

PLATFORCE

CRM+CLM

for
Pharma
Life Science
Medical Devices

platformforce.io

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
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12. Target settings
13. GPS tracking
14. Analytics (PowerBI)
15. Talent LMS
16. Coaching Module
17. Sales Module



WHO WE ARE

platformio.com

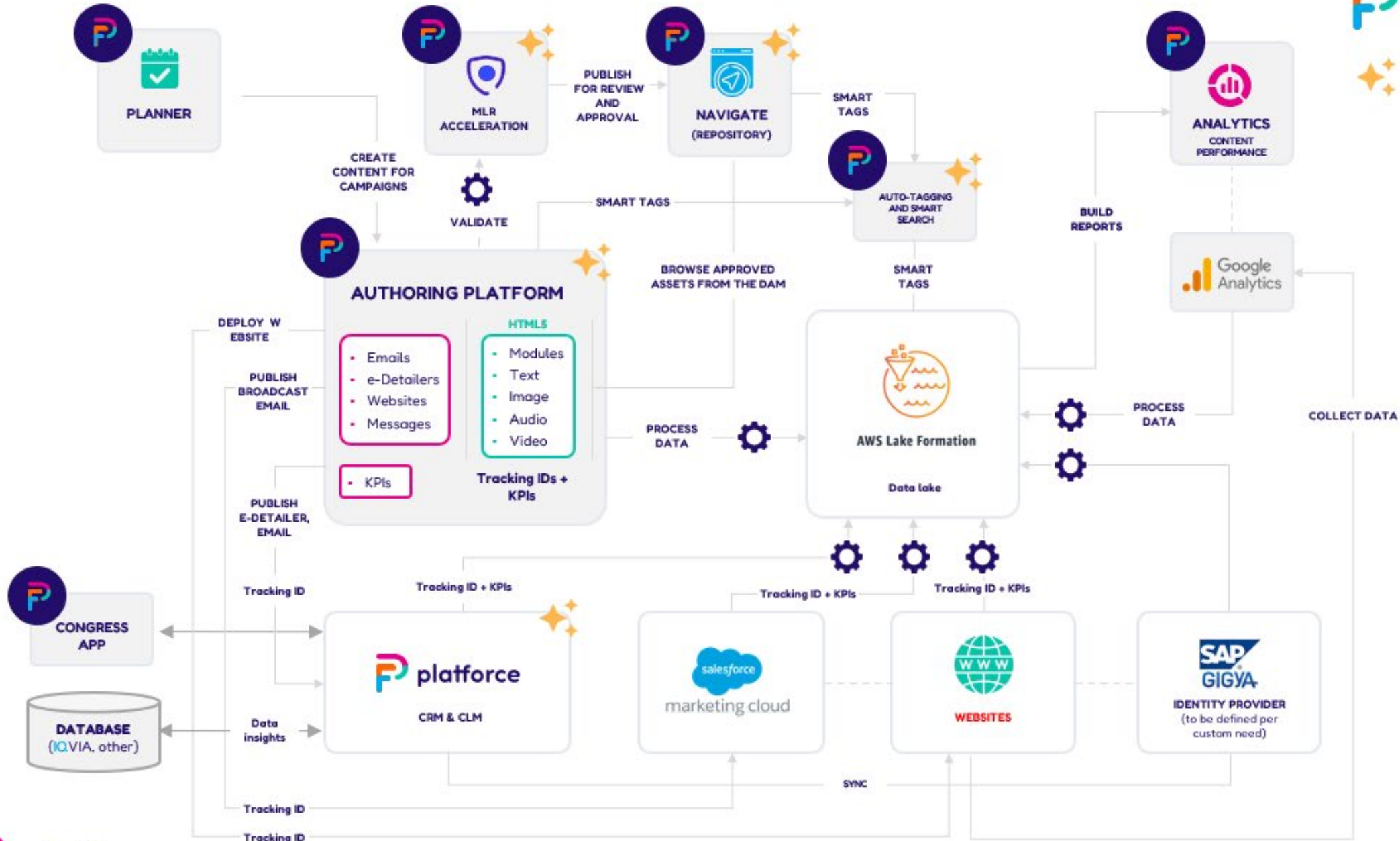
Who We Are

Platforce is a unified cloud-based AI-featured omnichannel solution that supercharges field force productivity and drives a compliant and engaging customer experience.



Our Solutions:

- **Customer Relationship Management (CRM)**
- **Field Force Automation (FFA)**
- **Automated Workflows**
- **Content Experience Platform (CEP)**
- **Digital Asset Management (DAM)**
- **Medical, Legal, and Regulatory (MLR)**
- **Closed-Loop Marketing (CLM)**
- **Omnichannel Engagement**
- **Reporting (PowerBI)**



Our mission and values

Our Mission is to empower field forces with innovative, customizable, and scalable solutions for productivity and compliant customer engagement.

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

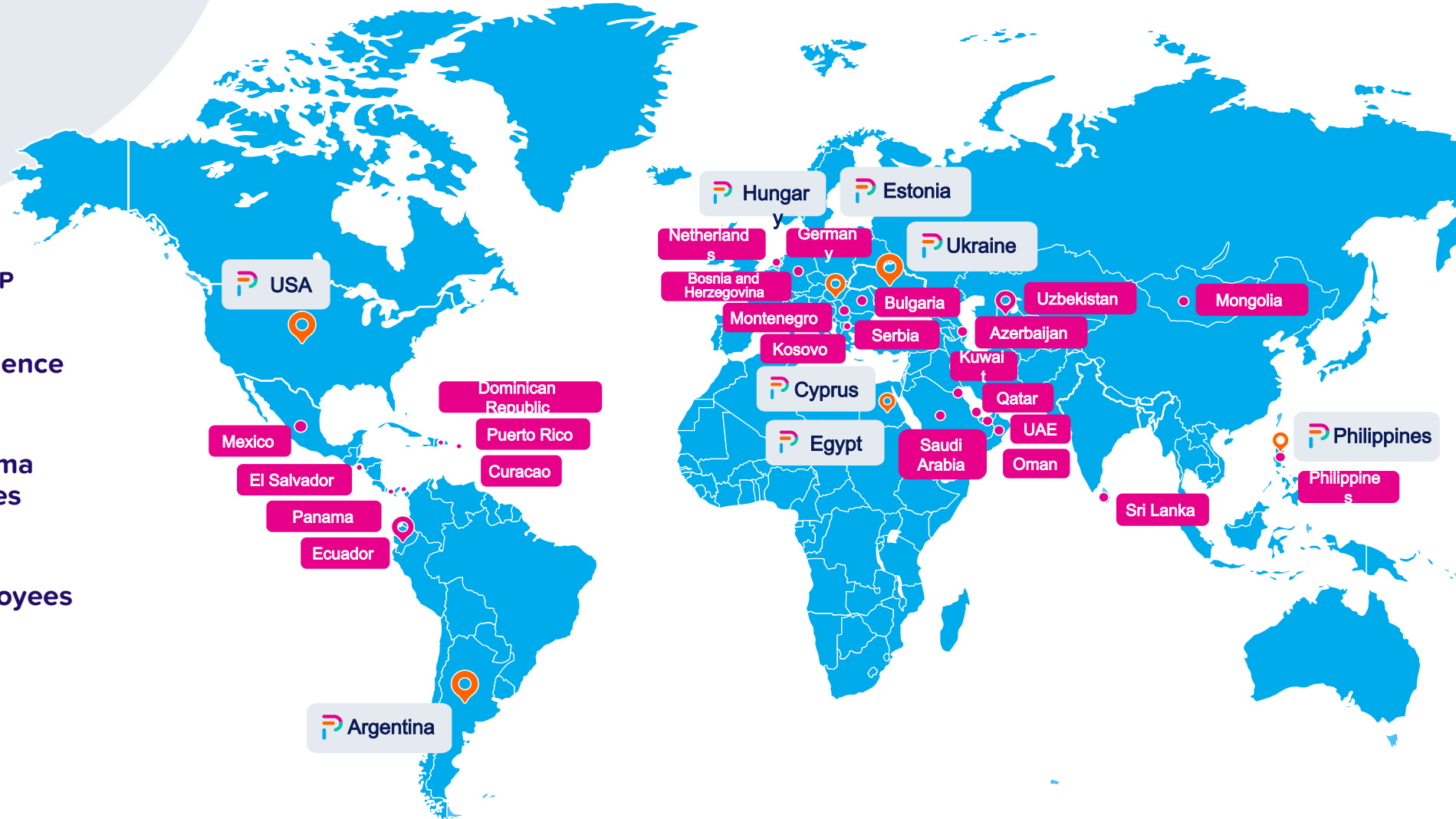
KEY NUMBERS OF THE GROUP

15+ Years of experience

150+ Clients in pharma and life sciences

700+ Qualified employees

100+ Agencies



Employee Structure Overview

Dedicated Employees

Our core team consists of dedicated employees who are committed full-time to our projects. These individuals bring specialized skills and a deep understanding of our company's mission and goals.

