

# Embrace the new **M A T R I X**



## STEP 1: UNDERSTAND MARKET TRENDS

**2019-2020: Blip or shift? Key trends in the HCP mix**

# Overview

1

Intro

2

OCE - Emerging changes/trends at the customer level (“demand”)

3

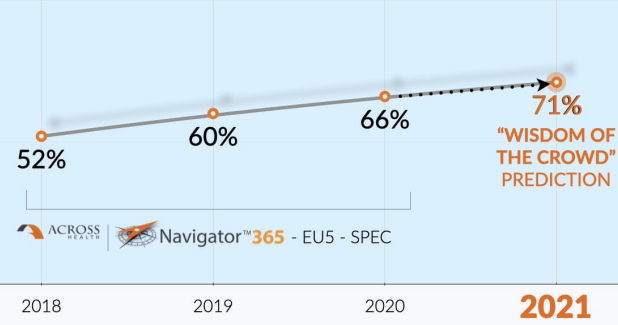
OCE - Emerging changes/trends at the pharma level (“supply”)

4

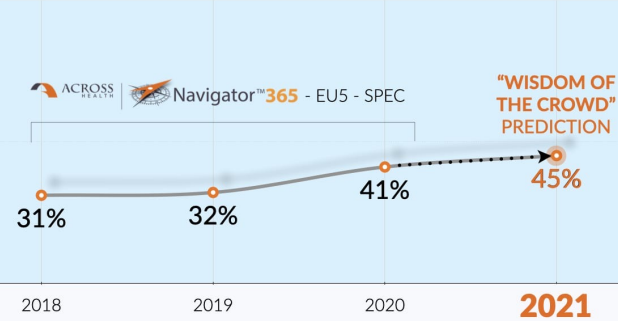
Reimagine the future

# This is what 100+ respondents said in January 2021...

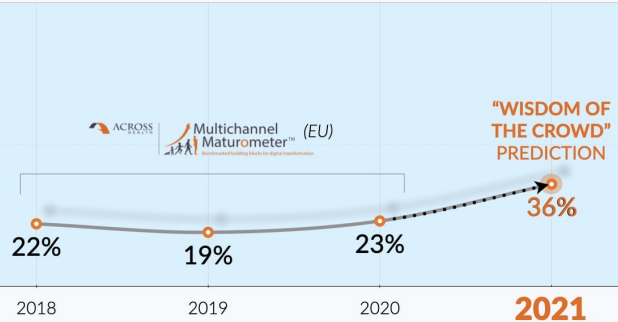
## 1. HCP INTEREST in digital pharma offerings



## 2. HCP SATISFACTION with pharma digital communication



## 3. SHARE OF MARKETING BUDGET allocated to digital



Biopharma is “still crazy/channel-centric after all these years...”

# “Doctors disappointed in pharma's digital pandemic efforts”

 **FIERCE**  
Pharma  
February 1, 2021



# Overview

- 1 Introduction
- 2 OCE - Emerging changes/trends at the customer level (“demand”)
- 3 OCE - Emerging changes/trends at the pharma level (“supply”)
- 4 Reimagine the future

# The sample

1.

## Navigator365 HCP

(Q4 2019, multiple TAs (specialists), N = 5112)

2019Q4	#	%
France	796	16%
Germany	843	16%
Italy	807	16%
Spain	852	17%
UK	806	16%
US	1008	20%
Total	5112	100%

2.

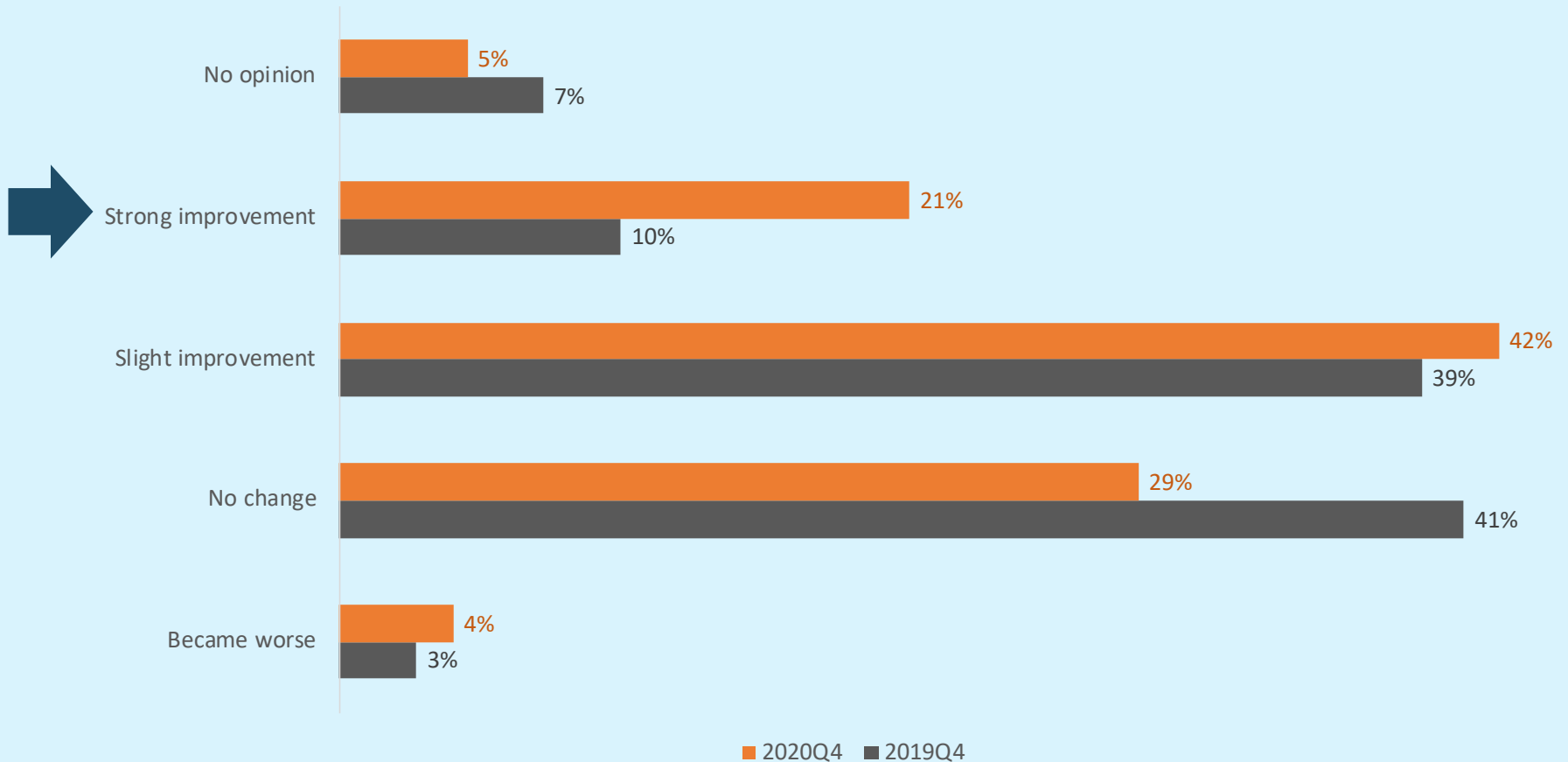
## Navigator365 HCP

(Q4 2020, multiple TAs (specialists), N = 3779)

2020Q4	#	%
France	546	14%
Germany	558	15%
Italy	573	15%
Spain	570	15%
UK	533	14%
US	999	26%
Total	3779	100%

# Over 60% see an improvement in biopharma digital content, but only about 1 in 5 see a strong boost

## IMPROVEMENT IN ONLINE CONTENT VS 12 MONTHS AGO - EU5 SPECIALISTS



Navigator Specialists EU5 2019 Q4, N = 4104  
Navigator Specialists EU5 2020 Q4, N = 2780

# Importance and satisfaction of pharma digital have increased

But there is still a huge gap – and only a few companies are pushing up the average

EU5

62%

Finds digital offerings from pharma **important** (54%)

+14%

42%

Is **satisfied** with pharma's digital offerings (33%)

+29%

56%

Finds **only some** pharma are offering relevant digital content (58%)

-5%



*% in brackets are from the 2019 set*

Navigator Specialists EU5 2019 Q4, N = 4104  
Navigator Specialists EU5 2020 Q4, N = 2780







