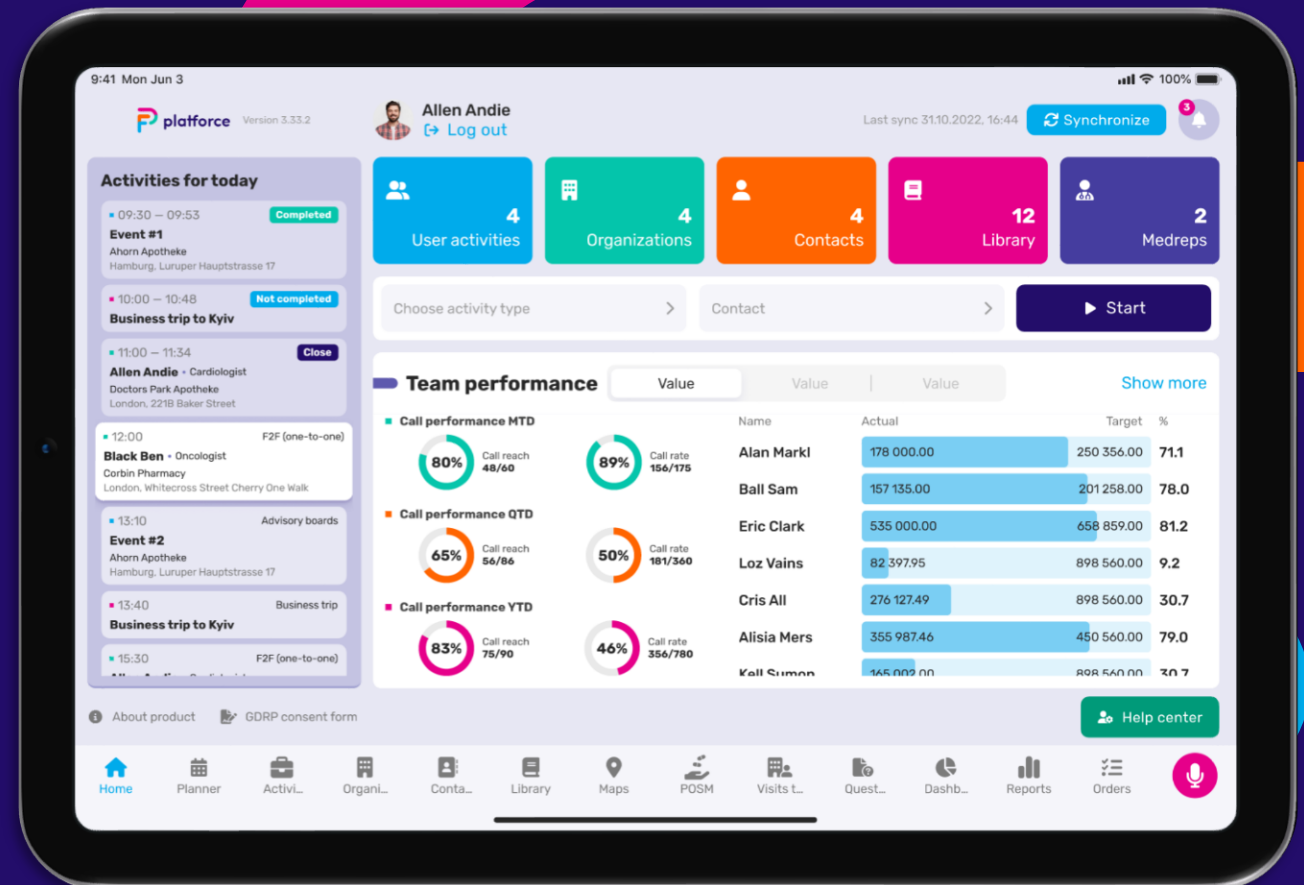
ID	Type	Planning date	Completed date	Joint visits	User
CL-0000020648	Remote Call	23.10.2023 13:20	23.10.2023 14:20	✓	Allen Andie
CL-0000020649	F2F (one-to-one)	23.10.2023 13:20	23.10.2023 14:20	✓	Allen Andie
CL-0000020650	Remote Call	23.10.2023 13:20	23.10.2023 14:20	✓	Allen Andie
CL-0000020651	Pharmacy	23.10.2023 13:20	23.10.2023 14:20	✓	Allen Andie
CL-0000020652	F2F (one-to-one)	23.10.2023 13:20	23.10.2023 14:20	✓	Allen Andie

Platforce Closed Loop Marketing (CLM)

Closed-loop marketing is marketing that relies on data and insights from closed-loop reporting.

KEY ELEMENTS OF CLM

- Interactive content
- Planner
- eDetailing with KPIs
- Remote calls
- Email sending
- Contact database
- Organization database
- Consent collection
- Offline access
- Analytics
- PUSH notifications
- GPS tracking
- Sample distribution



CLM Application

- Online/Offline work mode



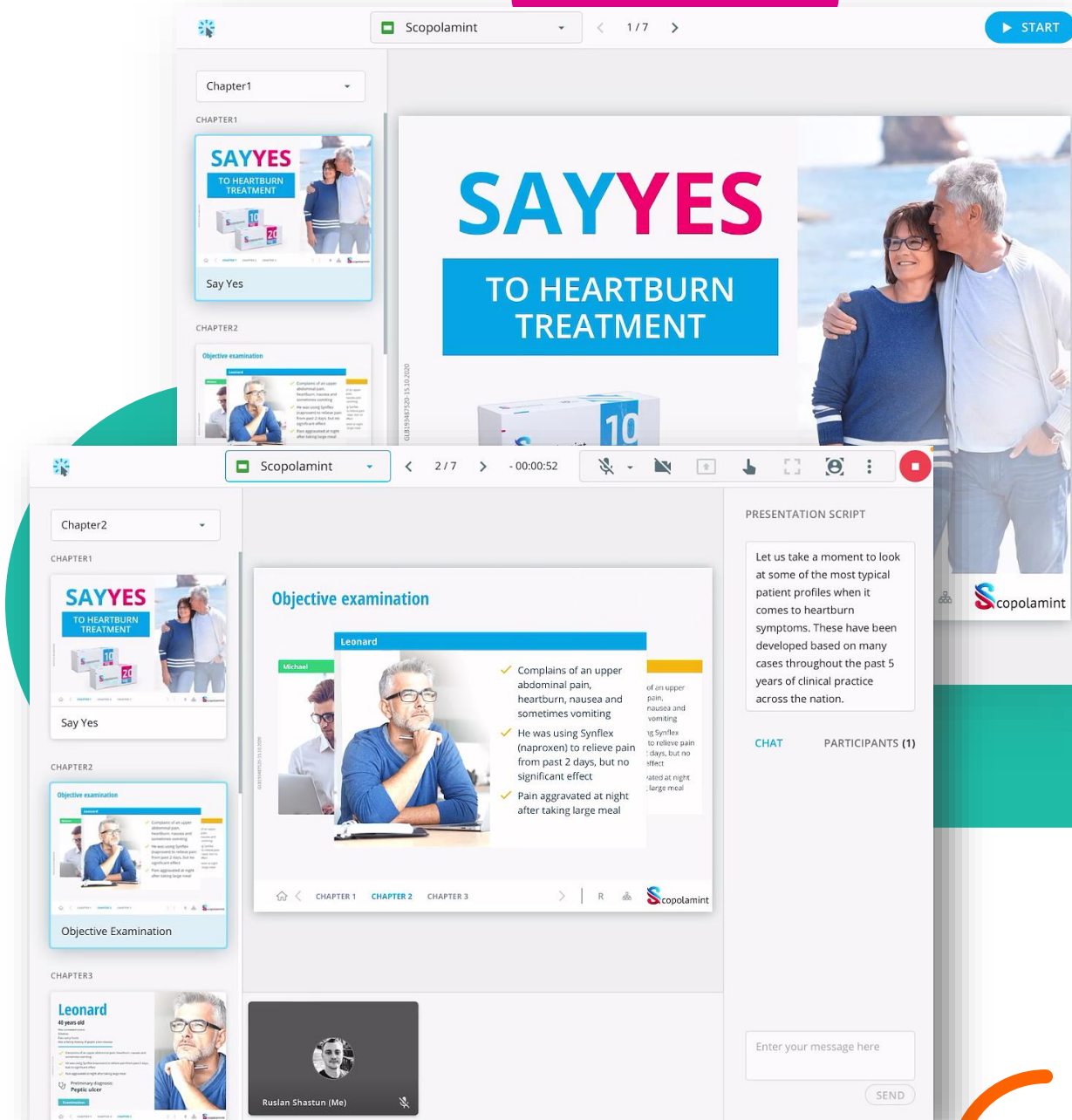
Remote calls (CRM & CLM)

