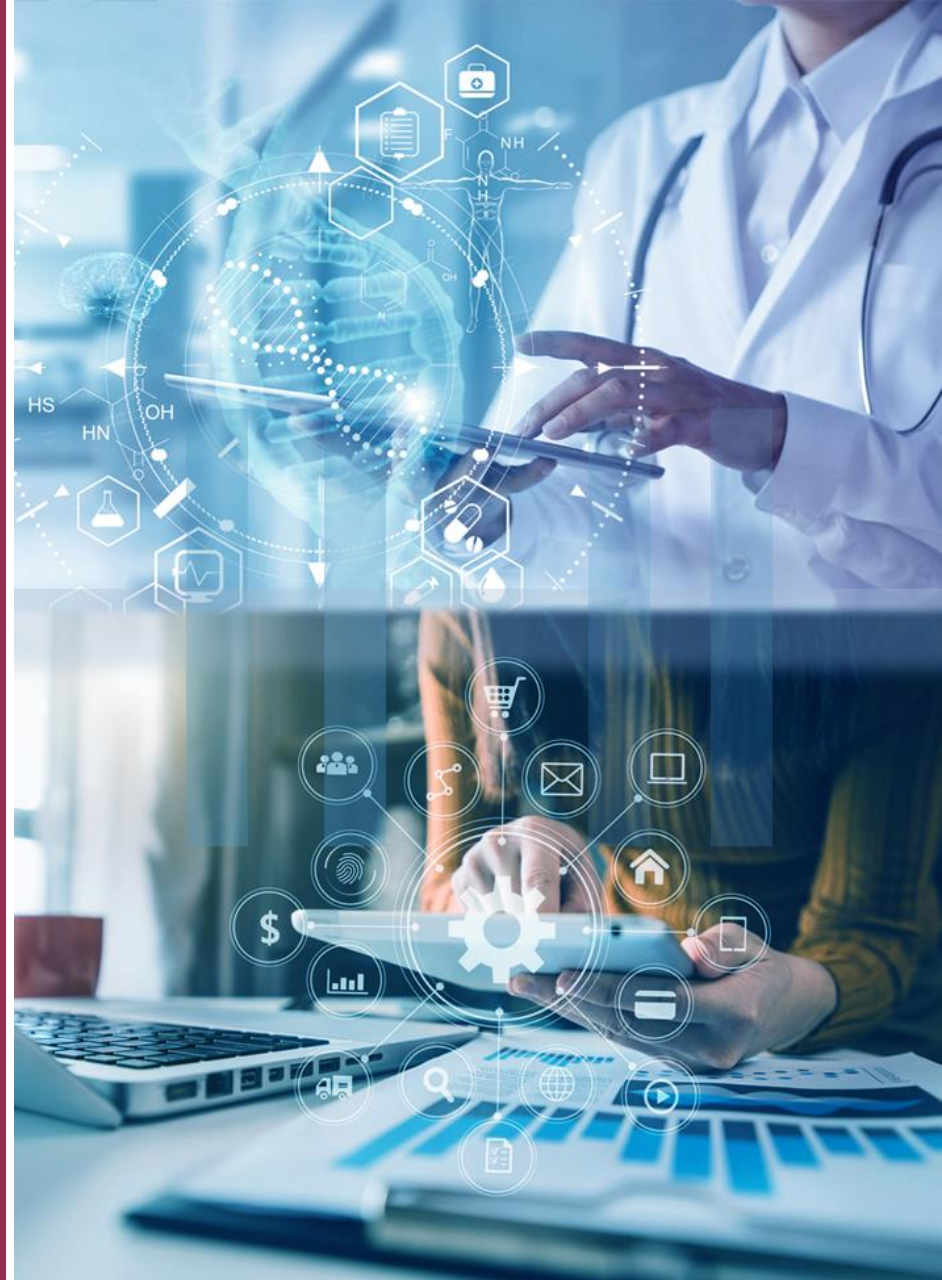


Embracing Omnichannel Engagement in Medical Affairs

Best Practices, LLC Strategic Benchmarking Research &
Analysis





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ISSUE	SAMPLE KEY ANALYSIS
BUSINESS ISSUE: As digital tools become further integrated into the medical field, Biopharma leaders must decide to what extent they can - and should - adopt omnichannel methods to engage stakeholders. This study examines the advances in omnichannel engagement activities by Medical Affairs organizations. The study probes and profiles how different organizations are implementing a variety of digital and in-person engagement activities, ever-changing staff roles, growing and shrinking resources, and newly-formed KPIs. METHODOLOGY: The study engaged 57 commercial and medical leaders from 43 biopharma companies in a benchmark survey. 	Big Picture: 83% of orgs have implemented some form of omnichannel engagement program, with 15% planning to do so soon 3 stages of maturity observed: Buy-in stage; resources and initial execution stage; strategic execution and optimization stage (Only ~20% of orgs in optimization stage) Content strategy: Single largest spend bucket is content dev; success is driven by ability to build and share many pieces of content to suit diverse needs High-impact channels: MSL virtual prez, data slides, on/off-label prez, Med Info letters, Unbranded websites, pubs, HCP portals, and social media KPIs: Not well standardized. Engagement scoring, knowledge gain, ATUs may be used

Omnichannel Study Participants: This study distills insights of Medical Excellence from 57 medical leaders at 43 companies