# Averages can deceive...

Within 12 months' time, behaviours are changing

- The segment that finds digital important is a majority (49-74% among specialists)
- Satisfaction also increases, but still does not reach 50% in most markets except Spain

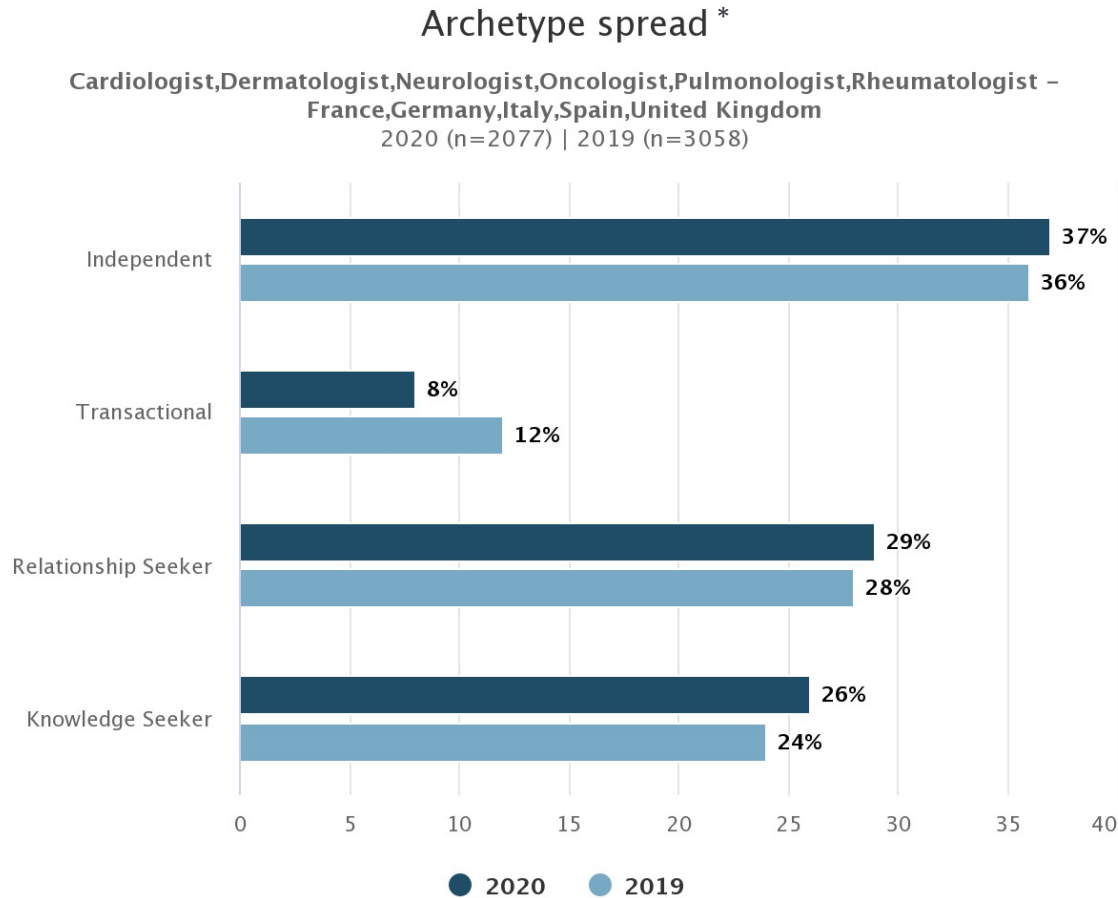
	Q4 2020		Q4 2019	
	% Important	% Satisfied	% Important	% Satisfied
<b>FR</b>	49%	41%	46%	39%
<b>DE</b>	51%	34%	43%	22%
<b>IT</b>	69%	42%	69%	44%
<b>SP</b>	74%	51%	78%	41%
<b>UK</b>	64%	43%	56%	36%
<b>US</b>	51%	41%	45%	43%
<b>GP (EU5)</b>	12%	37%	9%	28%

-  Increase by 10+% vs Q4 2019
-  Decrease by 10+% vs Q4 2019

Navigator Specialists EU5 & US 2019 Q4, N = 5112  
 Navigator Specialists EU5 & US 2020 Q4, N = 3779  
 Navigator GP EU5 2019 Q4, N = 801  
 Navigator GP EU5 2020 Q4, N = 622

# Did HCPs change?

Archetypes are, well, archetypes, ie, they remain quite STEADY



And internet time increases only 10% to 75 mins/weekday

\*McKinsey archetypes divide doctors into 4 behavioural segments

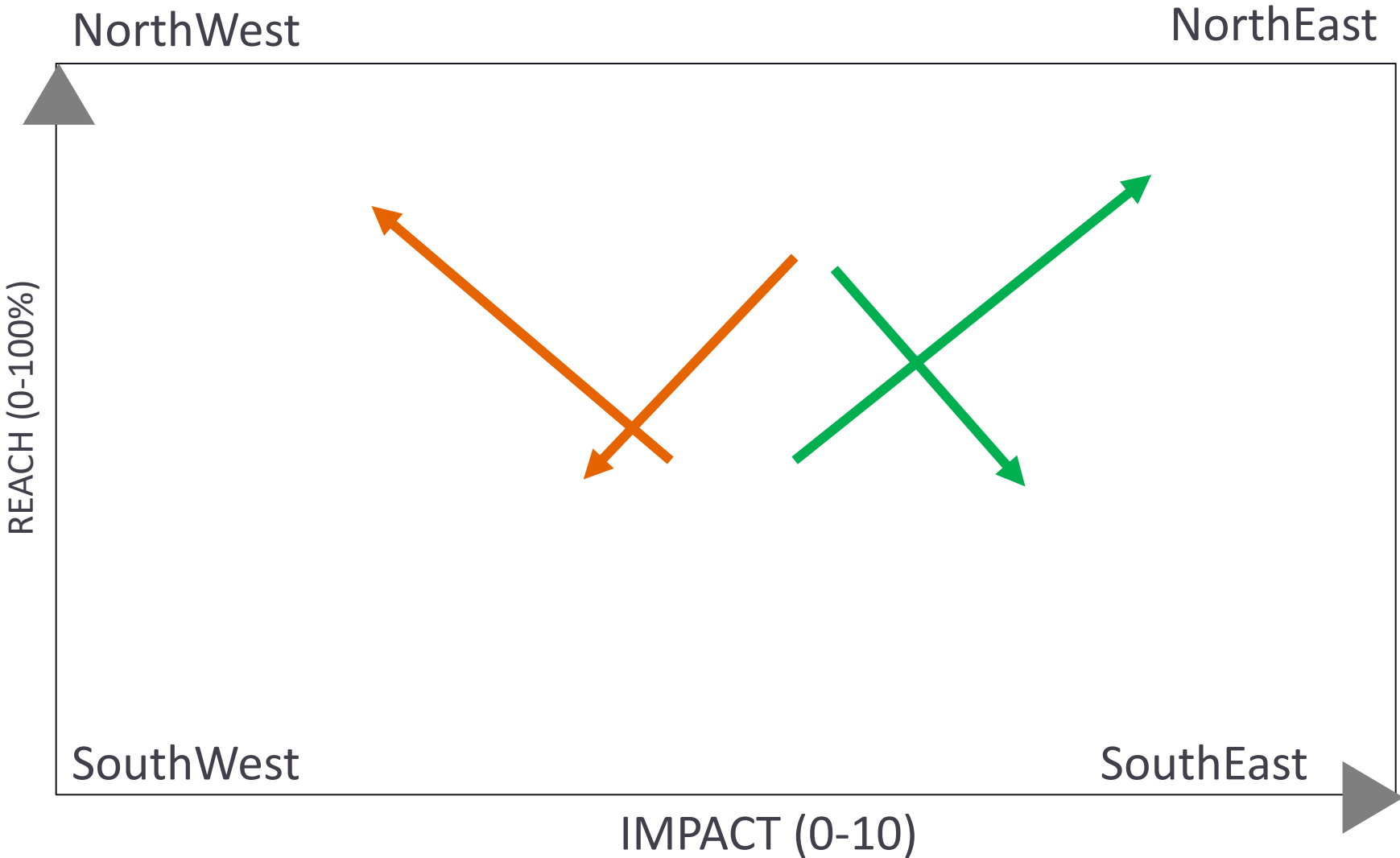
# Overview

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- 4 Reimagine the future

Where are we heading?