REMOTE CALL is an online interaction between an HCP and a medical representative.

MedRep shares approved branded content through live interactive screen-sharing software.

KEY ELEMENTS OF Remote calls

- No registration
- **Link-based access**
- One or Group of participants
- Invitation, follow-up, and reminder emails
- Screen sharing
- KPI collection
- Several e-Detailers in one session
- Video & audio access
- Session recording
- Presentation script
- Chat



The image displays two screenshots of the Scopolamint remote call interface. The top screenshot shows a presentation slide titled "SAYYES TO HEARTBURN TREATMENT" with a large image of a couple. The bottom screenshot shows a participant's "Objective examination" notes for a patient named Leonard. The notes include:

- ✓ Complains of an upper abdominal pain, heartburn, nausea and sometimes vomiting
- ✓ He was using Synflex (naproxen) to relieve pain from past 2 days, but no significant effect
- ✓ Pain aggravated at night after taking large meal

The interface also includes a "PRESENTATION SCRIPT" section with text: "Let us take a moment to look at some of the most typical patient profiles when it comes to heartburn symptoms. These have been developed based on many cases throughout the past 5 years of clinical practice across the nation." and a "CHAT" section with a "PARTICIPANTS (1)" list showing "Ruslan Shastun (Me)".

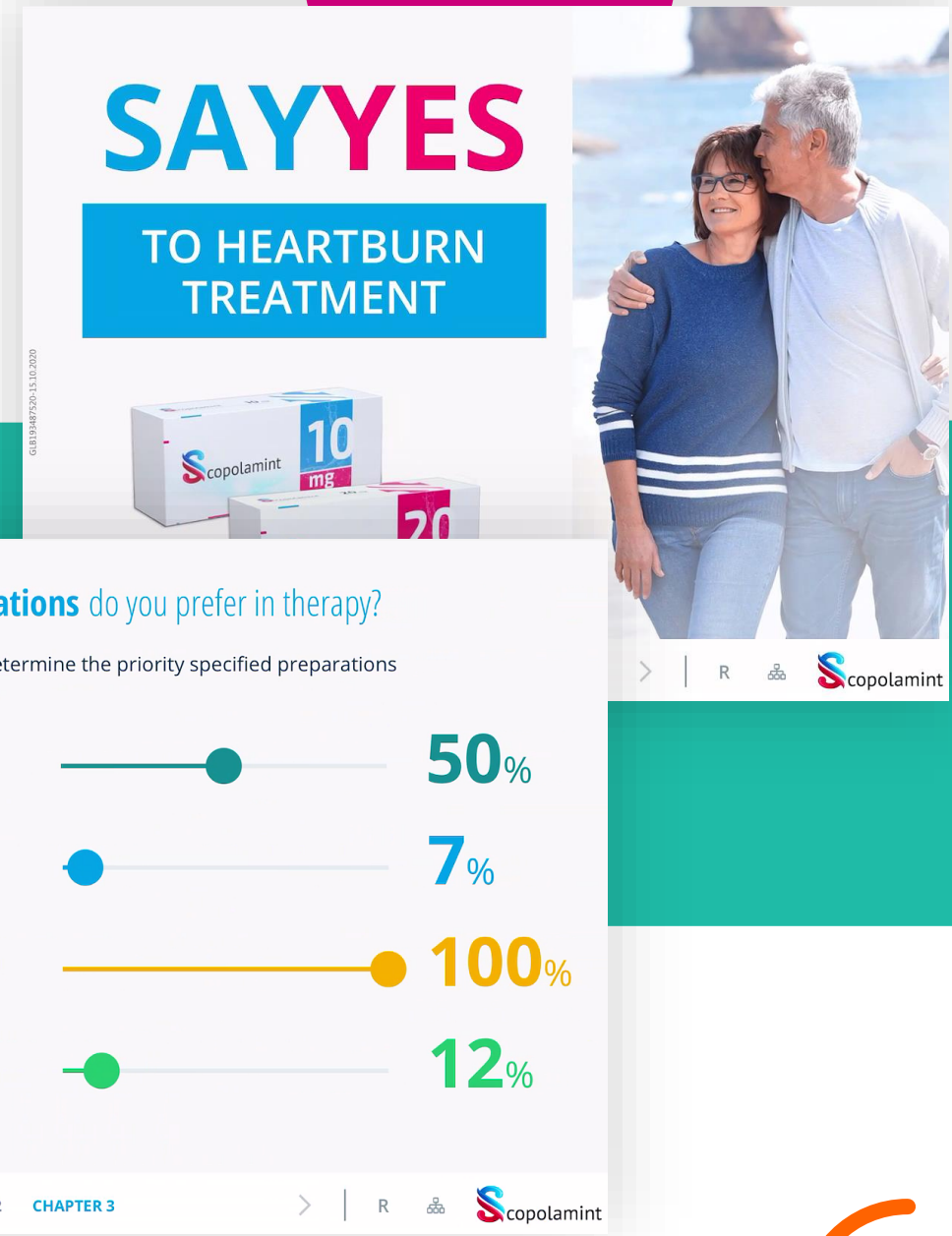
Face-to-face visits (CRM & CLM)

Face-to-face visit is an offline interaction between an HCP and a medical representative.

MedRep shares approved branded content on a tablet screen.

KEY ELEMENTS OF FACE-TO-FACE VISITS

- No internet connection needed (CLM)
- All materials are pre-downloaded
- One-to-one & One-to-many approach
- KPI collection
- Several e-Detailers in one session
- Visit results
- Distribution of branded samples after a visit




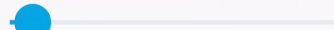



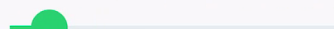


SAYYES
TO HEARTBURN
TREATMENT

Scopolamin 10mg
Scopolamin 20mg

Which of the medications do you prefer in therapy?