32 Total Dedicated Employees

11 Innovation & Product Development:
Leading the development and innovation of our products and services.

9 Customer Success & Support:
Ensuring customer satisfaction and providing ongoing support.

11 Growth & Marketing:
Driving growth through strategic marketing initiatives and sales efforts.

Shared Employees

In addition to our dedicated team, we have a roster of shared employees from our group company (mother company) who are engaged on a part-time or project basis, or as needed. These professionals provide additional expertise and support to ensure project success.

113 Total Shared Employees

17 Finance, Legal & Compliance: Handling financial planning, legal matters, and compliance issues.

19 Human Resources: Managing recruitment, employee relations, and HR policies.

4 Partner Relations: Maintaining and developing relationships with partners.

6 Omnichannel & Multichannel: Overseeing and optimizing multi-channel communication strategies.

4 Information Security: Ensuring the security of our information systems.

8 DevOps & Infrastructure: Managing development operations and IT infrastructure.

5 Data & Analysis: Providing data analytics and insights to inform decision-making.

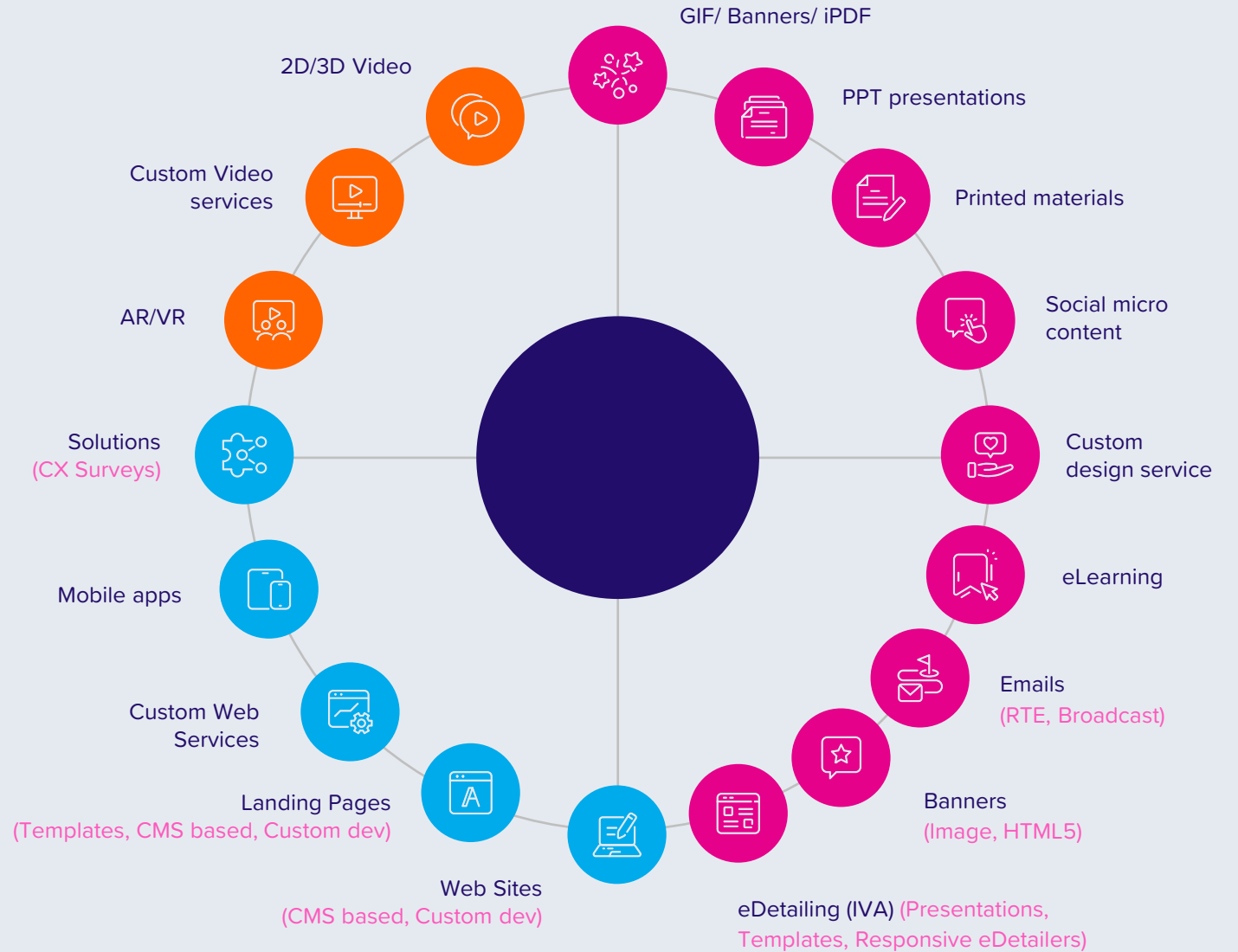
33 Product Development & Design: Contributing to product development and design processes.

17 Business Systems & Help Desk: Supporting business systems and providing help desk services.

Platforce Group Solutions



The DCF (digital content factory) provides specialized pharma content development with 24/7 customer support, scalable processes, advanced analytics, and a unified content repository, easily integrated with existing tech stacks.



Platforce is
compliant and
ISO certified



Platform capabilities

platform.io

All-in one CRM to streamline pharma companies' entire sales operations



Coaching your Sales Force

Evaluate the work of your field force.



Email Module

Mass mailing: tracking delivery, bounce, and open rates, and more.



Remote Events

KPIs from each participant, no installation required.



Segmentation and Targeting Setting

Measuring target percentages, call reach, and frequency



Social messages

WhatsApp, Telegram



CRM Modules

Sales, marketing, & management teams



HR & LMS

Employee database and analytics



Analytics

Power BI Analytics, your flexible window to market insights



Sales & Warehouse Module

Orders, approval flow, inventory, payment tracking



Working Days Calendar & Days Off Calendar

CLM to unite both sales and marketing activities under a single platform for better performance



Visits & Activities Calendar - per territory



Samples Distribution available in the tablet CLM app



HCP Consent collection both in online/offline mode



Face-to-face events



My Performance dashboard for fieldforce in a CLM app



RepTriggered Emails templates, history, details"



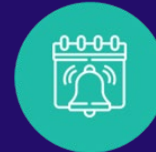
Remote Visits - gather KPIs from each participant, no installation needed



Visits Target Settings with planned target indicators for Reps



Accurate Tracking GPS & Route



Push - notifications to keep you close to your fieldforce



Social messages WhatsApp, Viber, Telegram, Facebook as visit types



Out of field activities vacations, business trips, sick leaves, trainings etc.

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, Field force performance, My performance, and Clients. The main content area features a 'My performance' section with activity statistics and efficiency metrics. Below this is a table of actions with columns for ID, Type, Planning date, Completed date, Joint visits, and User.

