a precision value & health team

The webinar series

FEB to SEP 2023

Global HCP & competitor omnichannel trends in life sciences 2022-2023

Webinar #1 – TUESDAY 28/02

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How Across Health brings **omnichannel products & frameworks** together in a unique E2E fashion

ACROSS HEALTH
a precision value & health team

www.across.health

Insight

- Understand & validate:
  - brand strategic imperatives
  - treatment flow, leverage points
  - customer/stakeholder segmentation
- Channel/content/media insights
- Benchmarking
- Company digital maturity & resources

Innovation strategy

- Customer journey definition
- Channel/content/context/media selection and prioritization
- Campaign strategy & programme planning
- Business case calculation
- KPI framework development
- Workshops & capability building

Intelligent execution

- Programme management, coaching & change management
- Content creation management
- Opt-in strategy
- Campaign orchestration & automation
- Self-service "execution at scale" package for affiliates

Impact

- Real-time 360° dashboard solutions
- Tracking of engagement KPIs
- Predictive analytics
- Pre/peri/post KPI & ROI analysis
- Continuous recommendations for optimization

FRAMEWORKS & SERVICES

- Insight: Maturity assessment (Maturometer™)
- Innovation strategy: Digital transformation strategy; Omnichannel customer-centric strategy; Omnichannel Launch Excellence
- Intelligent execution: Omnichannel campaign execution
- Impact: Impact measurement; Dashboards; Predictive analytics

PRODUCTS

Navigator365™

Navigator365™ **Cx Benchmark** → Navigator365™ **Core** / Navigator365™ **Payer** → Navigator365™ **Planner** → Navigator365™ **Tracker**

Omnitopia™

Some numbers

INDUSTRY-LEADING OMNICHANNEL EXCELLENCE **PRODUCT PLATFORM**

Highly scalable, end-to-end cloud-based OCE platform

Navigator365™

>80% find Navigator365 **(much) better** than competition

>50 **companies use it** for OCE insights, planning & tracking

>7,000 biopharma **users** on the Navigator365 platform

>65,000 omnichannel **HCP profiles** across 20+ therapeutic areas and 20+ countries

>10,000 participants in our **serious game** (Omnitopia™), over 4K copies of our Missing Manual,...to accelerate the omnichannel mindset shift

Core I Payer I Cx Benchmark I Powertools I Planner I Tracker

Game I elearning I workshops I manual

BEST-IN-CLASS OMNICHANNEL EXCELLENCE **SERVICES**

End-to-end strategic OCE services (OCE insights, strategy, execution, impact)

Presence in **Europe, Asia** and **US**

Highly metricized methodology for **Maximizing the Mix** (IQVIA-tracked cases)

Brought to you by **>60** highly experienced omnichannel natives

Seamless access to top-notch medical writing, creative services, PR, access & HEOR offerings *(from Precision Value & Health, our parent company)*

VOICE OF THE CUSTOMER

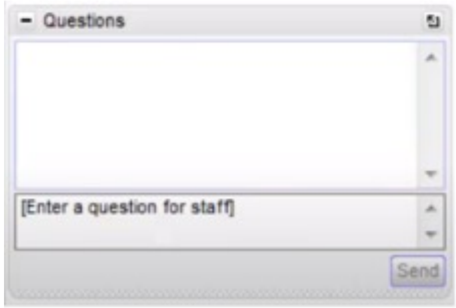
23% annual revenue growth rate (CAGR) since 2007

Serving **18** of the top 20 biopharma companies - and over **40 companies** in total

NPS = 74

Ground rules

- This webinar will take around 40 minutes, followed by questions
- You can submit questions at any time via the "Questions" box



- Please give us your feedback!
  - Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!
- The webinar will be **recorded** and made available after the session. We will send you an email with the details

Agenda

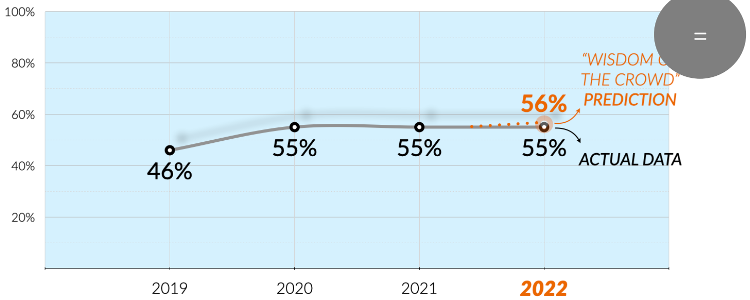
1	"Wisdom of the crowd" predictions 2022
2	Shifts in HCP channel & content affinity & Impact
3	Omnichannel HCP expectations for product launch
4	The competitive landscape - benchmarking
5	Payer omnichannel trends
6	Key takeaways

Your prediction for 2022...and reality

This is what 127 EU biopharma staff and 4010 EU5 SPECS said in 2022

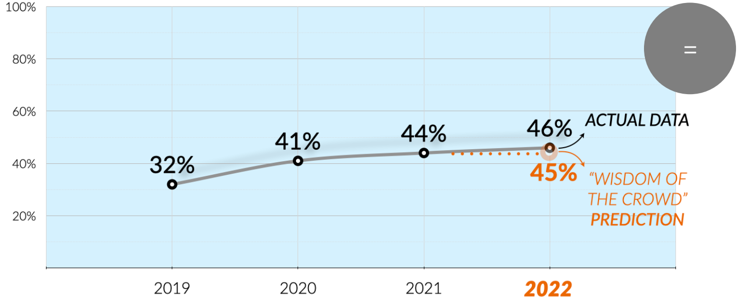
The wisdom of the crowd

1) HCP PREFERENCE for digital-only+mixed approach (commercial)



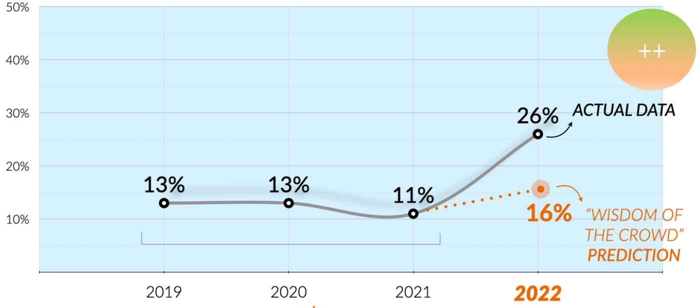
source: Navigator365™ Core - EU4+UK - Specialists n=4010

2) HCP SATISFACTION with pharma digital communication



source: Navigator365™ Core - EU4+UK - Specialists n=4010

3) PHARMA SATISFACTION with pharma digital offerings



source: Maturometer™ - EU n=127

The following data come from our brandnew GLOBAL TRENDS REPORT

More information on: across.health/GlobalTrendsReport

Agenda

BC = AC ?