Move the colored sliders to determine the priority specified preparations

 Lansoprazolum		50%
 Scopolamin®		7%
 Pantoprazolum		100%
 Omeprazole/ Esomeprazolum		12%

CHAPTER 1 CHAPTER 2 CHAPTER 3

Scopolamin

Interactive HTML5 content (eDetailing)

KEY FEATURES

- In-built navigation menu
- Animations
- Popups
- Integrated KPIs
- Text, audio, and video content
- Complex logic
- On-slide calculations



KPIs integrated into HTML5 presentations

DEVICE

- Device type
- Software and version
- Device time zone
- Internet connection type
- Browser and version
- Timestamp per call
- GPS per each call

DIGITAL/MCM

- Email
- Signature/Consent
- Smartphone (Yes/No)
- Messenger and type
- Internet usage
- Social media accounts
- Preferred channel

CONTENT

- Start time
- End time
- Interaction with elements on slide
- Products detailing order
- Full or not full product detailing
- Time on slide
- Skipped slides
- Studies of interest
- PDF downloads

CUSTOM

- HCP's potential and loyalty
- HCP's competitor preferences
- HCP's preferred therapy
- Key messages delivered
- NPS

REP PERFORMANCE

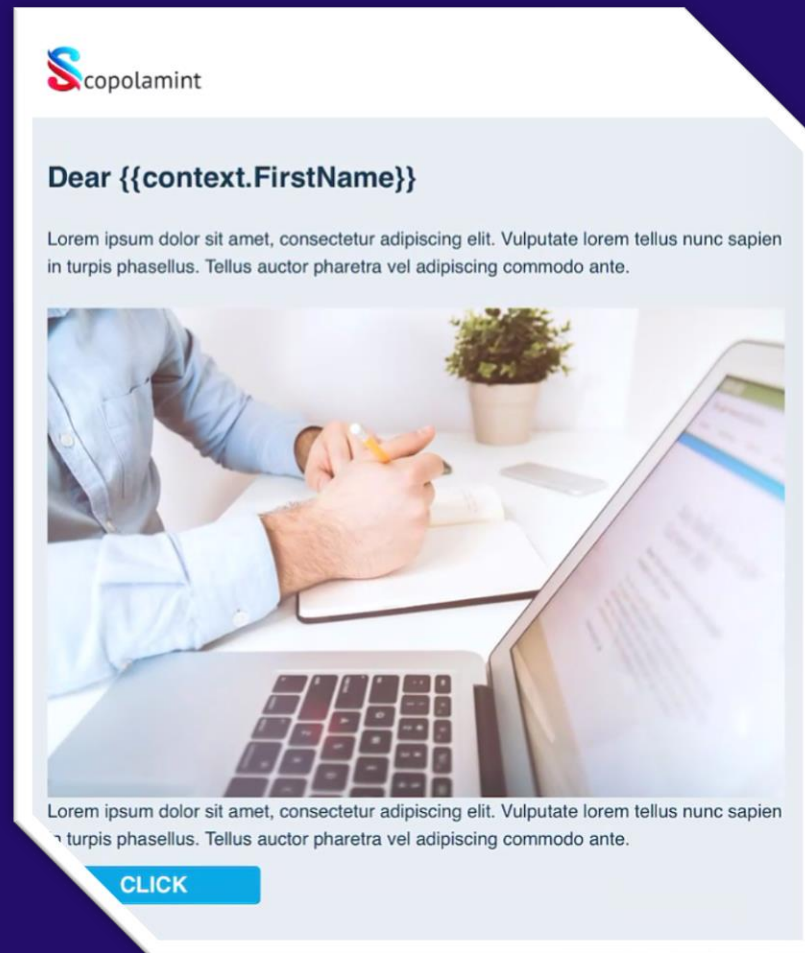
- Addressed doctor
- Call duration



KPIs we collect from Email & Social media channels

Emails

- Delivery rate
- Open rate
- Click rate
- Unsubscribe
- Spam
- Bounces



Social messages

- Sent
- Received
- Opened
- Failed



Sales module

- **Approval flow:** create or edit existing approval flows, assign users to certain business stages of the approval, and track the approval status of each one of them.
- **Vendor management:** navigate to and view details of a vendor such as their address, contact email, WhatsApp number, and more.
- **Product Categories:** manage product categories, orders, and stocks, edit and create new products. You can also specify the quantity and discount for each product, platform will automatically calculate the total amount for your order.
- **Order Management:** view the details of each order, such as the total amount, discount, delivery details, real-time status of orders and more.
- **Inventory Management:** view and manage available stocks, incoming invoices and transfers between warehouses and inventory.

Number	Name	Proposal date	School/organization	Contact	Total amount	Status
Request-05470	NTC	10.09.2023	The National Teachers College	Felipe Campos	2 025.00	Open
Request-05449	Rizal	10.09.2023	Rizal Technological University	Xavier Medina	25 685.00	Submitted
Request-05468	Pamantasan	09.09.2023	Pamantasan ng Lungsod ng Maynila	Lorena Nieto	10 000.00	Delivered
Request-05467	Adamson	09.09.2023	Adamson University	Lorena Nieto	1 000 000.00	Waiting for approval
Request-05466	De La Salle	08.09.2023	De La Salle University	Teresa Rodriguez	5 000.00	Paid

Order number: 14

Progress: Draft -> Waiting for approval -> Final address -> Submit -> Ready to delivery -> Delivered -> Waiting for approval -> Picked up -> Paid

General Information

Client: Dmytro Stankovich

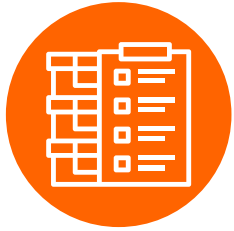
Request date: 10/02/2023

Order number: 14

Request date: 10/02/2023

ID	Created on	Name	Description	Code SKU	Product	Dosage	Packing form	Price	Notes	Logo
SK-000000001	11/01/2023 21:08	Adaptol		Adaptol/500/20/UA	Adaptol	500 mg	20 pills	437		
SK-000000002	11/01/2023 21:08	Adaptol		Adaptol/300/20/UA	Adaptol	300 mg	20 pills	291.42		
SK-000000003	11/01/2023 21:09	Atarax		Atarax/25/25/UA	Atarax	25 mg	20 tablets	98.9		

Sample management



SAMPLE INVENTORY

Set available samples limitation and several transactions for some time.