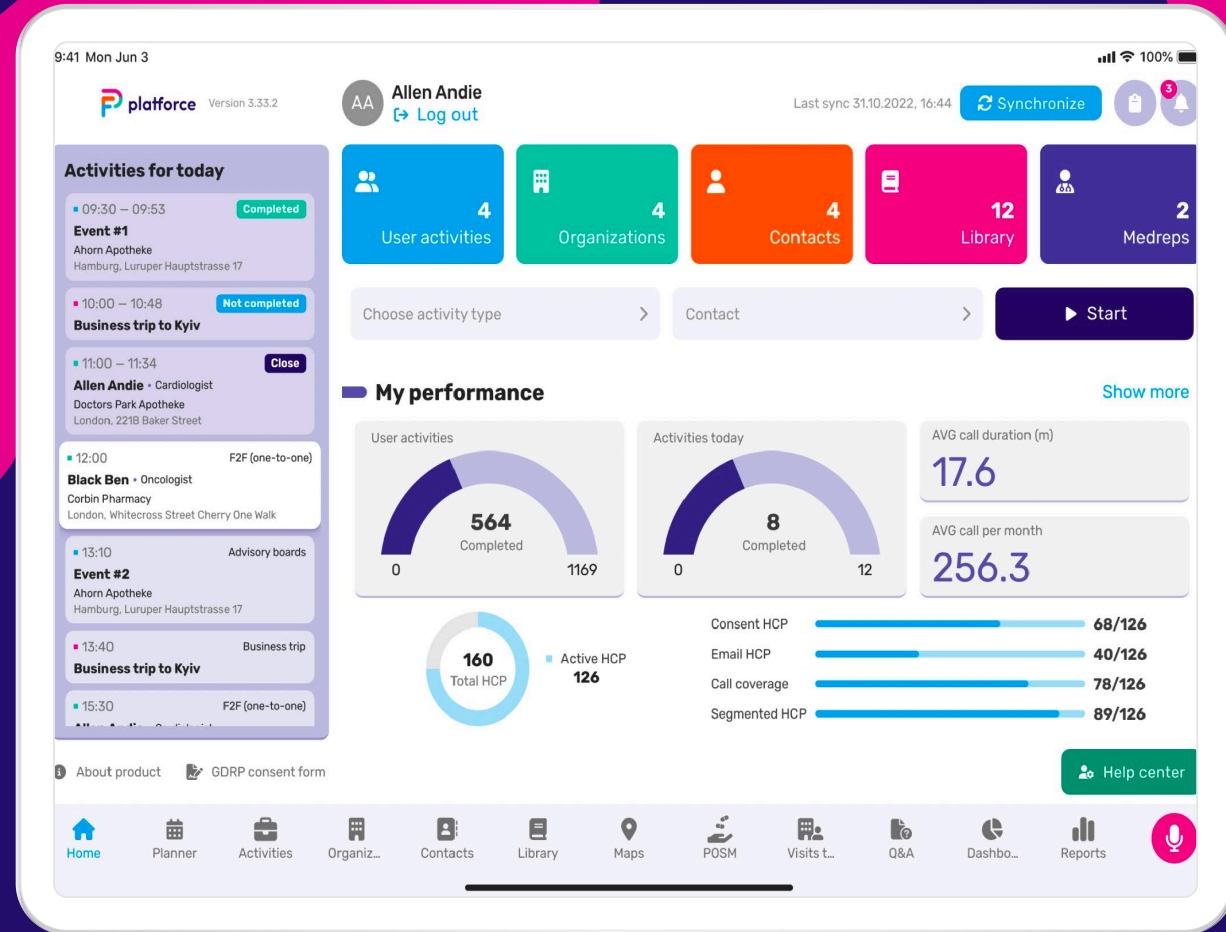
ID	Type	Planning date	Completed date	Joint visits	User
CL-0000020648	Remote Call	23.10.2023 13:20	23.10.2023 14:20	✓	Allen Andie
CL-0000020649	F2F (one-to-one)	23.10.2023 13:20	23.10.2023 14:20	✓	Allen Andie
CL-0000020650	Remote Call	23.10.2023 13:20	23.10.2023 14:20	✓	Allen Andie
CL-0000020651	Pharmacy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



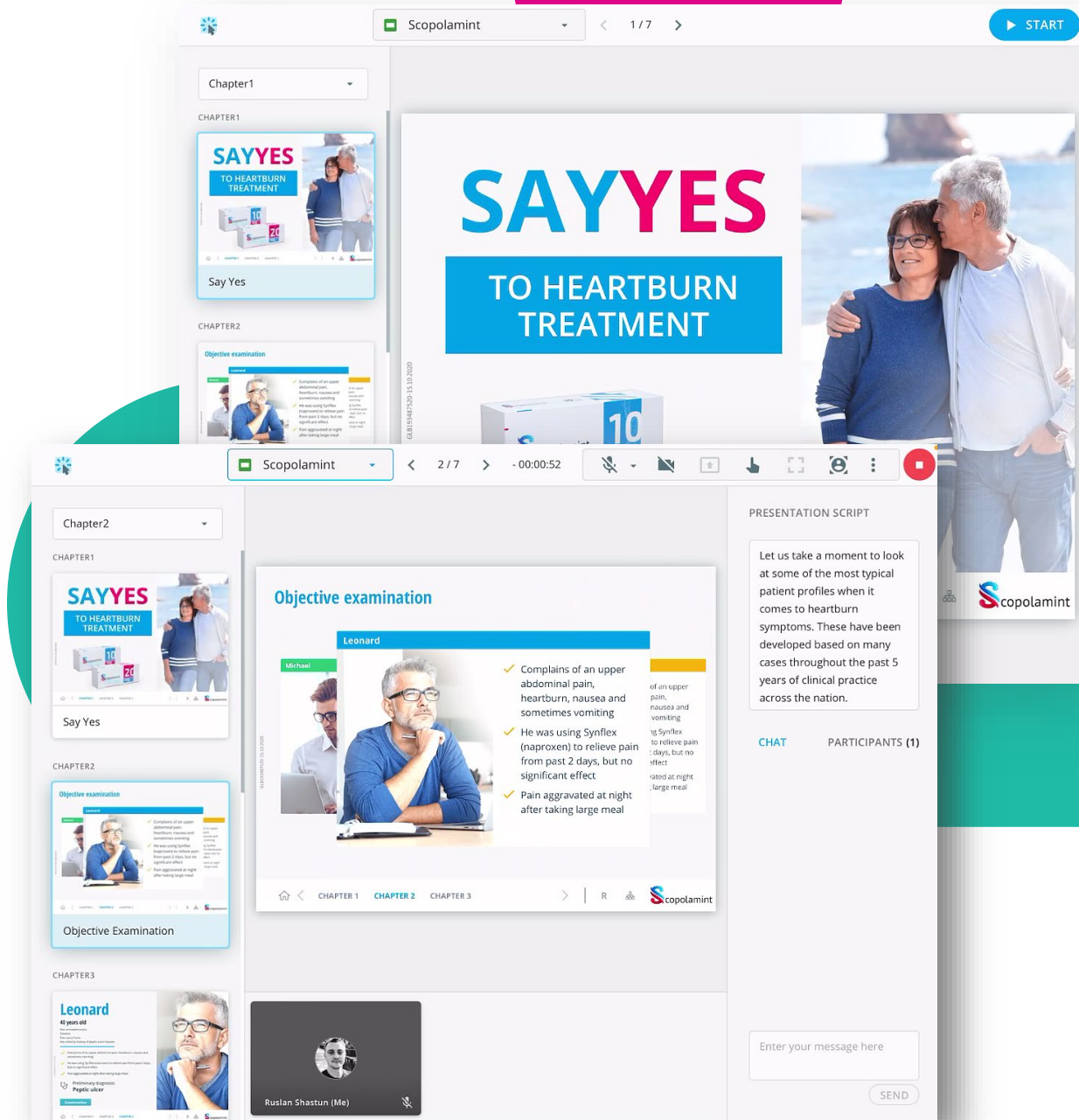
Remote calls (CRM & CLM)

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 screenshot displays the Scopolamint interface during a remote call. The main window shows a presentation slide titled "SAYYES TO HEARTBURN TREATMENT" with a large image of a couple. A sidebar on the left shows a navigation menu with "Chapter1" selected. Below the main window, a smaller version of the same slide is visible. The bottom section of the interface features a "Patient Case Study" for "Leonard", a 48-year-old male with a history of peptic ulcer. The case study includes a list of symptoms: "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", and "Pain aggravated at night after taking large meal". A "PRESENTATION SCRIPT" panel on the right provides context: "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." A chat window at the bottom right is labeled "CHAT PARTICIPANTS (1)" and contains the text "Enter your message here" and a "SEND" button. The interface also shows a video feed for "Ruslan Shastun (Me)" and a timer indicating "2 / 7" and "-00:00:52".