BEFORE CORONA | **AFTER CORONA**

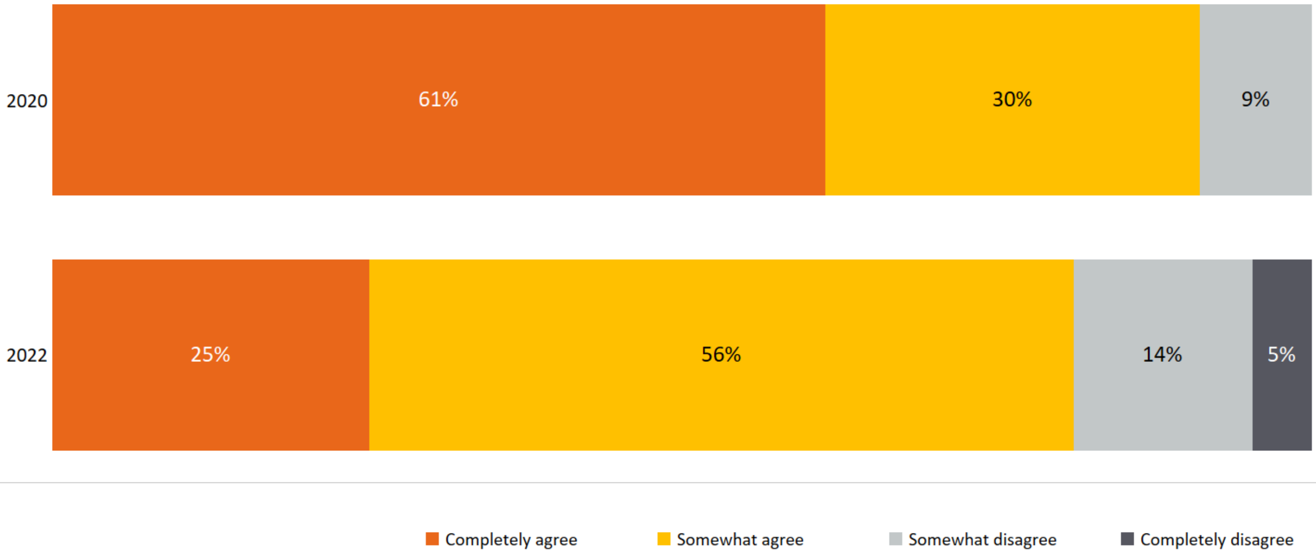
Poll

Did your company try to go back to “the old normal” in terms of “reps in the field” after Covid?

1. Yes, we boosted our F2F efforts to pre-covid levels
2. Yes, but we may move to a more balanced OCE effort again
3. No, we retained a reduced fieldforce capacity vs 2019
4. Do not know

Compared to 2020, the sense of urgency has dropped further in EU, suggesting a more paced approach

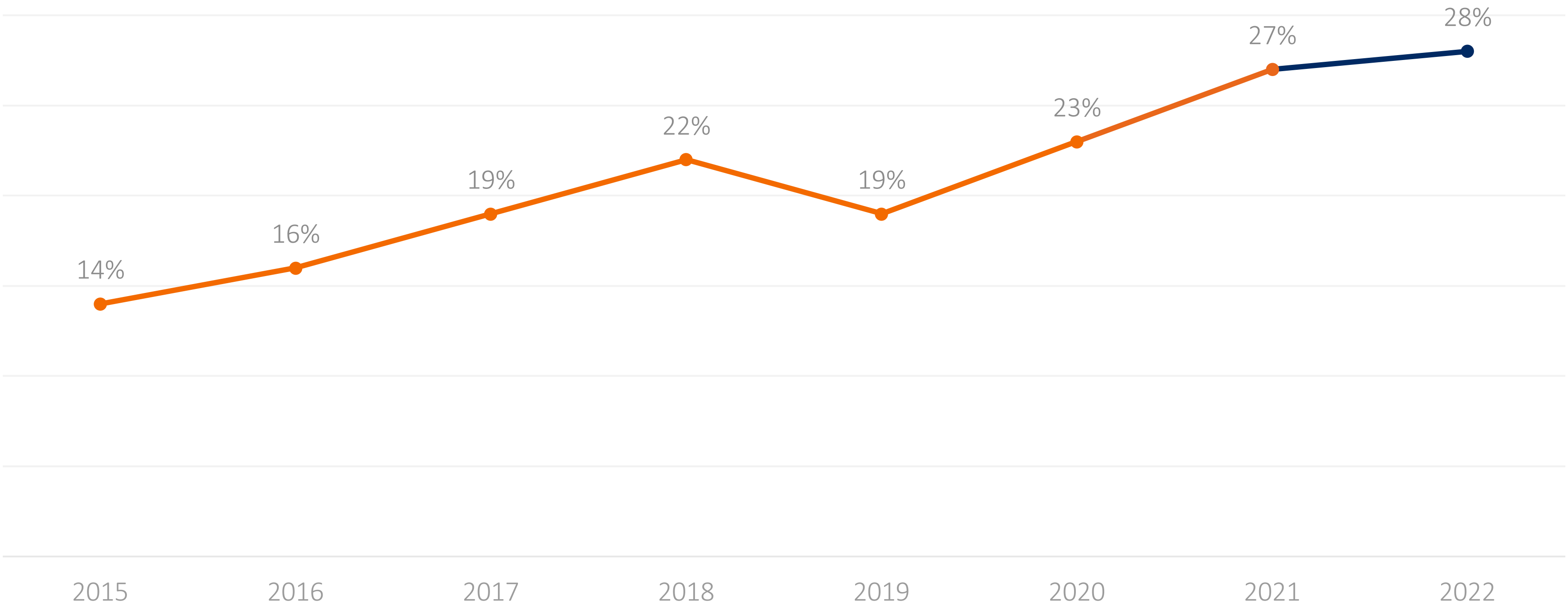
My company has a strong sense of urgency to change the traditional customer engagement model



Source: Maturometer™ 2022, EU Biopharma (n=127)

And the share of budget allocated to digital (EU) is plateauing too

It's 50% in other B2B industries...