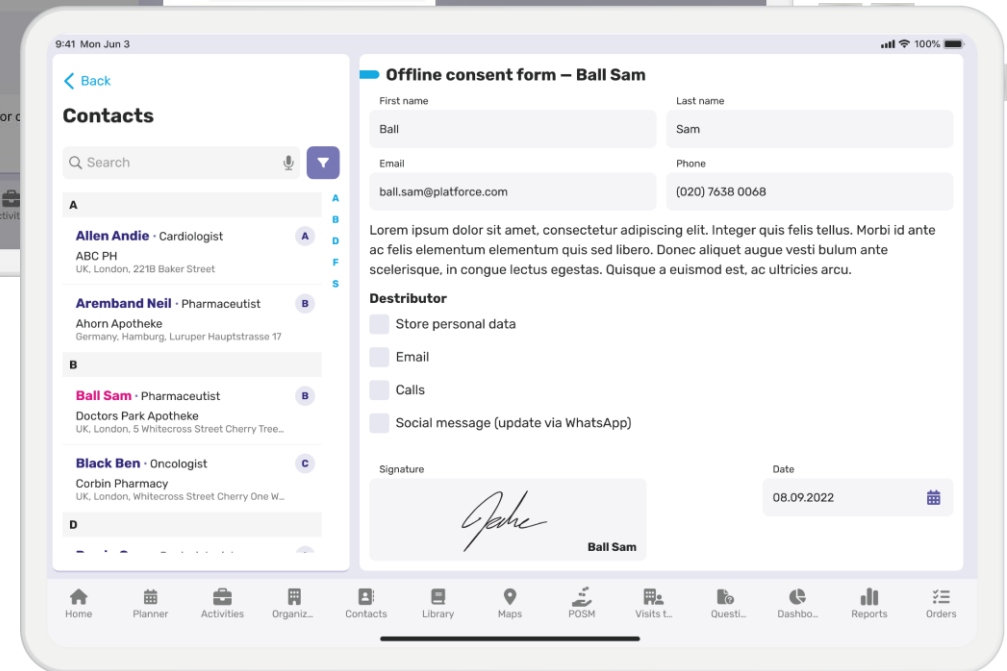
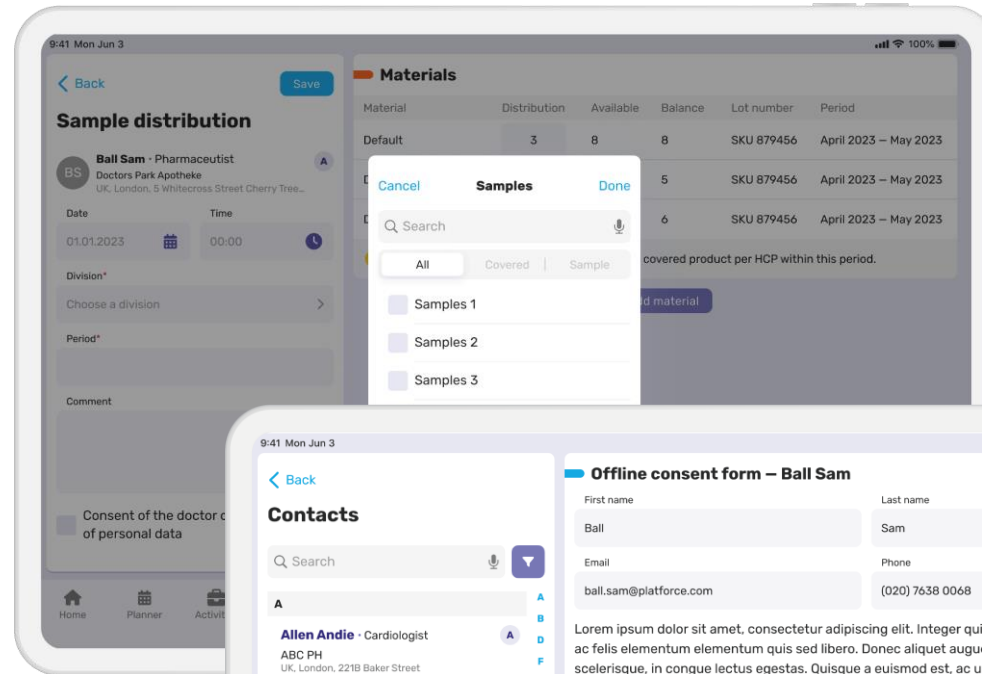
SAMPLE TRANSACTION

MR can provide samples directly in mobile CLM



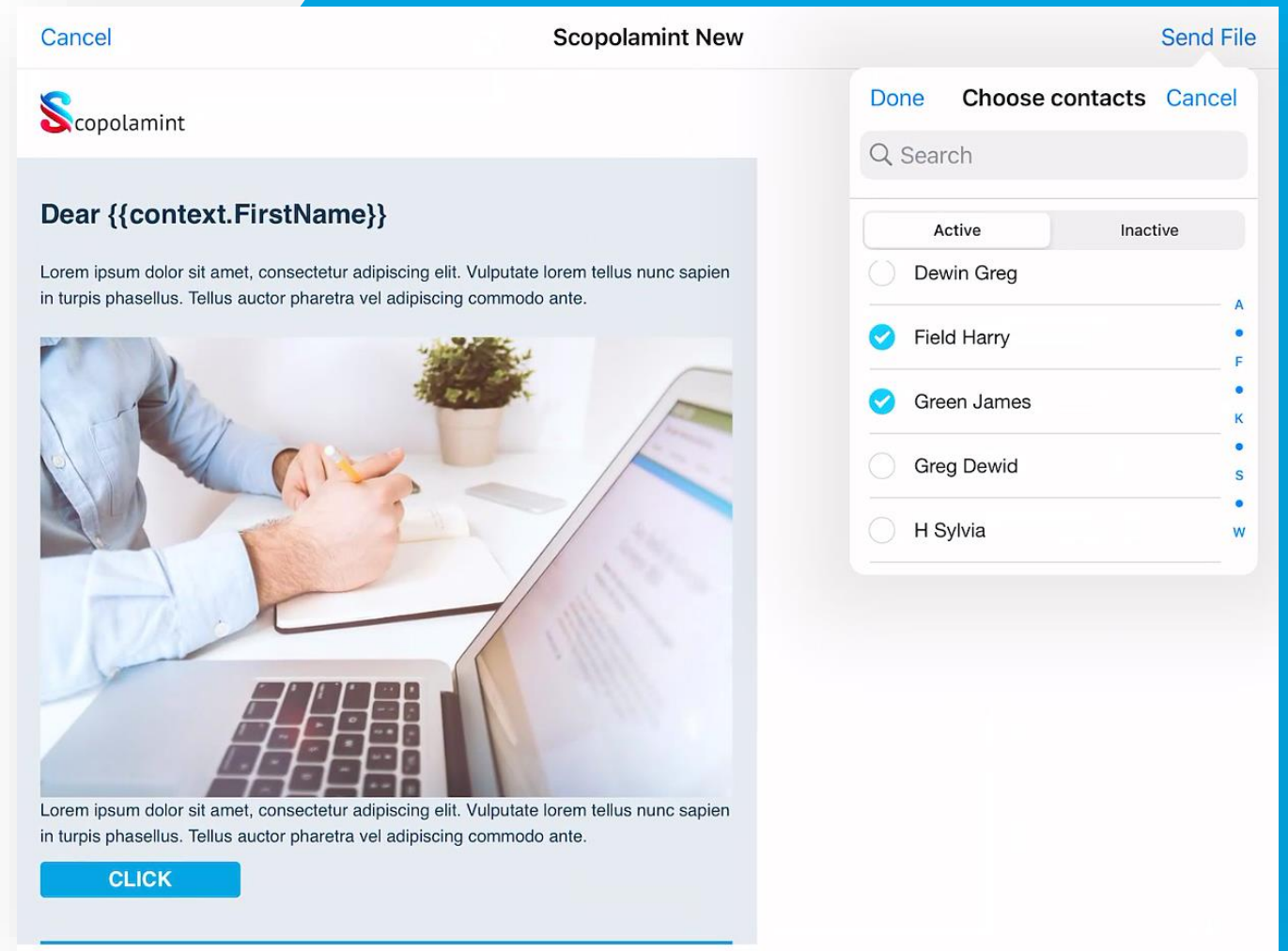
eSIGNATURE

MR captures the HCP signature to confirm a transaction offline in mobile CLM and sends data to online CRM through synchronization



Email templates

CREATE A SET OF TEMPLATED EMAILS TO COMMUNICATE WITH YOUR CONTACTS ON DIFFERENT PURPOSES

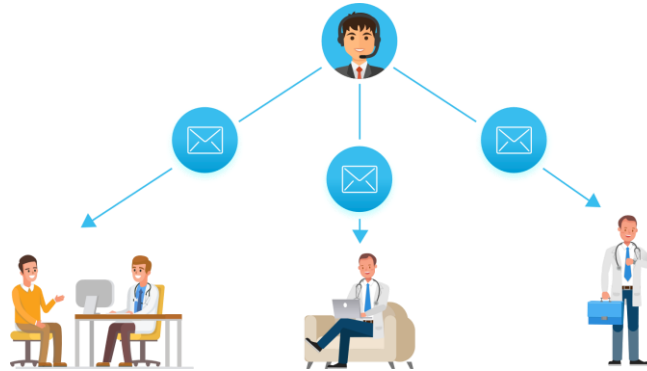


Email types

BOTH APPROVED AND BROADCAST EMAILS SHOULD BE USED TOGETHER TO DRIVE CUSTOMER ENGAGEMENT.

