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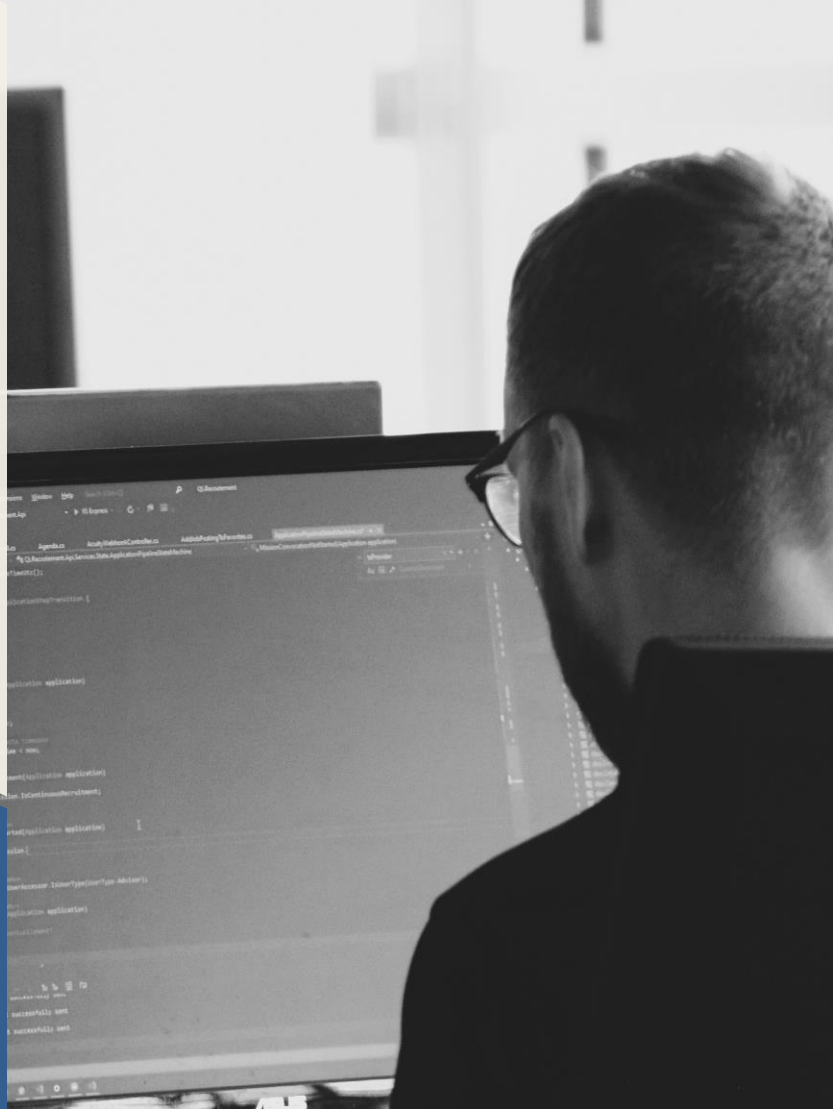
OPTICAL CHARACTER RECOGNITION (OCR)

ENABLING FASTER
ENROLLMENT AND SMARTER
INTEGRATION IN LIFE SCIENCES

CASE STUDY

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Abstract

This case study showcases how OmniTek Consulting partnered with a life sciences client to digitize and streamline form processing through optical character recognition (OCR) and improve the efficiency of life sciences Customer Relationship Management (CRM) systems. By automating data entry, integrating specialty pharmacy workflows, and tailoring CRM deployments, OmniTek helped reduce agent workload and accelerate enrollment timelines for patients. The initiative delivered measurable cost savings, improved data accuracy, and laid the foundation for future AI applications in the healthcare space.

Executive Summary

Life sciences companies often face administrative bottlenecks that hinder timely patient enrollment into specialty therapy programs. With our client, application forms arrived in handwritten formats, requiring extensive manual transcription by call center agents. At the same time, outdated Customer Relationship Management (CRM) systems made it difficult to scale enrollment and specialty pharmacy coordination efficiently.

OmniTek Consulting collaborated with their client to modernize their intake and customer relationship workflows. OCR tools powered by machine learning were trained to transcribe handwritten forms, while CRM systems were tailored to support complex pharmaceutical requirements. OmniTek played a central role in gathering requirements, bridging communication between business and technical teams, and overseeing the software development life cycle (SDLC). This transformation not only streamlined operations but also positioned the client for scalable growth and future automation.