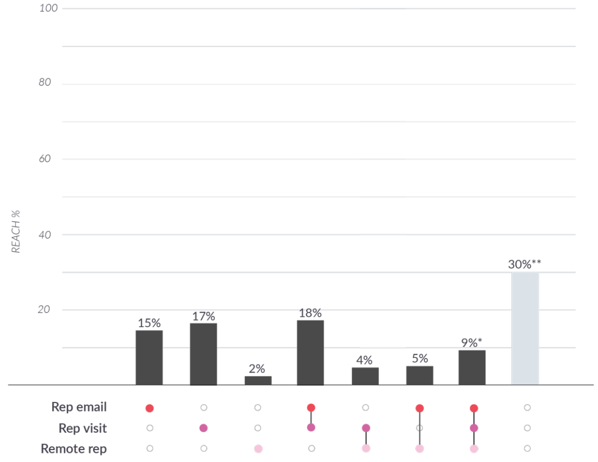
Source: Maturometer™ 2022, EU Biopharma (n=127)

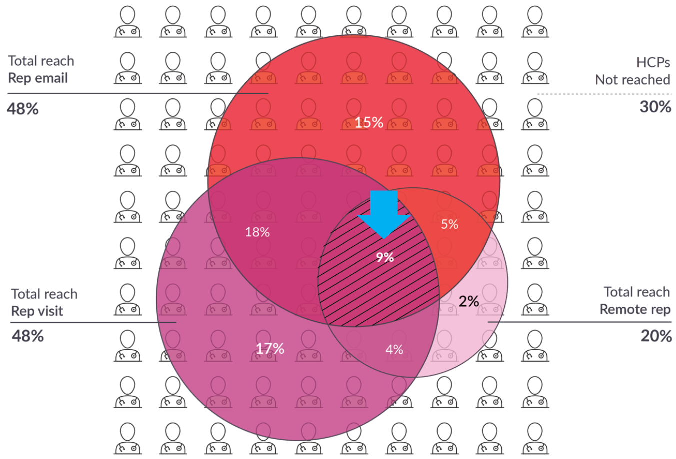
The truly omnichannel rep is still rare..

And the trend is similar across the globe

OC REP REACH - CARDIOLOGISTS, EU5, 2022

Rep email Rep visit Remote rep





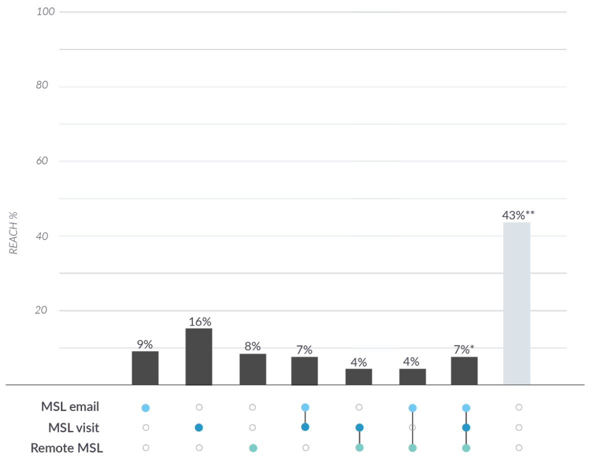
HCP PERSPECTIVE (specialists)	US		EU5		APAC		LATAM		GLOBAL*	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
	n=2071	n=2208	n=5041	n=4718	n=734	n=796	n=1075	n=482	n=8921	n=8204
HCPs reached by the OMNICHANNEL REP (engaged by rep, remote rep and rep email in the past 3 months)	10%	8% ↓	10%	9% ↓	6%	7% ↑	13%	6% ↓	10%	8% ↓

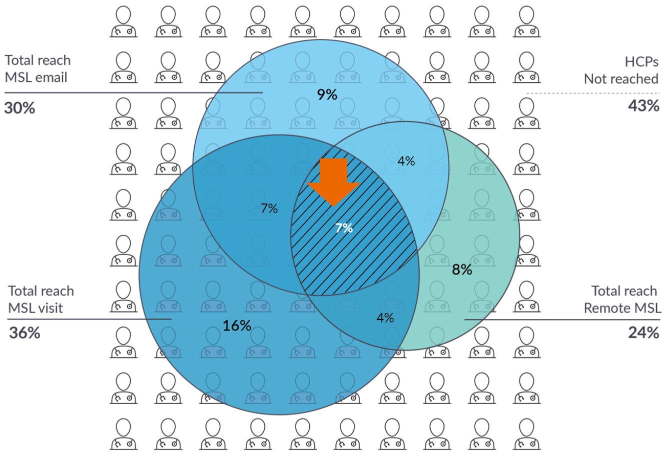
Source: Navigator365™ Core EU5 cardiologists, 2022 (n=506) & all specialists 2021 (n=8921), 2021 (n=8204)

And ditto for the OCE MSL

...and the level of the OC MSL is similar to that of the OC rep!

OC MSL REACH - CARDIOLOGISTS, EU5, 2022



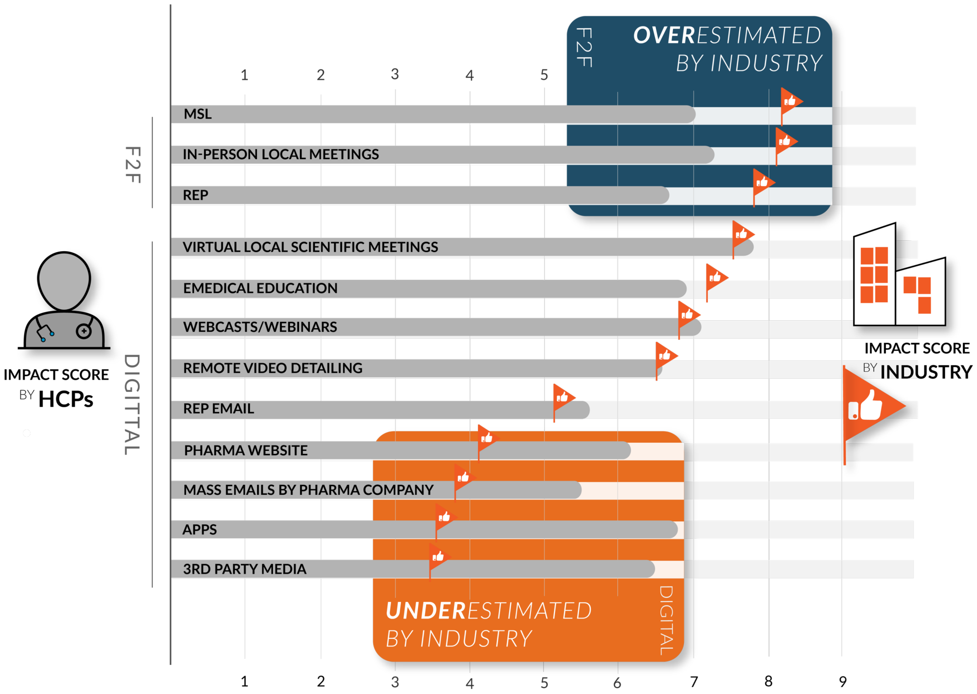


HCP PERSPECTIVE (specialists)	US 2021	US 2022	EU5 2021	EU5 2022	APAC 2021	APAC 2022	LATAM 2021	LATAM 2022	GLOBAL* 2021	GLOBAL* 2022
	n=2071	n=2208	n=5041	n=4718	n=734	n=796	n=1075	n=482	n=8921	n=8204
HCPs reached by the OMNICHANNEL MSL (engaged by MSL, remote MSL and MSL email in the past 3 months)	8%	7% ↓	8%	9% ↑	5%	4% ↓	6%	6%	7%	7%

