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Abstract

The pharmaceutical industry has undergone significant changes in recent decades and has been forced to adapt to new social, economic, and technological structures. But one thing that hasn't changed over time is that sales teams have always been motivated by incentive compensation. Thinking of that, having a tool that allows the sales team to have a high-level analysis of sales progress is a must. After successfully researching the advantages of the DMADV method, the Quota Tracker 2022 was designed and implemented to track sales quotas starting in January 2022. This tracker allows the sales team to analyze their product raw data and territories. After successfully implementing the Quota Tracker, this aims to create an annual leadership role for the employees in charge of this tool in each business unit. And it also intends to be implemented in other Business Units by 2023 since it is an easy way to track quotas and provide a helpful visualization of progress for the sales teams.

Key Terms — DMADV method, forecast, quota tracker, and sales quota.

Problem Statement

By the end of 2021, we found that sales representatives had poor management in keeping track of their sales quotas throughout the year, since the Tableau app is currently the only online site to retrieve raw TRX's reports for product sales. This report shows only the last 13-weeks with a gap of two weeks of delay, which means that the sales team does not see the total of TRX's in real-time. We identified that as time goes by, it is impossible to have visibility of more than the previous 13-weeks of the data, regardless of the day of access. Since a statement with the sales total is received two months after each month, surge an initiative of creating a template that allows a leader to document sales and make an analysis that the Tableau app does not provide. This additional analysis would help the sales team stay up to date on their quota.

Methodology

We use the DMADV methodology to design and implement the *Quota Tracker 2022* for the pharmaceutical sales team. This methodology should be implemented in Six Sigma's projects when a new process, product, or service will be designed or redesigned, and it must meet specific requirements. In Table 1, we can learn a brief definition of the five phases of the DMADV methodology. Figure 1 shows the project timeline proposed for this project.

Table 1: DMADV Methodology	Timeline
DEFINE Define the process and establish goal	January 1 – January 15
MEASURE Measure to determine process needs	January 1 – January 15
ANALYZE Analyze the data to find the best design	January 1 – January 15
DESIGN Design and test the process	January 16 – January 22
VERIFY Ensure that design meets the design input requirements to achieve the goal	April 2022

