Using Technology to Streamline Your Medical Conference Collection Processes

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Medical conferences constitute a key information source for competitive intelligence (CI) practitioners in the pharmaceutical and biotechnology sectors. However, implementing a coordinated collection effort during a medical conference requires a significant effort before, during, and after each event. In addition, the company employees actually attending the event are often not from the CI department, and they only have limited time to participate in the collection effort of your organization.

Fortunately, most attendees are willing to help; they just need a little guidance from you. Effective use of technology can sometimes make the difference between having individuals who are willing but unable to effectively gather information, and those who send valuable information back to your organization.

This article highlights the key issues and questions to consider when you are evaluating a software package to assist with your conference collection efforts.

DEFINE YOUR REQUIREMENTS

The first step in successfully leveraging technology to streamline your collection efforts is to align your potential system with the main day-to-day challenges associated with conference collection. Here are several common conference collection difficulties that the software should improve.

1. Managing all industry event information.

Managing a year's worth of events can be a great deal easier when the information is stored in one place. When considering a particular system, consider how easy it is to enter and access the data.

2. Assigning collection tasks.

Your conference attendees are often happy to help you, but they may either not be completely aware of the specific information you're looking for, or be able to fully recognize how something they learn during the event can be valuable to the CI effort. A software system should help you to manage contacts between you and the attendee team, and allow you to easily assign tasks and provide briefings.

3. Collecting contributions from various attendees.

Many conference attendees see intelligence gathering as a chore when they only have limited time to dedicate to CI collection during each event. Even enthusiastic attendees may forget to send in a contribution, or be distracted by events at the conference and forget their objective.

Experience shows that most people at a conference will access their email once a day or in short bursts, and often do not have time to do much else online. You need to simplify their contribution process to 3 clicks or less. A good software system allows you to do this.

4. Organizing received contributions.

How many times has your desk been covered with conference materials that "helpful" attendees have dumped there, or you had to cut and paste emails in Word to organize them? Software that links with scanning software or provides an easy system for attendees to contribute material while at the show can benefit you here.

5. Managing potentially sensitive data.

Unsubstantiated rumors can be interesting to hear, but they may not be something you want to publish to your whole organization without further investigation. Make sure your software has a "staging area" where contributions can be emailed or phoned in, and where they will be published only after you have approved them.

DEFINE FUNCTIONAL REQUIREMENTS

Once you have determined how you want to address the above issues, you'll then want to find out from your conference collectors what would help simplify their efforts. How do they want to communicate with you? Would they prefer a system that links to their PDA or email using pre-populated forms, or just generic emails? Would they like to frequently send reports on the go, or just once a day? Incorporating their needs goes a long way to ensure your new system will be used, and to help maximize the responses you receive.

Whether your information technology department builds a system for you or you decide to purchase the software off-the-shelf, your next step is to define what functional requirements the system has to meet. Here are some key questions you should answer when evaluating software to assist your conference collection efforts.