Source: Navigator365™ Core EU5 cardiologists, 2022 (n=506) & all specialists 2021 (n=8921), 2021 (n=8204)

Pharma continues to underestimate the value of digital (1)

TO WHAT EXTENT DO THESE CHANNELS IMPACT CLINICAL DECISION MAKING?
EU SPECIALIST HCPs vs. EU BIOPHARMA INDUSTRY

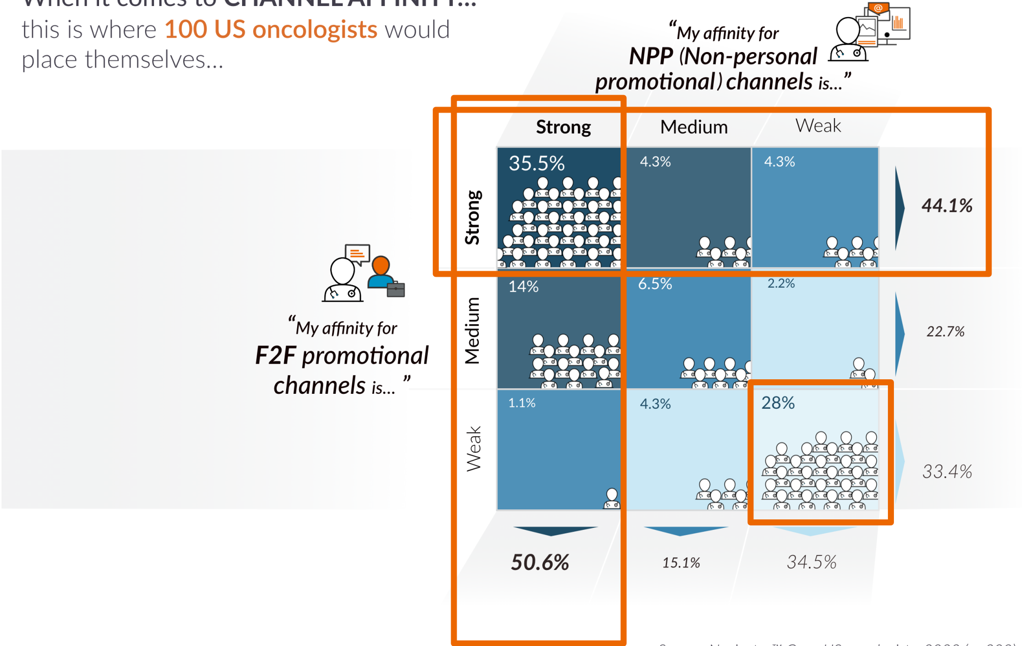


Source: Navigator365™ Core 2022, EU5 specialists (n=4718) & Maturometer™ 2022, EU Biopharma (n=217)

Pharma continues to underestimate the value of digital (2)

The segment with a high affinity for digital is 50% vs 44% for F2F…QUID the "no-nos"?

When it comes to CHANNEL AFFINITY…
this is where **100 US oncologists** would place themselves…

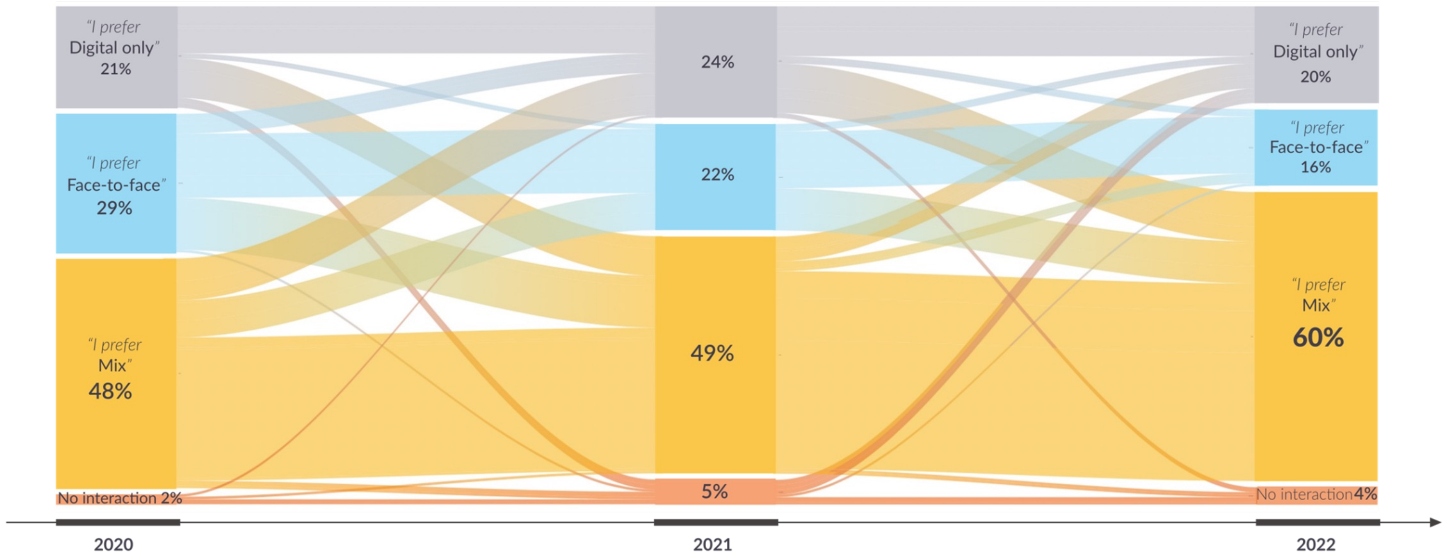


Source: Navigator™ Core, US oncologists, 2022 (n=200)

Pharma continues to underestimate the value of digital (3)

In the UK, the F2F preference segment (commercial engagements) almost halved since 2020

