IQVIA HCP/O ENGAGE – HARMONIZATION WITH GOLDEN ORG AND CATERING REGION-SPECIFIC CUSTOMIZATIONS
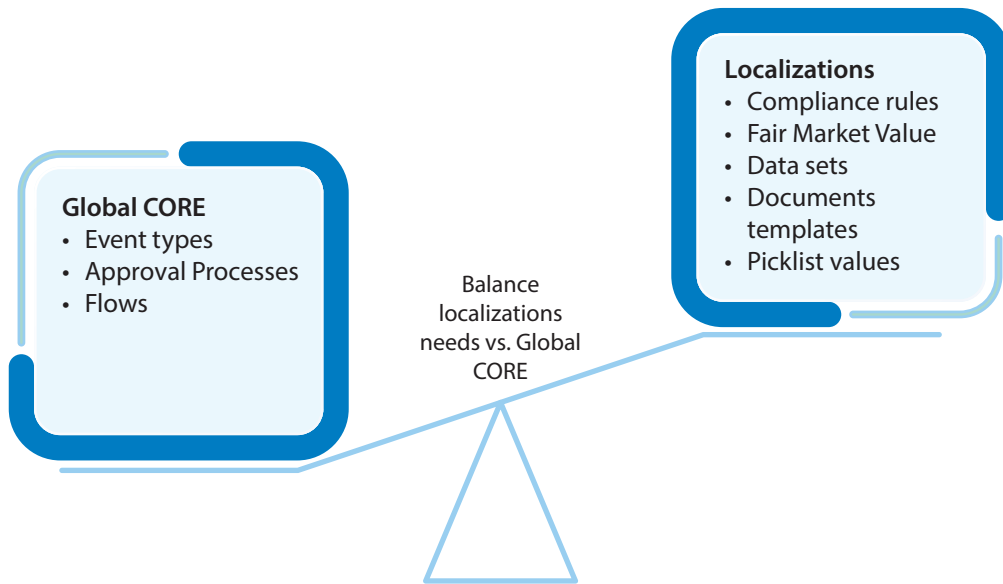
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The IQVIA HCP/O Engagement Management application supports management of the entire lifecycle for HCP and HCO events. It delivers a workflow that includes creating an engagement, HCP nomination, review and approval, contracting, logistics, and closeout activities such as proof of service and, total spending (including capture of transfer of value for transparency reporting). In addition, common business processes that exist outside of an engagement lifecycle, such as operating plans, master agreements, and expert qualification are also supported.

While IQVIA HCP/O Engage provides a solid platform for the HCP/O event management, major framework and features of the application are same for most of the regions, there are always needs of variations for the region, based on below considerations.

1. Legal, Regulatory and Compliance requirements of the region.
2. Region specific processes.
3. Region specific integrations.
4. Region specific data variations.
5. Cross border engagements.

The biggest challenge is to maintain the sanctity of the 'Global Core' and not deviating locally based on region wishes. To address this challenge, common Golden org for HCP/O engage driving the change management and feature releases has proven to be right solution for the customer. With this the feature releases and enhancements are being done with 'Global Core' golden org driving metadata changes.

The biggest challenge with an engagement solution is to keep the global CORE and not deviating locally based on country wishes

Global CORE
- Event types
- Approval Processes
- Flows

Balance localizations needs vs. Global CORE

Localizations
- Compliance rules
- Fair Market Value
- Data sets
- Documents templates
- Picklist values

Your recipe of success must be based on keeping this balance
We will help you defining the right cookbook to push back wishes, why handling relevant local aspects