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

Scopolamint 10 mg

Which of the medications do you prefer in therapy?

Move the colored sliders to determine the priority specified preparations

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

CHAPTER 1 CHAPTER 2 CHAPTER 3

Scopolamint

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


Send email

From*
no-replay@platforce.io

Email template
Template

Subject*
Confirmation of consent

Preview

 platforce


Dear #name!

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean sit amet egestas nisl, eget viverra leo. Mauris feugiat sodales lacus id finibus. Aliquam auctor non sem at molestie.

Proin nec tortor odio. Nam euismod, augue eu convallis iaculis, ex ligula vestibulum leo, in dictum ante ligula gravida justo.

Cras fringilla ligula nec convallis vehicula. Praesent vulputate tellus id imperdiet ultricies. Pellentesque faucibus ante sit amet varius tempus. Nullam congue elit nunc, in sollicitudin lacus luctus non.

Aliquam nec diam lobortis, varius urna ultricies, aliquam ligula. Etiam at metus nec ligula molestie ornare. Cras fringilla ligula nec convallis vehicula. Praesent vulputate tellus id imperdiet ultricies. Pellentesque faucibus ante sit amet varius tempus. Nullam congue elit nunc, in sollicitudin lacus luctus non.



Aliquam nec diam lobortis, varius urna ultricies, aliquam ligula. Cras fringilla ligula nec convallis vehicula. Praesent vulputate tellus id imperdiet ultricies. 

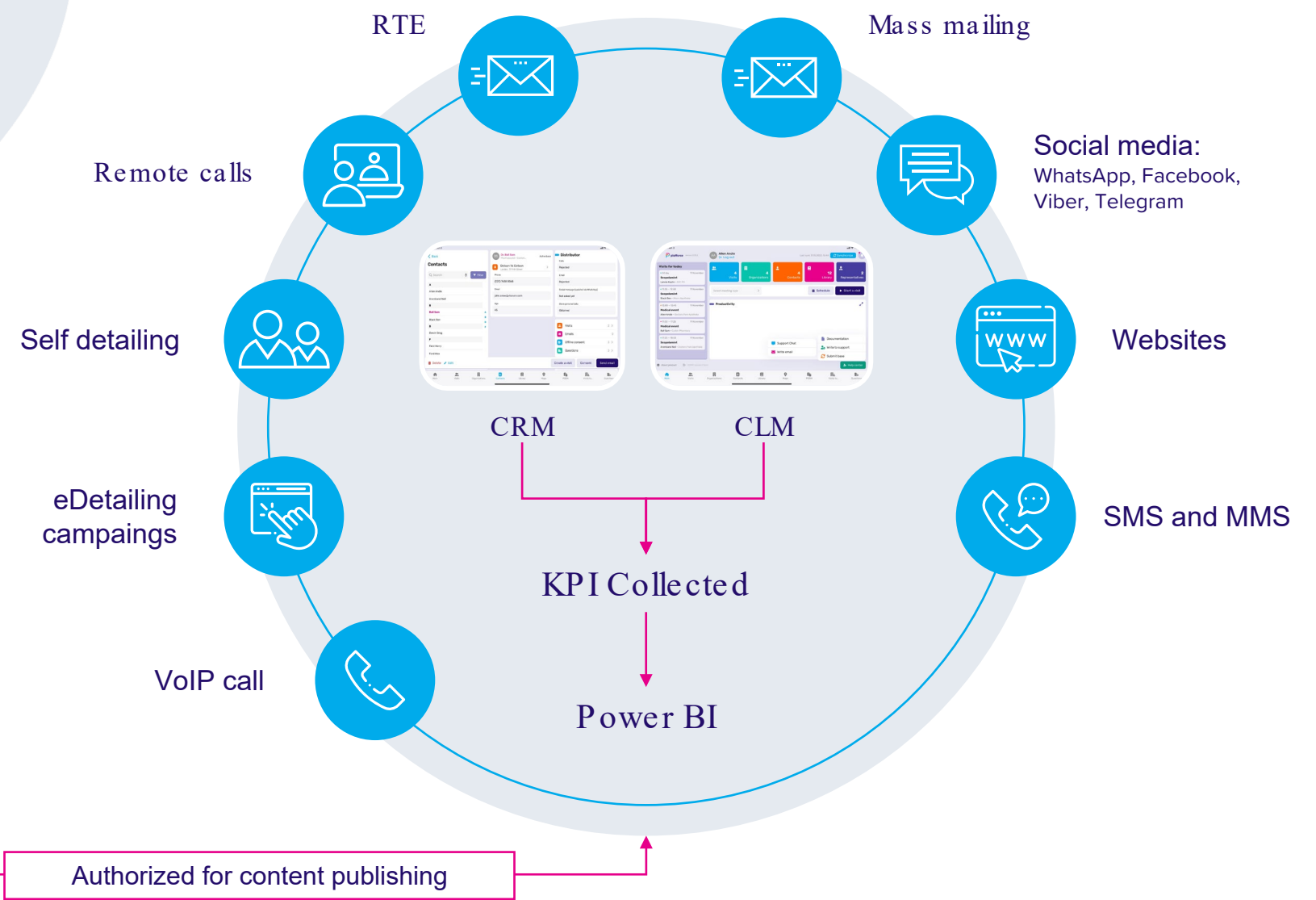
Social messages

- Sent
- Received
- Opened
- Failed

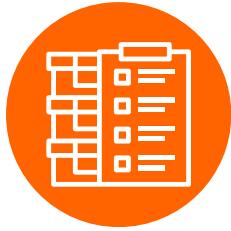


Omnichannel Capabilities

 + 
eWIZARD NAVIGATE
(CAAS & Content repository)

