



# Planet LifeCycle

Integrated Platform for Achieving Research and Development  
Program Management Excellence

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Planet allows cross-functional pharmaceutical R&D teams to achieve agility and consistency, control the project pipeline, manage all project-related budgeting and forecasting, coordinate the work of thousands of people and optimize billions of dollars.

If innovation is the lifeblood of pharmaceutical companies, exceptional research and development (R&D) program management is the force that keeps it pumping. It's difficult to imagine an industry with a more complex set of requirements for managing R&D programs. A typical pharmaceutical development organization has more than 50 projects in development at any time, each with thousands of tasks and dependencies and timelines ranging from 2 to 15 years. In addition to the welfare of the people who benefit from the drugs that eventually go to market worldwide, billions of dollars are at stake.

## R&D Program Management Is a Necessary Core Competence

Although the R&D cycles can be long, pharmaceutical companies share a sense of urgency to expeditiously arrive at each project milestone with reliable data that support smart go or no-go decisions, optimizing time and available resources. Yet with 15-20 discrete, specialized departments working on complex R&D programs for such long durations, change is constant, which makes it difficult to generate uniform data sets, understand current status and obtain historical or project-to-project comparisons.

In order to facilitate the flow of innovation and development in such a complex environment, pharmaceutical companies must make R&D program management a top core competence. One often considers core competence to be a characteristic of a workforce, but in the case of pharmaceutical R&D, competent people are not enough. Personnel (including project managers, financial planners and the people who are hands-on with drug development) often roll in and out of projects at any stage, taking working knowledge about projects with them. Core competence in R&D, which creates the infrastructure for innovation, must be fortified with a technology platform that helps control the present, remembers the project's history and can assist in optimizing the future.

## Planet Platform Unifies All R&D Program Management Functions

DataForm's Planet is holistic platform that optimizes pharmaceutical R&D program management. It's the universe used by hundreds of people involved in the R&D process to provide and receive definitive information about all aspects of every R&D project. With Planet, individual R&D projects are tightly managed from inception to the handover to the commercialization team. *Planet systematically provides multiple levels of control over the quality and accuracy of plans and budgets through the use of approved templates for project types (including standardized critical paths), pre-established work rules, an understanding of project dependencies and automated coupling of tasks and allowable associated costs.*

Planet provides all the functionality needed by every stakeholder in the R&D process, including project managers, financial analysts and department managers (e.g. from toxicology, clinical trial management, chemistry manufacturing and controls or regulatory affairs).

The Planet Platform integrates four critical functional modules, each of which is essential for R&D program management excellence:

1. Project Planning and Management,
2. Resource Budgeting and Forecasting,
3. Team Management and Collaboration and
4. Analysis and Reporting.

## Integrated Functionality Delivers Bottom Line Benefits

If the capabilities of Planet's four critical functional modules were delivered through multiple individual systems, achieving R&D program management excellence would be impossible. Linking financial and operational resource plans to project plans and reporting would have to be done manually, resulting in excessive costs, errors, delays and eventually, missed opportunities.

R&D program management delivers bottom line benefits by getting drugs to market on time or ahead of schedule. With so many concurrent R&D projects underway and the value of time to market being so high (consider that the value of expediting a new drug valued at \$500M annually by one week is nearly \$10M), resources – money, people and time -- cannot lay idle. Pharmaceutical R&D program managers are always looking for opportunities to “put and take” among the projects based on the actual project plans and budget relative to forecasts.

Planet, as an integrated program management engine, provides instant visibility into both the project plan (what's delayed and why) and the financial plan (how much money is now available?)

so, that program managers can immediately answer the question, “What moneys can be immediately reallocated from delayed projects to projects that can be accelerated closer to approval if given more resources?” Doing this analysis manually, meaning outside of Planet, would cost weeks with an opportunity cost in the tens of millions of dollars.

## Key Capabilities of Planet's Four Critical Functionality Modules

### Project Planning and Management

- Master Catalog – the Master Catalog is customized for each client and contains the building blocks and controls for plan development and maintenance. It contains:
  - Multiple templates with critical paths that are specific to the type of R&D project being undertaken (e.g. distribution of a drug for a new indication requires a different template than developing a new drug altogether);
  - A “dictionary” of thousands of tasks and notations that may be used to construct an individual R&D project plan and;
  - Rules about what can be done in plans or with other related files.

## Answer All the Common Multi-Dimensional Questions with Ease

Consider for a moment some additional commonly-asked questions that if not for Planet, would require people to manually construct answers using data from multiple systems.

1. “What's our actual spend on this project compared to forecast? How are these amounts different from what we believed would be the case when the project started?”
2. “What is our aggregate spending on a specific category (rolled up)?”
3. “Can you show me the cascading goals for this project? For this team? For that person?”
4. “What is the financial and time impact of a new regulation for POCs conducted in an early development stage? A late development stage?”
5. “What can be learned from past R&D projects that resemble this one?”

A primary advantage of the Planet Platform is that it was designed as an R&D program management platform from the ground up, so financial planning is linked with project planning, which is linked to resource allocation, which then ties to team member collaboration and ultimately, reporting. This not only makes project and financial plans more accurate, it makes multi-dimensional questions easier to answer.



