TRINITY

A Playbook for Optimizing Your Commercial Data Environment

For First Launch and Emerging Life Sciences Companies

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Introduction

What is keeping commercial data leaders in emerging life sciences companies up at night as they bring their technology to life in preparation for launch? What are the biggest concerns when considering changes to an existing infrastructure? Trinity Life Sciences has partnered with many first launch and emerging companies for decades to find solutions to their biggest technology challenges.

In this Advisory Brief, we pause to reflect upon some of the common missteps we've seen companies take when deploying their commercial data environment. We have compiled a playbook of best practices and things that companies should be thinking about to mitigate risk and foster success for their organizations.

Best Practices to Optimize Your Commercial Data Environment

Clarify Use Cases

Develop an Architecture Roadmap

Assign Clear Role Definitions for Data & Reporting

Develop a Cohesive Analytics & Dashboarding Governance Strategy

Establish Governance Regardless of Company Size

Understand the Implications of Push versus Pull Reporting Strategies

Assess the Strengths and Weaknesses of Data Sources

Prioritize Infrastructure Decisions

Create Efficient & Consistent Data Marts

Define Ownership Between Internal Functions & Vendors

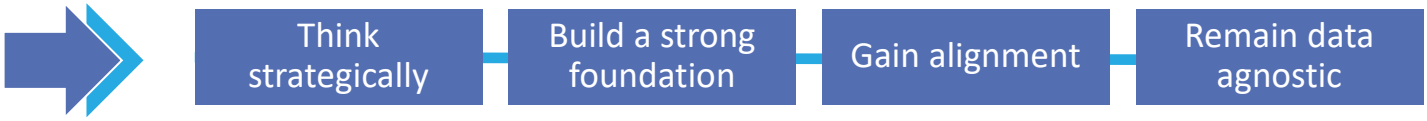
Clarify Use Cases

Industry Challenge

First launch life sciences companies often fail to clarify appropriate use cases when they acquire data. Defining data and system use cases takes time, a resource in short supply among these organizations. Individuals responsible for data management often prioritize the acquisition of data and systems without vetting the precise use cases those investments should address.

Trinity has observed that ambiguous or ill-defined use case definitions often lead to poor data decisions, architectural design challenges, development delays and increased expense.

Takeaways for Success



Companies can mitigate this risk by clarifying data use cases early and across teams when deploying their initial infrastructure. Taking a step back to understand the needs across the organization is important. Additionally, companies should be strategic regarding acquisition of data and deployment of systems, ensuring there is collaboration across functional teams.

Consider that data sources will be leveraged throughout the product lifecycle from pre-launch through peri-launch and post-launch. A strong, integrated data environment provides the foundational building blocks for data enablement, reporting, and analytics to support the organization as it grows and scales.

Collaboration is key to successfully defining data requirements. In support of this goal, Trinity always recommends a data summit with cross functional teams, distribution partners and data providers to gain alignment. Companies should ensure the data will support actionable insights that meet strategic business objectives. Companies also need to ensure that workflows will meet the demands of the business and don't become driven by the technology perspective.

There has been an explosion of new data sources in recent years. Companies should build systems and solutions that remain data agnostic, allowing for the integration of new data sources as organizational needs and industry capabilities evolve.

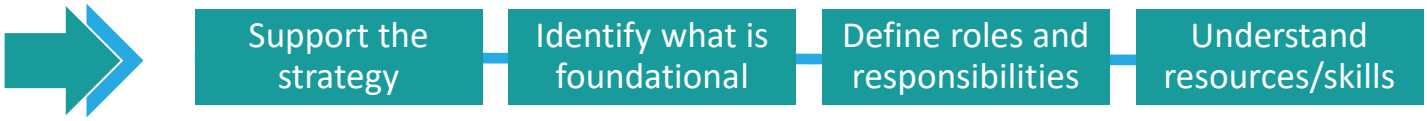
Develop an Architecture Roadmap

Industry Challenge

Emerging life sciences organizations may deploy a data architecture without a clearly defined roadmap. Going from R&D and clinical to Commercial is often a drastically different need as it relates to data infrastructure and technology.