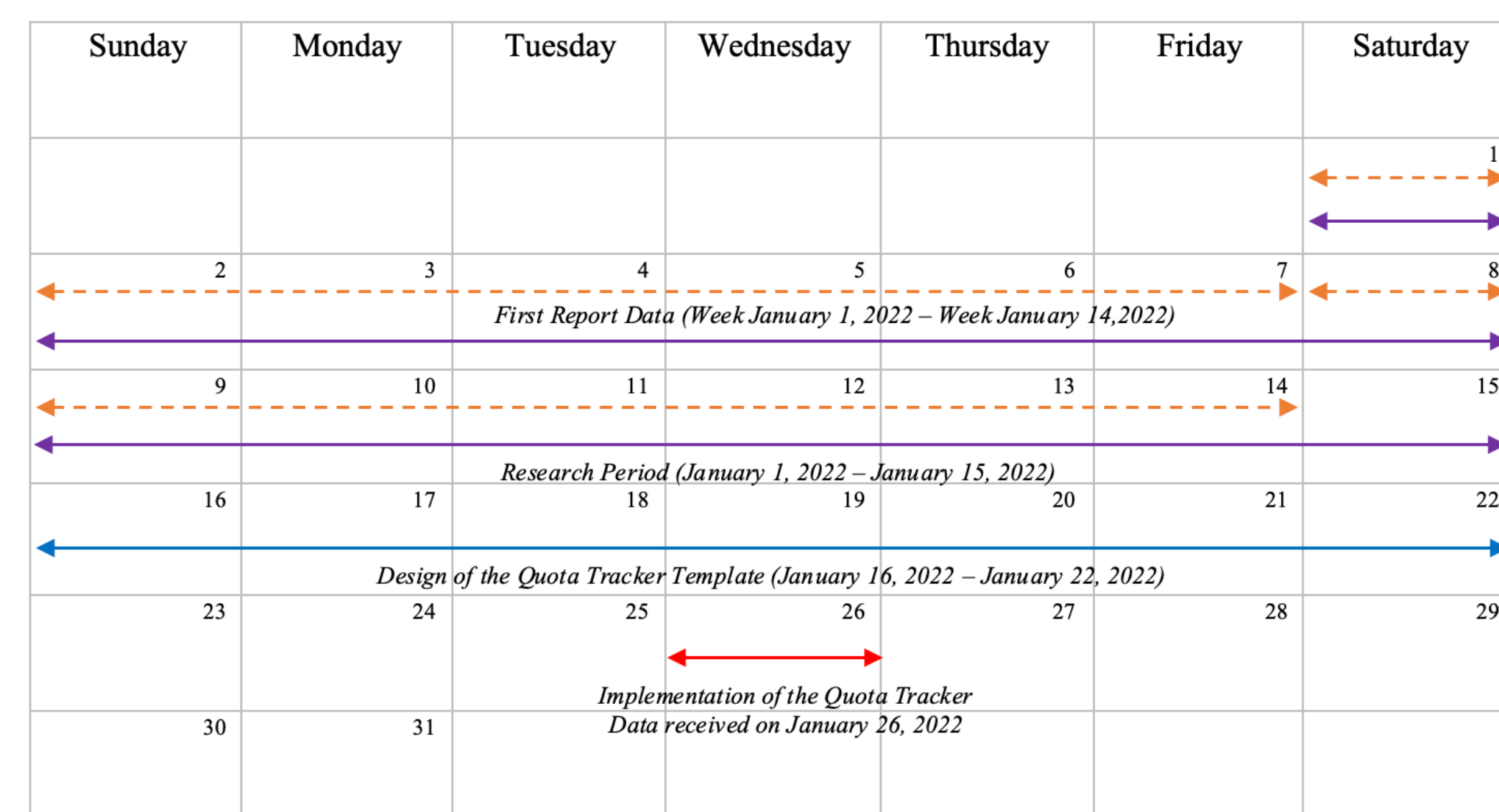


Figure 1: Project timeline in January 2022

Results and Discussion

DEFINE PHASE

Table 2 Project Charter	
Project Description	Design and implement a quota tracker for a pharmaceutical sales team using DMADV methodology.
Project timeline	January 2022 – April 2022
Project Goal	Provide a quota tracker template with high-level analysis for sales team throughout the year.
Benefits	Sales Team - Helpful visualization of sales quota.
	Financial - Reduce time search. Maximize sales team field time.
	Career Development - New cross-functional role.
Project Support	A-Business Unit Manager.
Project Member	Graduate student, A-Business Unit Team.

MEASURE PHASE

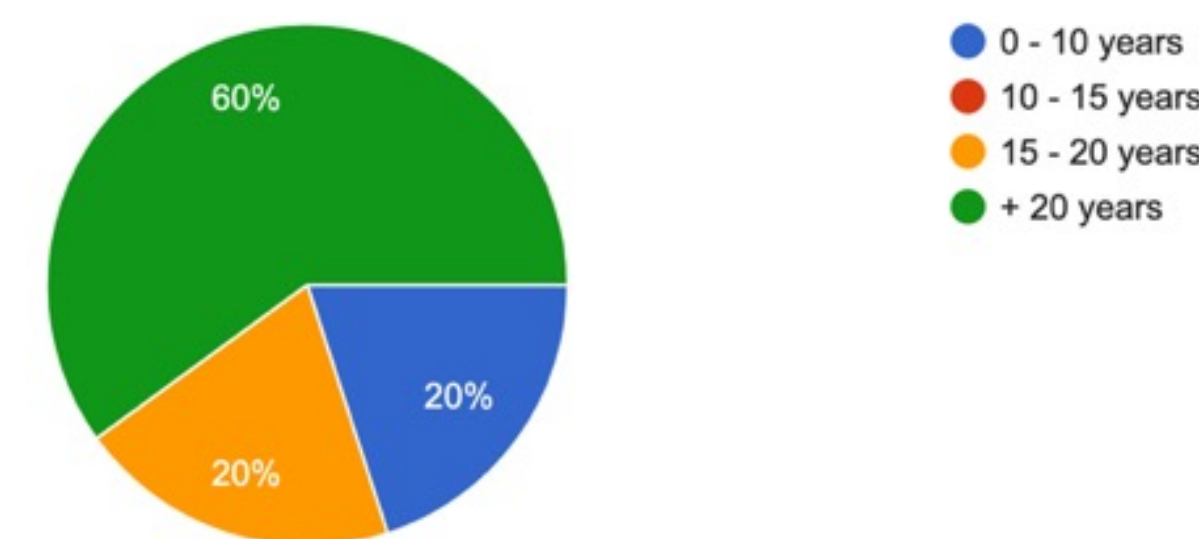


Figure 2: How many years of experience do you have as a Sales Representative?