Planet helps support strategic decisions such as pricing, outsourcing, identification and measurement of process improvement initiatives.

## Planet Platform Characteristics:

- SOA; Planet consumes data from other systems and provides project-related financial data, operational data or timelines/milestones to other applications such as a portfolio management application, corporate budgeting or BI tools.
- Role based; users see what applies to them and through the Pod Manager utility, can create custom dashboards with drill-down capabilities to personalized widgets.
- Microsoft-based; Built in .NET
- Integrated with Microsoft SharePoint
- Single Sign-on

The Master Catalog has two major benefits. First, it expedites the development and upkeep of project plans. Second, it enforces uniformity and consistency in metadata across projects and over time, which is crucial to analysis and reporting.

**Automated Change Management** - R&D plans are subject to hundreds of required changes over the development life cycle. The steady stream of changes – from country-by-country regulations for approvals to the addition of a clinical trial or changes to company processes - are systematically incorporated into plans and budgets. If a requirement changes, Planet will automatically update all plans that are impacted.

**Scenario Analysis** – Planet enables R&D program managers to quickly and reliably assess the impact of real or potential changes to the plan. This provides an environment for scenario construction and evaluation and identification of best alternative actions in a very fluid R&D environment.

**Roll Back Capabilities** – users can select a previous date in time and view the plan as it was at that time to understand original assumptions and changes.

## Resource Budgeting and Forecasting

- **Dynamically-Generated Template for Data Input** - Planet dynamically generates a web-based forecasting template based on tasks in the approved plan in the Planet Project Planning and Management module. unplanned.

This prevents people from budgeting for tasks that are

- **Roles-based Budgeting and Forecasting System - Users** only see the data that pertain to them.
- **Supports Activity Based Costing** - Activities are identified and costs are assigned according to the actual consumption by each so that the team can more precisely estimate the cost of individual tasks, the cost to achieve milestones, the overall costs and profitability of projects or even therapeutic areas in aggregate. This helps support strategic decisions such as pricing, outsourcing, identification and measurement of process improvement initiatives.
- **Integrates with Underlying Financial Management system (e.g. Oracle, SAP, etc.)** - All actuals and forecasts are presented along with plan data and can be synchronized multiple times daily.
- **Quickly Identifies Available Moneys** – If tasks in the project plan were contingent, those moneys are flagged for scrutiny and possible reallocation.
- **“Point in Time Analysis”** – Similar to its “roll back” capabilities, Planet allows analysts to go back in time to review the financial forecast and actuals at any point to better understand assumptions and changes that impacted outcomes.
- **Supports Risk Analysis** – by identifying budget, forecast, variability and activities within the development timeline that are committed or contingent, the R&D program management team can assess project risk.

## Team Management and Collaboration

- Integration with SharePoint – Integration with SharePoint puts Planet utilities at peoples’ fingertips, making it convenient to use the system while taking advantages of SharePoint’s document sharing and collaboration capabilities.
- Resource Tracking – Planet helps keep track of roles and resources
- Generate Project Team Lists – Planet creates and maintains team lists, which facilitates group communication.
- Work Management – Planet helps keep track of individuals’ work through the roles-based views.

## Analysis and Reporting

- Track Key Performance Indicators – At a glance, people can see how well projects are performing in any number of dimensions (e.g. time, resource utilization, costs, etc.)
- Project Scoring – Using pre-established rules, each project is scored according to criteria such as percent complete, dependencies, financial criteria or other risk factors.
- Quick to Design Reports – It’s very quick to generate reports and add rows or calculations to existing reports. There’s no need to spend days or weeks manually cutting and pasting data from multiple systems into spreadsheets.

- 500+ Custom Data Fields Offer Unlimited Options – With more than 500 custom data fields to choose from in the Master Catalog, there’s no limit to the ways managers can view and analyze data for status checks and critical decision making. Managers can generate reports regarding financial data, project data or a combination, such as the remaining forecasted spend for all projects that are approaching a certain milestone within the next 12 months.
- Ad Hoc Capabilities Supported – In addition to reports created by Planet Power Users, individuals may also explore the data to generate their own reports.
- Planet Data is Easily Integrated with Third Party BI Tools – In many cases, data contained in Planet is also integrated with other tools to create an executive dashboard, for example.

## R&D Program Management Excellence Starts with Planet

Planet allows cross-functional pharmaceutical R&D teams to achieve agility and consistency so that they may control the project pipeline, coordinate and make more efficient the work of thousands of people and optimize billions of dollars. It not only saves time and money by eliminating error-prone manual processes, but it helps pharmaceutical companies get promising product to market more quickly, thus enriching people’s lives and delivering bottom line benefits to the company.



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## About DataForm Software

DataForm Software develops and delivers R&D Program Management solutions based on its patented flagship product, Planet, which fully integrates financial planning, project and team management, and analysis and reporting. The company helps pharmaceutical and life sciences companies measurably reduce administrative cost, improve resource utilization and expedite development timelines, thus bringing products to market faster, helping people and contributing bottom line benefits.

Based in Fairfield NJ, DataForm Software has been committed to innovation and collaboration for 20 years.

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