CONEXUS
SOLUTIONS, INC.

Case Study:

A Blueprint for Scalable, Efficient, and Compliant Field Operations

Expert-Managed Automation Delivered 100% Compliance and Improved Field Productivity

Accelerating Commercialization

A global pharmaceutical company faced a growing administrative burden as Account Managers in the U.S. spent hours each week manually entering HCP meal expense reports into Concur, the company's expense management system, and verifying attendee data in multiple systems, including Veeva CRM and a centralized data master. Managers also dedicated significant time reviewing and approving entries.

> **With rising compliance risks, increasing meal volumes to support new product launches, and constrained field selling capacity, the company realized its manual process had become unsustainable.**

To overcome these challenges, reclaim valuable field and management time, and support future growth, the company pursued a scalable, automated solution to streamline reporting and ensure full compliance with CMS and corporate spend reporting requirements.

Automation reduced HCP meal expense reporting and approval time in Concur by 98%, achieved 100% compliance, and freed teams to prioritize HCP engagement and strategic initiatives.

Solution Snapshot

Conexus Solutions, Inc. partnered with the client to automate the end-to-end HCP meal expense reporting and approval process in Concur, replacing manual steps with a streamlined, efficient workflow supported across extended time zones.

Strategic Outcomes:

- **98% reduction** in HCP meal expense reporting and approval time.

- **100% compliance** with HCP spend reporting requirements, minimizing risk and exposure.

- **Scalable, future-ready process** supporting organizational growth and new initiatives.

- **Improved Account Manager productivity**, enabling teams to focus on HCP engagement and high-value activities.

98% Faster Reporting Through Streamlined Automation

Entering HCP meal expenses was a time-consuming process for the Account Managers, whose time is best spent on sales. Completing a single meal entry often took up to four hours, with approximately 30 meals per month, and a limit of two expense reports that could be submitted per month. Compounded by multiple representatives per region and a manual review process overseen by managers, this resulted in several days of administrative work per week for each employee.

To streamline the HCP meal expense process, the company partnered with an expert managed services provider with U.S. and global resources to automate the workflow, handle data entry, ensure compliance, and provide extended coverage support. To initiate HCP meal expense reporting, Account Managers submitted sign-in sheets and receipts via a simple and secure online form. The offshore team validated attendee data in Veeva CRM and Concur, ensuring compliance with CMS regulations and NPI reporting. Missing attendees were added to the centralized data master and verified before inclusion in the expense report, with the team coordinating across multiple system owners to ensure accuracy and consistency.

> A quality-control process flagged discrepancies, which were routed through a helpdesk for resolution before manager review, reducing manual workload and allowing managers to focus solely on exceptions.

The following diagram shows how the optimized workflow simplifies and accelerates HCP meal expense processing from initial submission through final manager approval:

Optimized HCP Meal Expense Workflow

Account Manager Submits Meal Documentation
Account Manager completes the online form and uploads the sign-in sheet and receipt after the HCP meal engagement.

Data Entry Team Validates and Processes
The team reviews the submission, verifies attendee data, adds missing HCPs to required systems, and resolves discrepancies with Account Manager as needed.

Expense Entry and Quality Check
Validated meal details are entered into Concur and undergo a quality check to ensure accuracy and compliance.
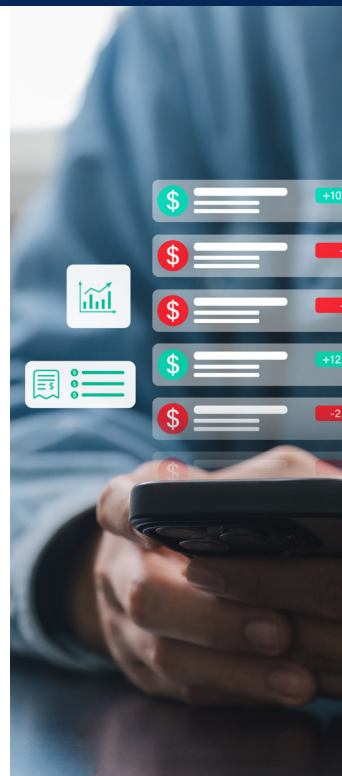
Account Manager and Auditor Review
Account Manager reviews and submits the expense report in Concur. Auditors then complete a compliancereview.

Manager Approval and Notifications
Managers approve finalized reports. Concur sends notifications to the Account Manager and Data Entry Team if any reports require correction.

Optimized HCP Meal Expense Take-aways

Training and onboarding support ensured smooth adoption, while SLAs (Service Level Agreements) and regular reporting maintained fast turnaround and consistent accuracy. By outsourcing labor-intensive entry and review tasks, the solution enabled Account Managers to allocate more time to meaningful HCP interactions, supported increased meal programs following new product launches, and established a scalable framework for future growth.

Delivering Scalable Efficiency for Data-Intensive Workflows

The automation of HCP meal expense reporting and approvals transformed a previously manual, time-intensive process, **reducing effort by 98%** while **ensuring 100% compliance**.

With a third-party team managing data entry, validation, quality checks, and workflow oversight, Account Managers and managers could focus on high-value activities, such as HCP engagement and strategic account priorities.

This scalable approach can be applied to other manual, data-intensive processes across the organization, providing a blueprint for efficiency and compliance.
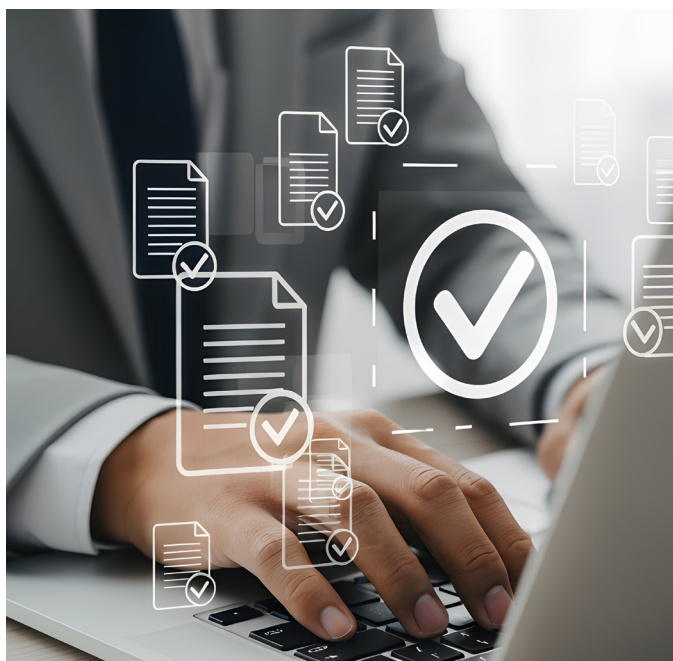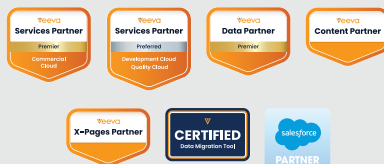
The team behind your team

Conexus Solutions, Inc. is a life sciences technology and managed services partner helping commercial and R&D organizations simplify complexity, reduce risk, and operate more efficiently. With deep industry expertise and flexible, scalable delivery across Veeva, Salesforce, AI, analytics, and operational support, Conexus enables life sciences companies to accelerate growth, strengthen engagement, and focus on innovation and patient outcomes. Learn more at cnxsi.com

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(609) 536-6009

info@cnxsi.com

cnxsi.com