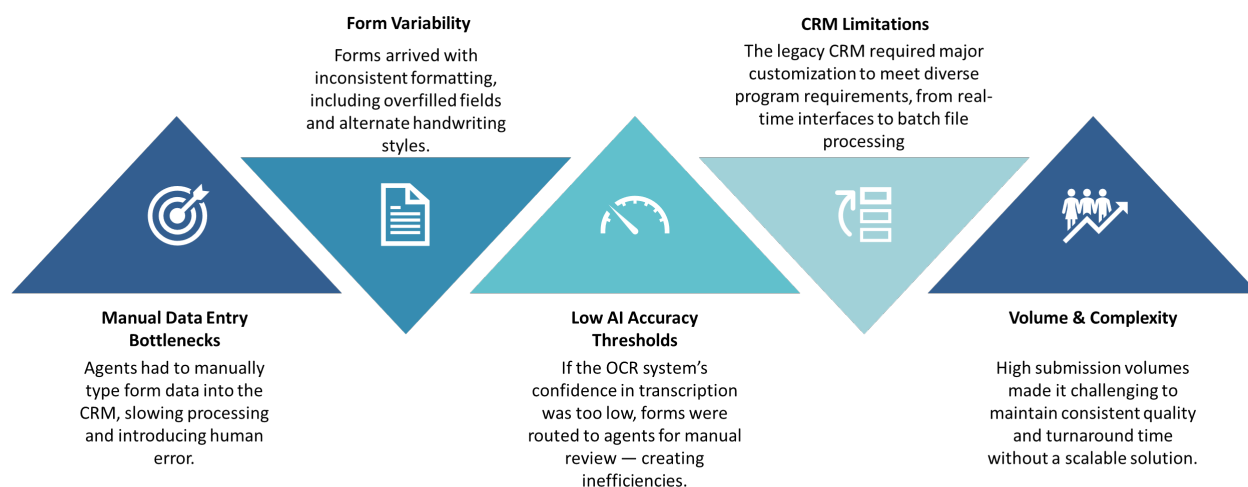
Strategic Context

Our client, a major player in the healthcare diagnostics and patient services domain, supported various patient access specialty drug programs. Enrolling patients into these programs required collecting clinical and demographic data through forms, many of which were still handwritten. These forms, submitted in inconsistent and often inaccurate formats, demanded extensive manual review by call center agents using an older Oracle-based CRM.

Given the high volume and low efficiency of the process, our client sought to introduce artificial intelligence (AI) to digitize and automate data extraction while also enhancing their CRM workflows to support real-time integration with specialty pharmacies.

Core Challenges

Several critical challenges limited the scalability and speed of our clients' operations:



Together, these challenges created operational friction, strained resources, and exposed the need for a more intelligent, automated, and scalable approach to data intake and customer relationship management.

Our Approach

At OmniTek, we applied our People–Process–Technology (PPT) framework to deliver an integrated, high-impact solution.

People: We served as the liaison between our client’s business stakeholders and the development teams, both inshore and offshore. Our team focused on deeply understanding client requirements, especially across specialty drug programs with unique data and reporting needs. We coordinated with call center teams, specialty pharma reps, and technology users to ensure every requirement was captured and reflected in design and deployment.

Process: We customized the CRM workflow to account for multiple communication channels (calls, emails, portals) and integrated with pharma partners for seamless reference sharing. We facilitated a robust SDLC, from requirement gathering and system testing to deployment and monitoring. Post-launch, we ensured continuous feedback loops and issue resolution.

Technology: We worked with a third-party AI vendor to train the OCR engine using extensive test data, simulating real-world handwriting scenarios. The more data processed with agents, the more accurate the model became. We also enhanced the CRM platform to support real-time integration and batch processing, tailored for each client and specialty pharmacy’s needs.

Decision Management Solution: From Challenge to Execution

Tackling complex data and workflow challenges in healthcare required a holistic approach that combined advanced technology, system customization, and end-to-end delivery support. OmniTek’s solution was designed not just to address immediate operational bottlenecks but to create a scalable, future-ready framework for managing high volumes of sensitive information. By integrating AI-driven tools, tailoring CRM platforms, and providing full lifecycle support, the initiative transformed what had been a manual, error-prone process into a streamlined, reliable decision management system.