APPROVED EMAILS

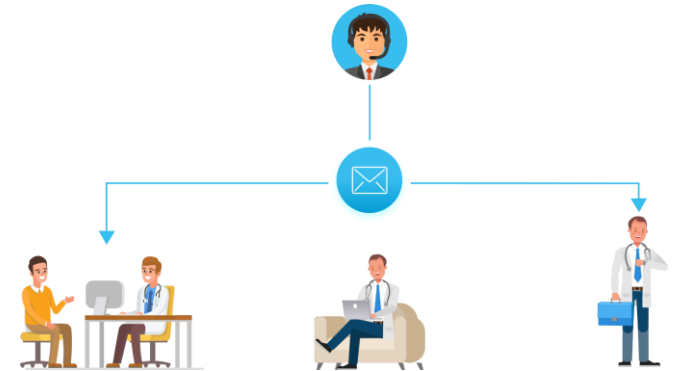
Personal message to 1 recipient



Approved emails extend face-to-face customer interactions with immediate and relevant follow-up content collected from a field user.

BROADCAST EMAILS

Messages to a broader HCP segment



Broadcast emails provide cost-effective customer interactions with larger groups of customers.

CAMPAIGN

Coaching Module

Streamline the coaching process of your team by using coaching forms to track progress and enable your positive coaching experience with the clarity of our UX.

The screenshot displays the Salesforce Coaching Module interface. On the left is a navigation sidebar with the following menu items: Dashboards, Accounts, Contacts, Coaching (expanded), Coaching form, Coaching, Organizations, Products, References, Classifiers, Segmentation tool, Sales Classifiers, Sales, Consents, Characteristics, Action Types, and Actions. The main content area is titled "Coaching form details" and includes a "Change File" button, a "Download" button, and form fields for Name (Coaching for medreps), Description (Medical representatives survey), Division (Test unit), and Is Active (checked). Below this is a "Section" header with a table of section details:

Section name	Section target	Is Hidden
General	1	<input type="checkbox"/>

Below the section details is a "Filter" button and a table of questions:

Name	Question Type	Is Required	Description	Order	Answer
How was thoroughly explained the info about a brand	Single choice	<input type="checkbox"/>		0	Could be better, 70% covered (0) Low amount of the info shared (0) Need improvement, 50% covered (0) Precise enough (0)

Consent email



CREATE A TEMPLATED
EMAIL TO GATHER
CONSENTS REMOTELY



Cancel Consent form Send File

Dear {{context.FirstName}}!

We are happy that you have recently shown interest in Platforce.

Your privacy is important to us. Hence we would like to have your consent in order for you to receive our newsletters, educational materials, invitations to events and more updates.

Please fill in our consent form and find out more about dedicated Privacy policies by clicking on the button below.

[Consent form →](#)

You can change your consent preferences at any time by returning to this email.

Thank you.

Customer Satisfaction Surveys



Conduct surveys to gain insights, measure customer satisfaction and gather feedback. You can also use surveys for a database segmentation purpose.

The screenshot shows the 'Survey details' page in Salesforce. On the left is a navigation menu with items: Contacts, Coaching, Organizations, Products, References, Classifiers, Segmentation tool (expanded to show Survey and Collected survey), Sales Classifiers, Sales, Consents, Characteristics, Action Types, Actions, Q&A, Periods, and User Tracking. The main content area is titled 'Survey details' and includes a 'Back' button, 'Delete', and 'Update' buttons. The 'General' section contains fields for Name (1), Survey type (Internal), Division, Test unit, End Date (11/16/2023 18:50), Start Date (11/05/2023 18:50), and Description (0 / 250). There is also an 'Is Active' checkbox. The 'Survey Question' section at the bottom has a 'Filter' button and a refresh icon.

Offline consent

Collect consents during face-to-face visits using the tablet

- Collecting consents during the visit, even with no access to the internet.
- Sending the collected data to CRM during the synchronization process
- History review of the collected consents

Back Offline Consent form - Aremband Neil Submit consent

First Name Neil Last Name Aremband

Email y.bilokur@viseven.com Phone

I agree to be contacted (via1 below mentoined chanel) for the purpose of recieving scientific and educational information, invitations for events, as well as information relating to products from PLATFORCE , or directly from the manufacter of such products .
If you dont wish to recieve any of the aforementioned information, please unsubscribe via the checkboxes below.

Intermediary

Email

Process personal data

Social message (updated via WhatsApp)

Telegram

PLATFORCE

Email

Process personal data

Social message (updated via WhatsApp)