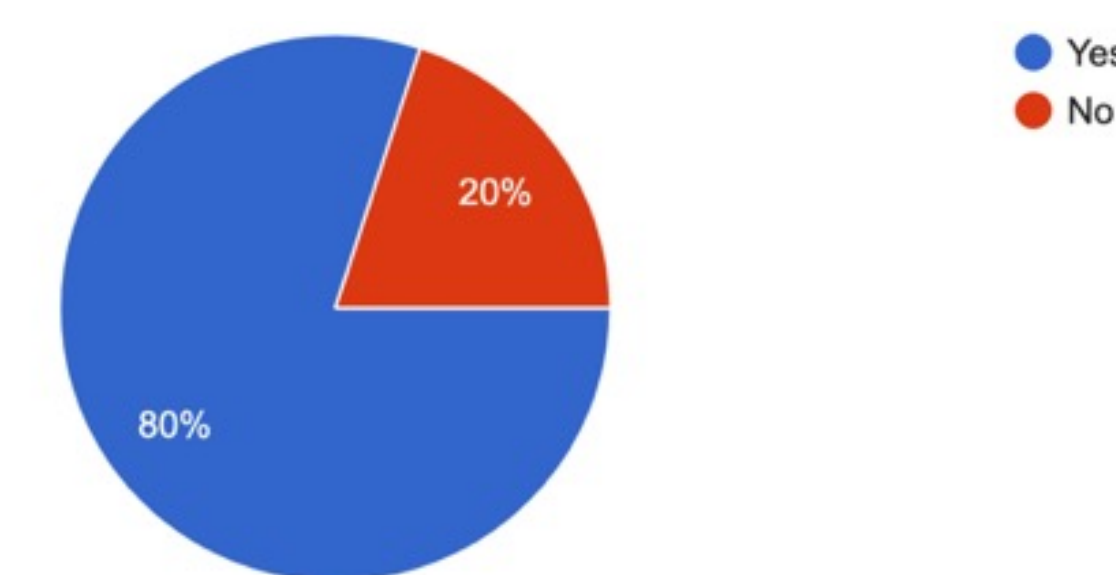


Figure 3: Have you previously used a quota tracker?