Trinity has observed that organizations lacking a clear technology roadmap for defining infrastructure may struggle to address the organization's continually changing analytics and reporting needs.

Takeaways for Success



Harmonizing the resources necessary to implement a commercial data infrastructure with clarity requires careful planning. Emerging life sciences companies should define a data management roadmap, either to implement infrastructure for the first time or to grow an existing data infrastructure.

After helping many companies build their data roadmaps, Trinity has identified the following best practices:

- The roadmap should describe the options and interdependencies of people, processes, and technology necessary for robust commercial data management.
- Companies should ensure the roadmap supports their strategy and enables their data for reporting and analytics.
- There should be alignment on what data and systems are foundational and must be in place for launch and which can be more flexible and phased in over time. Understanding cost implications and how they span budget cycles may factor into these decisions.
- Companies should determine who owns the decision making and deployment of data and systems, and ensure roles and responsibilities are clearly defined.
- Companies should understand resources and skills that currently exist internally, and which may need to be hired or outsourced.

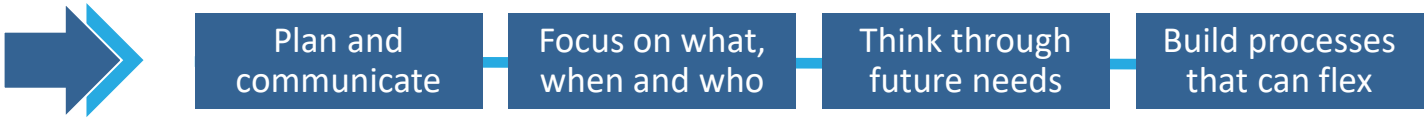
Assign Clear Role Definitions for Data and Reporting

Industry Challenge

Emerging life sciences companies may lack clear role definitions between Commercial and IT to enable Master Data Management, Data Warehousing and reporting success. The foundational systems required to manage commercial data are complex and nuanced and are likely to have dependencies with systems across various functional areas. Both Commercial and IT may have their own sets of requirements for how these systems need to be deployed.

Trinity has observed many organizations struggle to define requirements that are compatible across groups and clearly articulate the responsibilities of stakeholders and business partners.

Takeaways for Success



Organizations need to establish strong planning, collaboration and communication to gain alignment on the critical questions:

- What do they want to accomplish.
- When do they want to accomplish it.
- Who should be responsible for decision-making, and who needs to be engaged to ensure they are doing the right things for the organization.

Defining responsibilities between teams, outlining decision-making ownership and keeping partners engaged leads to improved outcomes.

It is also important for companies to think through immediate needs versus longer-term operational support requirements to ensure they are maximizing and driving value from their systems, tools and data. They should focus on building efficient, flexible tools and deploy a solution that can evolve with organizational needs.

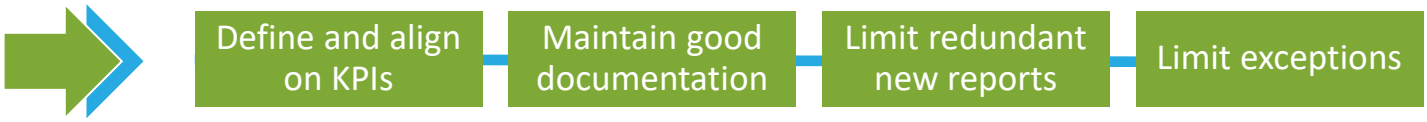
Develop a Cohesive Governance Strategy for Analytics and Dashboarding

Industry Challenge

Lack of a cohesive analytics and dashboarding governance strategy can lead to significant incremental effort, added complexity and increased cost for life sciences organizations. The demand for rapid insights to monitor commercial performance may result in companies hastily implementing reporting and analytics solutions. This leads to inconsistent business rules, or data from different reports telling different stories, which in turn leads to mistrust in the data and reporting platforms.

Trinity has observed companies in this situation implement costly infrastructure rebuilds to regain organizational trust and to rectify these challenges.