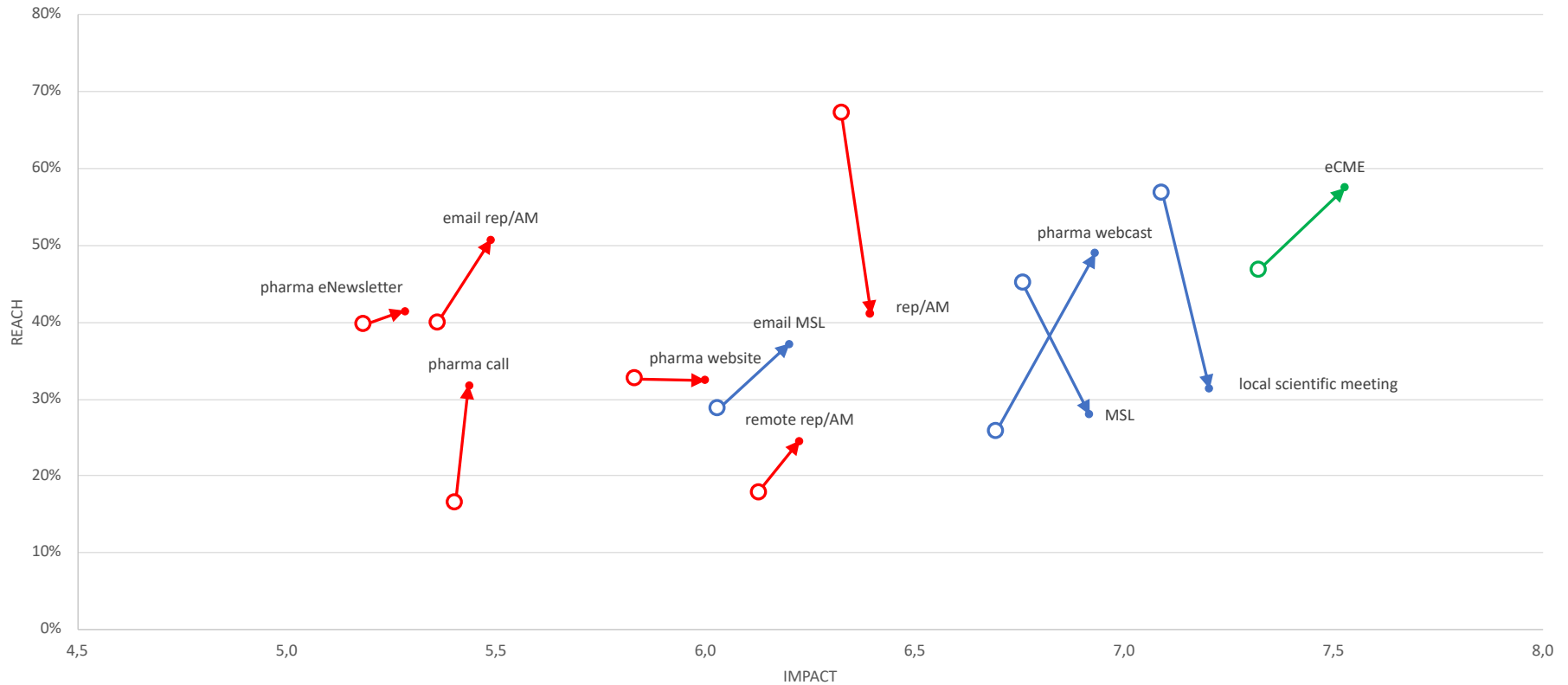


# The channel "compass" in C19 times



# Among EU5 specialists, reach AND impact of most pharma digital channels increased – NORTH-EAST (except for Marketing digital = EAST)

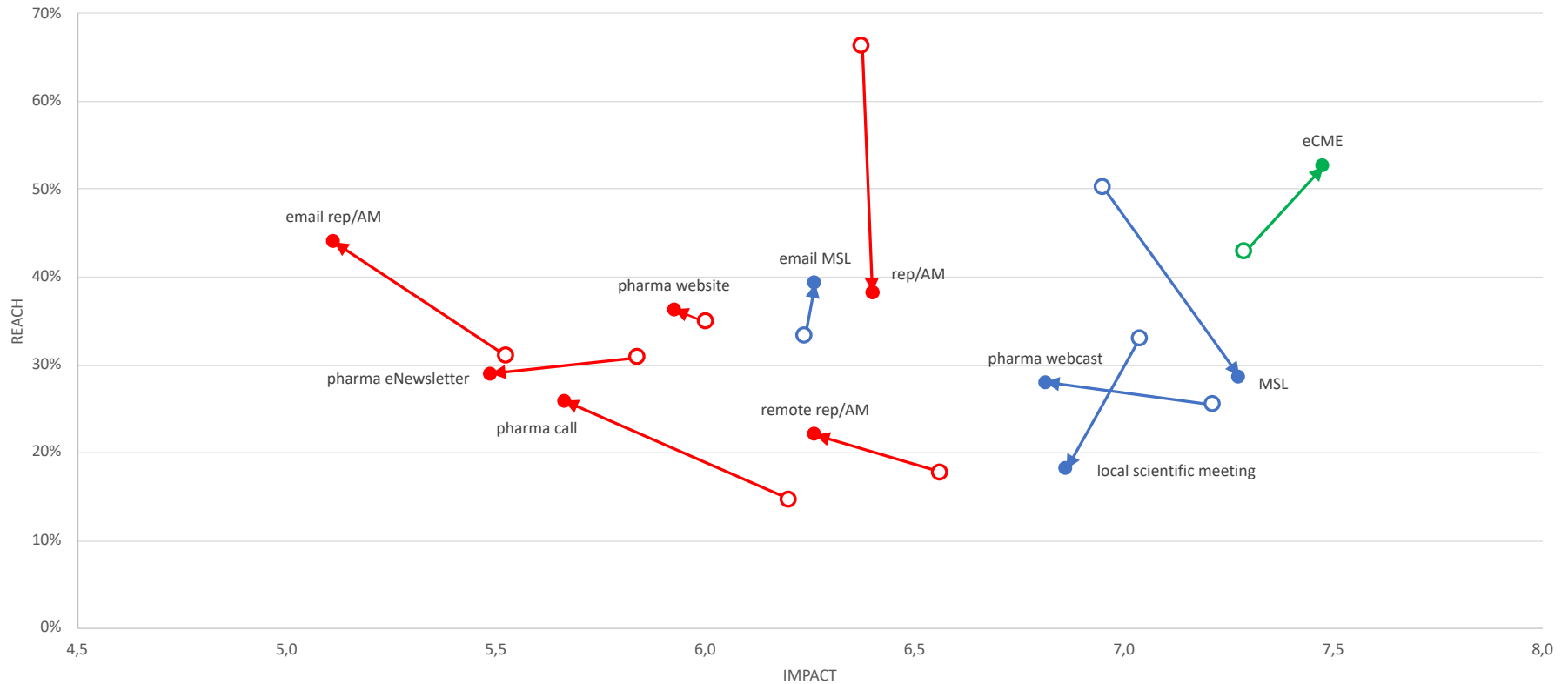
CHANNEL PERFORMANCE EVOLUTION 2019Q4 VS 2020Q4 - EU5 SPECIALISTS



Navigator Specialists EU5 2019 Q4, N = 4104  
 Navigator Specialists EU5 2020 Q4, N = 2780