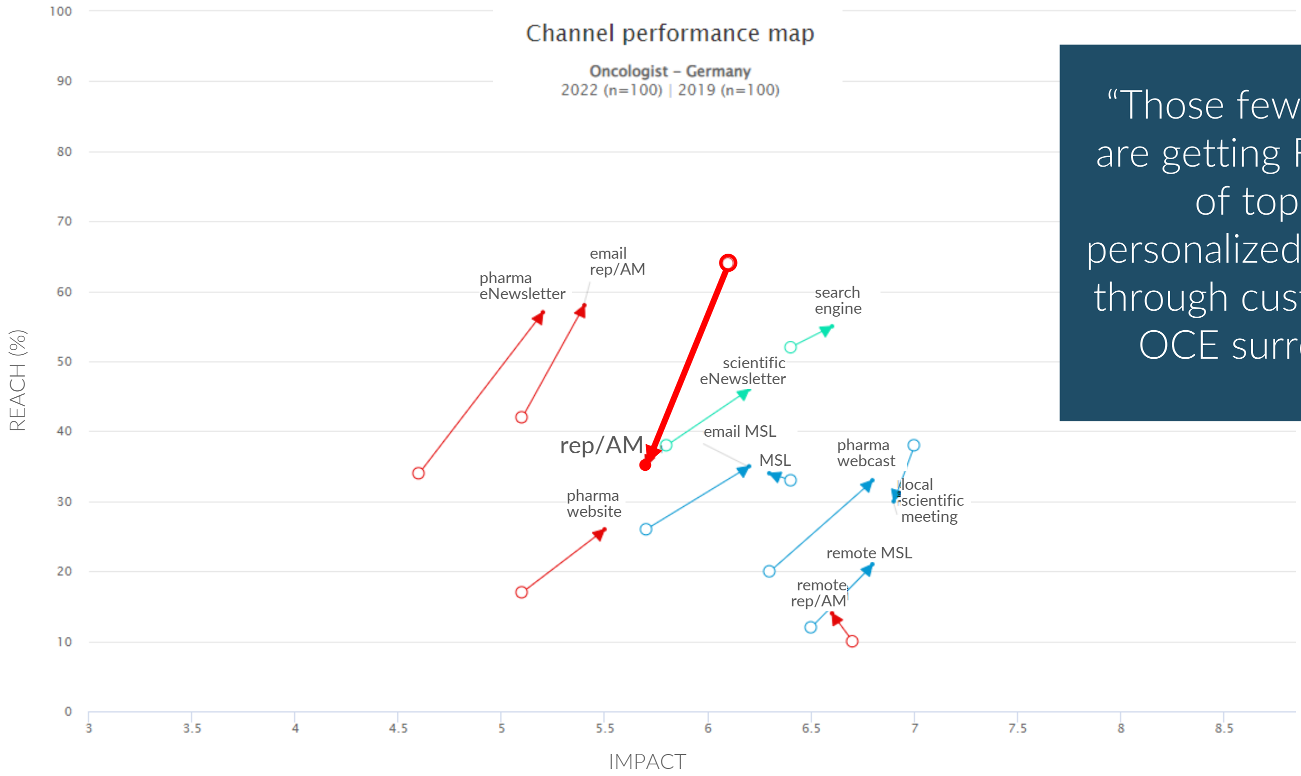
HCP PREFERENCES FOR (COMMERCIAL) COMMUNICATION WITH BIOPHARMA OVER TIME – SPECIALISTS, UK 2020–2022



Source: Navigator365™ Core UK specialists, 2020-2022 (n=195)

The same picture can be seen in Germany – OCE is here to stay

Key channels time trends 2019-2022



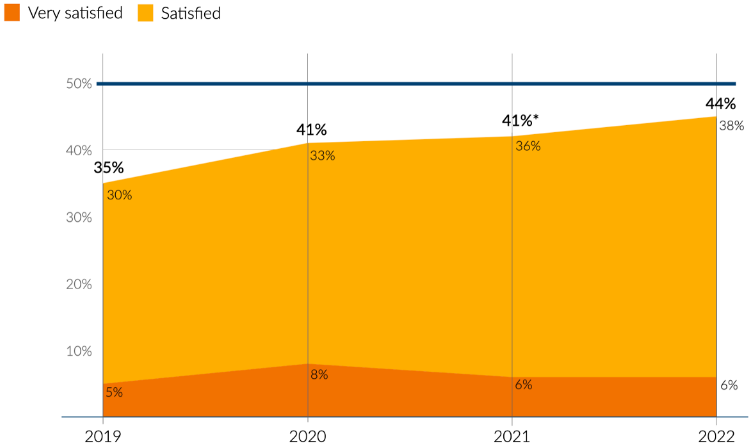
“Those few moments you are getting F2F need to be of top quality – personalized and maximized through customer-oriented OCE surround sound”

Source: Navigator365™ Core GER oncologists, 2019 (n=100) -2022 (n=100)

No surprise, then: HCP satisfaction levels are plateauing after a strong boost in 2020

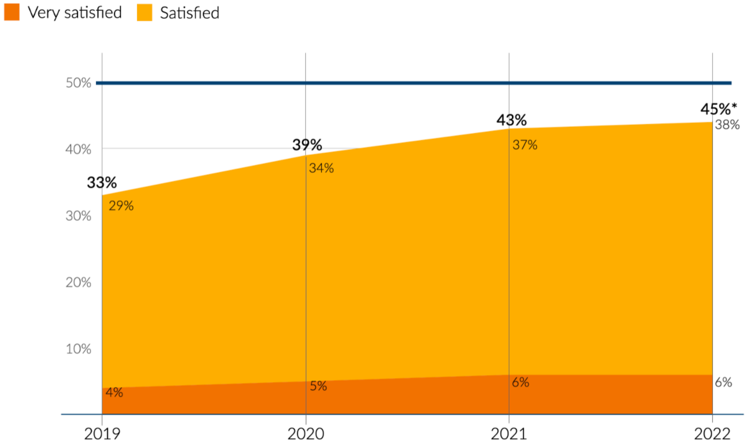
But with under 50% satisfied, there is still a strong upside!

SATISFACTION WITH PHARMA DIGITAL OFFERINGS - SPECIALISTS, US, 2019-2022



*Total due to rounding
Source: Navigator365TM Core, US specialists, 2019 (n=818), 2020 (n=1303), 2021 (n=2071) and 2022 (n=2208)