Takeaways for Success



Establishing a robust analytics governance process from the onset can help companies mitigate this risk. Companies should understand and define the KPIs, measures and calculations that will be leveraged. They should align on which teams are using the measures and for what specific purposes. Companies can leverage enablement sessions to gather feedback from stakeholders, document changes and decisions, and share them in a systematic way. When a decision is made, there should be a record of why it was made, who made it and the value that the change will have for the organization.

Companies should use trade-off conversations to modify existing reports, rather than creating unnecessary new reports. If new reports are requested, they should understand why they are needed.

Exceptions should also be limited, along with leveraging data outside of standard processes and systems.

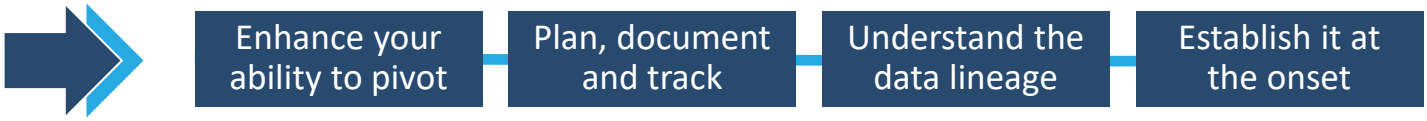
Establish Governance Regardless of the Size of the Company

Industry Challenge

Emerging companies tend to believe data governance and associated processes are only needed at larger companies with more complex environments. Emerging life sciences organizations often have nascent commercial and technology teams with stakeholders who wear multiple hats, and the need for formal process may seem too much. However, lack of oversight and planning hinders the ability to ensure appropriate investment in data management personnel, technology and processes.

Trinity has observed even traditionally nimble organizations stalled by challenges and inefficiencies with how internal data is managed, accessed and reported across the organization.

Takeaways for Success



A robust data infrastructure serves as the critical lynchpin for commercial analysis. Good governance does not equate to being less nimble but enhances an organization's ability to pivot.

Keys to effective governance include thoughtful planning, documentation and tracking for both near-term and longer-term initiatives. The team that helps to develop and launch the initial system may leave the organization, and the intelligence of why a decision was made disappears with them. Companies who do not track what data is coming in and how it is being used lose the ability to understand the effective data lineage.

If ignored at the onset, setting up governance becomes increasingly difficult and more time consuming. If companies don't take the time to put in place effective governance, the ability to have an effective data management strategy is also extremely limited. Building systems without good understanding and controls increases the likelihood for failure to meet objectives.

Understand the Implications of Push versus Pull Reporting Strategies

Industry Challenge

Life sciences organizations may struggle to understand the implications of push versus pull reporting strategies. While business intelligence efforts understandably emphasize the KPIs and layouts for reports, organizations often fail to adequately evaluate the trade-offs in the way reporting platforms are utilized.

Trinity has observed that self-serve analytics can empower the appropriate user groups, though it often confuses or upsets users who are less familiar with the properties of the underlying data. Push reporting lessens the administrative burden to view reports but limits the flexibility to perform deeper analysis or view information in alternative formats.

Takeaways for Success

Develop a data access strategy — Consider unique user needs — Not all users are analytical — ID need versus nice to know

Strong business intelligence and reporting capabilities are necessary for commercial effectiveness. When implementing a business intelligence process, organizations should devote sufficient effort to developing an appropriate data access strategy – aligning information delivery to user needs.

Differentiating user groups and developing reporting and access strategies to support the unique requirements of each group improves adoption and utilization. Expecting executives or senior level users to leverage a system in the same way as analysts or home office users isn't practical. Nor is an expectation that all users will be comfortable leveraging self-service analytics.

Trinity often finds organizations develop their business intelligence platforms with the intent to deliver self-service analytics. The goal is to provide the greatest access to available data. Often, the result is confusion and limited utility by the less analytical users. And analytical users can get lost in data exploration versus addressing critical business needs. Trinity recommends finding a balance between critically needed dashboards that are easily accessible and analytical portals for data discovery.