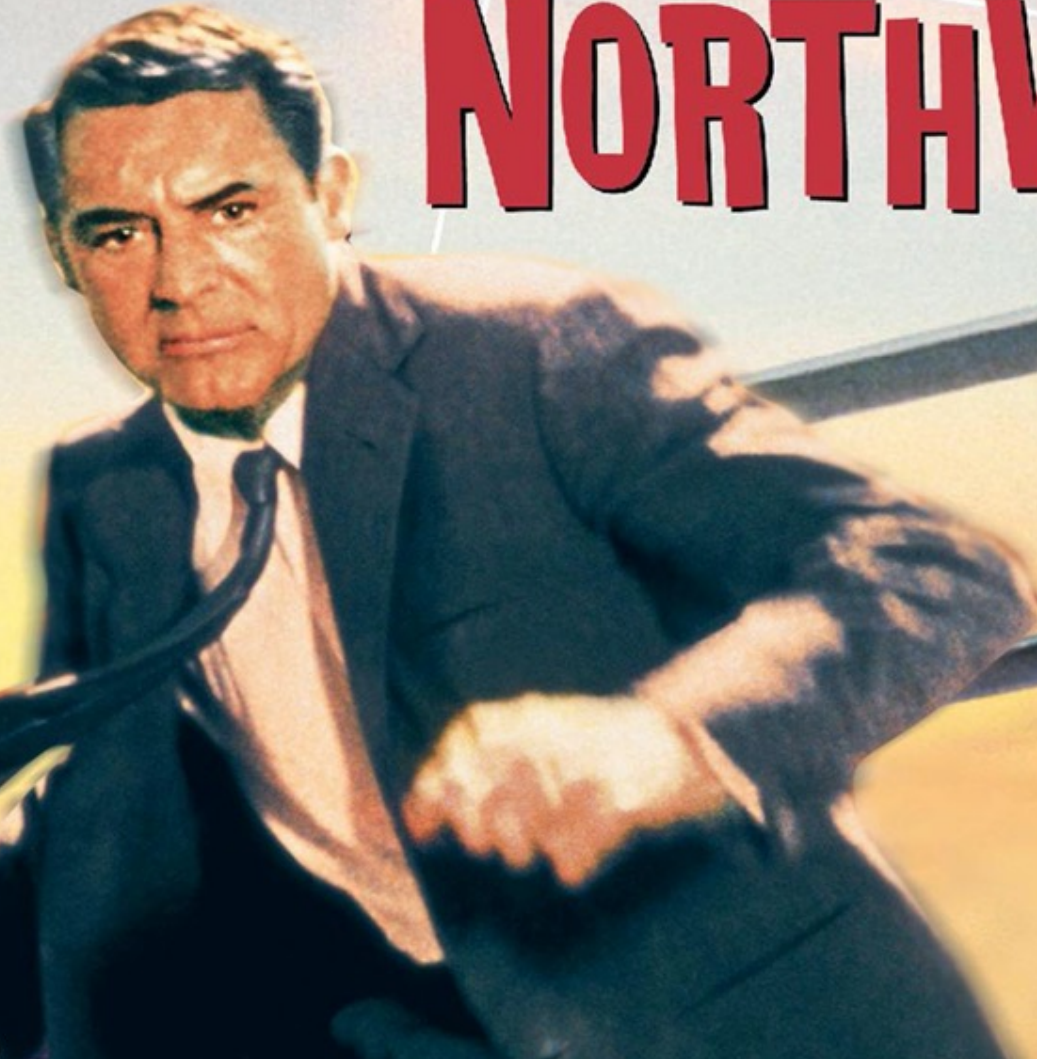
# Among US specialists, reach BUT NOT impact of most pharma digital channels increased – NORTH-WEST (except for Marketing digital = WEST)

CHANNEL PERFORMANCE EVOLUTION 2019Q4 VS 2020Q4 - US SPECIALISTS



Navigator Specialists US 2019 Q4, N = 1008  
 Navigator Specialists US 2020 Q4, N = 999

