ACROSS HEALTH
a precision value & health team

Reimagine customer engagement

Webinars 2024

ACROSS HEALTH

Beverly Smet
SVP Global Accounts
+ 32 478 64 28 46
beverly.smet@a-cross.com

ACROSS HEALTH

Vanessa Huichard
Senior Strategy Consultant
+ 33 6 79 70 62 53
vanessa.huichard@a-cross.com

How Cx excellence drives improved business outcomes: importance of **Cx Benchmarking**

Webinar #2 - TUESDAY 23/4/2024

Ground rules

- This webinar will take around 30 minutes, followed by questions
- You can submit questions at any time via the "Questions" box
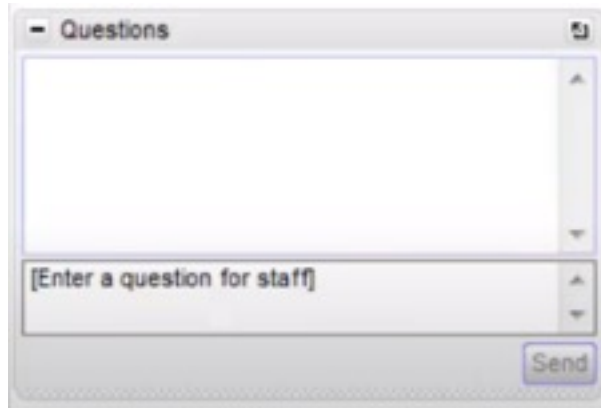
- Please give us your feedback!
  - Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!
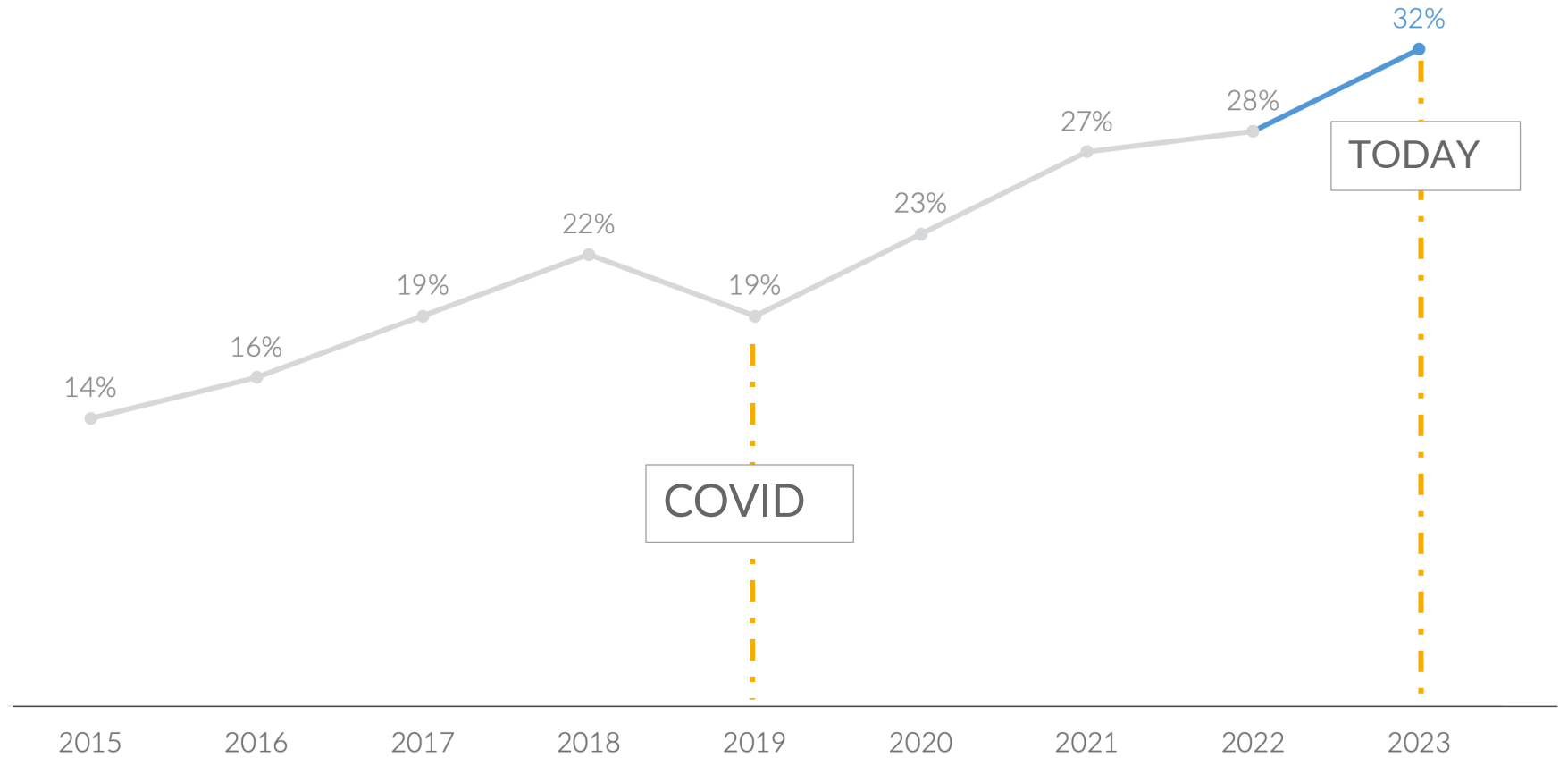
Agenda