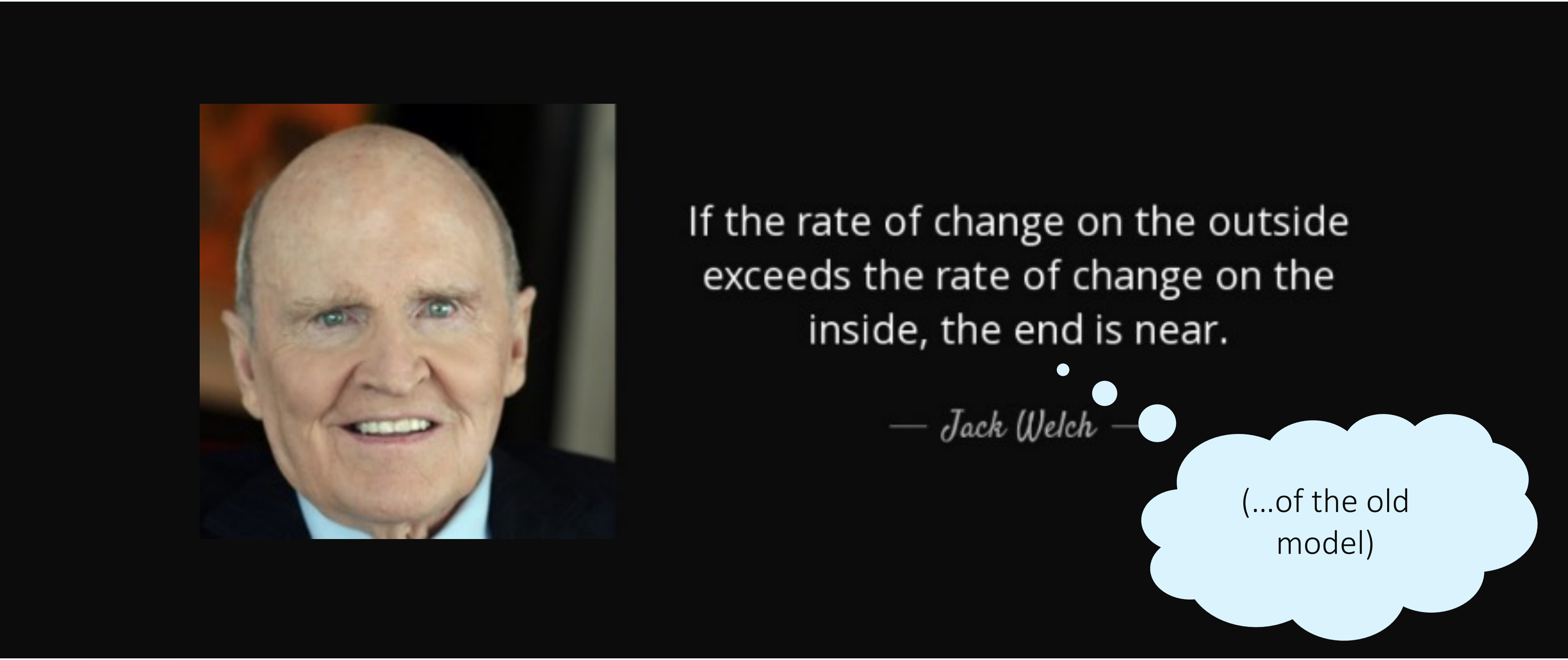
SATISFACTION WITH PHARMA DIGITAL OFFERINGS - SPECIALISTS, EU5, 2019-2022



*Total due to rounding
Source: Navigator365™ Core, EU5 specialists, 2019 (n=4885), 2020 (n=5529), 2021 (n=5041) and 2022 (n=4718)

Source: Navigator365™ Core US & EU5 specialists, 2019-2022

Slightly exaggerated, but still…



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Launches are harder to get right than ever before

40% 40% of worldwide drug launches failed to meet 2-year sales forecasts (2009–2017)[1]

80% 80% of all launches have their long-term fate determined during the first six months on the market[2]

65% 65% of Physicians dissatisfied or neutral with digital component at launch[3]

The Next Normal?
How does your launch strategy and execution need to evolve for success?

1. Source: Ready for launch: Reshaping pharma's strategy in the next normal. McKinsey & Company. 2020
2. Source: Launch Excellence VI: IQVIA, 2021
3. Source: Navigator365TM EU5 Specialists Q3 2022 (n=40100)

Poll

Does your company plan to launch new products in an omnichannel way?

1. Yes, both for pre-launch (medical, access, …) and launch
2. Yes, for the commercial launch only
3. No formal plans in place
4. Don't know

Preferred time for engagement with pharma around product launch

35% expects to get pharma communications way before launch

PREFERRED TIMING - ALL SPECIALISTS, 2022

Q: When would you like to engage with biopharma for the first time to learn about a new product?	6-12 months before launch	3 months before launch	During launch	3 months after launch	6-12 months after launch	Never
US (n=2018)	10%	21%	28%	15%	12%	13%
EU5 (n=4617)	12%	22%	29%	9%	12%	10%
APAC (n=564)	7%	18%	31%	19%	13%	12%
LATAM (n=306)	16%	35%	25%	14%	7%	3%
Global* (n=7595)	11%	24%	28%	14%	11%	10%

**Global: US, EU5, APAC and LATAM averaged (mean)*

Source: Navigator365TM Core, all specialists, 2022

And in terms of the commercial launch, HCPs require an omnichannel approach

PREFERRED REP FORMAT - ALL SPECIALISTS, 2022

Q: In terms of engagement with reps in a launch setting, which option do you prefer?	Mainly in-person	Mix of in-person and digital or digital only	Prefer not to engage with biopharma reps
US (n=2018)	45%	48%	7%
EU5 (n=4617)	47%	51%	3%
APAC (n=564)	36%	53%	10%
LATAM (n=306)	47%	52%	1%
Global* (n=7595)	44%	51%	5%

**Global: US, EU5, APAC and LATAM averaged (mean)*

Source: Navigator365TM Core, all specialists, 2022

At the most cricital moment in the PLC, HCP omnichannel satisfaction levels are at their lowest

↓ Decrease (>10% decrease vs 2021)
↑ Increase (>10% increase vs 2021)

HCP PERSPECTIVE (specialists)	US 2021	US 2022	EU5 2021	EU5 2022	APAC 2021	APAC 2022	LATAM 2021	LATAM 2022	GLOBAL* 2021	GLOBAL* 2022
	n=2071	n=2208	n=5041	n=4718	n=734	n=796	n=1075	n=482	n=8921	n=8204
HCPs (VERY) SATISFIED with biopharma's digital offerings	41%	44%	43%	45%	46%	44%	55%	51%	46%	46%
HCPs (VERY) SATISFIED with biopharma's digital offerings AT LAUNCH†	N/A	38%	N/A	34%	N/A	35%	N/A	41%	N/A	37%

N/A: data not available
**Global: US, EU5, APAC and LATAM averaged (mean)*
†Not all specialists were asked the launch question: US (n=2108), EU5 (n=4617), APAC (n=564), LATAM (n=306) and Global (n=7595)

Source: Navigator365™ Core, all specialists, consolidated data

Agenda

As customer perceptions and the competitive landscape continue to evolve, internal tracking leads to myopia

A more extensive session on Benchmarking takes place on Thursday, Mar. 23th 16h CET

'Omnichannel myopia' in the post-Covid era: The importance of Cx Benchmarking

Register here:
https://across.health/event/CxBenchmarkWebinar

To track your progress and see where you should focus, Across Health offers benchmarking at two levels