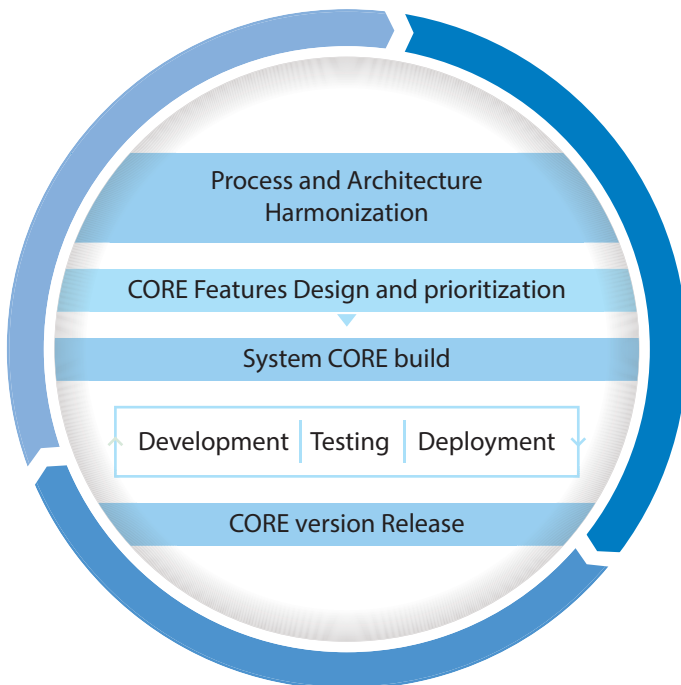Addressing the people aspects and resource constraints can help accelerate region activation and rollout

Following framework can help speed up the region activation.

- As part of Initial assessment; interview regions to understand current processes and systems. Demo the existing Global Core capabilities to get early buy in and help defining needed features to be built as priority
- Focus on enabling business change by introduce the new processes and ways of working to the regions. Provide outlook on the scope ongoing new Global Core release
- Simplify template filling process by extracting and filling out templates ourselves/ providing live support with regions with dedicated resources

We recommend focus on 'Global Core' build and version release using an agile approach. This ensures regular feature / functionality review both by the Global Core and region activation team and aids in ensuring synchronization on the enablement needed for region activation.

Our approach will focus on process harmonization first, followed by CORE build and version release

Assumption: Process and Architecture harmonization will be covered as part of the Design phase for the CORE Prototype currently ongoing

Process and Architecture Harmonization

CORE Features Design and prioritization

System CORE build

Development | Testing | Deployment

CORE version Release

*CORE processes & solution design is governed by Global SMEs and consulted via Advisory consul (e.g., affiliates champions in Medical, Compliance, etc….)
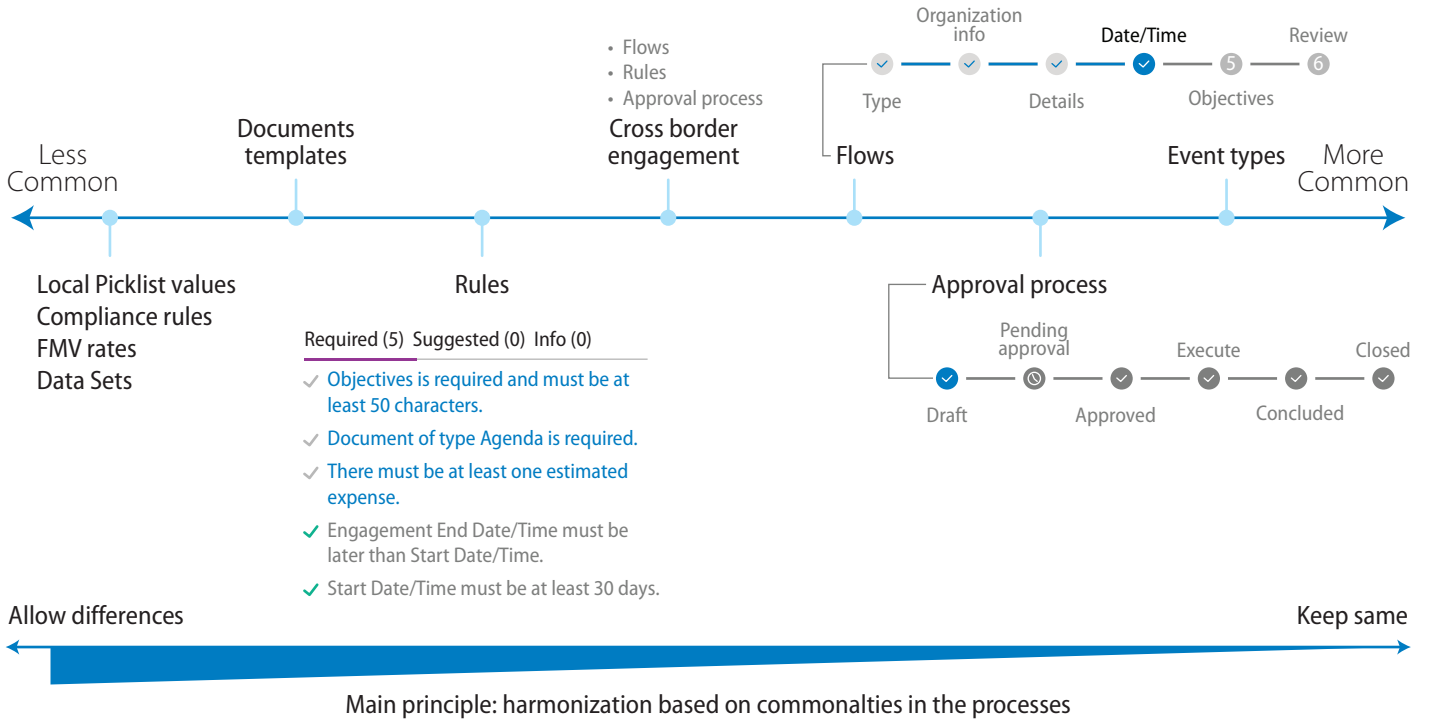
Building principles of 'Global Core' involves uniformity in key features of the core while region specific customizations are driven with less or no metadata changes.