1. AI-Driven OCR Engine:

The project began with collecting hundreds of handwritten forms to train the AI engine. By building models that could interpret varied handwriting and field layouts, the system automated much of the data transcription. If confidence scores were below a certain threshold, forms were escalated to agents or flagged for outreach to providers or patients.



2. CRM Tailoring for Specialty Pharmacy:

OmniTek customized the CRM platform (Oracle-based, with legacy components) to handle multi-format data entry, support different program types, and integrate with external pharma systems. We built both real-time and batch job capabilities to meet various processing demands.

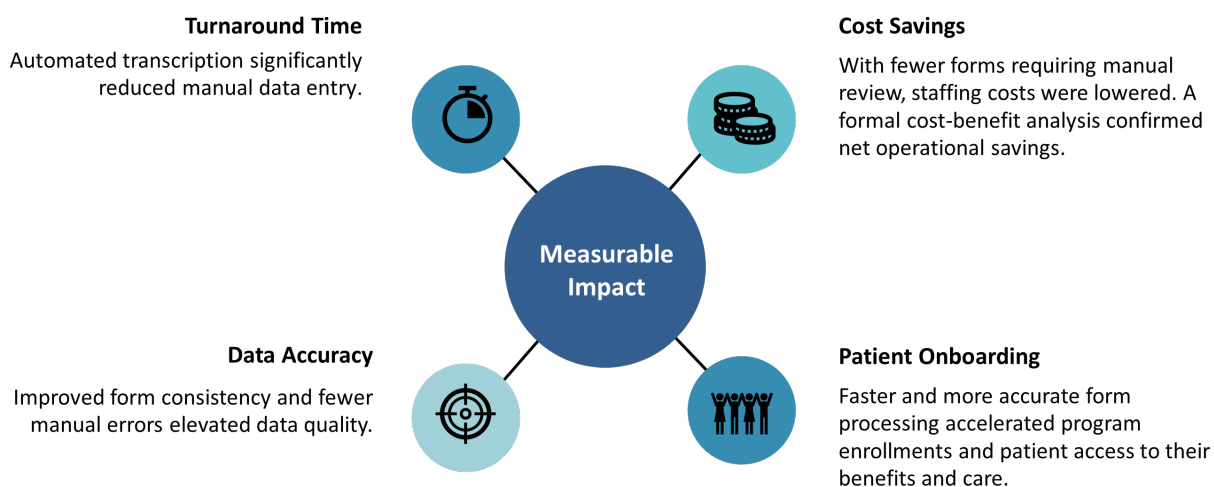
3. Full Lifecycle Support:

From requirement gathering to testing, deployment, and post-implementation monitoring, OmniTek ensured a seamless execution. We supported ongoing maintenance and handled change requests quickly based on real-world usage.

Measurable Impact

By implementing intelligent automation and modernizing core workflows, OmniTek Consulting helped the client overcome longstanding inefficiencies in their intake process. The transformation delivered measurable improvements across key performance areas:

Together, these outcomes not only streamlined day-to-day operations but also enhanced the client's ability to serve patients quickly, accurately, and cost-effectively, laying the groundwork for scalable, long-term impact.



Insights and Lessons Learned

At OmniTek, we understand that automation succeeds when grounded in practical experience and thoughtful design. Throughout this project, several important lessons emerged that helped guide both strategy and implementation with clarity and purpose:

- **Test Data is Everything:** Training the AI engine requires extensive, diverse form samples. Understanding real-world variations early is key.



- **Human-AI Hybrid Design:** Automation isn't always perfect. Flagging low-confidence data for agent review ensured quality while maintaining speed.
- **Clear Requirement Gathering Prevents Rework:** With so many specialty programs, deeply understanding each use case upfront saved time during deployment.
- **Simple Integrations > Overhauls:** Enhancing legacy systems instead of replacing them entirely proved both faster and more cost-effective.

These insights ensured the solution was technically effective, easy to adopt, and well-aligned with the client's operational goals. As a result, the transformation delivered real-world value with long-term potential for growth.

About OmniTek & Contact Information

OmniTek Consulting is a trusted partner for organizations seeking to enhance governance, operational agility, and decision-making. We specialize in modernizing business processes with a blend of human-centered design, technology expertise, and hands-on change management. From global development organizations to agile PMOs, we help teams bring clarity to complexity. If your organization is grappling with bottlenecks, inefficient workflows, or unclear roles, we can help.

Contact us today to explore how OmniTek can support your transformation journey and drive lasting results.

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