VANTORRA
Clarity for care teams

Training Needs Analysis



Executive Summary

- Inconsistent CRM capability and working practices, driven by a lack of coordinated training.
- CRM used mainly for call reporting, with low adoption of CLM, Approved Email, dashboards, and territory-planning tools.
- Unclear workflows are generating data quality issues, rework, and frustration – particularly around HCP creation and Data Change Requests.
- This TNA brings together workflow reviews, skills assessments, stakeholder interviews, and usage data to define role-based learning needs.



Evidence Base



Stakeholder Interviews

Insights gathered from conversations across Commercial, Medical, Value & Access, Leadership, and affiliate-market teams.



Learning & Capability Analysis

Role-Based Learning Needs Investigation and Skills Gap Assessment combined to identify current proficiency levels and capability gaps.



System & Usage Review

CRM documentation assessment and CRM usage metrics used to evaluate workflow clarity and adoption levels.

Current-State Assessment: CRM Usage Across Teams

Commercial

- Primarily used for call logging, basic account search, and viewing target lists.
- Limited use of CLM and Approved Email.
- CRM often seen as an administrative task rather than a tool that adds value.

Medical

- Used for multi-topic call logging, insight capture, medical information requests, HCP creation, and scientific discussions.
- High administrative burden driven by complex workflows, misaligned global/local configuration, and lengthy dropdown lists.

Value & Access

- CRM seen as less relevant to the role; call and account types feel overly commercially oriented.

Leadership

- Used mainly for dashboards and coaching conversations.
- Limited confidence in dashboard data and definitions constrains effective oversight.

What is Working Well?



CRM Usage

Teams are already applying CRM to advanced workflows, not just basic call reporting.

This reflects a mature grasp of CRM's capabilities in areas where workflows are inherently complex.

There is strong potential to scale this good practice more broadly.

Engaged Users

Stakeholders were open and constructive throughout the interviews.

Users offered detailed, considered feedback rather than resistance.

This provides a strong foundation for designing high-impact, user-centred training.

Clear Appetite for Standards and Consistency

Teams expressed a clear appetite for role-based guidance.

Several users specifically asked for a clear definition of “what good looks like.”

This suggests users are not resistant to training or to the CRM itself.

Workflow and Functions Concerns (Field Execution)



Call Reporting

The Commercial process is simple but unclear on mandatory fields and their purpose.

Medical workflows are complex and duplicative; multi-topic discussions require several separate calls to be logged.

Adding HCPs

A major pain point organisation-wide.

Users are unsure how to add HCPs; global search often fails.

Data verification often rejects records.

Record creation now takes 12–15 days (previously 5).

Data Change Requests (DCR)

Widespread confusion about what information is required.

Frequent rejections and lengthy approval timelines.

High DCR volumes and rejection rates across core and affiliate markets.

Workflow & Function Concerns (Adoption & Reporting)



Insights Capture (Medical)

A highly duplicative process with unclear quality expectations.

The system isn't designed well for multi-topic capture.

CLM & Approved Media

Very low adoption across all functions due to low confidence and a preference for hard copy.

Reps avoid CLM even when content exists, relying on PDFs instead.

Approved Email not widely used; no local templates exist.

Dashboards & Reporting

Conflicting or unclear dashboard definitions undermine trust.

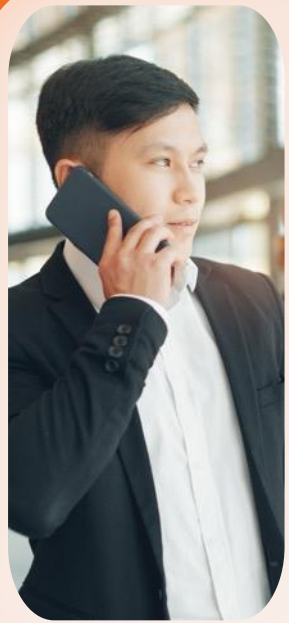
Several dashboards are outdated or inconsistent.