Benchmark Study Partners

Large Companies



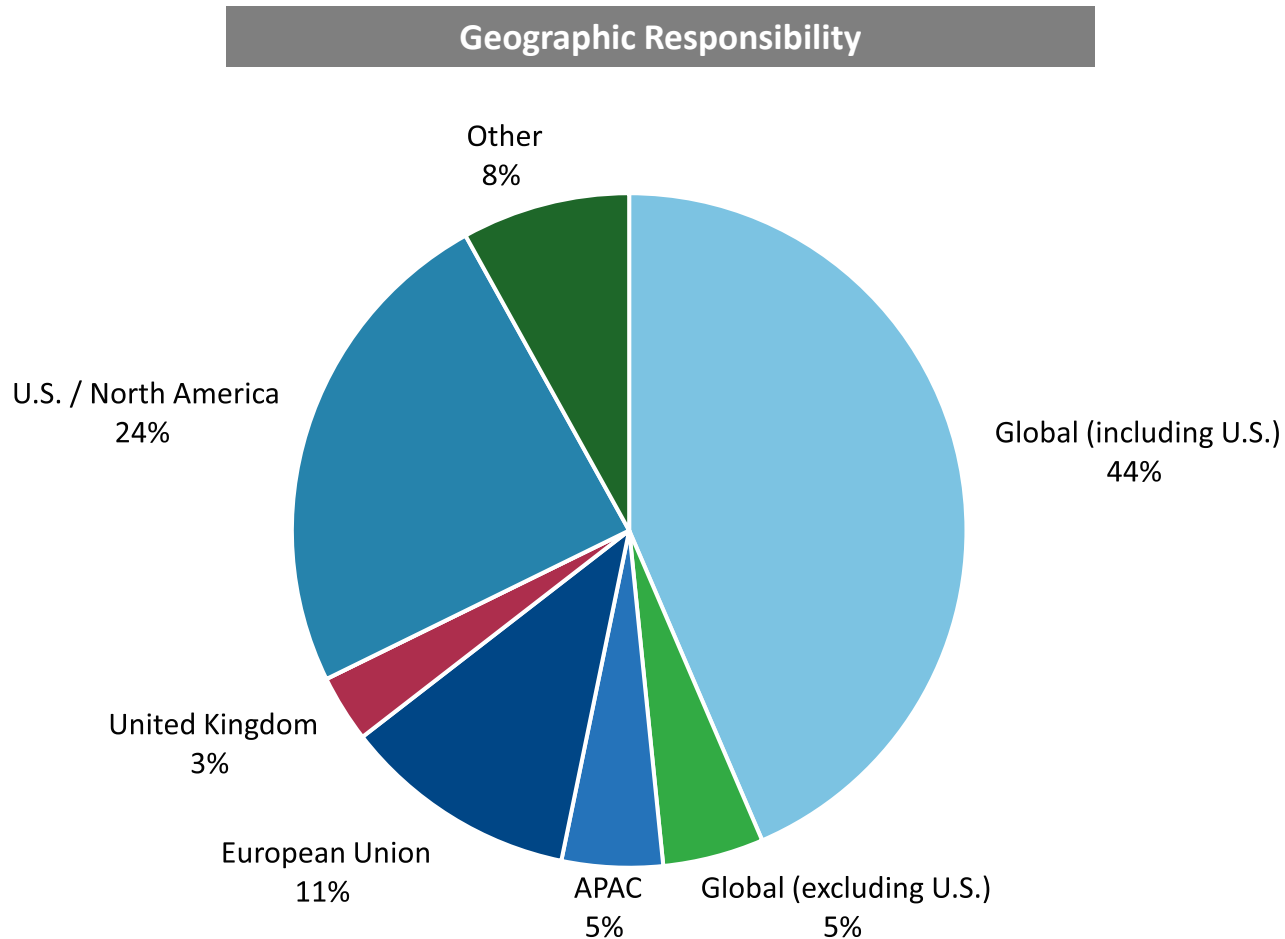
Small and Mid-size Companies



Industry Segmentation: Benchmark analysis is segmented into omnichannel “leaders” and those with “emerging” omnichannel capabilities

Omnichannel Leaders	Organizations with Emerging Capabilities
*Omnichannel consistently led by Medical Strategy *Greater allocation of budget, and significantly more staff, particularly among non-Medical IT staff *Higher percentage of engagements are enhanced by omnichannel capability *Omnichannel program includes most of these elements: Formal strategy, resources, buy-in, compliance, activities, KPIs, successes	*Omnichannel may be led by Medical Strategy, Ops, Excellence or Marketing *Lower resource allocations *Lower percentage of engagements are driven by omnichannel capability *Omnichannel program includes some of these elements: Formal strategy, resources, buy-in, compliance, activities, KPIs, successes
N=11	N=46

Geography: Survey respondents provide insight into omnichannel strategies within global, US and other Medical Affairs teams



N= 61

"Other" includes: Europe, Japan, Australia, New Zealand, APAC, Latin America, Russia, Eurasia, Middle East and North Africa, Commonwealth of Independent States

Q. What region or country does your survey reflect?

Sample key benchmark study findings

Current use of omnichannel in Medical Affairs: 83% of surveyed biopharma manufacturers have already implemented some form of an omnichannel engagement program within Medical Affairs. Another 15% are planning to do so. Just 2% have no plans to adopt an omnichannel model.

Three main stages of omnichannel maturity exist:

- Buy-in stage: Nearly 70% of companies indicate that their culture, leadership and cross-functional support of omnichannel initiatives