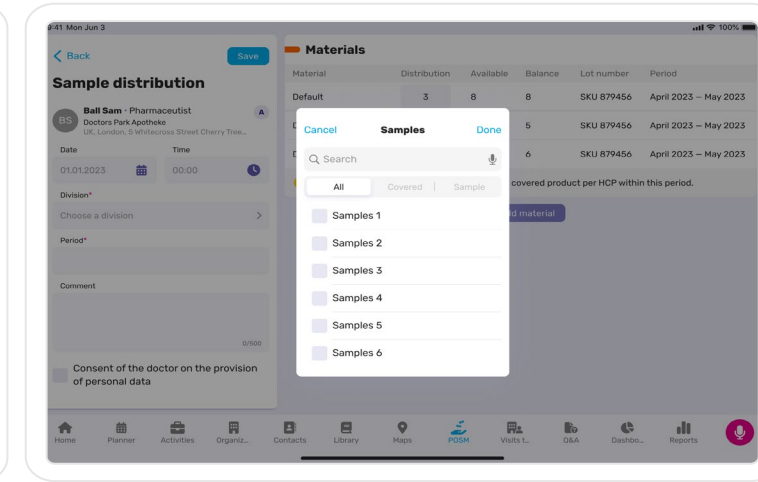
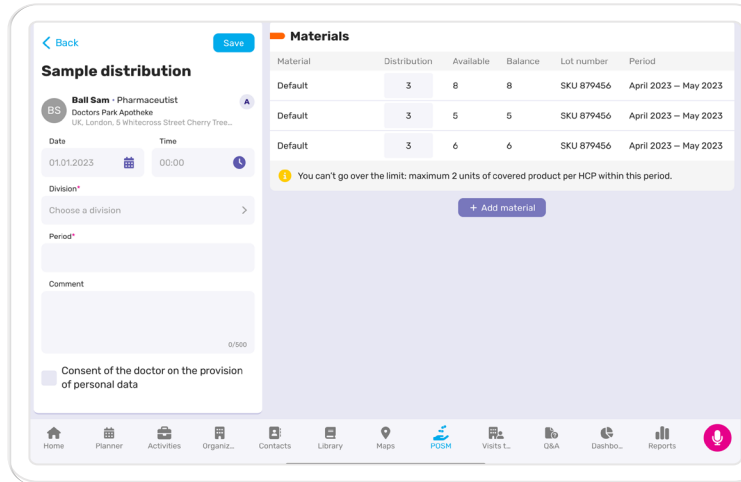


Sample distribution management



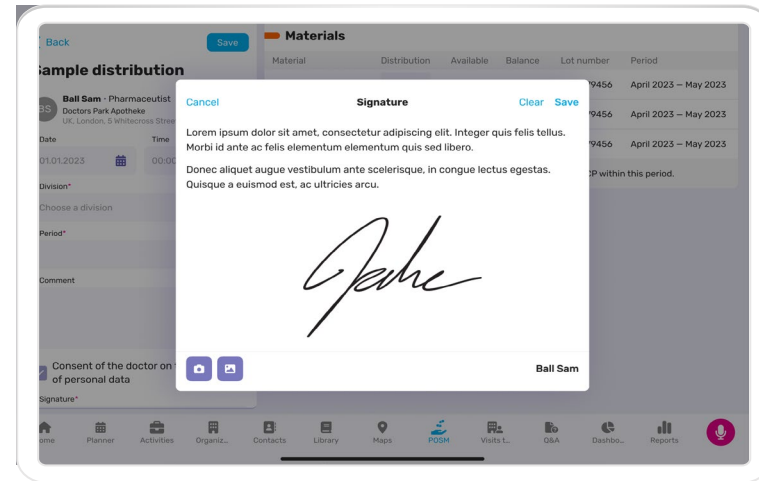
SAMPLE INVENTORY

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 SPECIAL TEMPLATES TO COMMUNICATE AUTOMATICALLY TO YOUR CLIENTS ACCORDING TO THE SITUATION

- E-mail to new clients/physicians
- E-mail physicians according to the specialization (pediatricians, gynecologists, dermatologists, cardiologists, etc.)
- Follow-up e-mail after the meeting
- Invitation to the webinar
- A complex merchandising module

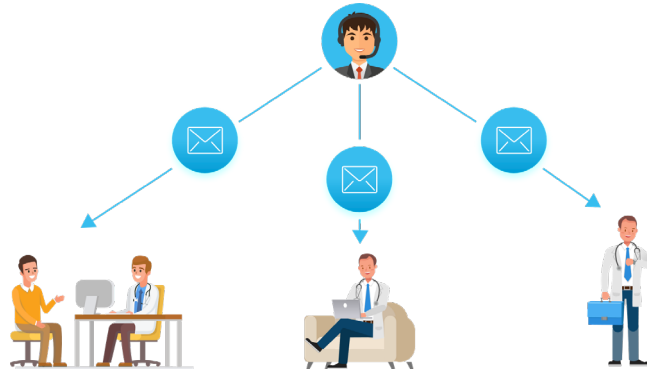


Email types

BOTH APPROVED AND BROADCAST E-MAILS SHOULD BE USED TOGETHER TO DRIVE CUSTOMER ENGAGEMENT.

APPROVED E-MAILS

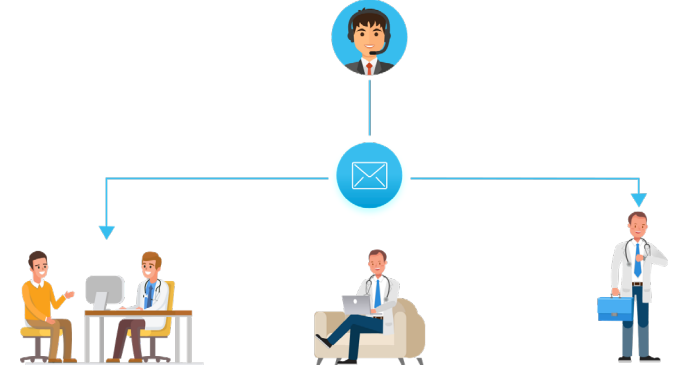
Personal message to 1 recipient



Approved e-mails extend face-to-face customer interactions with immediate and relevant follow-up content collected from a Field User.

BROADCAST E-MAILS

Messages to a broader HCP segment



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

CAMPAIGN

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.

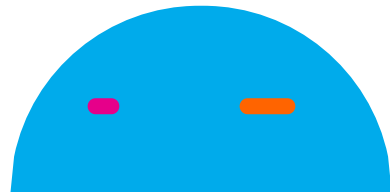
Your privacy is important to us. Hence we would like to have your consent in order for you to receive our newsletters, educational materials, invitations to events and more updates.

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.



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



We respect your privacy

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

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

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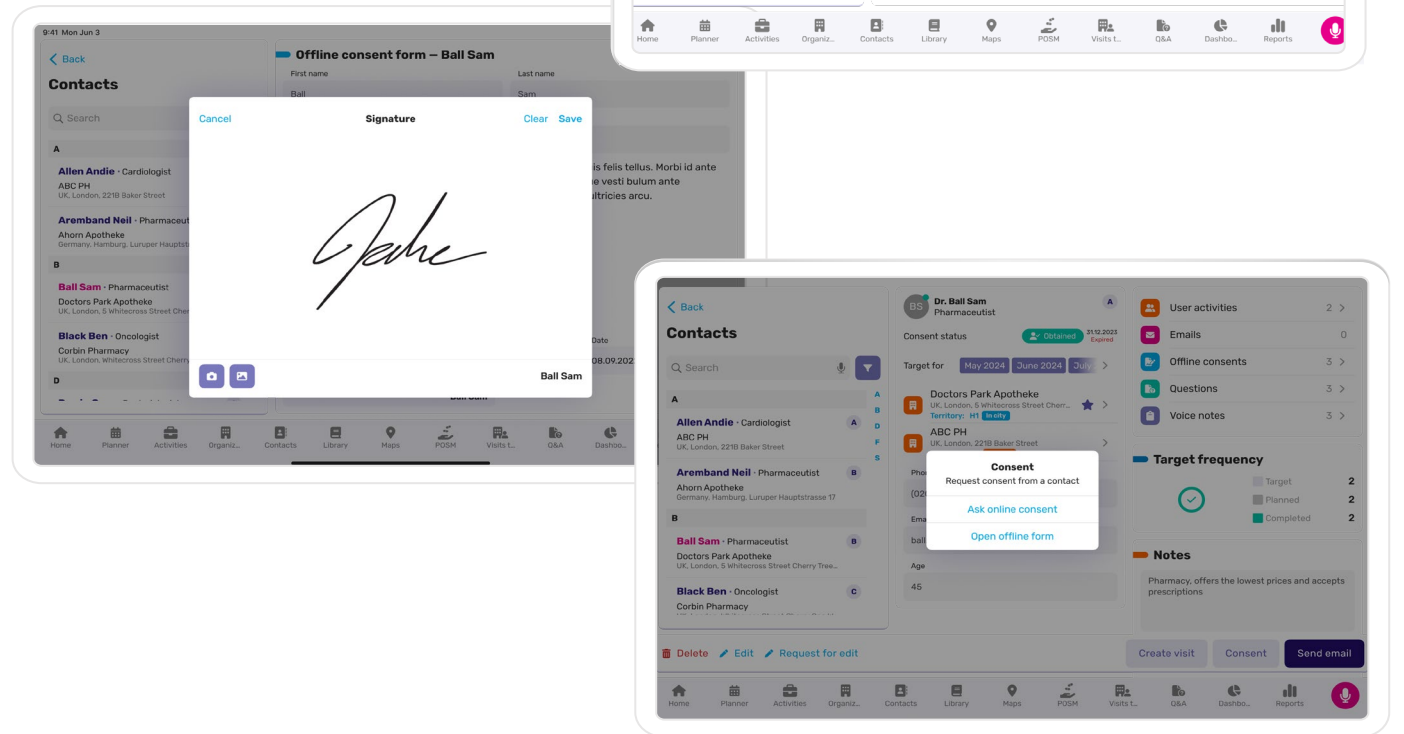
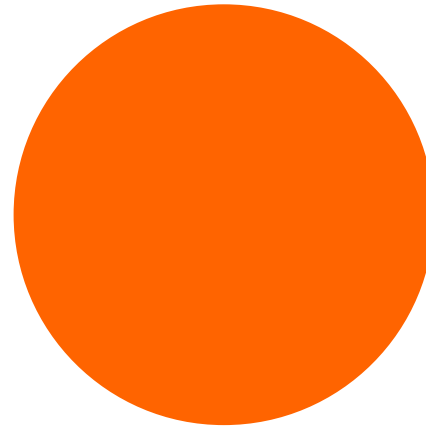
Distributor	Company
<input type="checkbox"/> Store your personal data	<input type="checkbox"/> Store your personal data
<input type="checkbox"/> Email	<input type="checkbox"/> Email
<input type="checkbox"/> Phone	<input type="checkbox"/> Phone
<input type="checkbox"/> Social media / messaging	<input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