The affiliate market relies on multiple dashboards and offline work.

Skills Gap Summary

Role	Key Skills Gaps	Severity
Commercial Reps	• Mandatory fields & call quality CLM usage • Approved Email • Territory management • Dashboard literacy • HCP creation & DCRs	
Medical	• Multi-topic call efficiency • Insight quality & structure • MIR/SIR understanding • Practitioner creation • CLM • Dashboard usage	
Value & Access	• CRM relevance • DCR quality • Account Plan usage	
Managers & Directors	• Coaching on CRM standards • Dashboard confidence • DCR approval consistency	

Cross-Market Themes & High-Priority Risks



Inconsistent Call Quality & Unclear Standards

- Reps are unsure which fields actually matter
- Medical workflows are overly complex

Risk: leadership cannot fully rely on CRM data to make decisions

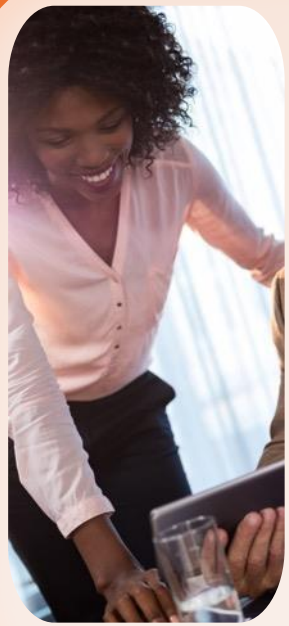


DCR Creation is inefficient

- High volumes, long delays, and ongoing user confusion
- Frequent rejections → lost calls and lost insights

Risk: declining data integrity and reduced visibility of customers

Cross-Market Themes & High-Priority Risks (Continued)



CLM Adoption is Low

- Reps prefer paper records and lack confidence using iPads
- MSLs have no CLM solution at all for scientific content

Risk: missed insights, compliance exposure, and inconsistent messaging

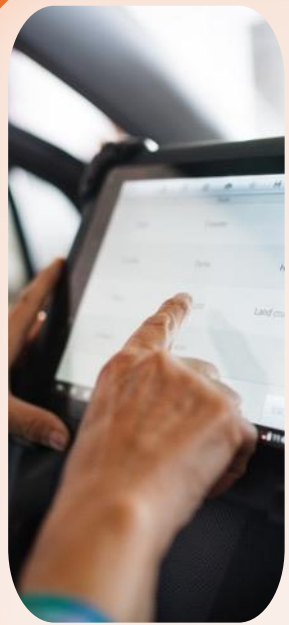


Insights Capture (Medical)

- A highly duplicative process
- Unclear expectations around quality
- System not designed for efficient multi-topic capture

Risk: reduced strategic value of the insights collected

Cross-Market Themes & High-Priority Risks (Continued)



Low Dashboard Literacy

- Users don’t trust the dashboard definitions
- The affiliate market has no single source of truth for reporting

Risk: weaker territory planning and less effective coaching



Lack of Change Management

- No quality control for CRM changes and no test environment
- No agreed workflow standards

Risk: ongoing rework and inconsistent field-level behaviour

Training Needs By Priority

Vantorra's priority training needs focus on building consistent CRM fundamentals across all users, while expanding advanced capabilities for Commercial and Medical teams to improve quality, efficiency, and system adoption.