- Resources & initial execution stage: Around 33% of companies report that there are sufficient talent and financial resources in place to be successful
- Strategic execution & optimization stage: Only 16% of companies indicate they have a “clear Omnichannel strategy” in place – and that this strategy is executed upon

Medical Strategy groups most often lead omnichannel programs: Strategy groups take a *leading* role at 100% of leading companies, followed by Medical Excellence (50%), and occasionally even Marketing. IT groups play a *supporting* role at 83% companies, followed by Medical Operations (59%), and Medical Information (56%).

Leading companies find high impact across many channels and touchpoints: No one channel is perfect for all segments or individual targets, but each can contribute “a piece to the puzzle” of forging a better overall user experience. Leading companies achieve much higher impact than other emerging companies in these engagement channels: MSL virtual presentations, data slides and on/off-label presentations, Med Info letters, unbranded websites, publications, HCP portals, and social media.

Future of Omnichannel: Despite implementation challenges, omnichannel unlocks many benefits for Medical Affairs application



Novelty of omnichannel engagement (internal / external)



Appropriate infrastructure, processes, platforms and measures



Cross functional collaboration



Adherence to compliance and regulatory standards that limit the value of information dissemination



Content tailored to HCP requirements



Budget and resources



Perceived inherent bias from HCPs/Patients regarding Pharma created educational materials

Greater potential for behavioral change



Ease of use

Program agility, flexibility, & reliability



Better metric collection

Workflow management

Lead management



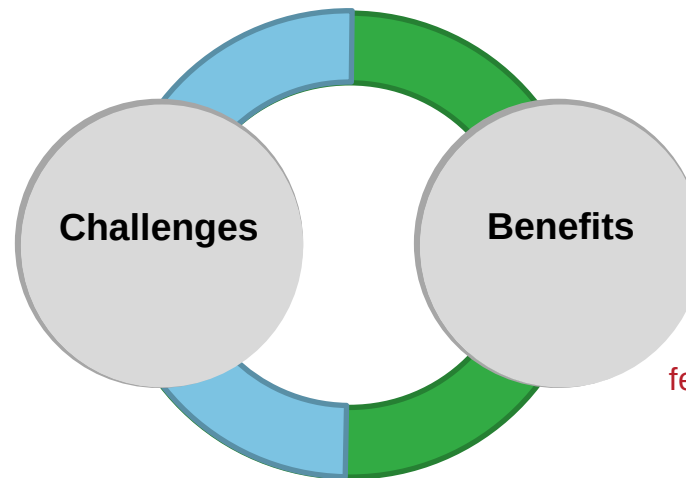
Broader network reach with fewer human resources required