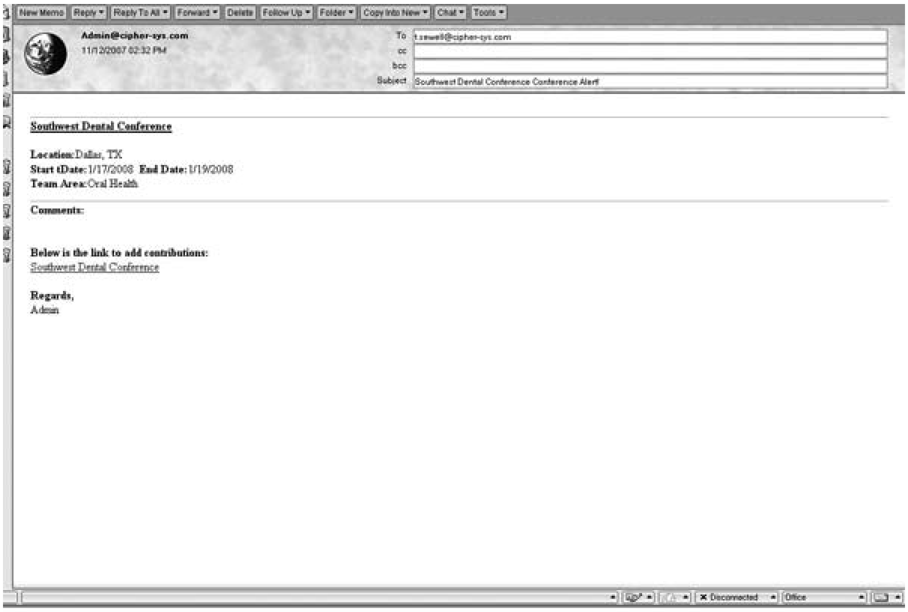

Figure 1: A user-specific URL can assist with data capture.

1. Does the system allow you to store upcoming vital event details in a database?

Although you can utilize a simple Excel spreadsheet for this, it could save you time to have all your company's event details located on one place that is searchable (see issue #1 above). For instance, you may wish to search events happening on the West Coast during a particular time of year, on a specific topic. Excel filters can help with this, but are much more limited than a relational database.

2. Does the system integrate with your email address book and/or email system?

If so, the system will enable better team collaboration. (This question relates to Issues 2 and 3 above.) If the competitive intelligence collection system links directly to your email address book, you can easily send out task assignments, deadline reminders, and conference briefings. Plus, attendees can quickly contribute by simply completing an email-based form, or by sending an email from their Blackberry directly into the system. (See Figures 1 and 2 for samples.)

3. Does the system create a conference schedule?

This great feature is seen more often in this area – Cipher's own Conference Manager has it. Once you have entered all your event details (from poster sessions, seminar briefings, and luncheons to evening networking events) the system can generate a conference schedule, particularly by each attendee. This saves time and minimizes confusion by organizing who is collecting what information, when.

A coordinated conference collection schedule also helps minimize the possibility that intelligence-important events will not be covered by your collectors. If your system does not offer this, consider how you will address this issue. You may find you will need to rely on each attendee to create their own schedule, or type one up for each person.

4. Does the system provide IP- or URL-specific access?

To maintain confidentiality and system security, most quality collection systems provide contribution links that are user-specific. This helps manage the contributions as they come in, too – you'll automatically be able to recognize individuals' contributions due to their specific IP or URL. You'll also be able to identify which individuals have fulfilled their assignments, and which ones still "owe" you a report. Figure 1

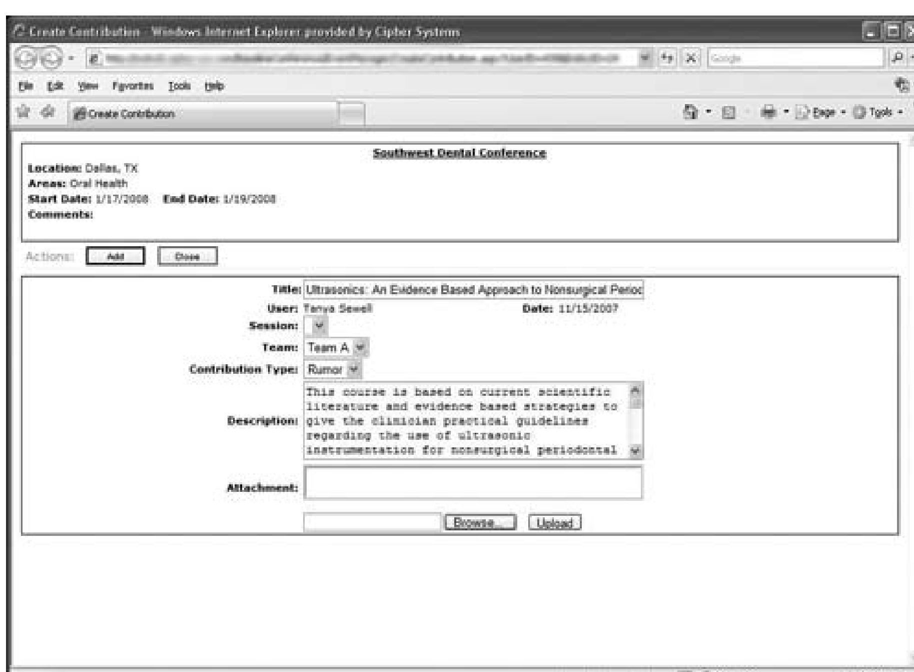

Figure 2: A pre-populated form – only 3 clicks away – helps attendees contribute faster.