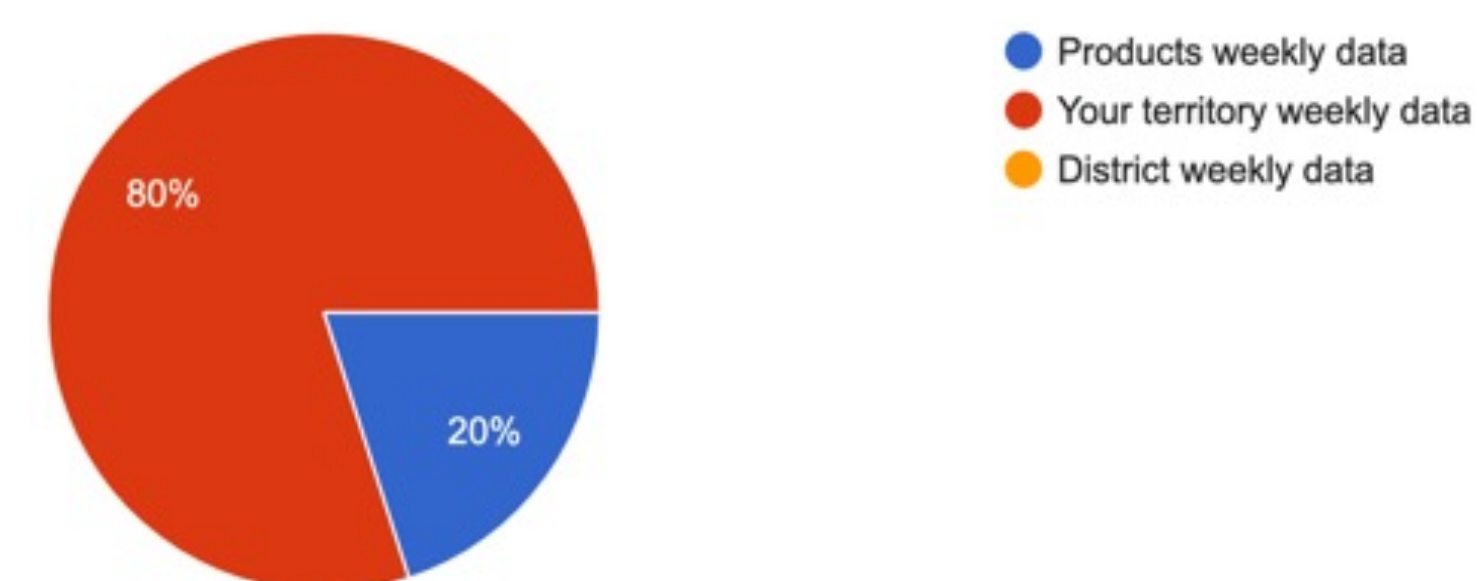


Figure 4: For you, what should be the most important data presented in the 2022 Quota Tracker?

ANALYZE PHASE

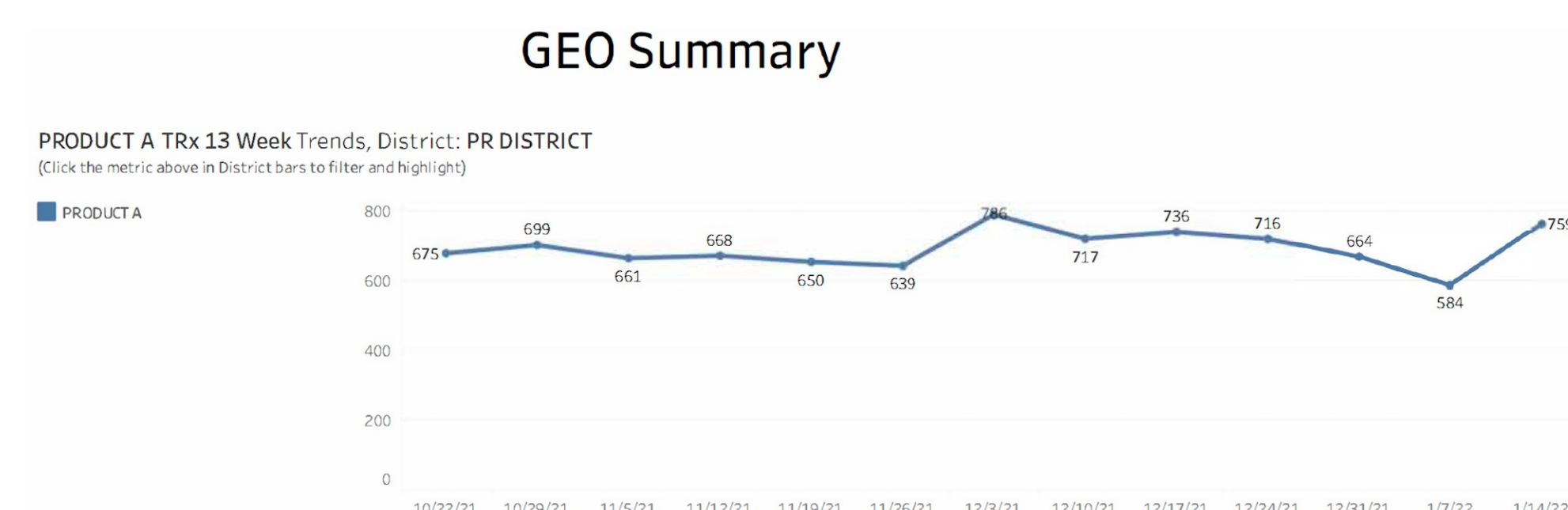


Figure 5: Tableau Product A Geo Summary (January 26, 2022)

