CASE STUDY

How Close-Up's CRM Helped the Largest Pharmaceutical Company in Bolivia Modernize its Sales Force

The adoption of modern technologies has become a critical imperative for companies globally, particularly for market leaders aiming to adapt processes to sustain competitiveness and preserve market share. However, ensuring a successful transition involves grappling with challenges that extend beyond technical and financial realms. For instance, resistance from employees accustomed to manual processes may hinder the adoption of new tools. Overcoming such obstacles often requires cultural shifts within the organization.

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In this case study, we delve into the transition of INTI, Bolivia's largest pharmaceutical company, from paper-based procedures to Close-Up's state-of-the-art CRM system. Among its various benefits, the company now efficiently conducts doctor visits with the assistance of visual aids, facilitating the monitoring of user engagement metrics such as prescribers' time spent in the app.

Additionally, we examine how INTI addressed cultural barriers within its sales force, where certain members had relied on printed materials and manual spreadsheets for decades.

Before the Switch: Paper and Spreadsheets

Established in 1936, INTI is the largest pharmaceutical company in Bolivia with over 25% market share. It manufactures and distributes more than 1,300 products nationally, exporting some of its bestsellers to countries in Latin America, Europe, and Asia.

To support these operations, INTI employs approximately 1,100 professionals – which, considering Bolivia's population of 12 million people, makes it one of the country's largest private employers. Figure 1 illustrates some of these facts.

Figure 1. INTI, Bolivia's largest pharmaceutical company, in a nutshell.

Throughout most of its eight-decade history, the company relied on manual spreadsheets and printed materials as the primary tools for its sales force. During typical visits to prescribers, field agents would introduce new products, distribute relevant literature, and collect the doctor's signature on Throughout most of its eight-decade history, the company relied on manual spreadsheets and printed materials as the primary tools for its sales force. During typical visits to prescribers, field agents would introduce new products, distribute relevant literature, and collect the doctor's signature on paper. Subsequently, they would submit reports – often numbering in the hundreds per day – which were manually consolidated into spreadsheets for further analysis by the statistics team.

However, with the advent of modern CRM platforms, management recognized that some of these practices were too inefficient for the company's scale. Consequently, they deliberated whether to develop new internal capabilities or engage a consolidated provider. Ultimately, they opted for the latter, forging a partnership with Close-Up to initiate a significant overhaul of their sales force operations.

Shifting to Close-Up's CRM

The transition to Close-Up's CRM was not merely an event but a comprehensive process due to its significant impact on operations. It encompassed various steps, including planning, deployment, and assessment, all requiring meticulous consideration by decision-makers.

Here, we outline three key challenges encountered by INTI during this transformative journey. The initial challenge was financial. INTI needed to procure 250 tablets to grant agents access to the CRM. Each tablet carried a price tag of approximately $600, inclusive of taxes, amounting to a total capital investment of $150,000 – equivalent to 625 monthly minimum wages in Bolivia. To surmount this obstacle, INTI negotiated a bulk order with a national manufacturer, substantially reducing costs by over two-thirds. With the resulting bill of $50,000 aligning reasonably with the company's sales force budget, INTI proceeded with the transition.

The next hurdle was operational. Having relied on manual processes, INTI had amassed thousands of printed research papers and accompanying literature. A sudden transition risked rendering these assets obsolete. Consequently, management opted for a phased deployment of the CRM. Digital signatures and automatic report generation were adopted from day one, while both digital and printed visual aids were utilized until exhaustion, minimizing wastage.

Lastly, the cultural challenge loomed large. The majority of INTI's sales force was accustomed solely to printed media, with limited exposure to smartphones and tablets. To address this, the company organized workshops and Q&A sessions to ensure employees could effectively utilize the CRM. Common concerns, such as safety and logistical issues (e.g., risks of theft, lack of Wi-Fi connectivity), were addressed transparently. This approach significantly boosted morale and facilitated a smoother transition process.

A Results-Driven Platform

> **“The Transition from legacy processes to a modern CRM platform might seem daunting. However, as they continue to grow and innovate, INTI and other pioneers demonstrate that the effort is worth it.”**

Since adopting Close-Up's CRM in 2015, INTI has witnessed remarkable gains in efficiency across various aspects of its operations. Productivity has soared thanks to automatic report generation, while monitoring sales force metrics has become significantly more streamlined. Additionally, communication with prescribers has seen notable enhancements, largely attributed to the incorporation of several CRM features.

A prime illustration of this is Close-Up's Sales Driver, an online repository housing presentation decks, scientific papers, and other pertinent literature utilized by field agents during their visits. This resource provides prescribers with easy access through an intuitive interface, ensuring compliance with strict privacy guidelines. The ability to monitor user activity allows for the evaluation of the effectiveness of sales force presentations and visual elements.

Transitioning from traditional processes to a modern CRM platform may appear daunting at first glance. However, as evidenced by the ongoing growth and innovation at INTI and other trailblazing organizations, the investment proves immensely worthwhile. At Close-Up, we stand committed to supporting our partners throughout this transformative journey, offering comprehensive assistance from planning to execution. We encourage you to explore our website to discover more about how we can empower your business.

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Interested in seeing what Close-Up can do for your organization? Reach out to us.

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