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

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



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 Field Representatives
- 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):

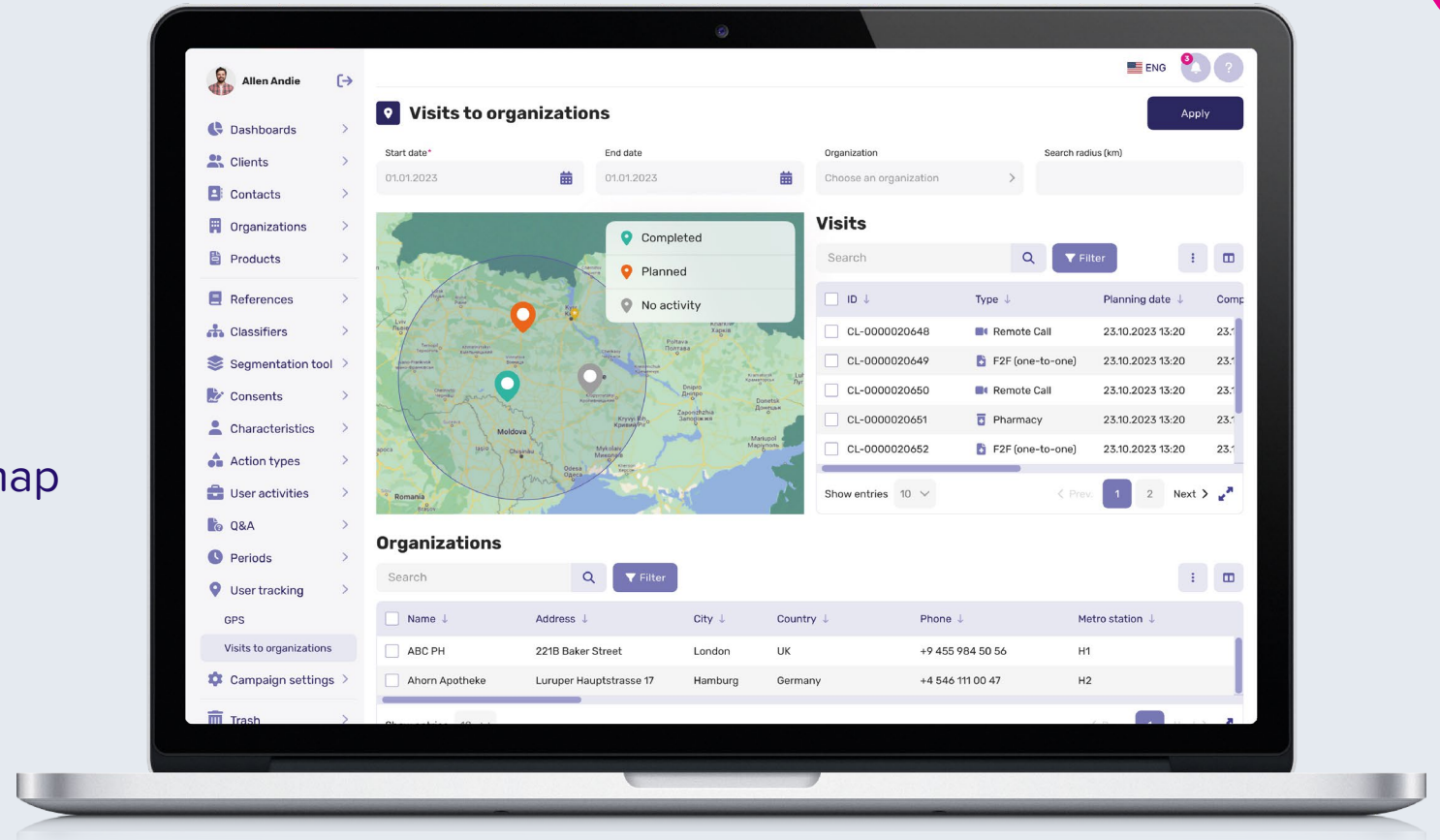
- Target categories (segments) – frequency, coverage, number of visits, etc., based on contacts (HCPs or pharmacists) on the dedicated work territory of MR
- Types of visits – face-to-face, joint, coaching, OTC, remote calls, etc.
- Time period – a number of days to spend on visits by type