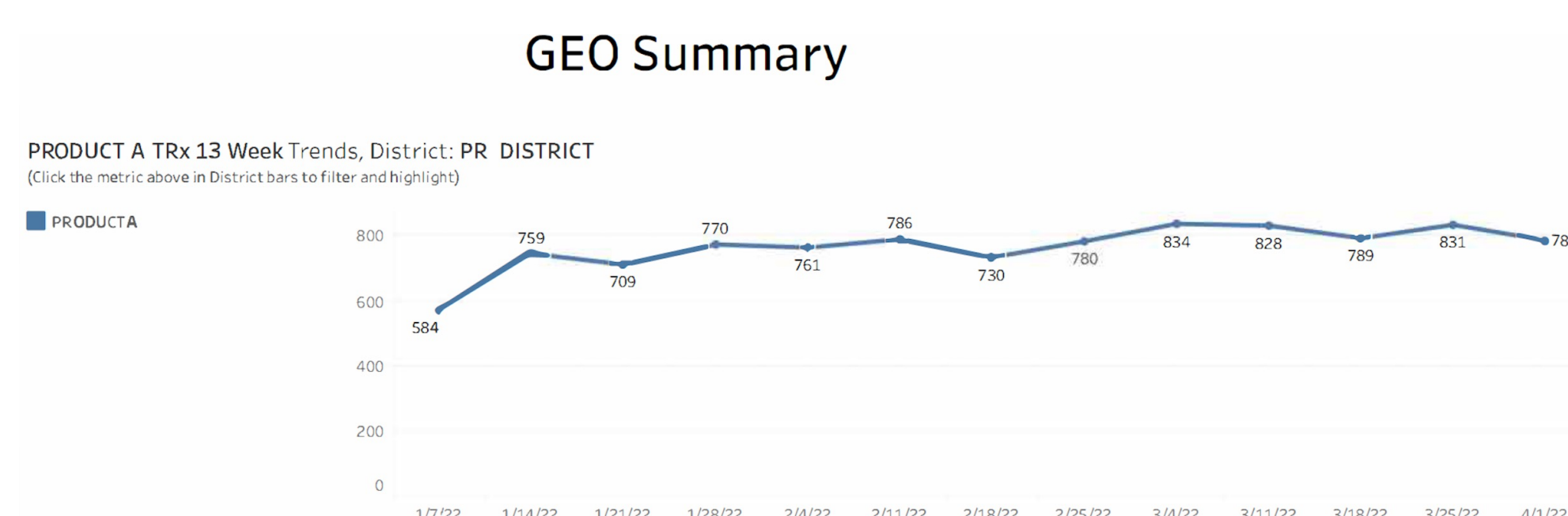


Figure 6: Tableau Product A Geo Summary (April 20, 2022)