Consistent messages (single source of truth)



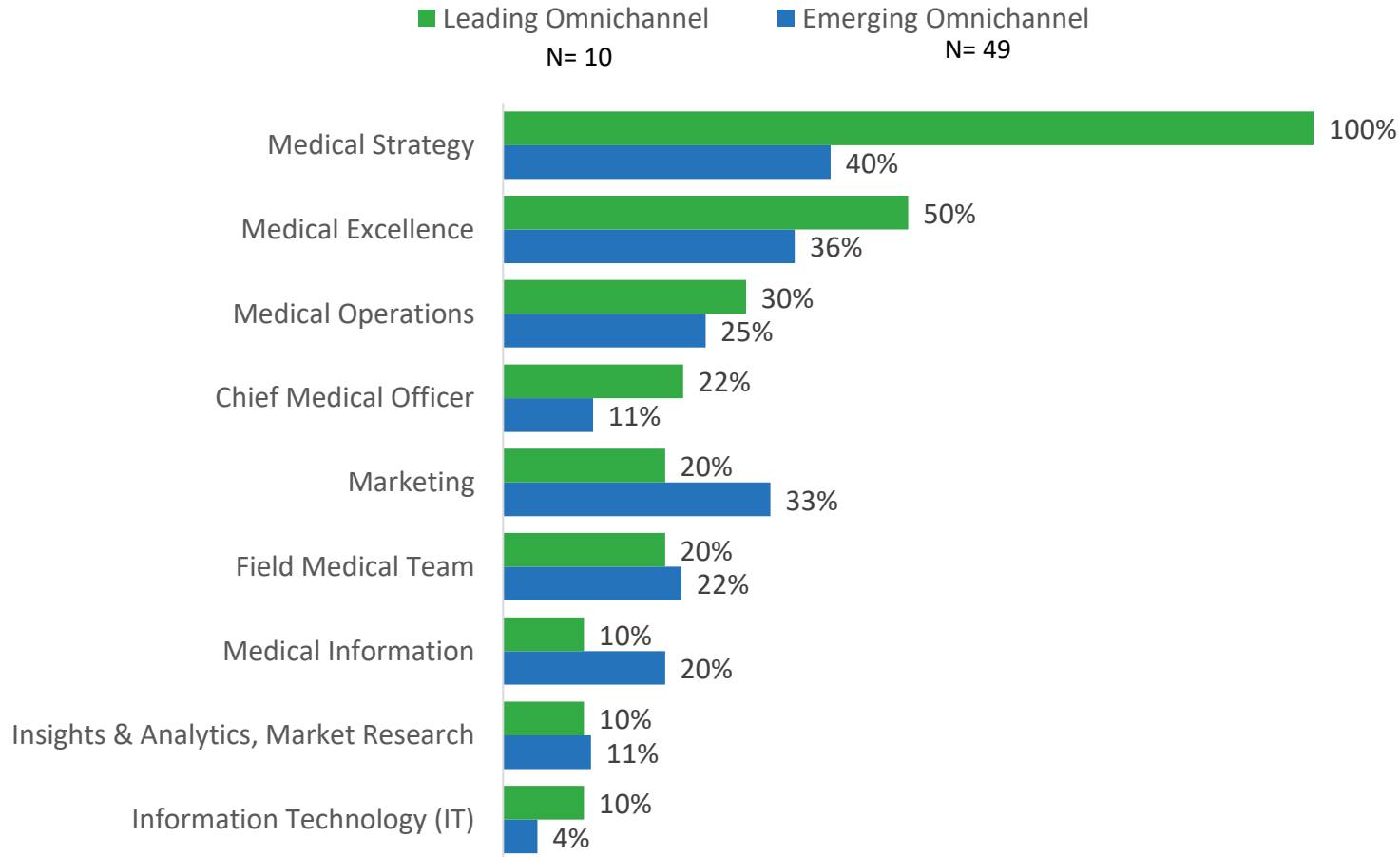
Ability to personalize content for more effective medical communications