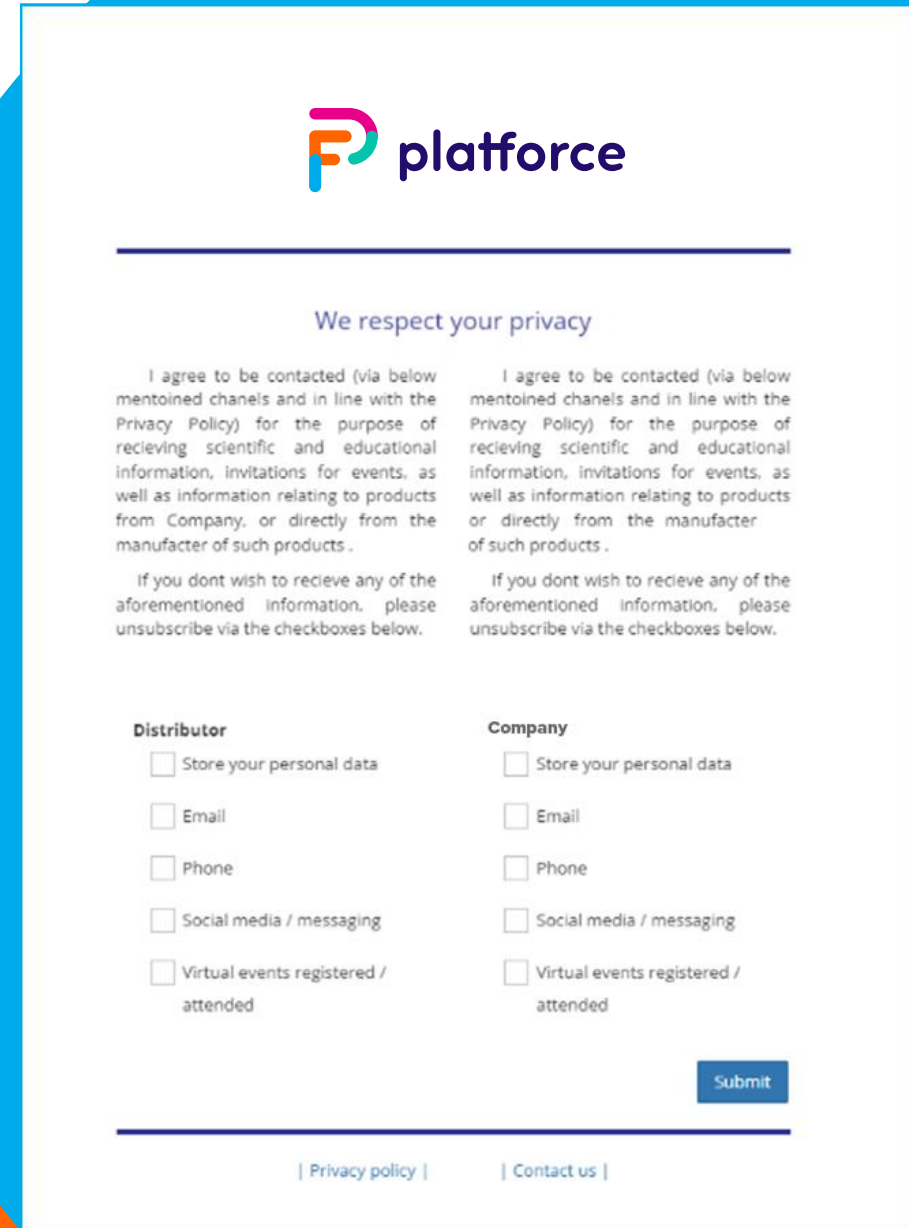
Telegram


Signature Date 18.04.2022

Online consent

COLLECT HCPS' CONSENTS ACCORDING TO GDPR RULES

- Personal data processing for users
- Encrypted data when contact disagrees with consent
- Personalized and branded template to a dedicated HCP (template can be chosen from the list of previously uploaded forms according to the purpose)
- Changing the business account from which to send the consent form is possible.
- An easy way for HCP to fill out the consent form (fill the checkboxes) in the landing page opened by the link
- The ability for HCP to change preferences (via the same link or to notify MR during the visit and make changes directly into the personal card)
- Checking the consent status in real-time
- "Personal data" storage in CRM/CLM – all the consents are gathered in the HCP's personal contact card. Only HCP-approved media activities can be sent.
- History review of the collected consents



 platforce

We respect your privacy

I agree to be contacted (via below mentioned channels and in line with the Privacy Policy) for the purpose of receiving scientific and educational information, invitations for events, as well as information relating to products from Company, or directly from the manufacturer of such products .

I agree to be contacted (via below mentioned channels and in line with the Privacy Policy) for the purpose of receiving scientific and educational information, invitations for events, as well as information relating to products or directly from the manufacturer of such products .

If you dont wish to receive any of the aforementioned information, please unsubscribe via the checkboxes below.

If you dont wish to receive any of the aforementioned information, please unsubscribe via the checkboxes below.

Distributor	Company
<input type="checkbox"/> Store your personal data	<input type="checkbox"/> Store your personal data
<input type="checkbox"/> Email	<input type="checkbox"/> Email
<input type="checkbox"/> Phone	<input type="checkbox"/> Phone
<input type="checkbox"/> Social media / messaging	<input type="checkbox"/> Social media / messaging
<input type="checkbox"/> Virtual events registered / attended	<input type="checkbox"/> Virtual events registered / attended

[| Privacy policy |](#) [| Contact us |](#)

Messengers

**CREATE REP-TRIGGERED &
BROADCAST MESSAGE
CAMPAIGNS DIRECTLY FROM
PLATFORM CRM**

- Enhance your marketing strategy with an additional communication channel
- Send messages to opted-in contacts with confidence in compliance with GDPR rules and obtaining consent
- Create lists of contacts for mass mailing
- Use snippets for better personalization
- Select the message template from the list
- Use internal tags to mark and track messages
- Track the message status real time
- KPIs to be collected

INTEGRATED MESSENGERS:

- WhatsApp 
- Telegram 

Target settings

CREATE TARGETS & PUSH THEM TO YOUR FIELD FORCE TO GAIN RESULTS

- Planned target indicators for MedReps
- Add description to targets
- Set periods
- Manager's approval of target activities
- Performance analytics
- Segments, brands, activities, timelines to be counted

KEY METRICS TO SET

(can be customized or added according to the client's needs):

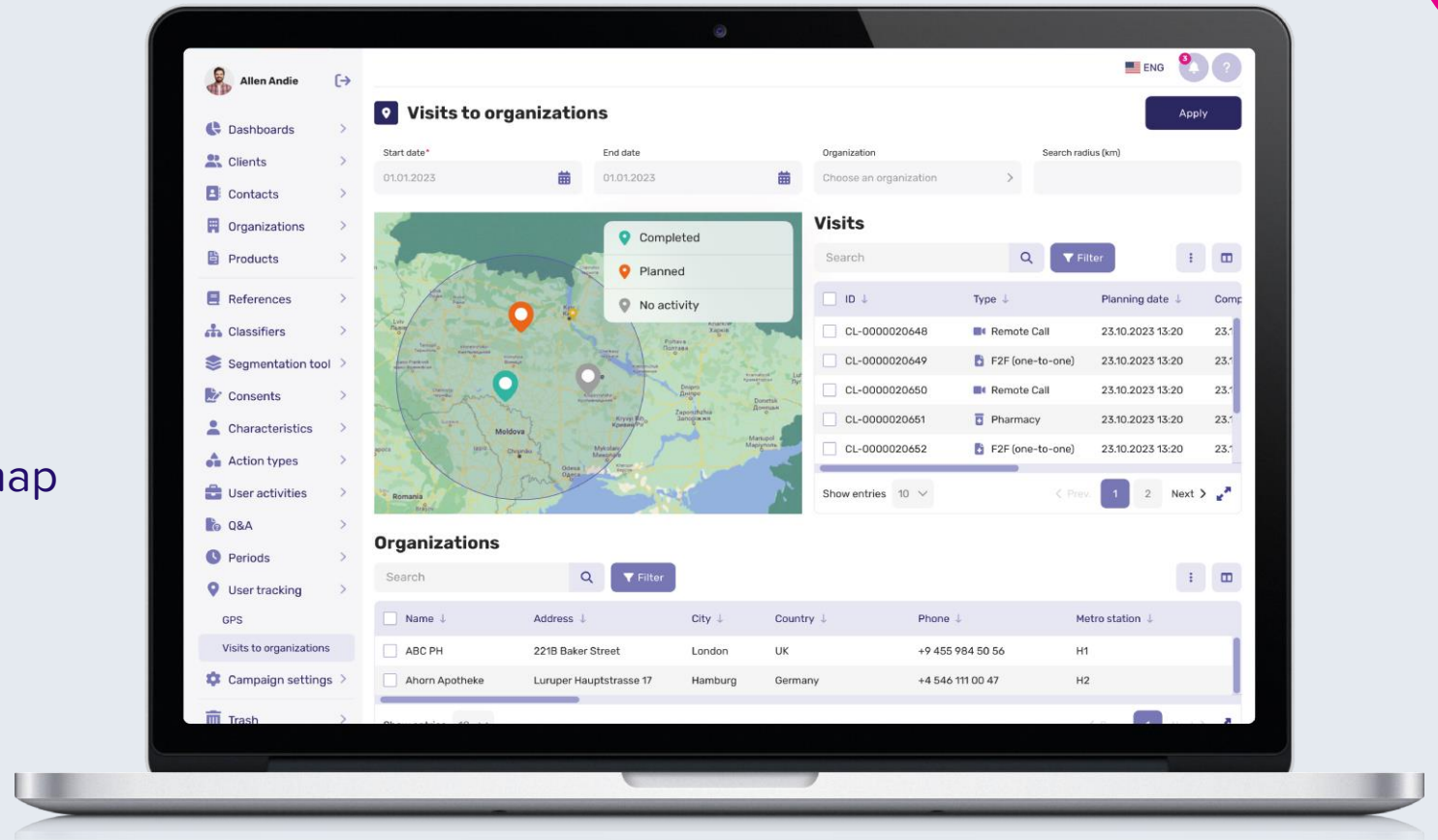
- Target categories (segments) – frequency, coverage, number of visits, etc., based on contacts (HCPs or pharmacists) on the dedicated work territory of MR
- Types of visits – face-to-face, joint, coaching, OTC, remote calls, etc.
- Time period – a number of days to spend on visits by type