Navigator365™ Cx Benchmark

Navigator365™ Core
(part 4)

Astrazeneca is leading in the omnichannel oncology space

Overall company scores in oncology 2021-2022

↑ Rank improved vs 2021

COMPANY BENCHMARKING

COMPANY RANKING (HCP PERSPECTIVE)	GLOBAL RANKING 2021	GLOBAL RANKING 2022	US RANKING 2021	US RANKING 2022	EU5 RANKING 2021	EU5 RANKING 2022	APAC RANKING 2021	APAC RANKING 2022	LATAM RANKING 2021	LATAM RANKING 2022
	n=1560	n=907	n=402	n=200	n=705	n=501	n=160	n=104	n=293	n=102
AstraZeneca	1st	1st	3rd	1st ↑	1st	1st	1st	3rd	1st	1st
Bristol-Myers Squibb	4th	2nd ↑	1st	2nd	2nd	2nd	12th	5th ↑	7th	6th ↑
Abbvie	9th	3rd ↑	4rd	4rd	13rd	11th ↑	8th	1st ↑	17th	14th ↑
Amgen	7th	4rd ↑	2rd	3rd	9th	10th	11th	9th ↑	8th	9th
Novartis	8th	5th ↑	11th	8th ↑	4th	5th	9th	7th ↑	6th	8th
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
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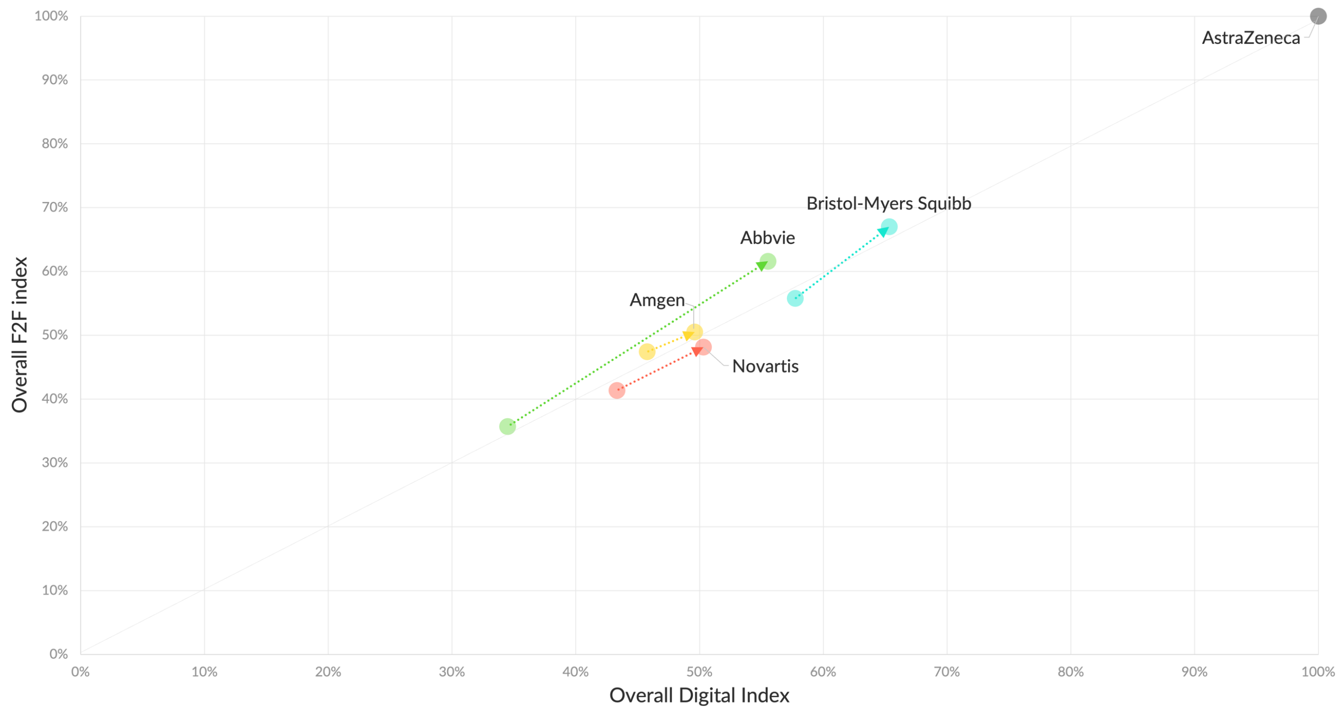
Source: Navigator365™ Core oncologists, 2021 (n=1560), 2022 (n=907)

All other companies are moving up versus 2021, but the gap remains high

Evolution of F2F vs digital excellence in oncology



COMPANY BENCHMARKING

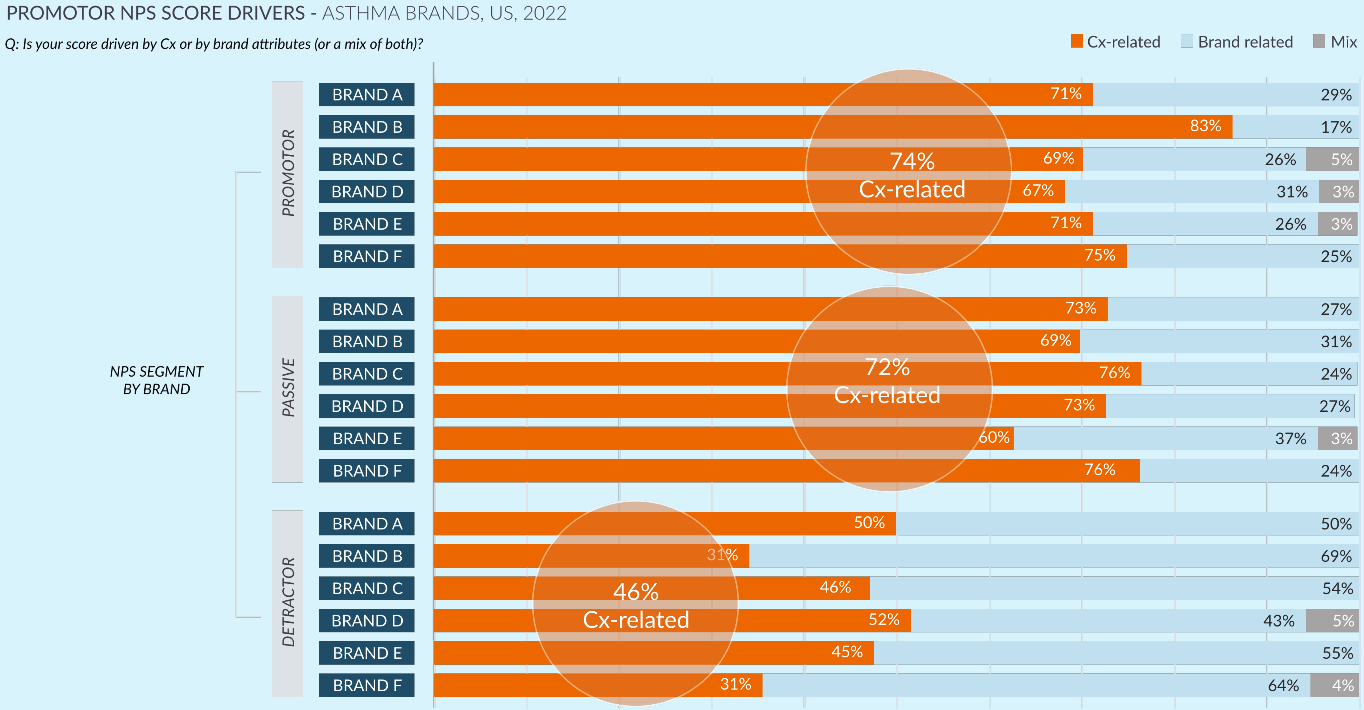
F2F channels: *rep, rep tablet, MSL, MSL tablet, offline scientific meetings;* ***digital channels:*** *remote rep, remote MSL, rep email, MSL email, pharma email, pharma website, webcasts, eMedical education, online conferences*