Cost & Time savings



Group Roles: Medical Strategy plays a leadership role in omnichannel at 100% of companies in advanced segment

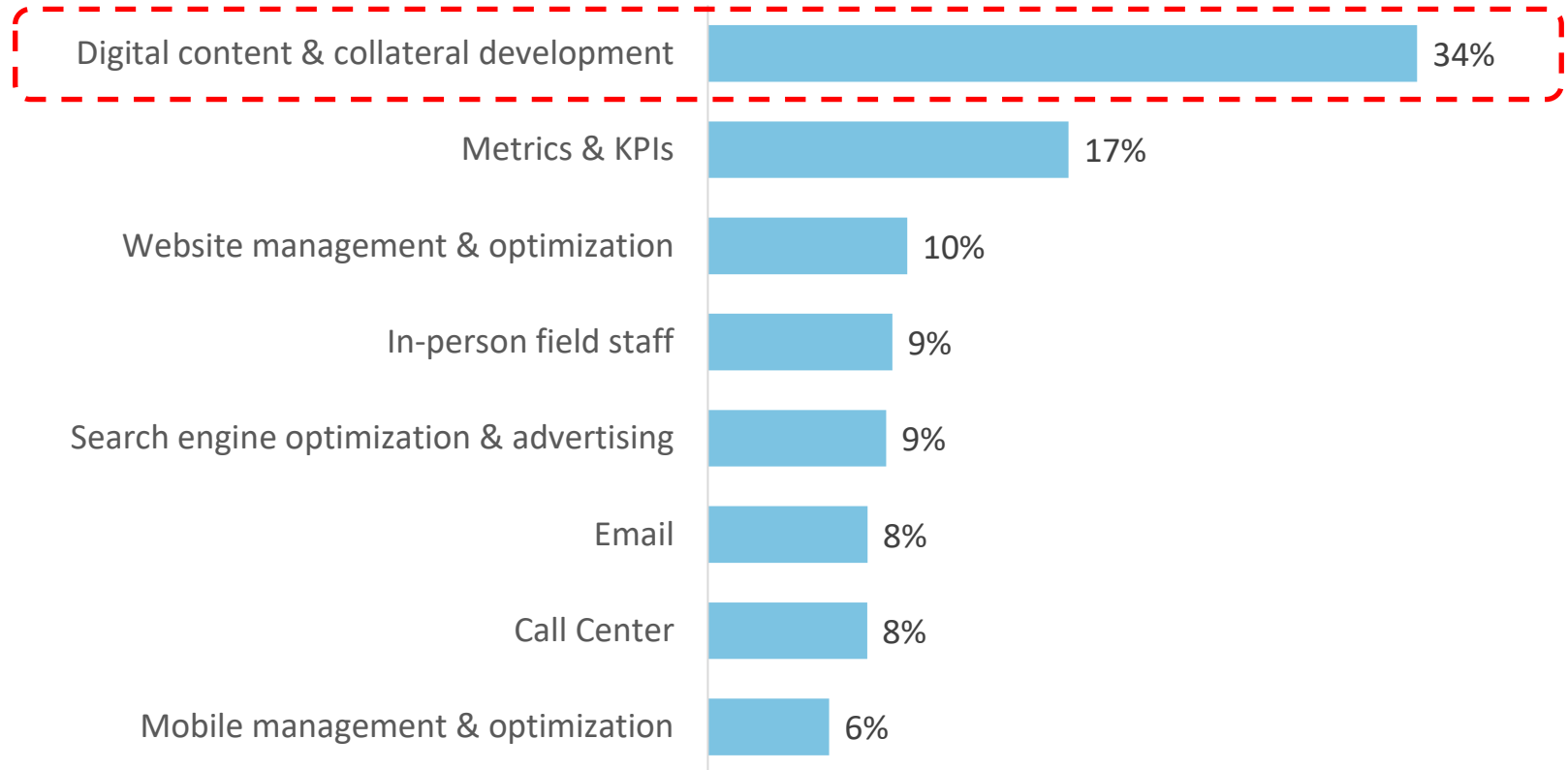
Roles that Lead Omnichannel Engagement Teams (Leading vs. Emerging)