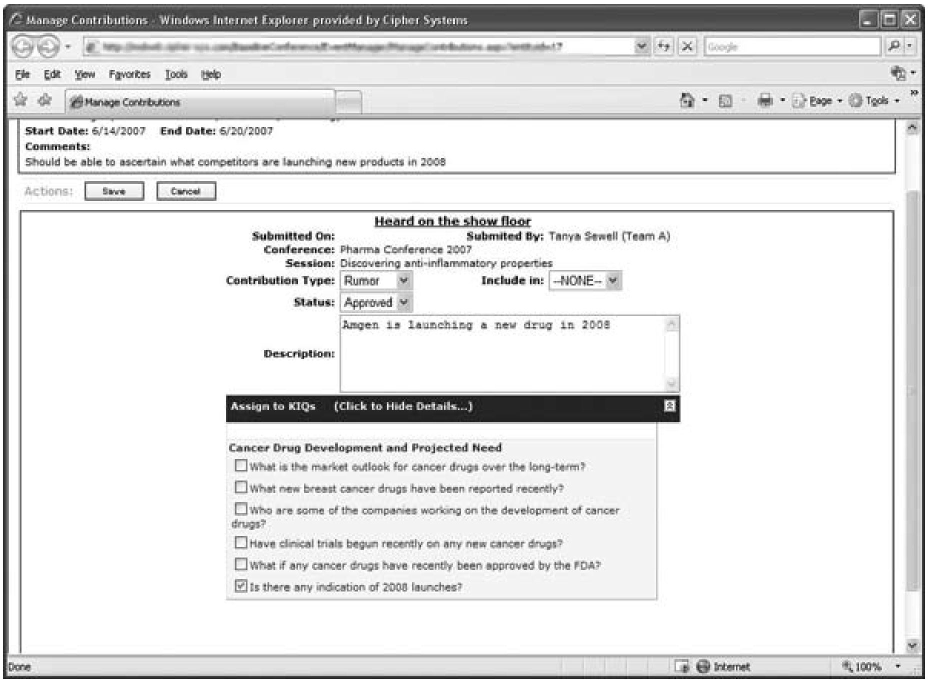

Figure 3: The ability to assign contributions to a report is a good timesaver.

provides an example of this.

If you choose not to implement this feature, you will need to require your contributors to log in to a system. This creates a barrier to ease of entry and may decrease the number and quality of contributions you receive.

5. How does the system you're considering manage received contributions – after they come in, where do they go?

Make sure there's a staging area for new contributions. This assures that only those individuals authorized to view the data – in this case, you as the CI manager – can do so. The staging area also keeps potentially damaging, sensitive, or inappropriate information contained until it's been cleared or verified. Carefully consider what members of your team will have access to this area.

6. How does the system facilitate the use of the information? Does it allow you to link contribution assignments to Key Intelligence Topics or other reports?

It would be unfortunate to have a nicely automated and organized front end, only to manually handle all the contributions at the end. The topic-linking feature can save substantial time. (See Figure 3 for an example of how to organize this.) Some systems allow you to organize this upfront. When you can assign a particular Key Intelligence Question to an attendee, this gives them "ownership" of the issue at the event. If the system allows you to export reports, this can be a great time saver too.

7. How will the conference collection system integrate with your own corporate systems?

Most solutions that provide conference collection capabilities are systems hosted on the supplier's network, so in all likelihood they will not easily "converse" with the other systems in your corporate environment. If you decide to build a home-grown version or apply a desk-top product, carefully consider this capability. Your own Information Technology department can help you decide what will and won't work.

A system that truly addresses the key user and functional requirements listed above has a good chance to add value to your competitive intelligence conference collection efforts.

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