

Top 10 Features of Salesforce Advanced Therapy Management - A High level implementation guide



Introduction

Titanium Tekzi Business Solutions proudly presents this white paper detailing the real-world capabilities, outcomes, and implementation framework of Advanced Therapy Management (ATM) within Salesforce Health Cloud.

As a premium Salesforce consulting partner, our mission is to help healthcare and life sciences clients harness the power of scalable CRM solutions for regulated, patient-centric therapy delivery. This guide presents ten core ATM features with practical insights and recommendations for deploying them in commercial and clinical environments.



1. Multi-Step Scheduling

What It Does

Coordinates apheresis, lab processing, and infusion steps based on therapy timing needs.

Use Case

Align apheresis on Day 0, manufacturing by Day 3, infusion by Day 10 with therapyspecific dependencies.

Result

Reduced therapy rescheduling by 15-20% over 12 months in advanced therapy clinics due to better alignment.



- 1. Define therapy workflows using Therapy Master
- 2. Configure step sequencing with lead-time logic
- 3. Set appointment templates for each phase
- 4. Apply SLA rules for pre-checks and time buffers
- 5. Enable scheduling automation via Flow or Process Builder





2. Chain of Identity & Custody Tracking

What It Does

Maintains a tamper-proof digital chain for sample handling and delivery.

Use Case

Track a CAR-T sample through handoffs - hospital -> courier -> lab -> manufacturing -> infusion.

Result

Cut manual auditing time by 30-40% and ensured full regulatory traceability during mock FDA inspections.



- 1. Enable COI and COC data models
- 2. Create digital acknowledgment checkpoints at each handoff
- 3. Integrate barcode/QR scan devices or courier feeds
- 4. Store timestamps and sign-offs within patient case
- 5. Link documents to a secure, audit-compliant repository



3. Role-Based Task Management

What It Does

Auto-assigns tasks to the correct user based on their step in the therapy.

Use Case

After consent, tasks are sent to the courier to pick up samples and to the lab to prepare manufacturing.

A Result

Reduced missed task handoffs by 25%, improving therapy progression and team accountability.



1. Define roles and permissions in Salesforce 2. Create task templates mapped to therapy workflow steps 3. Build automated task assignment rules in Flow 4. Set escalation timers for overdue items 5. Track task status and completion at each stage

4. Case-Based Therapy Workflow

What It Does

Combines all therapy activities into a unified case record.

Use Case

Each stakeholder (site coordinator, lab, manufacturer) accesses the same real-time patient case timeline.

A Result

35% faster issue resolution and 20% less internal coordination emails.





1. Create custom Case Record Types for therapy types 2.Add related lists: activities, milestones, task logs 3. Use Dynamic Forms for role-based visibility 4. Enable Chatter or notes for collaboration 5. Control access using sharing rules



5. Therapy-Specific Configuration

What It Does

Lets you run different therapies with unique rules on one platform.

Use Case

Configure CAR-T and mRNA vaccine workflows separately with different SLAs, forms, and stakeholders.

A Result

60% faster configuration deployment compared to launching on separate platforms.



- 1. Create separate Therapy Templates
- 2. Customize workflow steps, duration, and approval logic
- 3. Assign specific stakeholders per therapy
- 4. Enable therapy-specific dashboards
- 5. Test and version each therapy flow before rollout



6. Alerts & Exception Handling



Automatically notifies stakeholders of delays, missed steps, or logistic failures.

Use Case

Courier delay triggers alert to reschedule patient infusion to avoid therapy expiration.

Result

Reduced logistics-related therapy failures by 22% in 6-month clinical operations window.



- 1. Configure SLAs and milestones per therapy type 2. Build condition-based alerts in Flow or OmniScript 3. Integrate courier status APIs for triggers
- 4. Notify via SMS/email based on escalation rules
- 5. Log alerts and resolution time for reporting



7. eConsent & Enrollment Automation

What It Does

Digitizes patient onboarding and consent capture, even remotely.

Use Case

A patient completes pre-screening, consent, and medical form online — prior to site visit.

A Result

Enrollment times dropped by 2–3 days; paper processing reduced by 50%.



Use Experience Cloud or Screen Flows for digital forms
Integrate with DocuSign for e-signatures
Map consent outcomes to patient case
Auto-create tasks for next steps after submission
Store signed forms in a compliant document store

8. Logistics & Vendor Coordination



Connects with logistics providers and tracks shipping events and handoffs.

Use Case

Live sample status (pickup, transit, delivery) updates therapy case in real-time.

A Result

SLA adherence for cryopreserved therapies improved by 15–18% across regions.



1. Integrate courier APIs via Mulesoft or External Services 2. Map shipping milestones to Therapy Workflow object 3. Create Flow triggers based on status codes 4. Notify coordinators or labs based on events 5. Store delivery proof and chain data under case



9. Global Command Center Dashboard



Provides live performance metrics across therapy sites, countries, and teams.

Use Case

Leadership views delay rate trends by site, region, and therapy type in one dashboard.

Result

Reduced unresolved regional bottlenecks from 14% to 5% within a quarter.



1. Build custom reports on SLA, task, and milestone objects 2. Segment dashboards by therapy, geography, and site 3.Add filters for root-cause analysis (delay, rejection, failure) 4. Schedule dashboards for weekly distribution 5. Link with compliance trackers for audit-readiness



10. Post-Therapy Monitoring & AE Reporting



Tracks follow-up milestones and auto-notifies physicians on adverse trends.

Use Case

Patient's wearable shows elevated temperature — system flags AE alert.

Result

Enabled 10–12% improvement in timely AE reporting across 3 clinical trials.



- 1. Use Milestone + Activity Setup for follow-up timelines
- 2. Enable data ingestion from wearables / patient apps
- 3. Create Flow to detect abnormal values
- 4. Auto-create case note or urgent task for doctor
- 5. Track adverse events via AE reporting object + standard forms





Prepared By : Saravanan Paramasivam CEO & Founder

Thank You







www.titaniumtekzi.com





Saravanan@titaniumtekzi.com