Common Sense Portal Development for Pharma

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Introduction

In a big pharma, intranet portals play a key role in integrating complex information infrastructure across divisions, functions, specialties, projects, or federations of partner companies by acting as a virtual gateway to externally hosted content.

While the model can be straight forward, many intranet portal projects are initiated without the fundamental understanding of what a portal is intended to do. Before building a portal, take the time to understand the purpose and then focus on the requirement discussion - particularly as it pertains to the audience, content design, and layout.

Consider a trade show where a variety of independent vendors and customers aggregate together. The customer locates a vendor who operates a booth at the expo. If the customer desires in-depth information from the vender, the customer may interact with the vendor and even visit the vendor's show room or warehouse. In much the same way, functions and teams use portals to advertise to other functions, teams, or leadership. Once found, they can offer more in-depth information and support.

Since portals are agnostic, portal content should be organized as intuitively as possible. In most cases, this can mean neutrality, simplicity, and consistency. Remember that visitors are passing through to the more in-depth information they need. Finally, upon arriving at the functional/team site they will encounter complexity, local processes, culture, and lexicons.

Choosing between Portal and Team Site

There are cases where customers want a portal design (tiles, buttons, etc.) for what is essentially a team site. Be careful that design complexity and administration do not become a distraction from the site's core purpose – providing quality, timely content. There are also instances where the business function is using a portal as a duplicate content repository. This scenario poses risk of inconsistency with source data. This can be confusing and will result in loss of confidence in the site. If the site must serve more than one purpose, have clear business rules that communicate when the site will provide portal services and when the site functions more like a typical team site.

Depending on the vantage point of your stakeholder, (enterprise, divisional, functional, sub-function, department, team, project, matrix team) you need to determine, whether to build a portal, a web site, or a blend of both. If your site will be providing content and not merely acting as a portal, take time to carefully identify sites where you will advertise your content so it will be found by the target audience. Consider the trade show example above. What would make the most sense for you?

A. Build a facility?
B. Rent a booth at a boat expo?

Looking at the scenario plainly, answer B probably makes more sense.

Finding Information is Key

Imagine there is good data/information being generated around your organization and no one knows where it is. This is lost productivity!

Consider the following scenarios in a typical Pharma company:

- Multiple or duplicate subscriptions to the same syndicated research. The program level marketing team doesn't know the information was purchased by the TA and buys the same subscriptions!
- A team who forecasts disease prevalence compiles insights quarterly. Due to frequent organizational changes acquiring this information requires multiple emails/phone calls.
- Market intelligence is paying a consulting firm for reports on trials in a dynamic disease area. If presented in a timely manner, this information is valuable to brand teams. Currently, its being shared in PowerPoint slides compiled and emailed monthly. The value of the investment is lost because the information is not disseminated when relevant.

A portal may solve these problems by making the information more easily accessible to decision makers when needed. So, the portal needs to integrate all of these sources of information, vendors and reporting tools, in a way that delivers investment value.

Initiating Development

Conceptualize the portal – based on applying/utilizing an analogy to present the information. Portals should be easy and intuitive to navigate. In the same way that the Expo analogy was used above, build a story for the desired user experience. Is it like a “community,” a “mall,” “Main Street,” a “service station,” or even a “space station”? Align imagery, graphics, layout, and colors to reinforce the analogy.

Measure, Build, Test and Deploy

Regardless of the size of the portal project, adhere as much as possible to Project Management and SDLC best practices. Like all projects, one of the biggest challenges with portal projects is closing. The difference between 90% and 100% is humongous and can make a considerable difference in how well your portal meets the business need. We miss the last 10% because we misunderstand the requirements or real requirements never existed. Using a rigorous process for requirements elicitation and delivery methodology will ensure success.

Here are some recommendations for planning and executing your web portal project:

1. Start by developing a rigorous set of business questions you want to answer using this portal. The objective of the portal is to answer the question “where do I find….?” It is good to get very specific with detail.

As a brand manager looking for competitive analysis you might want to know the following:

- Who are the managers in the regional markets for my brand?

- How do I identify competitors in certain regional markets?
- How do competitor products compare with mine?
- Which of my competitors have products that have successfully completed Phase III studies?

As a remote worker in the PMO, you might ask the following:

- How do I obtain a new laptop?
- How do I obtain VPN access?
- Who do I contact to download Microsoft Project?
- How do I obtain access to a SharePoint site?

As you may have noticed, the questions are related, but may be addressed by different teams and in different ways. The objective for the portal is to bring them together in a common environment or community so that users can easily find the information they need.

2. Identify all involved parties from the customer side and delivery side. You will want to Identify all of the stakeholders such as:
   - Sponsors
   - Champions
   - Content Providers (Teams, Contracted Services)
   - End-Users

Identify the roles involved in delivery. It is not necessary that the roles are filled 1:1. In fact, one individual may fulfill all of the roles, but it is important to identify which rare needed and who will play the following:

- Business analyst
- Designer
- Data modeler (if applicable)
- Data visualization expert
- Graphic designer, etc.

The list can go further depending on the complexity of the project. The key is to identify the roles and assign them to someone.

3. Consider governance structure deeply.

As a rule of thumb, the portal should be high level - open and transparent with access restrictions occurring at the content level or team site level. Still, business rules for user access should be defined and there should be a model for managing user access dynamically, if possible, by using dynamic user lists. If there is an exception requirement for certain types of contractors, include this in the business rules and support it with an access request process.

Prior to rollout governance, support should be in place if there are any hiccups in the process of the portal, such as unintended access denials or unavailable pages. If so, the site will become a burden. Users will avoid it. Support the launch with a communications strategy that will be consistent in structure and frequency as you move into steady state, but not before the governance and support are in place.

Managing the Steady State

Once the site is deployed, it must be managed so that it is up to date with changes in your pharma organization. Here are some basic rules around content management that should be followed to insure the portal continues to offer value to portal visitors:

1. The organization of the portal should reflect the organizational structure and messaging strategy identified during the requirements gathering phase of the project. Align content updates accordingly. Clearly define who will be responsible for publishing in the portal. Who are the content generators? Think about how the content updates align with the natural rhythm of work cycles, such as project forecasts or financial performance announcements. This includes regularly scheduled content updates (information people expect to find) and breaking news and information. In both scenarios, identify the publishing channels in advance.

2. Provide Team with clear processes for publishing content. Do not assume the content publishers' knowledge of SharePoint or web publishing. This is an area where a little more effort in developing documentation for the business process can make a big difference in terms of getting information on the portal in a timely manner.

3. Have regularly scheduled meetings with stakeholders focusing on continuous improvement in the portal. This should include stakeholders - in-scope teams and functions. During the sessions, you should obtain feedback from the functions, brands, etc. and review site metrics while defining actions that will be taken to make the site better for site visitors. If something is not working, revise it or let it go. Often portal projects are allowed to fail due to emotional attachment with a site feature that is confusing or distracting.

Conclusion

Think of a portal as a dashboard for your organization to build synergy across the teams and functions working to deliver patient therapies… to get status on external activities that may impact your deliverables. In today's environment more and more of us are working on projects with cross-functional teams. To maximize the value of this model, managed organizational transparency is. A well designed portal can reduce wasted effort, compartmentalization, project timelines and a whole lot of frustration.

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