Platforce CLM. GPS tracking activities



KEY ELEMENTS OF GPS tracking

- See your field force activities on a map
- Exact GPS location to start a visit
- GPS analytics
- Route improvement



Analytics empowered with Power BI

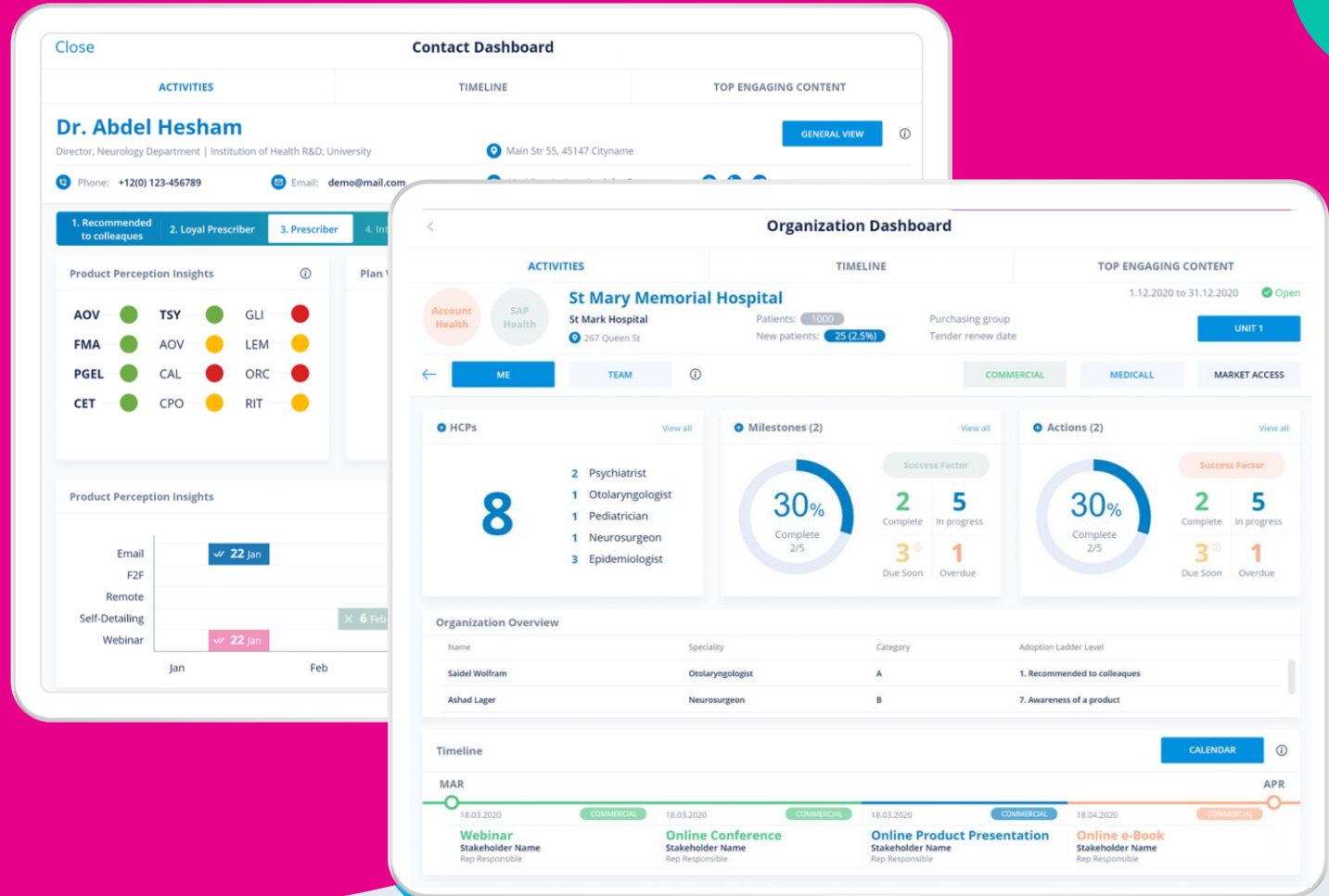
Pre-designed dashboards:

- Field force performance
- Consent collection
- Segmentation
- User activities
- Planned vs completed activities
- Content KPIs
- My performance for MedReps
- Customized dashboards to match your requirements