Index = *company's score divided by the leading score, therefore the leading company has an index of 100%*

Source: Navigator365™ Core oncologists, 2021 (n=1560), 2022 (n=907)

In many cases promoter NPS scores are driven by Cx rather than brand attributes

A key strategy can be to shift passives to promoters…through a superior Cx



BRAND BENCHMARKING

Source: Navigator365™ Cx Benchmark, 2022

Source: Navigator365™ Cx Benchmark US asthma brands, 2022

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The omnichannel opportunity is even higher at the payer level

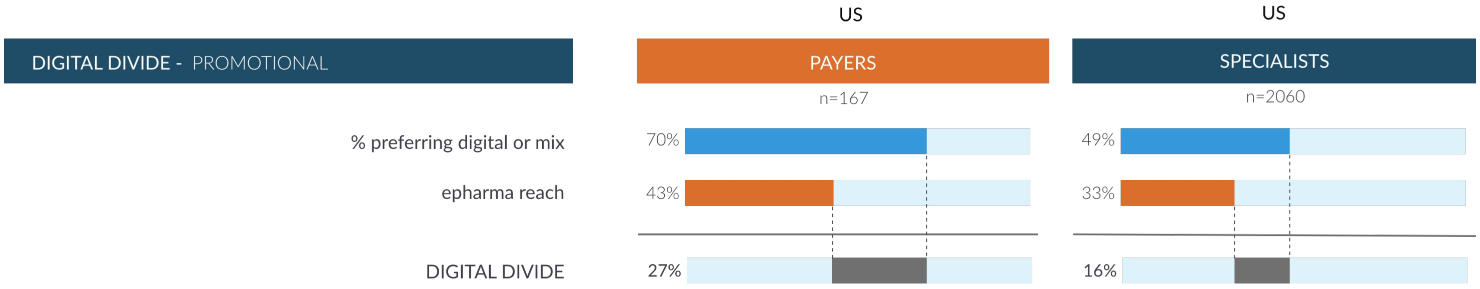
Higher interest…and bigger gap vs pharma supply

…66% of US payers vs 53% of US SPECs

…find pharma digital (very) important…

…and the pharma supply gap is bigger vs HCPs

DIGITAL DIVIDE PROMOTIONAL - PAYERS VS SPECIALISTS, US, 2022



Source: Navigator365™ Payer US Payers, 2022 (n=167) & Navigator365™ Core US specialists, 2022 (n=2060)

Agenda

Key takeaways

Did any expert ever say that OCE was easy? OCE leadership is a marathon

1. **Biopharma's urgency** to invest in OCE at scale declined in 2022 while pharma satisfaction with their own multichannel (not omnichannel) efforts reached new heights
   - Getting to OCE at scale remains "the cake"; new trends like AI, hyperpersonalization,… are just "cherries" as long as the foundation/cake is not in place
2. However, the gap with **how physicians want to engage with biopharma** is growing further – while F2F access is going down again…"make every moment matter" – also new role for marketing & medical – the "war for attention" is on.
3. Prescriber satisfaction with biopharma's OCE **launch** efforts is even lower than their average satisfaction levels, while successful launches are increasingly rare
4. Despite pharma's lower urgency overall (see 1), some companies and brands continue to accelerate their OC investments – **external benchmarking** is an important driver for long-term customer leadership and for keeping the momentum in the transition
5. Omnichannel does not stop at the prescriber level…also **payers** are keen on OCE engagement with biopharma
   - There is a clear opportunity to look at the omnistakeholder level – across all functions: commercial, medical, access, and patient service

‘Change is great, as long as it happens to others”

Successful change requires FOUR dimensions (AH Maturometer framework)

1		2		3		4		
Need for change	×	Clear vision & goals	×	Capability to change	×	Concrete first step	=	Successful change
	×	Clear vision & goals	×	Capability to change	×	Concrete first step	=	Slow start
Need for change	×		×	Capability to change	×	Concrete first step	=	Lack of coordination
Need for change	×	Clear vision & goals	×		×	Concrete first step	=	Frustration
Need for change	×	Clear vision & goals	×	Capability to change	×		=	Lack of action

Variation of Gleicher’s Formula. Source: Dannemiller and Jacobs, Changing the way organizations change. A revolution of common sense. The Journal of Applied Behavioural Science (1992)

KEY RISKS

- Urgency down
- Vision not translated into strategy roadmap
- Limited focus on mindset change vs tech + new roles for mktg, medical & access
- Limited measurement & robust pilots

There's more where this came from: see our brandnew GLOBAL TRENDS REPORT!

across.health/GlobalTrendsReport

Want to know more? Join us on our upcoming webinars

The webinar series

FEB to SEP 2023

To sign up:

across.health/2023-webinars

All our resources at your fingertips:
https://across.health/resources

- **'Omnichannel myopia' in the post-Covid era:**
  The importance of Cx Benchmarking
  THURSDAY, MAR. 23TH 16H CET
- **Omnichannel Launch Excellence:**
  From global to local
  TUESDAY, JUN. 13TH 16H CET
- **Omnichannel maturity:**
  What's the industry up to (Maturometer™ 2023)?
  TUESDAY, SEPT. 26TH 16H CET

ACROSS HEALTH | a precision value & health team

The webinar series

Question time!

Please give us your feedback!

Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!

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https://www.across.health