

# Target Setting



## Customer Need

Traditionally, when sales reps in life sciences organizations want to request changes to targets and segments, they use spreadsheets and emails to rationalize their request. After discussions with their managers, manually updated spreadsheets are forwarded to the home office for final review and approval.

This target-setting process is manual, prone to errors, and doesn't provide any history or visibility into the discussion or rationale for changes. As the changes are approved, they are entered into Veeva or other CRMs. The lack of control over the timing of the change results in greater complexity and administrative "noise" as target updates are made within the system. Many teams struggle to manage the constant updates and prefer a regular cadence such as a quarterly review, so they have time to discuss changes, understand their impact, and come to an internal agreement on a proposed target segment.

## Key Features

Conexus Target Setting facilitates target-setting discussions with visualizations that provide real-time feedback on a rep's proposed changes. The solution uses configurable approval workflows to automate and optimize the process while tracking customer segmentation change requests. Mandated comments capture and track the reason for the change as it moves through the review cycle. Offline workflows enable teams to implement the change on their schedule and based on their unique business needs.



## Benefits of Target Setting

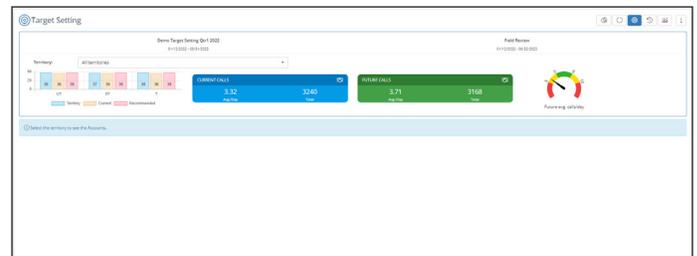
Conexus Target Setting facilitates collaboration between reps, managers, and the home office to appropriately segment their targets. Mandated comments often trigger additional dialogues among managers and sales reps. Unprecedented visibility and collaboration combined with an intuitive interface help teams set appropriate territory-level targets and refine call plans for optimal sales coverage. Auditable workflows ensure that the entire team has access to and understands the changes, the rationale for changes, and when they are implemented. Once finalized, Target Setting output can be easily transferred to a Veeva call plan or other CRM.

Our solution offers control and compliance while fostering greater collaboration. Conexus Target Setting facilitates more meaningful and efficient conversations about targets and segments that lead to more efficient and effective sales activities.

## Target Setting

Territory	Account	Rep Name	Rep Segment
DM1001	Pharm Co.	John Doe	Pharm
DM1002	Chemical	Jane Smith	Chemical
DM1003	Biotech	Mike Johnson	Biotech
DM1004	Medical	Sarah Lee	Medical
DM1005	Pharm	David Kim	Pharm
DM1006	Pharm	Emily White	Pharm
DM1007	Pharm	Chris Brown	Pharm
DM1008	Pharm	Alex Green	Pharm
DM1009	Pharm	Mia Black	Pharm
DM1010	Pharm	Noah Grey	Pharm
DM1011	Pharm	Olivia Red	Pharm
DM1012	Pharm	Liam Blue	Pharm
DM1013	Pharm	Ava Yellow	Pharm
DM1014	Pharm	Ethan Purple	Pharm
DM1015	Pharm	Sophia Pink	Pharm
DM1016	Pharm	Lucas Orange	Pharm
DM1017	Pharm	Isabella Silver	Pharm
DM1018	Pharm	Benjamin Gold	Pharm
DM1019	Pharm	Charlotte Bronze	Pharm
DM1020	Pharm	James Iron	Pharm

Target Setting Dashboard



Target Setting Review

## About Us

Conexus Solutions, Inc. delivers innovative sales and marketing operations support and technology solutions to small and mid-size life sciences companies. Our solutions are developed and implemented by our team of sales, marketing, and technology professionals who bring decades of experience and innovation to every project. Visit us at: [www.cnxsi.com](http://www.cnxsi.com).