Power BI Dashboard Example

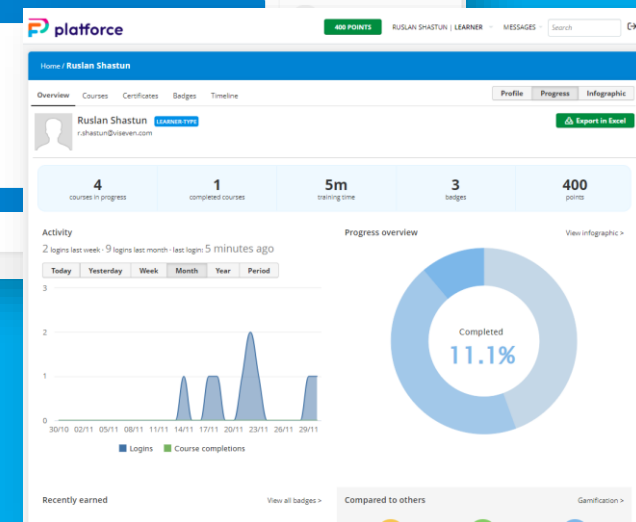
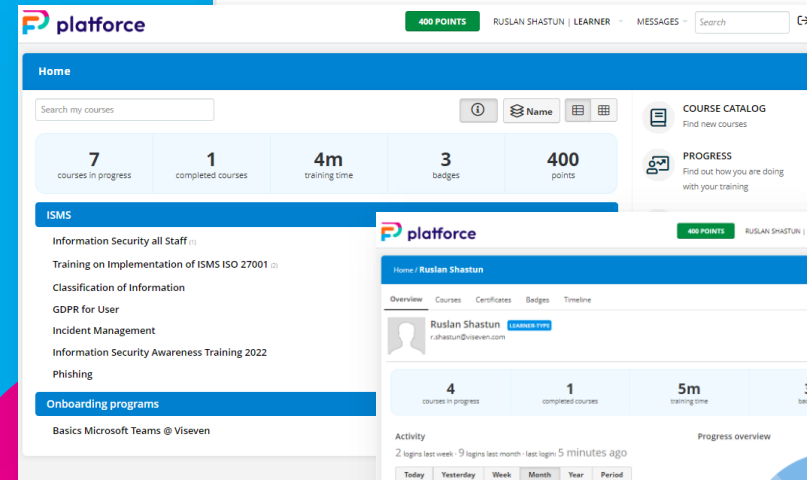
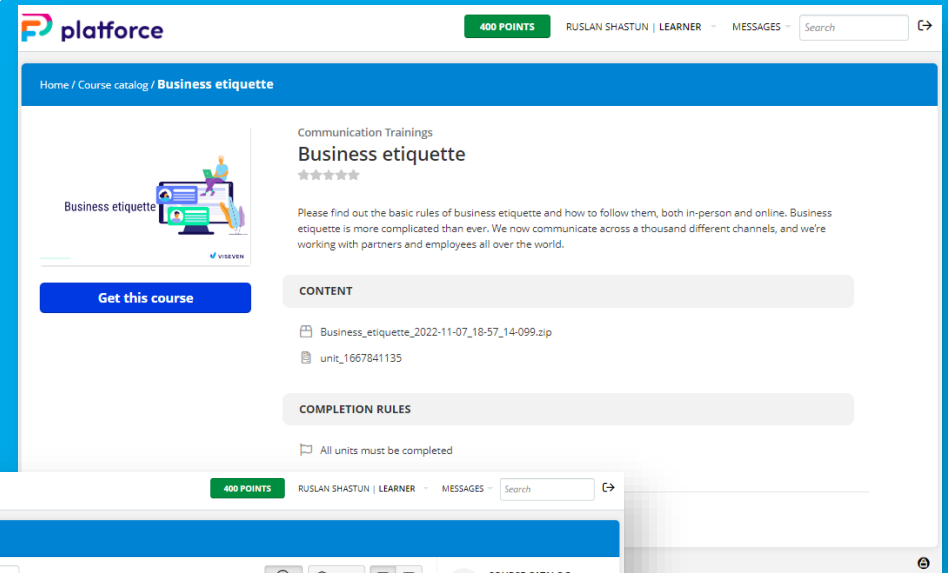
- Templates with visuals and graphs
- External & internal data analytics
- Data export to any BI system
- Visualization by a pre-defined set of parameters
- Access based on a user rights



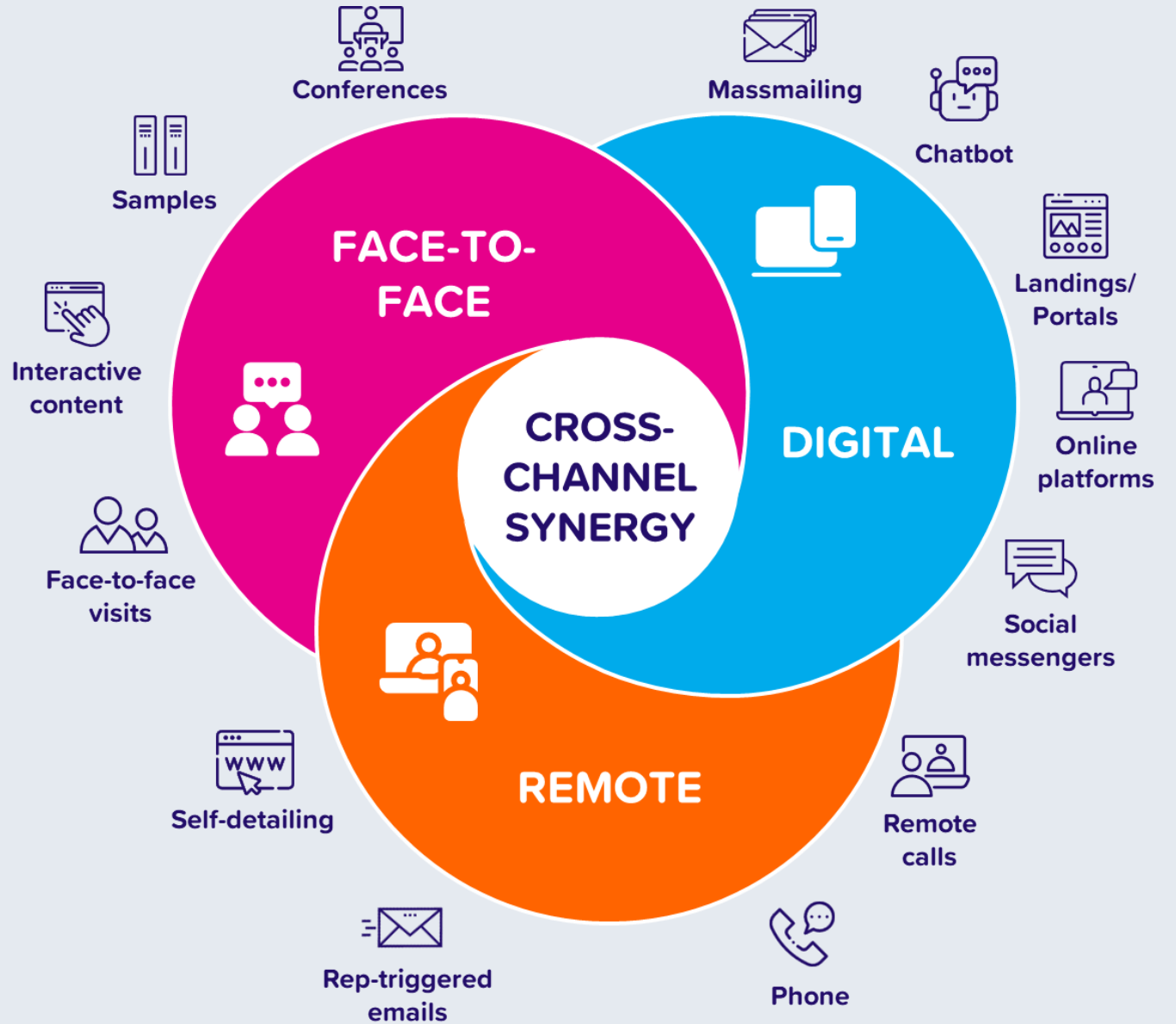
Talent LMS module

Training to every employee with a top healthcare LMS — built for training success

- **Easy to use** – get started with just a few clicks
- **Flexible** – no hidden fees, long-term commitments, or lock-ins
- **Customizable** – use your custom domain, logo, theme, custom media assets, components, and much more.
- **Ready-made courses** – localized to your users' languages
- **Mobile-ready** – IOS & Android mobile app
- **Powerful & extensible** – enterprise-grade features to use
- **Zero maintenance** – cloud-based solution with no installation setup and maintenance
- **Analytics & Compliance** – track learners' training and overall progress. Ensure compliance with renewable certificates
- **Security** – SSL is available



Engagement Capabilities



Integrations

INTEGRATION



Twilio

INTEGRATION



Telegram

INTEGRATION



WhatsApp

INTEGRATION



AWS SES

INTEGRATION



AWS VoIP

INTEGRATION



Google Analytics

INTEGRATION



Outlook

INTEGRATION



eWizard

INTEGRATION



Firebase

INTEGRATION



PowerBi

Future integrations:



Amazon Pinpoint



Amazon Machine Learning



Ready to get started?

Automate business processes and improve customer experience – book your online demonstration today!

REQUEST A DEMO NOW!

platformio.com