

Roster Management Overview



Customer Need

Most life sciences commercial teams are constantly evolving. As new team members in the field are being onboarded and offboarded, it is quite difficult to track and manage non-HR-specific roster information such as layered territory membership, sample locker locations, or leaves of absence.

Some teams use spreadsheets to track this information, but its dynamic nature requires constant manual updates. The spreadsheet approach limits access to critical data, is prone to errors because of manual interventions, and can't support real-time views of the current roster. It creates a silo of information that must be manually imported into downstream systems to support decision-making. As team members come and go, it is almost impossible to achieve a current, up-to-date understanding of who is actively participating on the team.

Key Features

The Conexus Roster Management Tool is a central repository for non-HR specific field personnel data. It offers the automation and propagation of roster data needed to achieve accurate, real-time views. It helps managers align employees to territories, supports roster for multiple teams and provides a snapshot of the roster at different points in time.

It also offers wider connectivity with the ability to source employee related information from multiple systems through an API or file-based transfers. Users can manage notifications of changes to the roster through different delivery mechanisms while leveraging customizable dashboards that provide insight into employees' information and territories.

Roster Management also tracks roster changes and provides an audit trail. It is part of an integrated sales management suite that provides holistic support for commercial operations. The suite also integrates with Veeva CRM.

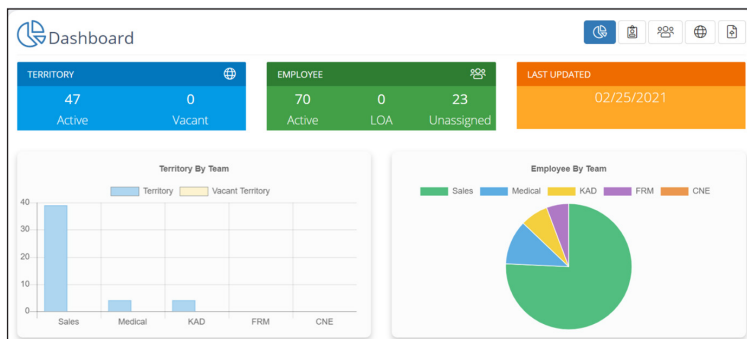


Benefits of Roster Management

Roster Management is part of the Conexus integrated suite of tools that support commercial team management and operations. It offers greater accuracy of information across the enterprise by automating the tracking and management of critical data such as leave of absences, sample storage locations, and territory alignments for multiple teams.

While it integrates with the Conexus Suite and Veeva CRM, users also can export roster data in various file formats to support broader use and integration. Roster Management helps managers maintain up-to-date territory information and manage layered territory alignments for multiple teams.

Roster Management Dashboard



Client Territory Id	Display Name	Territory Team	Territory Level	Employee Name	Employee Id	Hire Date	Mobile Phone	Address	Employee Team	Employee Role	Manager
110000	110000 - NorthEast - RBM	Sales	Region	Hector Terry	10458	12/30/2020		15 Hudson Yards, New York, NY, 10001, United States	Sales	RBM	
110101	110101 - Chicago, IL	Sales	Territory	Jay Allison	20123	12/30/2020		9853 S Drexel Ave, Chicago, IL, 60628, United States	Sales	TBM	Hector Terry
110102	110102 - New Haven, CT	Sales	Territory	Christine Watson	10342	12/30/2020		273 Concord St., New Haven, CT, 06512, United States	Sales	TBM	Hector Terry
110103	110103 - Manhattan North, NY	Sales	Territory	Irene Foster	10343	12/30/2020		910 Summit Ave., Bronx, NY, 10452, United States	Sales	TBM	Hector Terry
110104	110104 - Manhattan South, NY	Sales	Territory	Michael Ryan	10344	12/30/2020		6735 Ridge Blvd., Brooklyn, NY, 11220, United States	Sales	TBM	Hector Terry

About Us

Conexus Solutions delivers innovative sales and marketing operations support and technology solutions to small and mid-size life sciences companies. Roster Management is designed, 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.