**C19's**  
**NORTH EAST vs**  
**NORTHWEST**

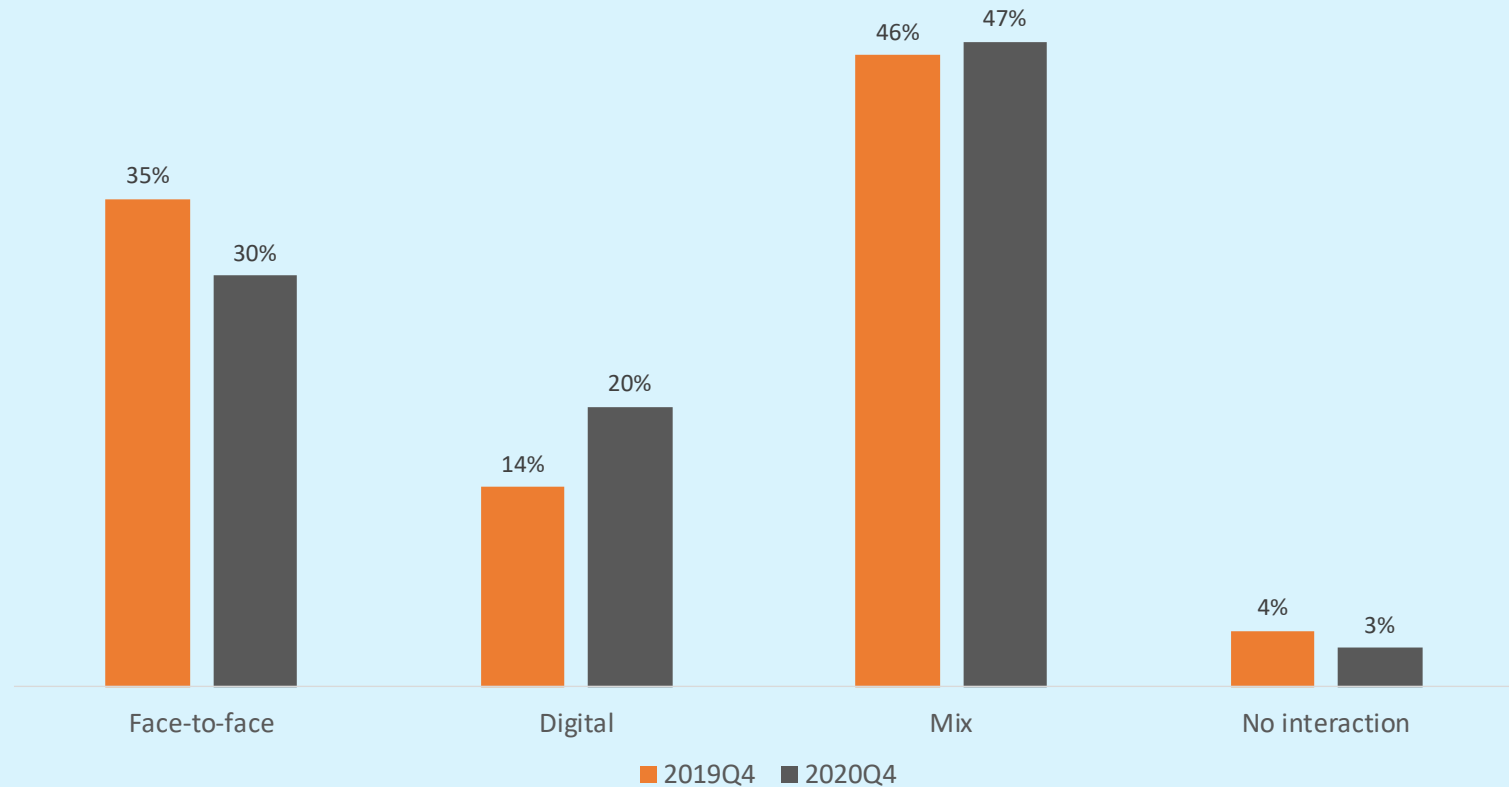




# In the Medical sphere, 67% of HCPs now want at least SOME digital

More segmented approaches are needed going forward

## COMMUNICATION PREFERENCES (EDU) - EU5 SPECIALISTS

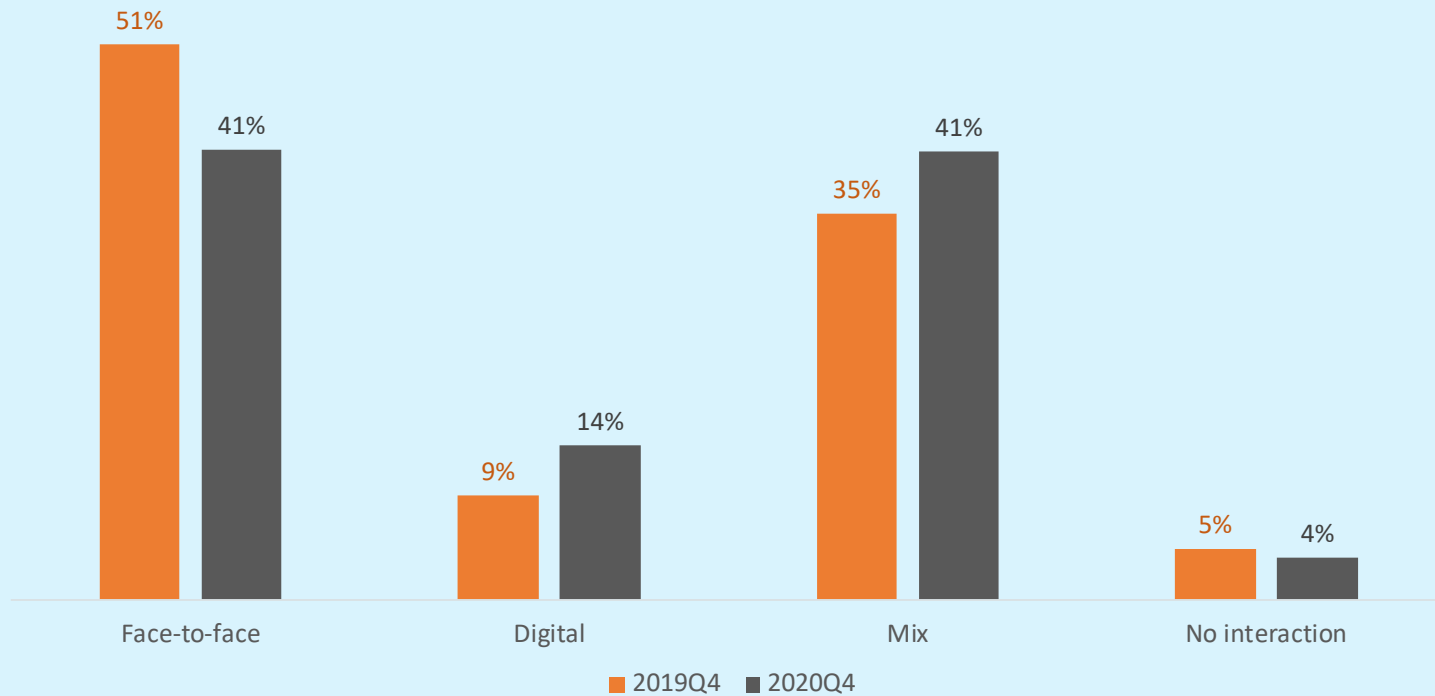


Navigator Specialists EU5 2019 Q4, N = 4104  
Navigator Specialists EU5 2020 Q4, N = 2780

# In Commercial, a majority (55%) now want at least SOME digital

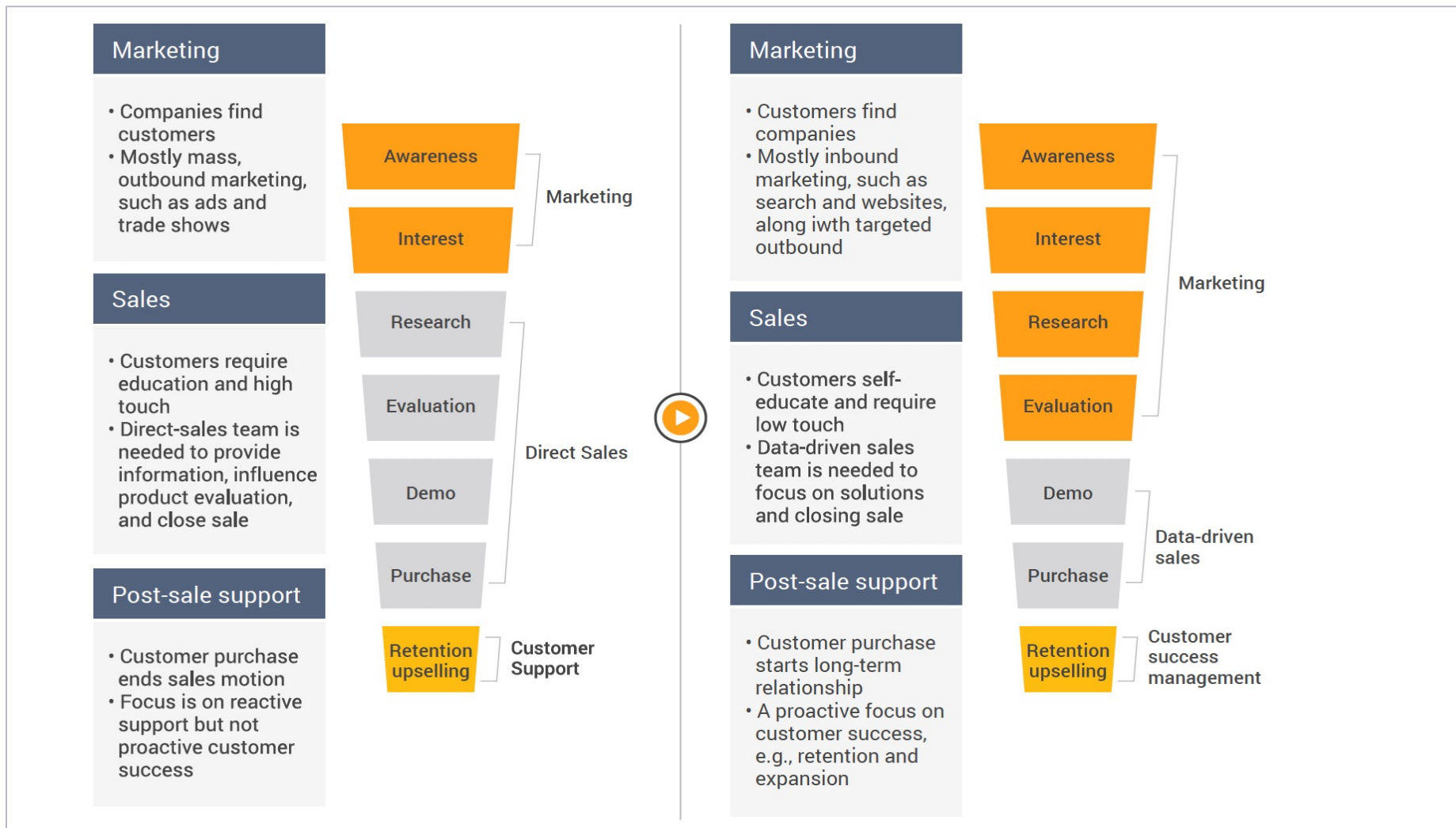
REPEAT: More segmented approaches are needed going forward

COMMUNICATION PREFERENCES (PROMO) - EU5 SPECIALISTS



Navigator Specialists EU5 2019 Q4, N = 4104  
Navigator Specialists EU5 2020 Q4, N = 2780

# In the Never Normal, Marketing has a direct revenue-related role and it's all about marketing & sales alignment



Source: BCG

# Case study: Part 1

## Multichannel engagement as growth accelerator and referral predictor for innovative, cardio procedure

### SITUATION

- Global player developed innovative treatment option for treatment of highly prevalent heart condition
- Patient procedure through referral and intervention
- Limited awareness around alternative treatment
- Limited supporting staff in focus markets.

### MC approach



### Lead profiling approach

Multichannel campaign  
+ Scoring algorithm  
= Next best visit



### Finetune through predictive analytics

Campaign responsiveness, fieldforce visit recency & frequency, congress & meeting attendance and frequency



RESULTS:

### Objectives

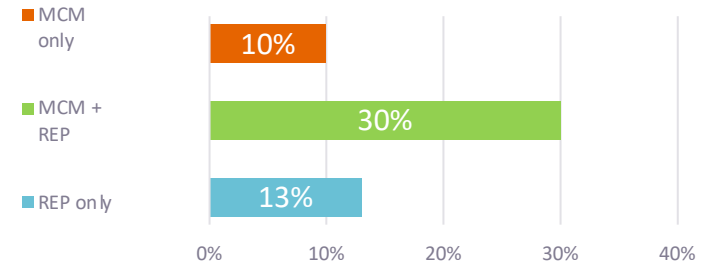
1. Maximize outreach & educate target referrers.
2. Use Omnichannel to distinguish "hot" from "lukewarm" leads for prioritising F2F visits

### CHANNELS:

- Newsletters
- 3<sup>rd</sup> party email
- Bannering
- Direct mailings
- Congress material
- Web portal content updates
- Outbound call center
- Live & recorded KOL webinars
- Sales rep leave behinds



Referral uptake (+%) by type of promotion



# Case study: Part 2

## Multichannel engagement as growth accelerator and referral predictor for innovative, cardio procedure

### SITUATION

- Global player developed innovative treatment option for treatment of highly prevalent heart condition
- Patient procedure through referral and intervention
- Limited awareness around alternative treatment
- Limited supporting staff in focus markets.