Assess the Strengths and Weaknesses of Industry Data Sources

Industry Challenge

Emerging life sciences companies may lack an understanding of the strengths and weaknesses of given data sources. The datasets used to drive commercial strategy in healthcare have grown substantially over the last two decades. In addition to primary and secondary sales and utilization data, organizations now seek greater insight into their customers including professional and organization relationships. Specialty manufacturers that are often highly dependent on gleaning insights from patient or claims data are faced with the challenge of selecting a dataset from competing vendors or trying to build it themselves.

Trinity has observed companies looking for guidance in understanding the benefits and challenges of each approach and source.

Takeaways for Success

Companies should apply a strategic approach to data management, not only when it comes to managing the data sources they have purchased but also when deciding which data sources to acquire. Decisions should ensure alignment to the organization's strategic objectives based on a comprehensive data strategy.

Companies often fall into the trap of acquiring data for specific purposes by specific teams. With greater collaboration and understanding of data purchases, companies can identify additional valid data uses to enhance the value of their investment. While not all applications will be critical, having the incremental insights is helpful.

Not all data will support all uses. It is critical to understand, document, educate and communicate the appropriate uses. Data used for the wrong purposes often clouds the broader acceptance of any findings leveraging that data source.

Trinity recommends annual reviews of acquired data to ensure it still meets business needs. Data is expensive, it is important to ensure it delivers value for the investment.

Prioritize Infrastructure Decisions

Industry Challenge

Infrastructure decisions are often delayed at emerging companies, which can create rushed implementations, functionality tradeoffs and missed requirements. Emerging companies tend to have tight budget controls and look to optimize spending. Given the investment required for data management, companies frequently elect to postpone data infrastructure decisions as long as possible. Believing what may seem like rational explanations for delaying infrastructure decisions, they often fail to recognize the full implications of those delays.

Trinity has observed that such delays often yield rushed implementations, which subsequently produce an infrastructure with more limited functionality and missed requirements. Additionally, the cost implications from these delays often outweigh the perceived savings from the delay.

Takeaways for Success

Companies should leverage a disciplined project management approach that promotes flexibility and cost management, without compromising quality. By not using good project management principles, it becomes increasingly difficult to have real conversations to reset expectations with changes in timelines or investment.

New infrastructure deployments often start with a wish list, which gets whittled down from discovery to selection. It is critical to continue to evaluate shifts in priorities and needs during implementation. Understanding the impacts of these changes can provide insights to ensure resources are deployed correctly.

Clear and open communication is equally critical to articulate impacts to the project. Understanding the impacts of trade-offs or changes is necessary to set realistic and agreed to expectations. Dissatisfaction with infrastructure projects is often linked to disconnects in understanding. Those disconnects lead to assumptions and expectations that are not achievable based on the agreed scope. Unfortunately, without good project management and communication, perceptions of misses by the project will become reality.

Create Efficient and Consistent Data Marts

Industry Challenge

Many organizations inadvertently create redundant and inconsistent data marts to support ongoing reporting and analytics needs. Organizations face pressure to extract rapid insights from their data. Although companies may have business intelligence and analytics solutions in place, highly dynamic business requirements often compel certain stakeholders to circumvent existing processes and system configurations. While speed to insights is important, a poor data governance process can significantly inhibit operational efficiencies, data quality and reporting consistency.

Similar metrics leveraged and/or calculated differently across disconnected reports with inconsistent business rules can cause confusion if not managed appropriately. Creating copies of the same data, leveraged in independently managed marts, to generate custom or different reports enables opportunities for inconsistency. This leads to complex data investigations and user distrust.

Trinity has observed that without effective reporting protocols and governance, organizations experience greater effort when modifying their data infrastructure and limited visibility into impacts across separate reporting processes.

Takeaways for Success

Reporting governance | Harmonized business rules | Standardize calculations | Limit data replication

Just as effective data governance is required to ensure good data, so is effective reporting and analytics governance. Deviations from established processes, data stores and reports should be well understood and agreed upon.

It is critical to ensure that established business rules are applied consistently to all analytics and reporting deliverables. If exceptions exist, users must clearly understand differences. The same holds for KPIs and metrics. Calculations should be agreed upon and commonly applied, with deviations in reports or analytics clearly differentiated.