Q. What is the role of each group for omnichannel engagement?

Budget Allocation: Digital content development is by far the single largest omnichannel expense area

Omnichannel Budget Allocation per Activity Area: Total Benchmark Class



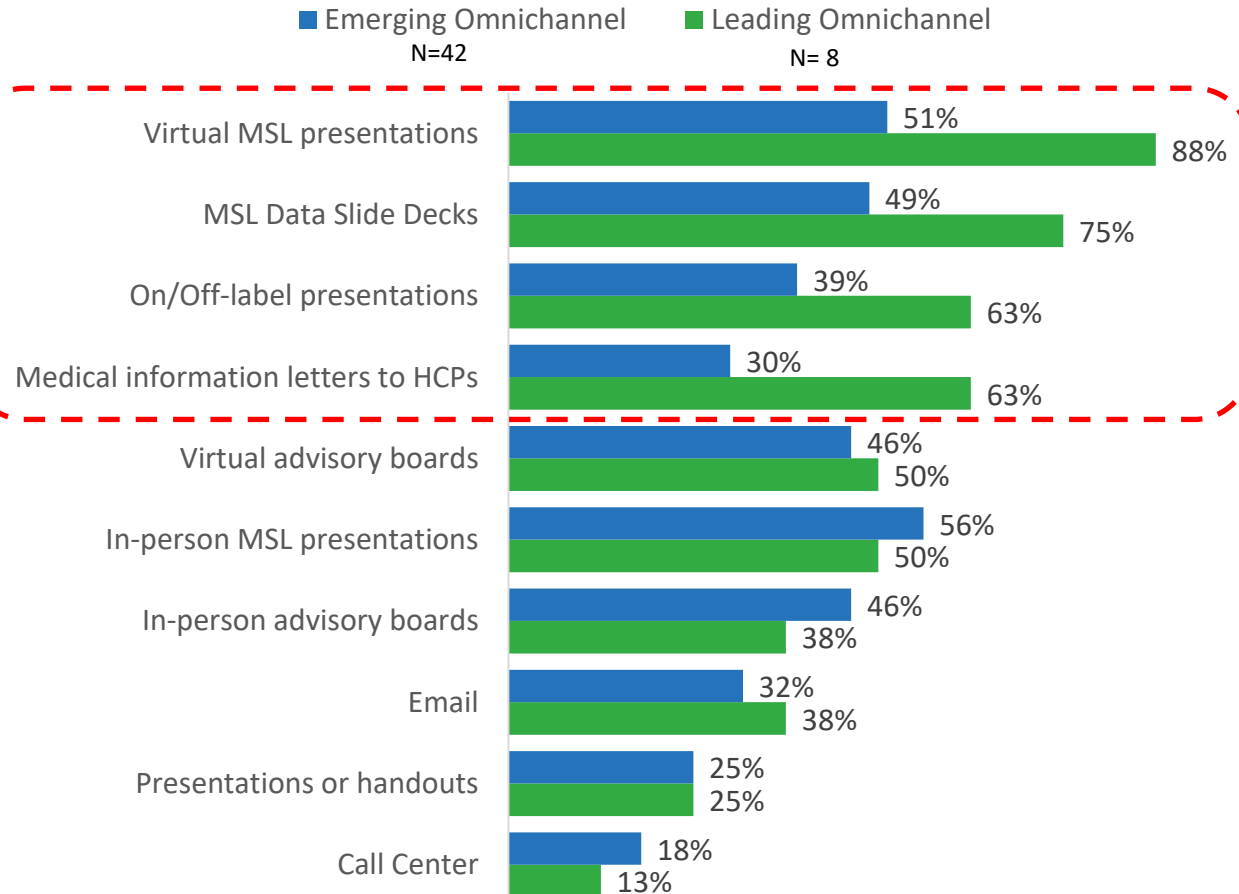
N=37

Q. Approximately what percentage of your organization's total omnichannel engagement budget is allocated to each of the following activity areas?