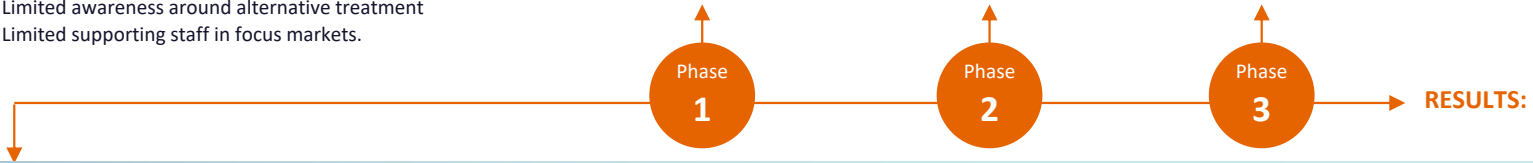
### MC approach

### Lead profiling approach

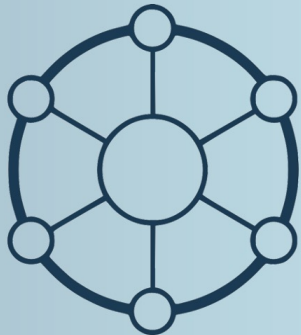
- + Multichannel campaign
- + Scoring algorithm
- = Next best visit

### Finetune through predictive analytics

- Campaign responsiveness, fieldforce visit recency & frequency, congress & meeting attendance and frequency




## Navigator 365™




  
Reading an email  
+0,2

  
Read a webpage  
+0,4

  
Call accepted  
+0,2

  
Watch video  
+1,1

  
Act upon DM  
+0,7

  
Watch webinar  
+1,2



Recency

Frequency

Potential

Multichannel campaign



Scoring algorithm



NEXT BEST VISIT

## Case study: Part 3

Multichannel engagement as growth accelerator and referral predictor for innovative, cardio procedure

Lead scoring as a planning aid for the fieldforce

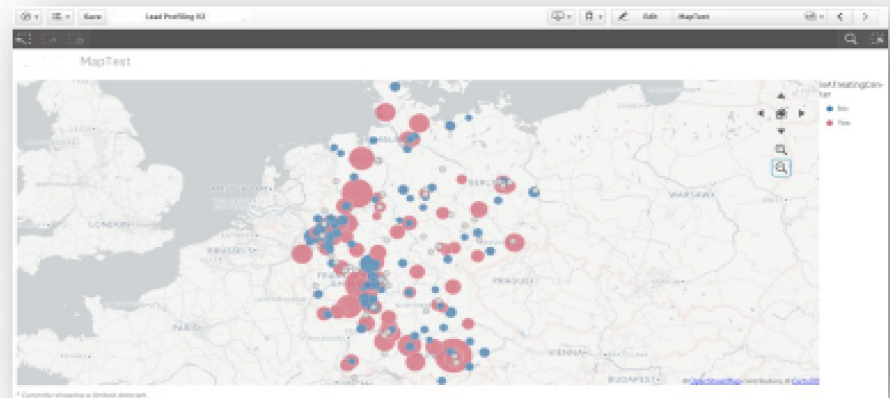


### Goal

- Prioritize visits to save time and increase efficiency
- Improve access to physicians

### Reps get visibility on

- Automated ranked list of high-potential HCPs to plan their next best visit
- Visibility on all touchpoints so far with the company (360° view)



# The competitive landscape



# Let's have a quick look at part 4 of the Navigator365: competition

Comparing Q2 2020 vs Q4 2020

## Navigator 365™

PART 1

PART 2

PART 3

PART 4

Competitor benchmark



## Uneven competitive landscape (Q2 2020 vs Q4 2020)

Example “oncology” – top-3 per country

	FR	DE	IT	ES	UK	US
Abbvie	3 (+3)					2 (-1)
Amgen	2 (+1)					
AstraZeneca	1 (-)	2 (-)	1 (-)	2 (+1)	1 (-)	3 (+2)
Bayer		1 (+2)				
BMS				3 (-1)	3 (-)	1 (+1)
Janssen		3 (+2)				
MSD						
Novartis			3 (-)			
Pfizer					2 (+3)	
Roche/Genentech			2 (-)	1 (-)		

\* change in rank vs 2020Q2 in brackets

- AstraZeneca is the only company in the top 3 everywhere
- BMS in 3/6; Abbvie, Roche in 2/6
- Rankings vary by market
- Need/opportunity for a stronger INT-local alignment

Navigator Oncologists 2020Q4 EU5 & US, N = 481

# Zooming in on AZ (3 channels out of the 18) for 6 markets

Moving from strength to strength – but there is “low-hanging fruit”

AstraZeneca	FR			DE			IT			ES			UK			US		
Rank	2019	2020	Delta	2019	2020	Delta	2019	2020	Delta	2019	2020	Delta	2019	2020	Delta	2019	2020	Delta
remote rep	1	3	-2	15	2	+13	4	2	+2	2	3	-1	17	1	+16	6	4	+2
website	7	7	+0	5	3	+2	3	1	+2	4	2	+2	2	2	+0	6	8	-2
webinar	3	2	+1	9	5	+4	10	1	+9	6	2	+4	1	3	-2	15	5	+10

Key dimensions	# channels	Channels covered			
Sales	4	rep	rep tablet	remote rep	rep email
Marketing	4	enewsletter	website	app	social media
Medical	8	MSL	MSL tablet	remote MSL	MSL email
		emeded	webcast	F2F sc meeting	online sc meeting
Patient services	2	patient app	PSP (support pr)		
Overall digital leadership		companywide			
Customer effort score		companywide			
Health tech innovation		companywide			



Navigator Oncologists 2020Q4 EU5 & US, N = 481

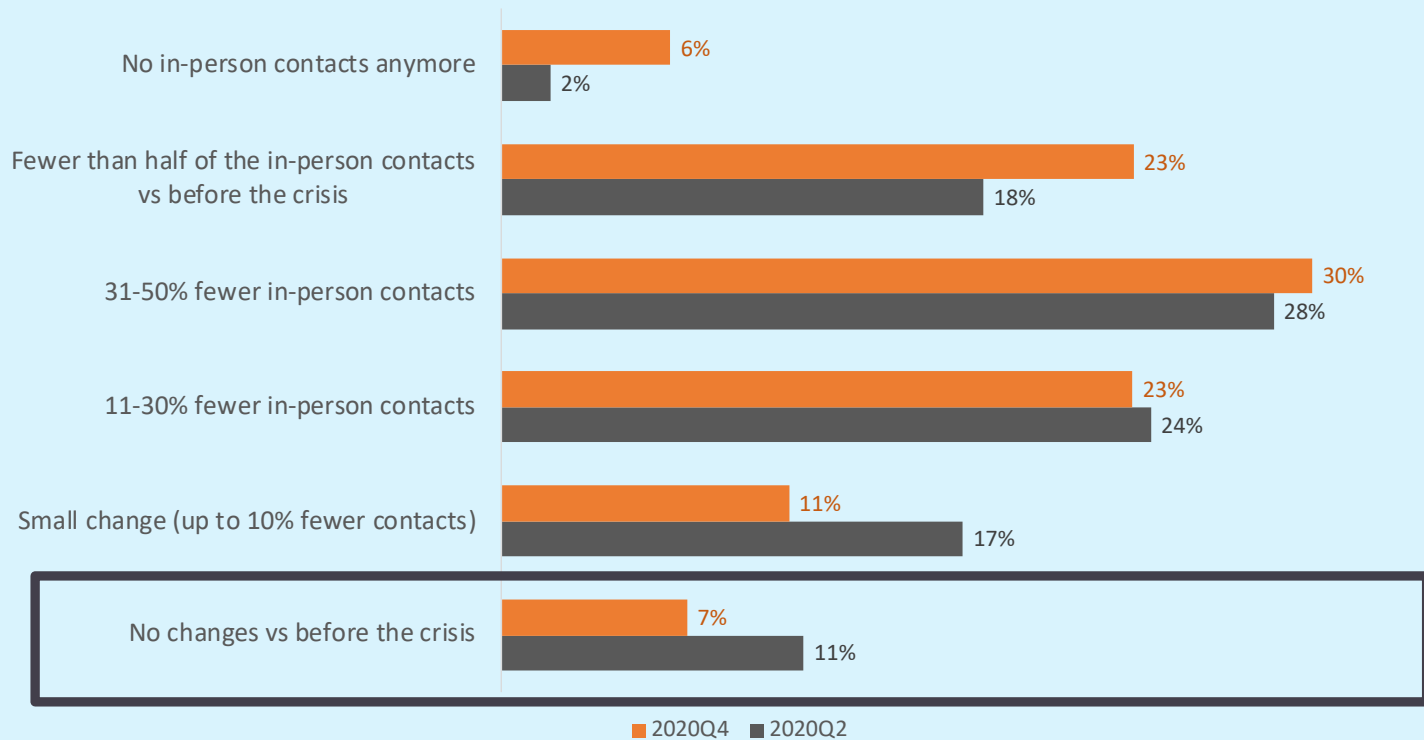
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# Blip or shift? Only 7% expects NO change in rep calls going forward...