While users may have needs for custom cuts of data, limiting the number of data environments is critical to ensure data consistency and accuracy. It is equally important to clearly delineate the need for raw versus processed data.

Define Ownership Between Internal Functions and Vendors

Industry Challenge

Life sciences organizations may lack clear role definitions between Commercial Operations, IT and vendors. Implementing and maintaining a commercial data infrastructure generally requires coordinated efforts from many cross-functional stakeholders. Commercial Operations may be expected to drive requirements for sales management and to support organizational data analysis needs. IT may need to ensure system reliability, governance and security. Vendor partners are expected to provide expertise for the solutions they have been hired to support. Ensuring efficient and effective operations requires a clear understanding of expectations and the role each team will play.

Trinity has observed that when a lack of clarity exists, functions may make disconnected decisions, for example obtain a particular technology or dataset without recognizing the limitations or future implications to the overall infrastructure and operations. This may result in an organization being limited, unable to make system changes, vendor changes or meet emerging needs.

Takeaways for Success

Clear roles & responsibilities → Open communication → Plan business reviews → Bi-directional accountability

It is critical to establish appropriate RACIs based off clearly defined roles and responsibilities. Lack of role clarity leads to organizational disconnects, vendor disconnects, decreased employee satisfaction and missed project goals. It is also a best practice tenant to ensure alignment of expectations across and within teams, including key vendors.

A net benefit of role clarity is open, honest and transparent communications, along with needed accountability. It also enables accountability to be bi-directional, preventing inappropriate assignment of “blame.”

Regular planned touchpoints with vendors to review future needs, current initiatives and past performance (good and bad) of both organizations should be a standard. It enhances alignment, shares success and enables improvements.

Conclusion

We hope this Advisory Brief has illuminated some of the most critical things that companies should be thinking about when deploying their commercial data environment. Technology is a tool, and as with all tools, most are effective when leveraged with adequate planning and maintenance, along with clarity for what it does and why it is used. Organizations can face significant challenges if they fail to recognize the importance of defining best practices for the way technology is leveraged.

In summary, planning is critical. Companies should take time to understand the business objectives and strategy to put in place the appropriate infrastructure and reporting. Collaboration and communication are key, along with clarity of roles and responsibilities. Governance should not be viewed negatively. If done right, governance (or perhaps more favorably referred to as enablement) can enhance organizational nimbleness. When it comes to tools, it takes a blend of configurability, customization and out of the box thinking. Companies should think through their custom work, and make sure they are not diminishing their ability to pivot to meet evolving business needs. Finally, good documentation and organizational alignment increase the likelihood of success. Documenting why decisions were made helps companies thrive not only today but also tomorrow with their next generation of users.