DESIGN PHASE

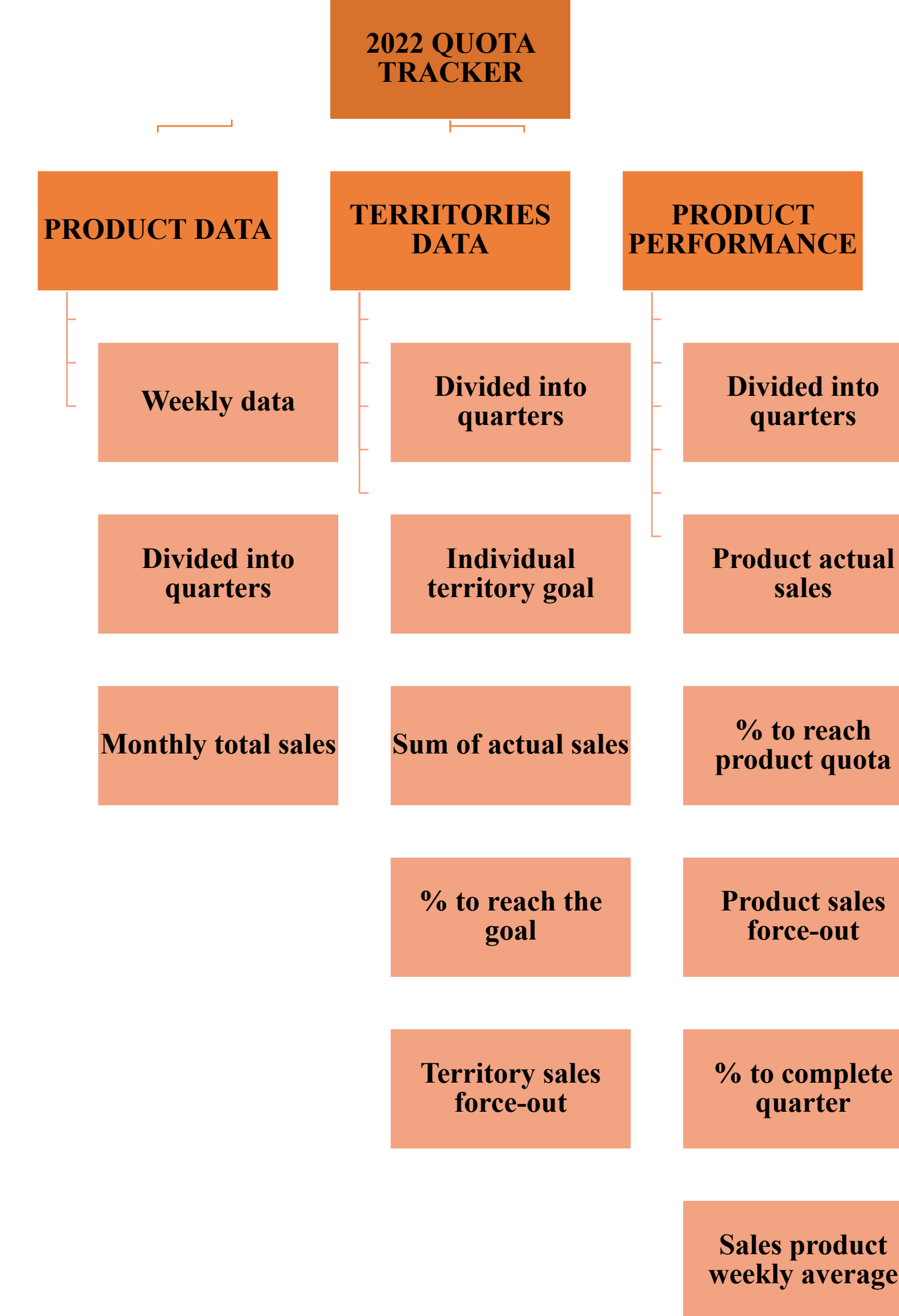


Figure 7: Quota Tracker Excel Template Structure

By establishing the right template structure using Microsoft Excel, we create the template with the specific information the sales team needs it. Figure 8 shows the current product templates as of April 20, 2022, when Q1 was completed. This template is currently in use for four different products.