Comparison Q2 2020 – Q4 2020

LOOKING TO 6 MONTHS FROM NOW, HOW DO YOU THINK YOUR CONTACTS WITH SALES REPS WILL EVOLVE BY THEN VERSUS BEFORE THE COVID-19 CRISIS? - EU5 SPECIALISTS




**\*Range for “no change”: 3% (ES) to 14% (FR)**

FR (14%), DE (5%), IT (6%), ES (3%), UK (6%)

Navigator Specialists EU5 2020 Q2, N = 665  
Navigator Specialists EU5 2020 Q4, N = 2780

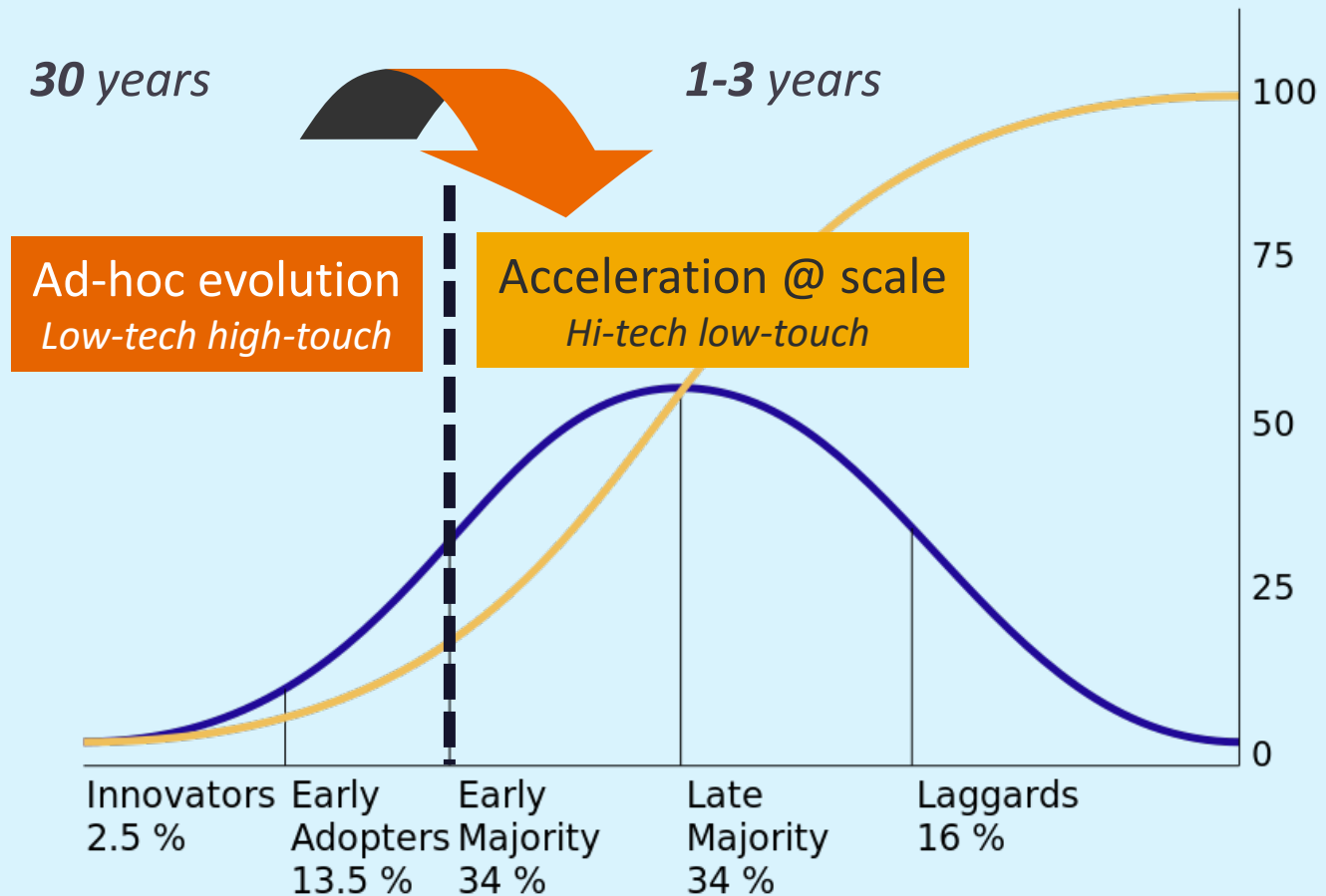


It takes on average 66 days to change behaviour  
...in the meantime, we are almost 365 days underway...



New Mindset ?

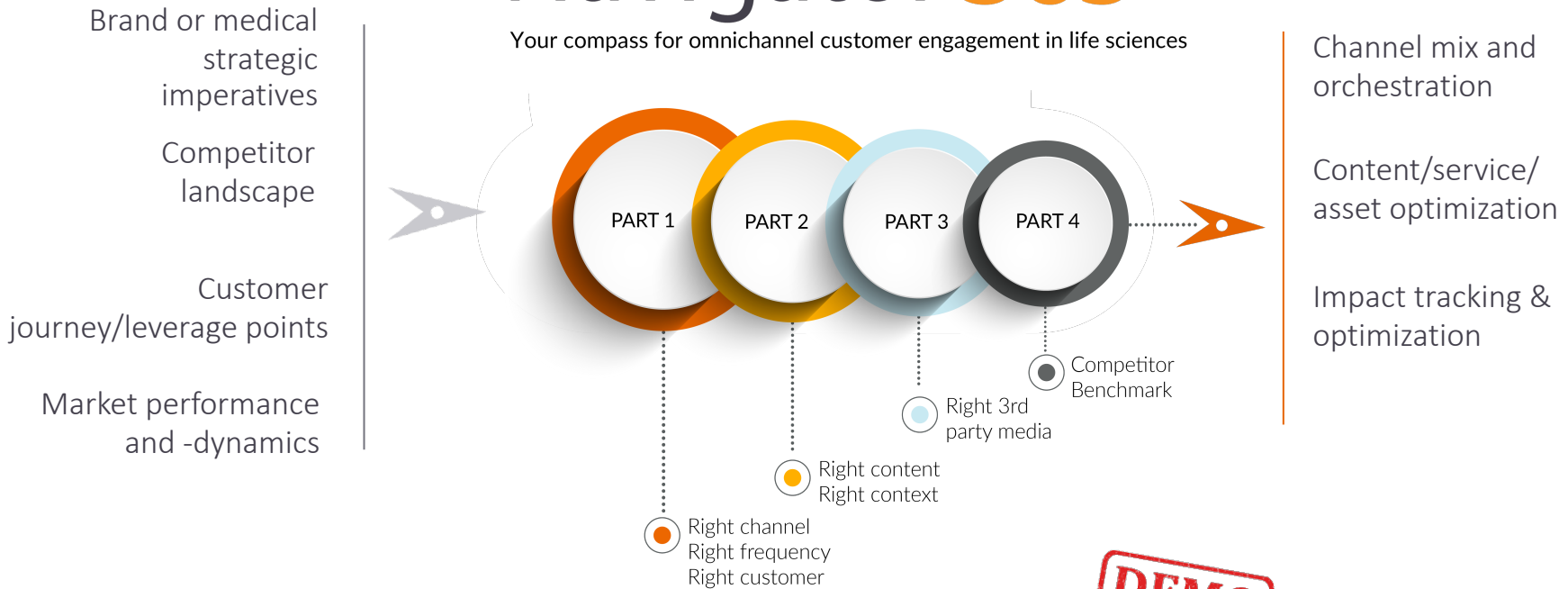
# The shift is starting to unfold...we have reached the tipping point! What is needed? Transformation @ Scale



