

HEALTH CARE PROJECT BRIEF

AT A GLANCE

CarpeDatum created a custom cross-selling proposal optimization solution for a Fortune 20 company, combining the analytical and calculating power of TM1 with a data warehouse and custom front-end solution that:

- Improved analytical capability that lowered customer prices, improved competitiveness and increased margins
- Provided interactive visual interface making it easier to use for an entire sales force, regardless of technical skills

CUSTOMER BENEFITS

- Unifies Unit of Measure for items across multiple packaging types
- Maintains pricing parity across volume tiers and contracts
- Auto proposal generation
- Integrated work flow
- Interactive visual interface
- Project scope: 300+ users

SOLUTION TECHNOLOGIES

- HTML/JavaScript/jQuery
- CarpeDatum's Enterprise Services
- IBM Cognos TM1
- IBM Netezza

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Medical Products Cross-Selling Solution

Leveraging CarpeDatum's TM1 and Web-based applications development expertise, IBM Global Business Services selected CarpeDatum as the partner of choice to architect and develop a comprehensive medical products cross-selling application for a Fortune 20 medical supply chain provider. The company is a leading manufacturer of medical and surgical products, including gloves, surgical apparel and fluid management products who provides over 700,000 pharmaceuticals and medical products to more than 60,000 locations each day.

The web-based application allows regional directors, sales reps, product reps and pricing analysts to quickly identify cross-selling opportunities by analyzing customers purchases (across multiple locations), determining available vendor discounts, and passing these savings onto the customer while at the same time, increasing profit margins.

Once the user is satisfied with the deal structure the system automatically generates a PowerPoint proposal including all of the relevant metrics for use by sales reps to communicate this cost savings to the customer.

Solution Details

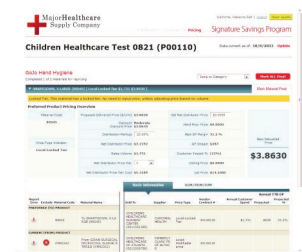
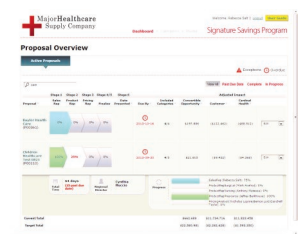
The solution began by breaking down products from various suppliers and packaging methods into a common individual unit of measure (or IUM). From this point; standard cost, contract cost, and tier cost can be determined for each product. In a similar manner, customer usage (purchase) information is broken down into IUM granularity for list, tier and contract prices for existing and proposed products.

With a common unit of measure (UOM) foundation, along with a preferred material cross reference (which maps existing products to preferred products,) a proposal can be created which illustrates the impact on the gross profit as well as the overall customer impact, while at the same time, maintaining pricing parity across multiple customer locations and purchasing contracts.

These proposals are then reviewed and adjusted at a proposal, category and/or material level by product reps, sales reps, and pricing analysts in order to fine tune the content prior to generating the presentation for the customer.

Workflow is an integral part of the application that monitors and guides the proposal through multiple stages within the life-cycle of the sales opportunity:

- Regional directors can initiate a proposal across a single or a group of customer locations.
- Sales reps can review and determine initial categories or materials that comprise the proposal.
- Product reps can evaluate the material costs and tiers to ensure accuracy.
- Pricing analysts can review and adjust the delivery price based on purchasing decisions within the overall proposal.
- Sales reps finalize and prepare presentation materials and supporting documentation for customer review.



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WHO WE ARE

CarpeDatum is a premier provider of strategic business intelligence and performance management solutions, focused on enabling companies to make timely and informed business decisions. We provide our clients with the tools, resources, and experience to rapidly implement and harness the power of business intelligence applications.

At CarpeDatum we have been developing Business Intelligence solutions since 1997. Our highly skilled consultants have years of real-world experience in financial analysis, business management and information systems.

For more information about other CarpeDatum customer project briefs, please visit:

www.carpdatuminc.com/clients/briefs

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Technologies Utilized

The end-user experience is entirely web-based and requires no software or plug-ins to be installed on the users' computers. This enables the company to deploy to over 300 users without the complexity of managing software versions and installations in a geographically diverse environment.

This architecture tightly integrates these technologies, yet cleanly delegates the responsibilities, into a cohesive solution that leverages the strengths of each of these components.

Pure HTML/JavaScript/jQuery UI

The user interface is a 100% HTML/JavaScript/jQuery application that is entirely client side. This provides a maximum compatibility between computing platforms, including mobile platforms, while reducing maintenance costs. The UI is developed using a distributed application architecture that maintains a high degree of performance and scalability under heavy loads with minimal server requirements.

Enterprise Services

Developed by CarpeDatum, Enterprise Services is a drag and drop middleware platform that provides the communication layer between the web front-ends and TM1.

Enterprise Services (ES) provides real-time read/write capability into the TM1 calculation engine into a format readily consumable (as objects) by JavaScript and jQuery.

This relieves the burden of creating specialized server-side web services using the TM1 API. Enterprise Services provides pass-through security to TM1, connection pooling and optimized query management for high-speed access to information in TM1.

IBM Cognos TM1

IBM Cognos TM1 is an in-memory OLAP database which serves as the centralized calculation engine for the medical products cross-selling system. All of the complex logic for managing costs, pricing, customer impact, aggregation, consolidation, etc. are contained within TM1.

IBM Netezza

IBM Netezza appliance serves as the staging location of SAP master data, material price catalogs, and cross-reference mappings, as well as the archival of proposal information for historical reporting and data provider for down-line systems.