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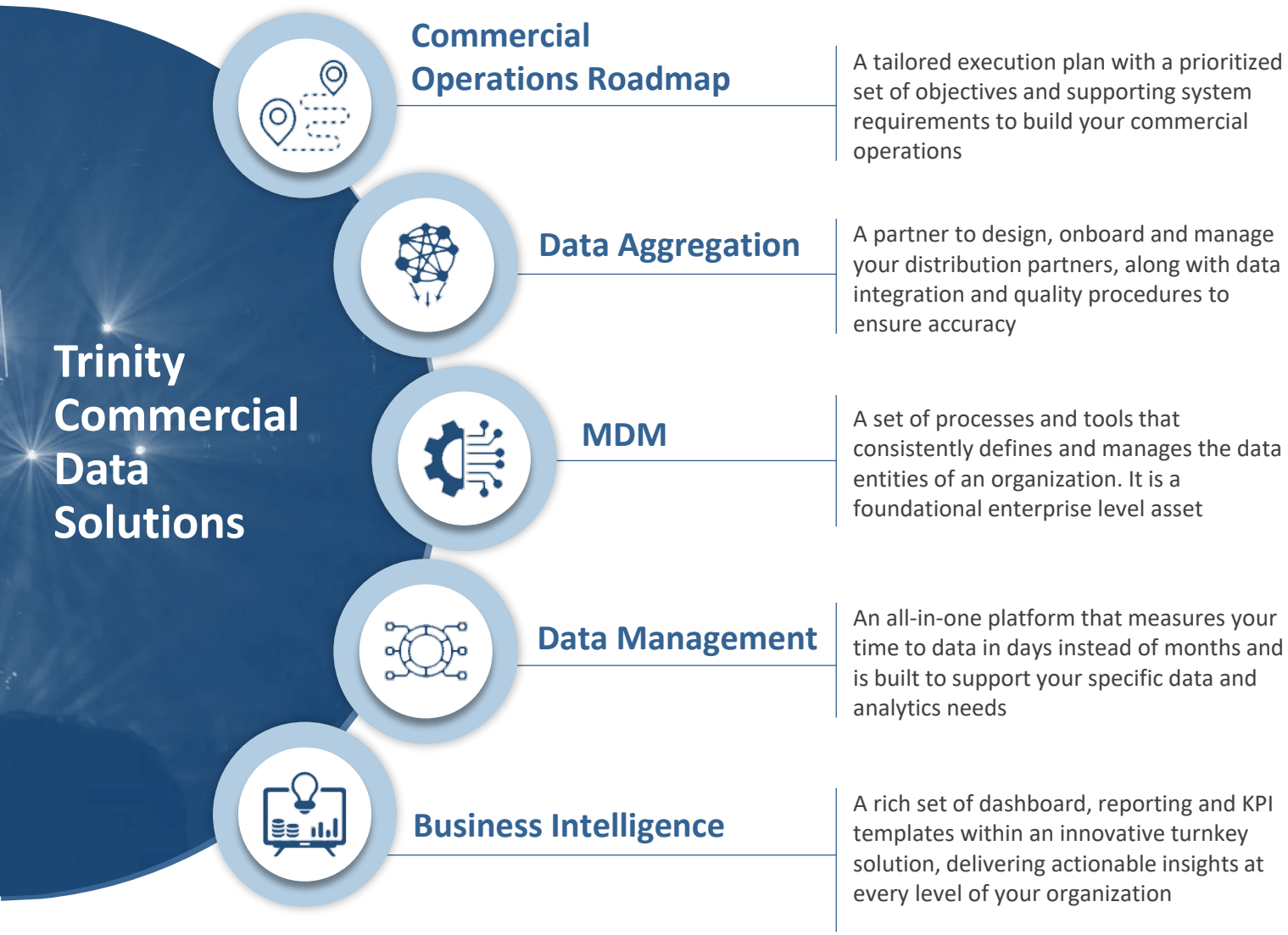
About Trinity Commercial Data Solutions

Data lives at the foundation of every successful life Sciences company; however, it is also one of the biggest pain points. Trinity's clients require a timely, accurate, agile and scalable solution that is accessible to their entire team. Trinity provides a business-driven solution that avoids traditional roadblocks and keeps pace with companies' evolving business needs. We ensure data quality, accessibility, and delivery.



Commercial Operations Roadmap

A tailored execution plan with a prioritized set of objectives and supporting system requirements to build your commercial operations

Data Aggregation

A partner to design, onboard and manage your distribution partners, along with data integration and quality procedures to ensure accuracy

MDM

A set of processes and tools that consistently defines and manages the data entities of an organization. It is a foundational enterprise level asset

Data Management

An all-in-one platform that measures your time to data in days instead of months and is built to support your specific data and analytics needs

Business Intelligence

A rich set of dashboard, reporting and KPI templates within an innovative turnkey solution, delivering actionable insights at every level of your organization

About Trinity

Trinity is a trusted strategic commercialization partner, providing evidence-based solutions for the life sciences. With over 25 years of experience, Trinity is committed to solving clients' most challenging problems through exceptional levels of service, powerful tools and data-driven insights. Trinity's range of products and solutions includes industry-leading benchmarking solutions, powered by TGaS® Advisors. To learn more about how Trinity is elevating life sciences and driving evidence to action, visit trinitylifesciences.com.

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