Country-specific features in a CORE model are typically based on commonality across countries and regions

Less Common — Local Picklist values, Compliance rules, FMV rates, Data Sets — Documents templates — Rules — Cross border engagement (Flows, Rules, Approval process) — Flows (Type, Organization info, Details, Date/Time, Objectives, Review) — Approval process (Draft, Pending approval, Approved, Execute, Concluded, Closed) — Event types — More Common

Required (5) Suggested (0) Info (0)
- Objectives is required and must be at least 50 characters.
- Document of type Agenda is required.
- There must be at least one estimated expense.
- Engagement End Date/Time must be later than Start Date/Time.
- Start Date/Time must be at least 30 days.

Allow differences ← → Keep same

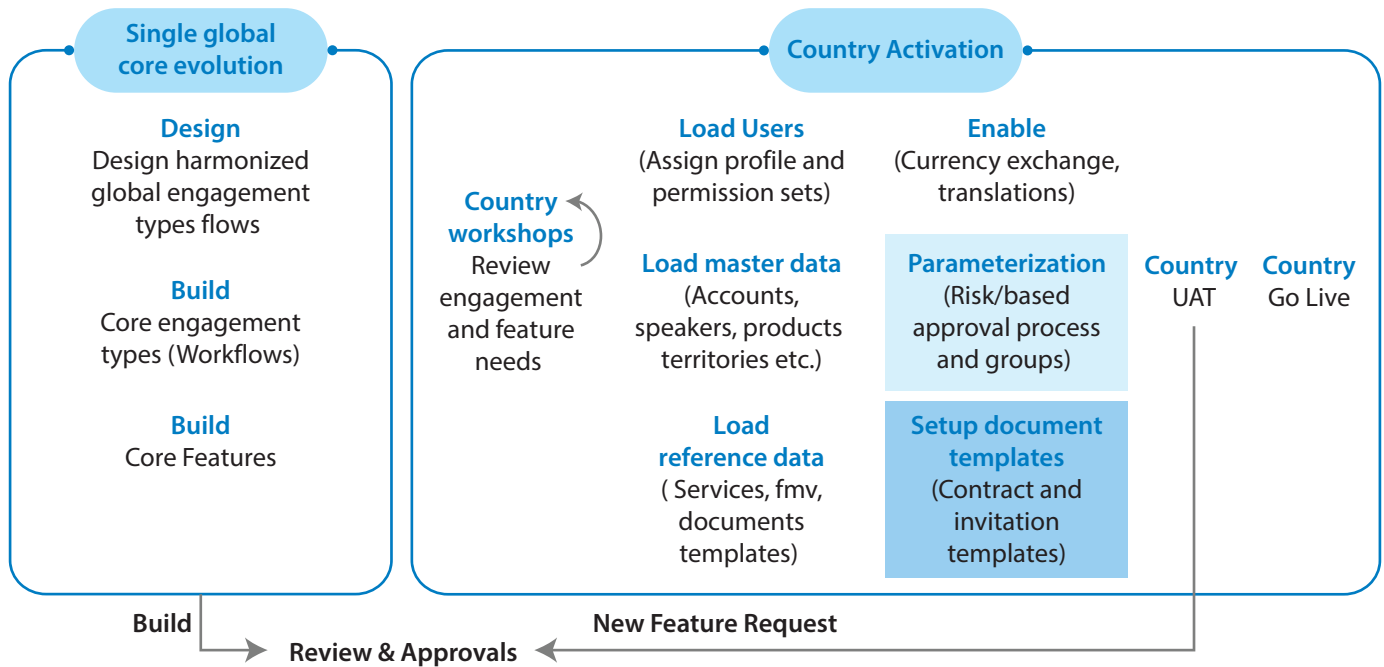Main principle: harmonization based on commonalties in the processes