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

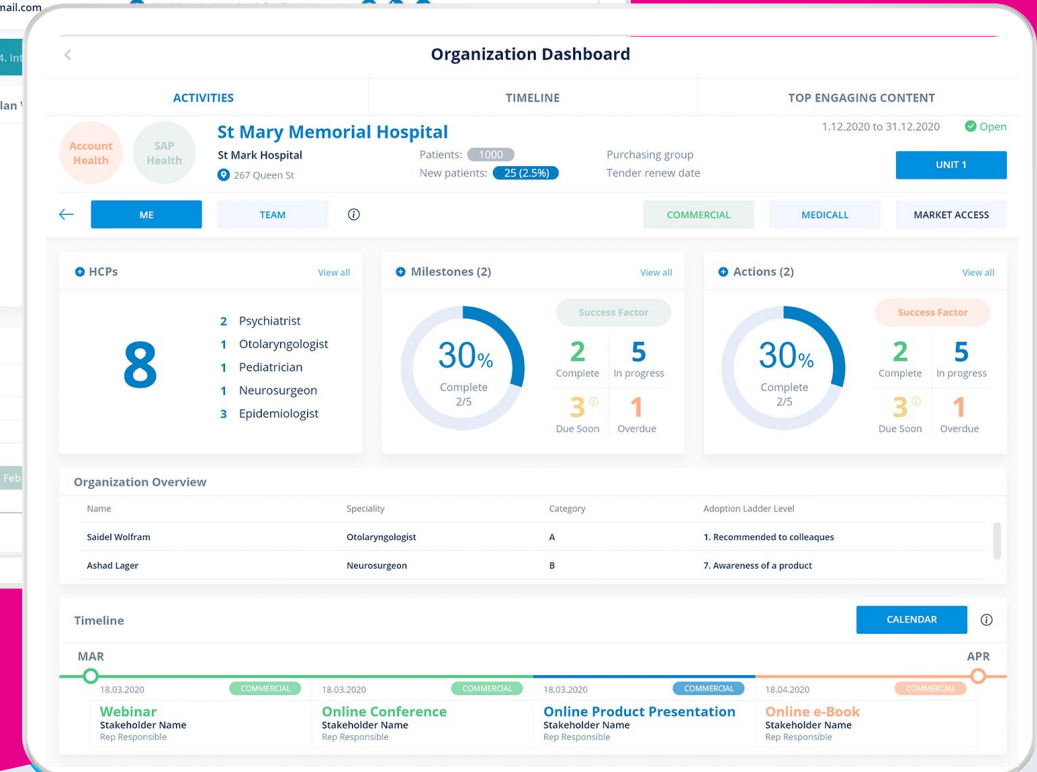
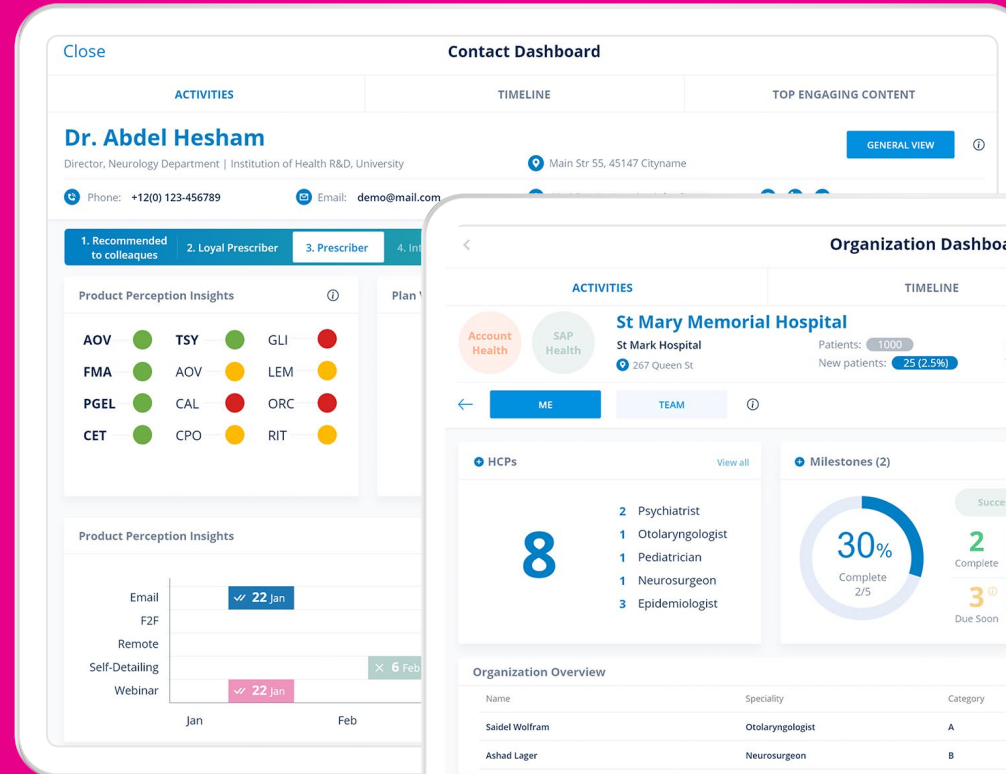
Pre-designed dashboards:

- 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



AI Insights Assistant

- This state-of-the-art feature captures every crucial detail from medical representatives' interactions with healthcare professionals (HCPs), transforming how engagements are analyzed and understood.
- Optimize your sales team's performance by helping them plan their sales activities automatically & in advance.



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

The screenshot displays the Platforce LMS interface for a learner named Ruslan Shastun. The top navigation bar includes the Platforce logo, a '400 POINTS' badge, the user name 'RUSLAN SHASTUN | LEARNER', a 'MESSAGES' link, and a search bar. The main content area shows the course 'Business etiquette' with a 5-star rating and a description: 'Please find out the basic rules of business etiquette and how to follow them, both in-person and online. Business etiquette is more complicated than ever. We now communicate across a thousand different channels, and we're working with partners and employees all over the world.' Below the description, there are sections for 'CONTENT' (listing 'Business_etiquette_2022-11-07_18-57_14-099.zip' and 'unit_1667841135') and 'COMPLETION RULES' (stating 'All units must be completed'). A 'Get this course' button is visible on the left.

The screenshot shows the 'Home' dashboard for a learner. It features a search bar for courses and a summary of progress: 7 courses in progress, 1 completed course, 4m training time, 3 badges, and 400 points. Below this, there are sections for 'ISMS' (Information Security all Staff, Training on Implementation of ISMS ISO 27001, Classification of Information, GDPR for User, Incident Management, Information Security Awareness Training 2022, Phishing) and 'Onboarding programs' (Basics Microsoft Teams @ Viseven).

The screenshot displays the learner's profile for Ruslan Shastun. It includes a 'LEARNER TYPE' badge and an 'Export to Excel' button. The dashboard shows 4 courses in progress, 1 completed course, 5m training time, 3 badges, and 400 points. The 'Activity' section shows 2 logins last week and 9 logins last month. A 'Progress overview' section features a bar chart showing logins and course completions over time, and a donut chart indicating that 11.1% of the course is completed. The bottom of the page shows 'Recently earned' badges and a 'Compared to others' section.

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 coaching module interface for a user named Allen Andie. The main title is "Coaching for medreps". The interface is divided into two sections: "Section 1" and "Section 2".

Section 1: Contains a question titled "How was thoroughly explained the info about a brand?". The question type is "Single choice". The question text is "How was thoroughly explained the info...". There are four answer options: "Could be better, 70% covered", "Low amount of the info shared", "Need improvement, 50% covered", and "Precise enough". The "Is required" checkbox is checked. The section target is 1.

Section 2: Contains a question titled "Which topics these articles may touch?". The question type is "Text". The question text is "How was thoroughly explained the info...". There are no answer options visible. The "Is required" checkbox is checked. The section target is 5.

The interface includes a sidebar with navigation options: Sales classifiers, Periods, User tracking, Campaign settings, Trash, Reporting, User management, Planner, Notification, eWizard, LMS, Plugins, Technical tools, Sales, Coaching, Coaching form, Coaching, and Tasks console. The bottom of the interface shows the Plاتفorce logo and copyright information: "Plاتفorce © 2014-2023 V 4.0.0".

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 displays the Platfora user interface for configuring a survey. The sidebar on the left contains a navigation menu with items such as Dashboards, Clients, Contacts, Organizations, Products, References, Classifiers, Segmentation tool, Survey, Contacts survey, Share survey, Adaptive segment setup, Sales classifiers, Consents, Characteristics, Action types, User activities, Q&A, Periods, User tracking, Campaign settings, Trash, Reporting, User management, Planner, Notification, and eWizard. The main content area shows a survey configuration for 'Annual' with a contact named 'Ball Sam' (Pharmacist). The survey title is 'Which topics those articles may touch?'. The survey is divided into two parts, 'Part 1' and 'Part 2'. Each part contains multiple questions, each with a 'Yes' (checked) and 'No' (unchecked) option, and an 'Or' option. The bottom of the interface shows the Platfora logo and copyright information: 'Platfora © 2014-2023 V 4.0.0'.