Foundational Needs (All Roles)

Understanding the "Why" Behind CRM Data

- What leadership uses the data for, and why it matters
- The fields that actually drive meaningful outcomes

Call Reporting Standards

- What "good" looks like in practice
- Mandatory vs optional fields
- Efficient multi-topic capture

Global Account Search & HCP Creation

- Clear search logic, and when to create vs request

DCR Workflow & Best Practice

- The information needed to avoid rejections
- Cross-market differences
- How approvals flow

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Capability Expansion

Commercial

- A CLM-first approach to calls
- Approved Email usage
- Territory planning using maps & targets
- Dashboard-led self-coaching

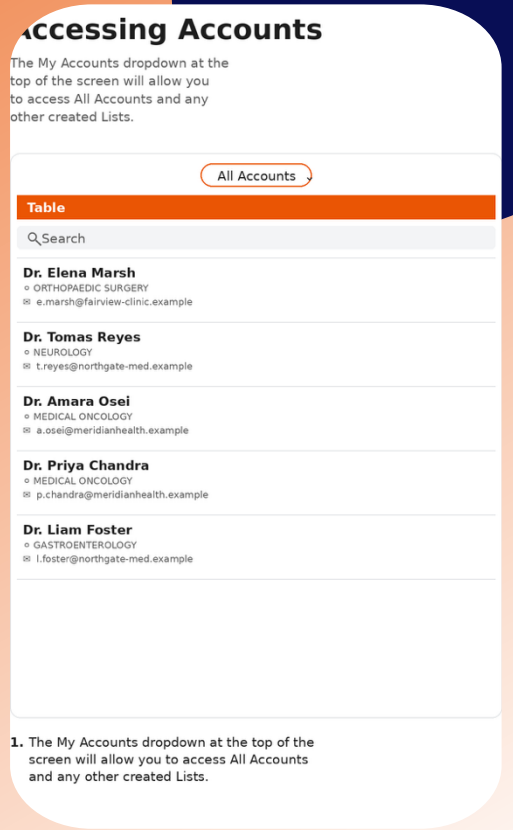
Medical

- Multi-topic call efficiency
- Insight quality & structure
- MIR/SIR governance
- Scientific content usage (building CLM readiness)

Recommended Training Approach

- Short, task-focused micro-videos with in-CRM walkthroughs
- Dynamic Quick Reference Guides (QRGs) for modules and everyday scenarios
- Scenario-driven training modules
- Role-based learning pathways
- Ongoing reinforcement through a Champions Network





Proposed Curriculum Outline (Modules 1–5)

Each module includes a full workflow Quick Reference Guide (QRG), supported by short, focused tutorial videos that break every task into simple, easy-to-follow steps.

Modules are phased according to the severity of the issues identified and the number of users affected, with the highest-impact functions prioritised first to maximise adoption and value.

1. CRM Fundamentals

- Navigation, Accounts/Schedule, syncing & offline use
- How CRM data is used across the business

Phase 1

2. Call Reporting Excellence

- What a high-quality call report looks like
- Mandatory fields, with good vs poor examples

Phase 1

3. Global Account Search

- Search logic
- Create vs request
- DCR vs Global Search
- Avoiding common errors

Phase 1

4. DCRs

- When to submit
- Required information
- Hospital verification

Phase 1

5. CLM and Digital Engagement

- Presenting content in CRM
- Managing iPad interruptions
- Media vs PDFs
- Approved Email

Phase 2

Proposed Curriculum Outline (Modules 6–10)

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6. Insights Excellence (Medical)

- What good insight quality looks like
- How insights flow through to global teams

Phase 2

7. MIR/SIR (Medical)

- Differences & country variations
- When to use each

Phase 2

8. Dashboards

- Report definitions
- Consistent reporting practices
- Cross-market dashboards

Phase 3

9. Account Planning

- Maps & routing
- Targeting strategy
- Planning & coverage

Phase 3

10. Leadership

- Coaching to standards
- Monitoring adoption
- Data-driven decision-making
- Change control procedures

Phase 3



Conclusion

Vantorra's CRM has the right core functionality, but capability gaps, low digital adoption, and limited trust in the data are preventing it from delivering its full value.

This training programme will:

- Improve data quality and consistency
- Increase field efficiency and confidence
- Strengthen leadership decision-making
- Enhance customer engagement
- Reduce administrative burden across teams