# Navigator 365 helps at a crucial step – translating your strategic imperatives into a high-impact customer engagement strategy

## Navigator 365™

Your compass for omnichannel customer engagement in life sciences



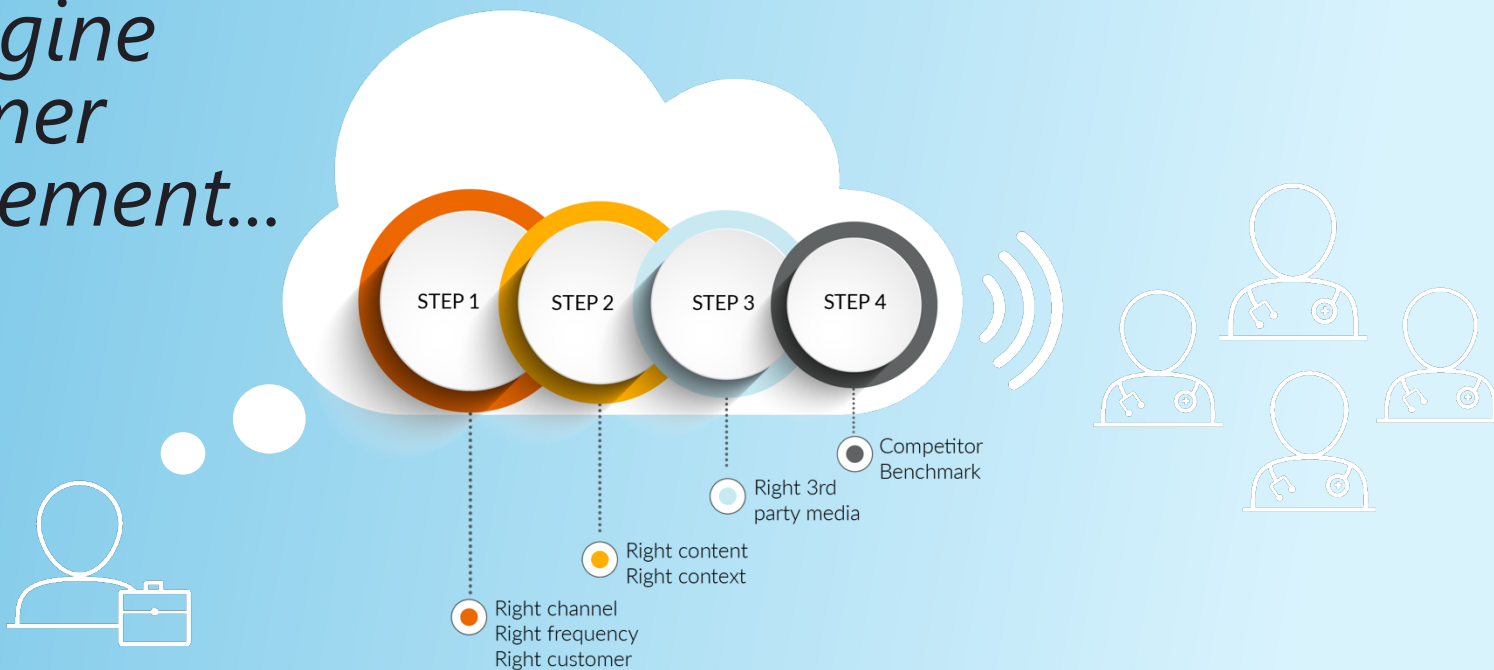
[www.across.health/navigator365](http://www.across.health/navigator365)

**DEMO**

**83%** of clients find Navigator (much) better than competition\*

\* Maturometer 2020

Reimagine  
customer  
engagement...



# Navigator 365™

Your compass for omnichannel customer engagement in life sciences

for the post-C19 era

[www.across.health/navigator365](http://www.across.health/navigator365)

**DEMO**



# For our core sets, the new time trends Powertool produces key trends (Q4 2019 vs Q4 2020) with one simple click



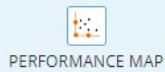
Navigator 365™

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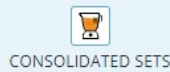
FULL REPORTS **POWERTOOLS**



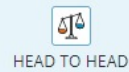
EQUIVALENCE MAP



PERFORMANCE MAP



CONSOLIDATED SETS



HEAD TO HEAD



3<sup>RD</sup> PARTY MEDIA

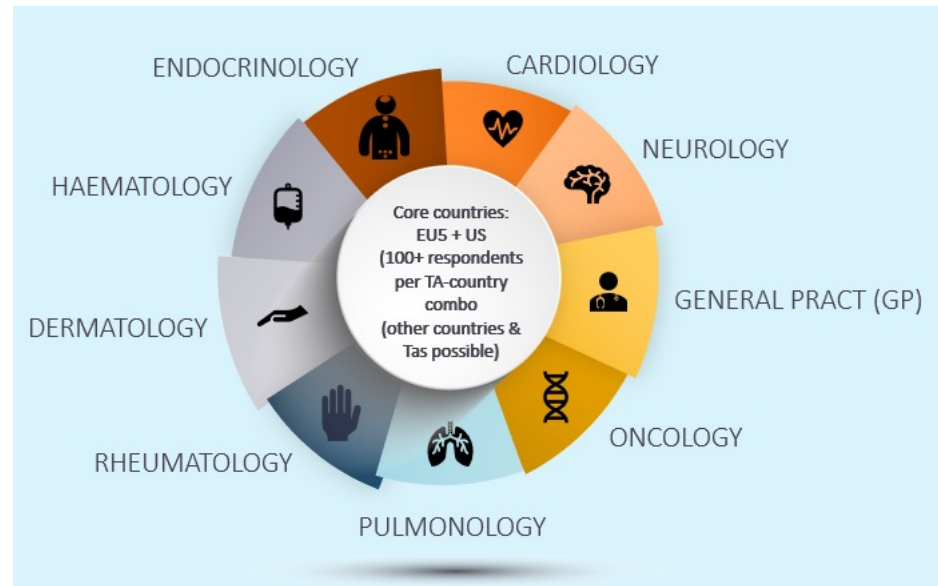


BENCHMARKING



TIME TRENDS

- General Reports ▼
- Channel Performance
- Channel Frequency
- Internet Time
- Archetype Spread
- Communication Preferences
- Digital Satisfaction
- Digital Engagement
- Content Relevance
- Digital Preference
- Company Benchmarking >





self-service  
product suites

services  
AI framework

evidence &  
experience

SELF-SERVICE PRODUCT SUITES

**Navigator 365™**

 **Navigator365™ Core**  
Power your OCE strategy with truly actionable insights

 **Navigator365™ Planner**  
Translate your OCE strategy into a robust plan

 **Navigator365™ Tracker**  
Track your OCE campaign for high impact

**Scala 365™**

 **Scala365™ Learning**  
Boost your omnichannel capabilities

 **Scala365™ Game**  
Hone your OCE skills in a gamified test drive

 **Scala365™ Manual**  
Stay ahead with the ultimate OCE guide



END-TO-END SERVICES

**INSIGHT**

Develop actionable insights into the market, customer objectives, target audience, and company OCE maturity & ambitions

Key product catalysts:

- Navigator365 Core
- In-house Maturometer
- Scala365

**IMPACT**

Measure & optimize for superior customer experience & business results

- 360°dashboards
- Predictive analytics
- Test-control and ROI analysis

Key product catalysts:

- Navigator365 Tracker
- Scala365

**INNOVATION STRATEGY**

Create a solid, pragmatic & measurable omnichannel strategy

- For HCPs, patients & payers
- From launch to maturity
- For marketing, sales & medical

Key product catalysts:

- Navigator365 Planner
- Scala365

**INTELLIGENT EXECUTION**

Execute the strategy & monitor for optimal impact

- Programme management
- Coaching & change mgt
- Campaign orchestration

Key product catalyst:

- Scala365

# Embrace the new **M A T R I X**



OLD NORMAL

NEW NORMAL

**Thank you**