Order Management

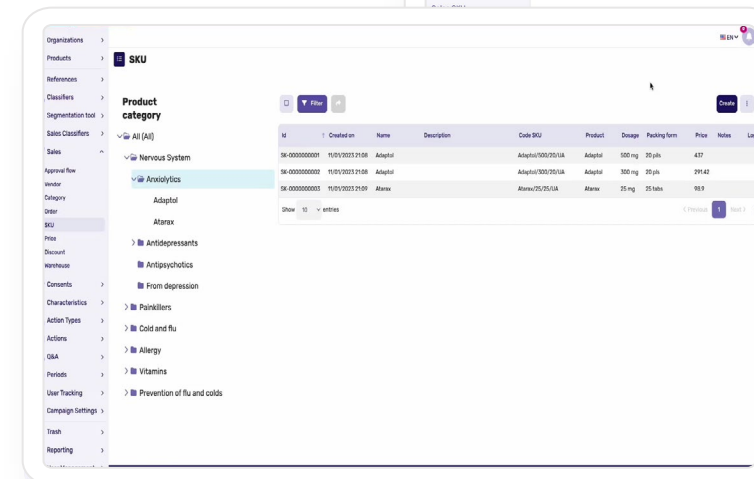
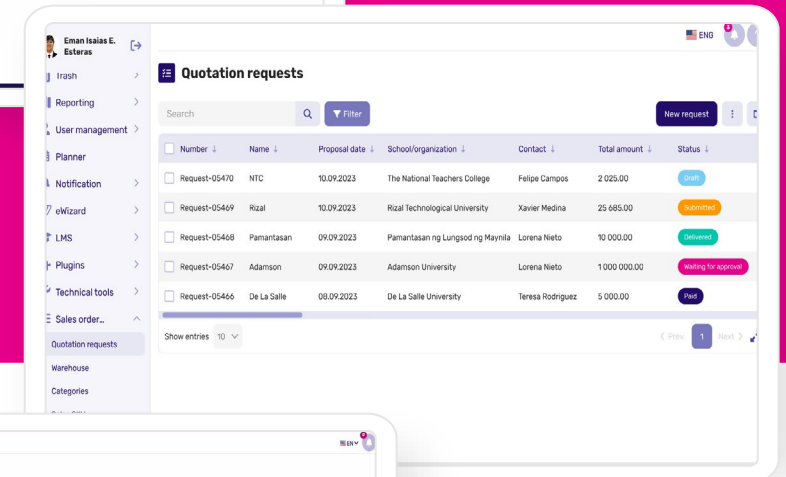
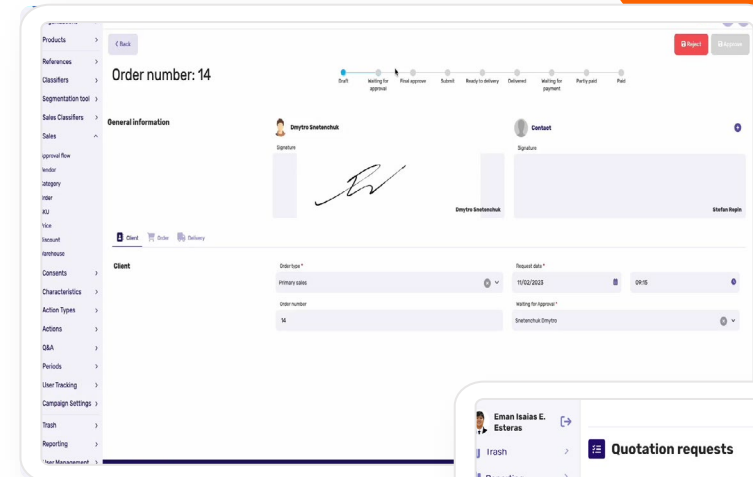
Approval flow: create or edit existing approval flows, assign users to certain business stages of the approval, and track the approval status of each one of them.

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.



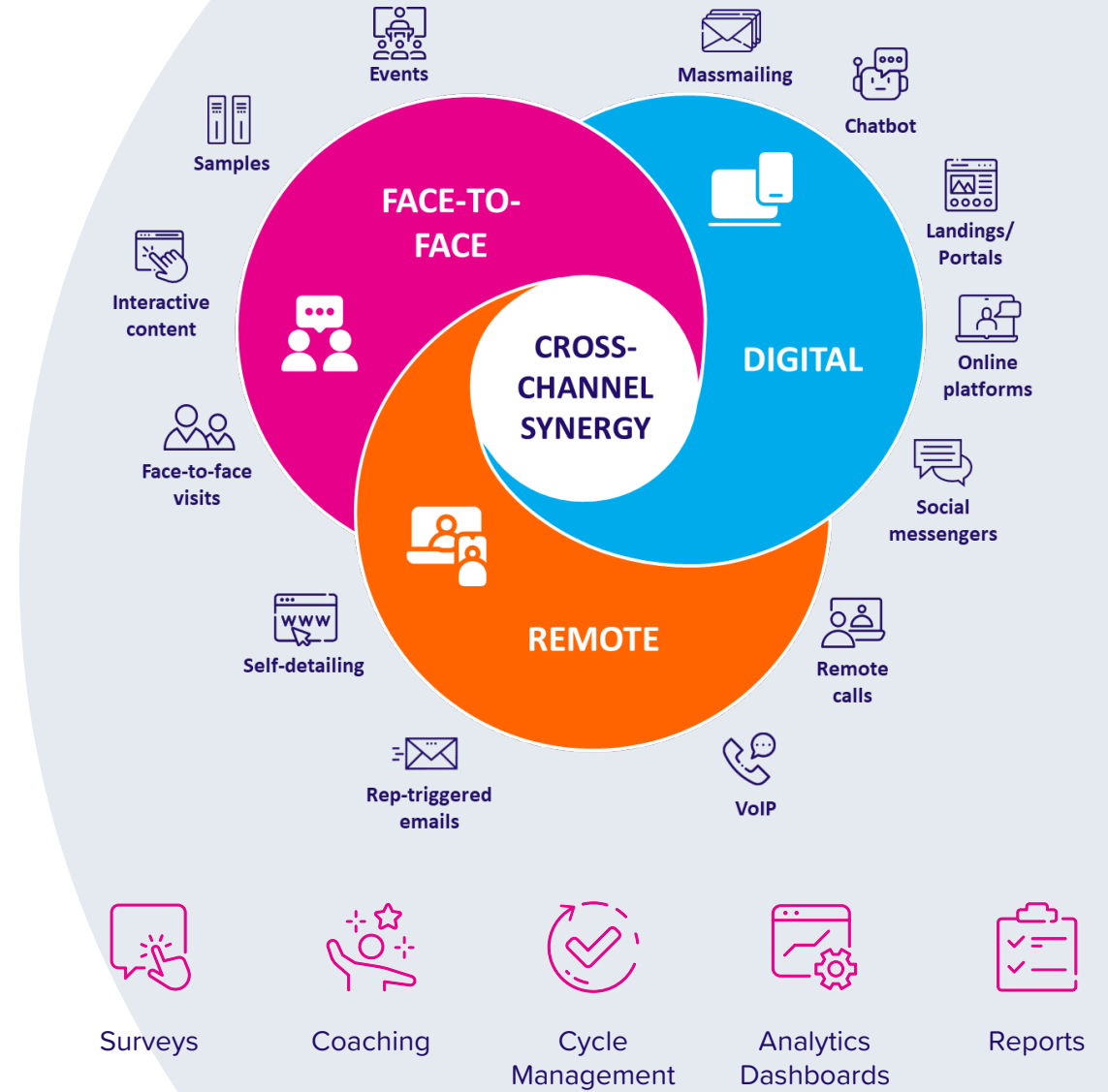
Platforce Modules

Flexibility

Our solution is tailor-made for the pharma sector, offers unparalleled customization. It integrates smoothly with client-specific workflows and regulatory demands, enhancing budget efficiency and HCP engagement.

Adaptability

Designed for the dynamic pharma industry, Platforce easily adjusts to local regulations and market shifts, ensuring companies stay compliant and ahead of trends.



Ready to get started?

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

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