Communication Channels: Leading omnichannel groups glean noticeably higher value from MSL and on/off-label presentations, as well as HCP letters

Communication Channels for Omnichannel Engagement:

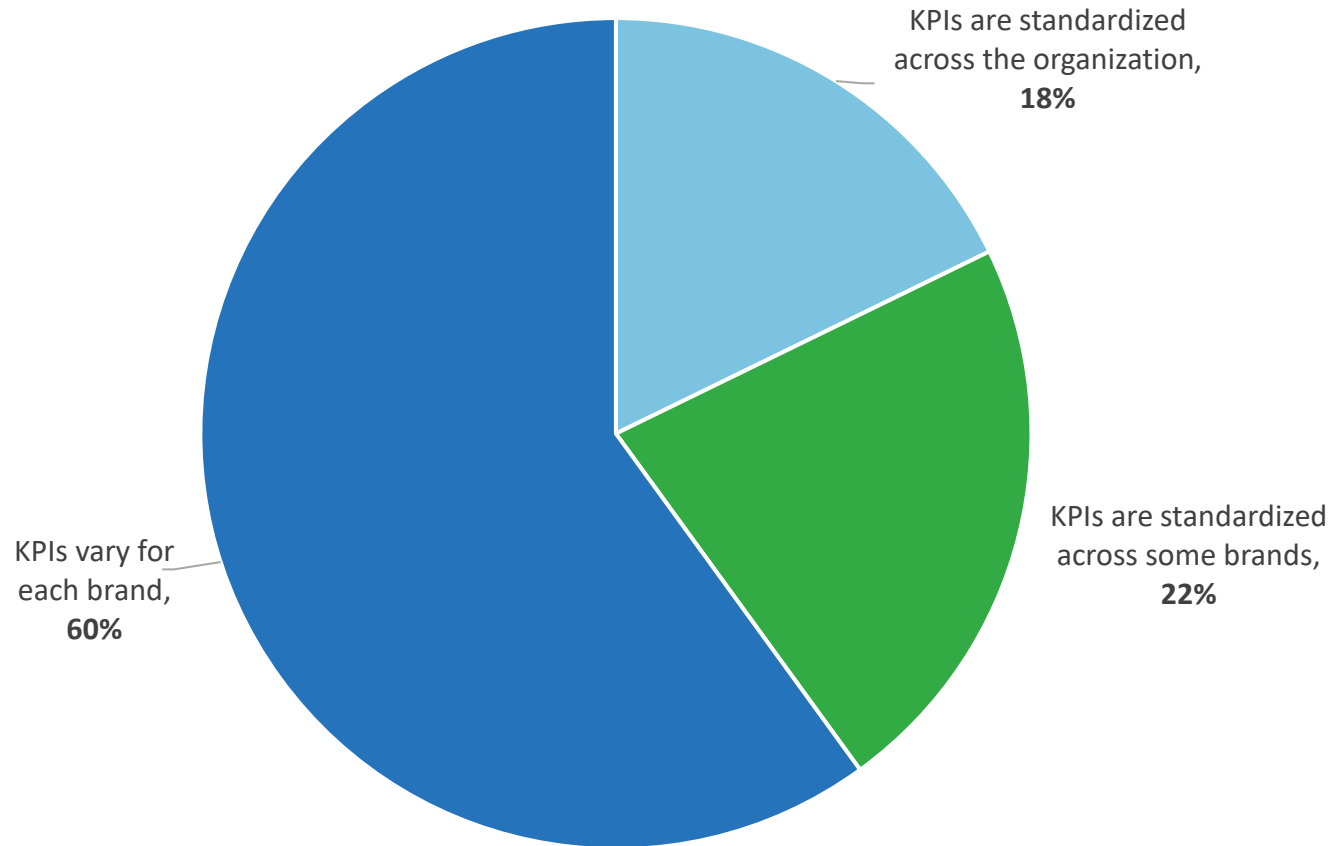
Direct Communications Channels: *Targeting specific individuals and audiences*



Q. How valuable are these communication channels as part of your omnichannel engagement program?

KPI Standardization: Omnichannel engagement-related KPIs tend to vary across brands for most manufacturers

Success in KPI Standardization: Total Benchmark Class



N=45

Q. To what extent has your company been successful in standardizing omnichannel engagement KPIs?



Our company is an internationally recognized thought leader in the field of best practice benchmarking®. We provide research, consulting, benchmark database, publishing and advisory services to the biopharmaceutical and medical device sectors. We work closely with business intelligence groups. Our work is based on the simple yet profound principle that organizations can chart a course to superior economic performance by leveraging the best business practices, operating tactics and winning strategies of world-class companies.

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