Figure 8: Product A Quota Tracker Excel Template for 2022

VERIFY PHASE

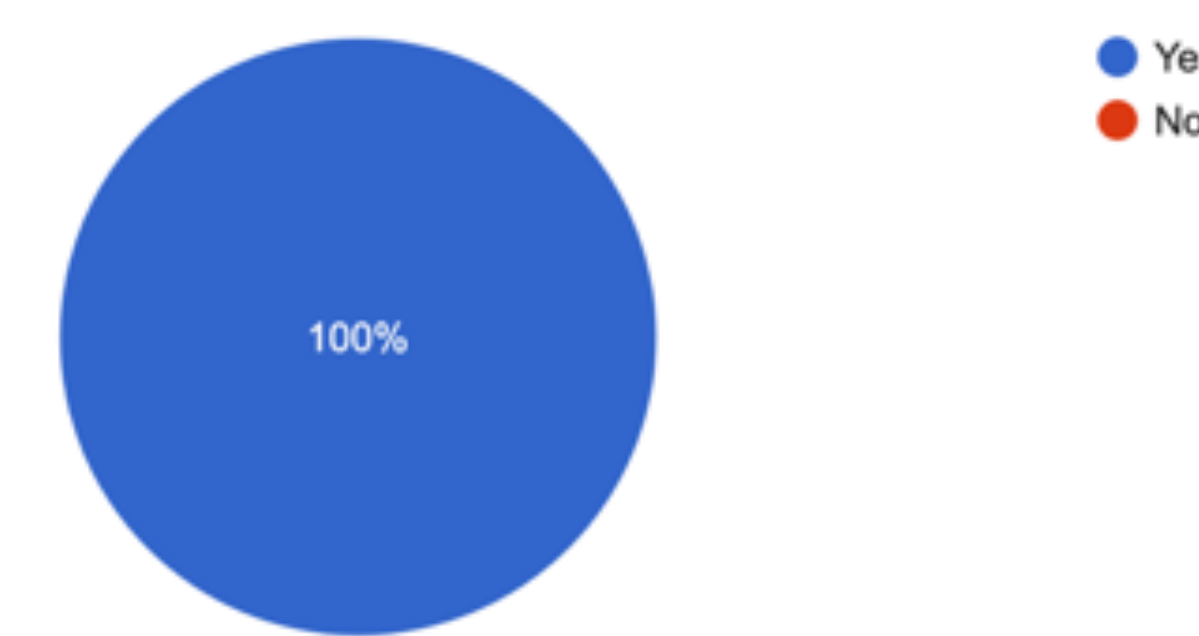


Figure 9: Do you understand that the 2022 Quota Tracker adds value to your experience as a sales representative?

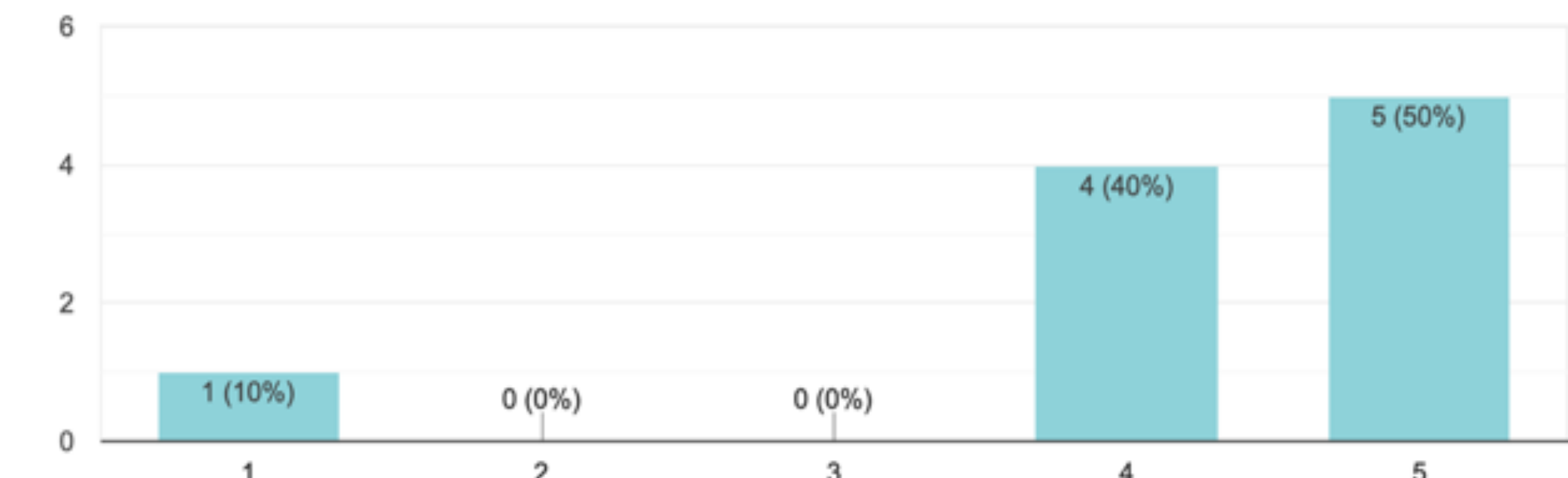


Figure 10: Overall, how satisfied are you with the 2022 Quota Tracker?

Conclusions

We can conclude that the tool has presented multiple benefits for the sales team immediately after implementation. These benefits are summarized in the following:

- The 2022 Quota Tracker presents a helpful visualization of the long-term quota.
- Allows providing a high-level analysis of the forecast and sales trends of the products.
- It's a quick and easy way to track the quota progress for different products at the same time.

We acknowledge that the data presented by this tool is not a substitute for the full performance of the sales representative in the field. Even recognizing that it is a manual tool, this allows maximizing the sales representative's time when accessing the data directly from the Tableau app. However, the Tableau app will continue to be a must-have for the sales team since it is the only platform for accessing the raw product data. The Quota Tracker will continue to allow having an alternate access to the same information with an extra analysis. The success of this tool is currently being considered for implementation in other Business Units and is intended to provide a leadership role. This role will be aligned with professional development in the Operations department and guided by an assigned mentor from this area. This project met and exceeded the sales team's expectations and was able to identify opportunities in other departments.

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