The enablement of regions is typically established on an 80% core and 20% localization approach considering some key accelerators. If new features are requested as part of region activation, they will require approval by Global process experts to keep on evolving & refining the global processes & CORE.

With 'Global Core' making a backbone of the platform, new region onboarding will include below typical activities.

- Agreement, Invoice, Invitation templates
- Engagement Email templates
- Reference data loading
- User creation and Permission Set assignments
- Activation of features based on Admin Console

If new features are requested as part of Country activation, they will require approval by Global process experts to keep on evolving & refining the global processes & CORE

Single global core evolution

Design
Design harmonized global engagement types flows

Build
Core engagement types (Workflows)

Build
Core Features

Country Activation

Country workshops
Review engagement and feature needs

Load Users
(Assign profile and permission sets)

Load master data
(Accounts, speakers, products territories etc.)

Load reference data
(Services, fmv, documents templates)

Enable
(Currency exchange, translations)

Parameterization
(Risk/based approval process and groups)

Setup document templates
(Contract and invitation templates)

Country UAT

Country Go Live

Build

New Feature Request
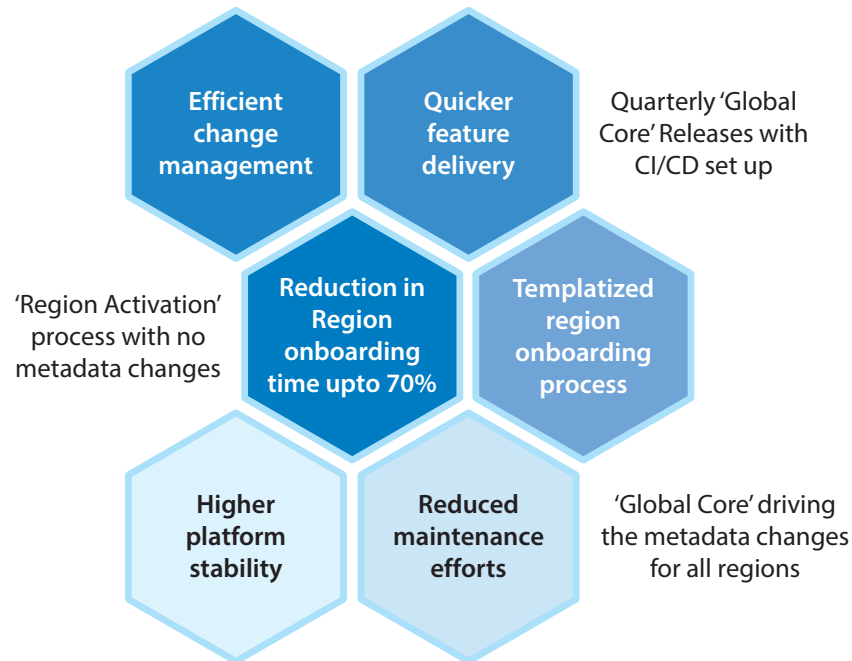
Review & Approvals

Conclusion:

With simplification of region onboarding activities, 2 parallel tracks are executed for the program.

- 'Global Core' track for feature configuration and enhancement.
- 'Region Activation' track for onboarding new regions

There are many benefits realized through the above segregation which not only helps faster onboarding of new regions, but also ensures standard product engineering principles and efficient change management. Some of the benefits are depicted below.

Efficient change management	**Quicker feature delivery** — Quarterly 'Global Core' Releases with CI/CD set up
'Region Activation' process with no metadata changes — **Reduction in Region onboarding time upto 70%**	**Templatized region onboarding process**
Higher platform stability	**Reduced maintenance efforts** — 'Global Core' driving the metadata changes for all regions

Want to know more about harmonized IQVIA HCP-Engage Global Org?

Reach out to our team of experts !

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