1. Why all the stars are aligned for Cx Benchmarking

2. In search of the ultimate KPI for evaluating pharma performance

3. Correlation analysis between Cx Excellence and business outcome (client cases)

4. Navigator Cx Benchmark for providing actionable OCX insights

5. Holistic KPI framework for impact measurement

Why all the stars are aligned for Cx Benchmarking

Since the pandemic, digital marketing budgets ramped up significantly

(?) *Which percentage of your marketing budget is allocated to digital initiatives this year?*

DIGITAL SPEND

14% — 2015
16% — 2016
19% — 2017
22% — 2018
19% — 2019
23% — 2020
27% — 2021
28% — 2022
32% — 2023

COVID

TODAY

Maturometer™ 2023, EU Biopharma, n=129

Reimagine customer engagement Webinars

ACROSS HEALTH

What's the size of the prize ? Should we continue to invest in the new OC GTM model or revert back to the OLD NORMAL ?

❓ *What are potential bottlenecks for digital in your organization?*

2021 *(n=135)*

Bottleneck	%
Not enough internal knowledge	16%
Regulatory / Legal / Healthcare compliance issues	15%
No clear digital strategy	14%
ROI questions	9%
No headcount to support this	8%
Lack of technology	8%
Lack of internal buy-in/priority	7%

2023 *(n=217)*

Bottleneck	%
Regulatory / Legal / Healthcare compliance issues	21%
ROI questions	14%
Not enough internal knowledge	9%
No clear digital strategy	9%
Lack of technology	9%
No clear reason to change/no "burning platform"	7%
No budget	6%

Maturometer ™ *2021-2023, EU Biopharma*

How important is benchmarking as a driver for Omnichannel and Cx excellence (OCX) for you ?

1. We use OCX Benchmarking routinely
2. We already started an OCX Benchmarking pilot
3. We are considering a project in 2024
4. We looked into it, but didn't find it an effective approach
5. Totally irrelevant

Very few respondents are benchmarking routinely, but interest is there
Relatively low satisfaction levels as a result of mainly "internal" benchmarking activities

## How important is benchmarking as a driver for omnichannel excellence for you?

- We use omnichannel benchmarking routinely — 9%
- We already started an omnichannel benchmarking pilot — 34%
- We are considering a project in 2023 — 27%
- We looked into it, but did not find an effective approach — 24%
- Totally irrelevant — 6%

Maturometer™ *2023, EU Biopharma, n=217*
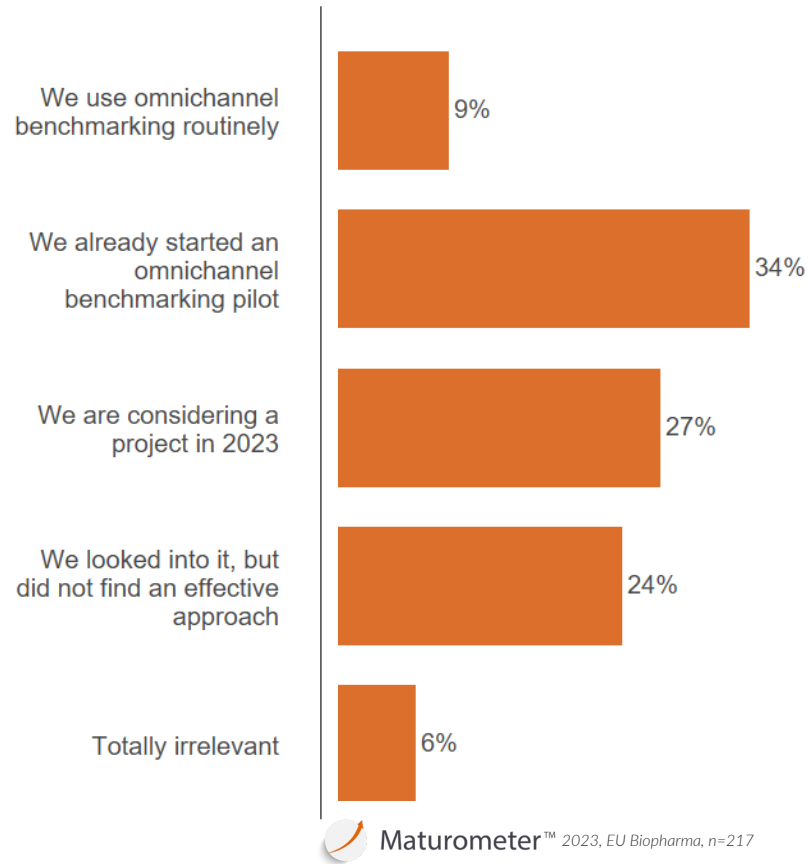
Which omnichannel benchmarking parameters are you tracking/considering?

- External metrics — 32%
- Internal metrics — 68%

Maturometer™ *2023, EU Biopharma, n=203**
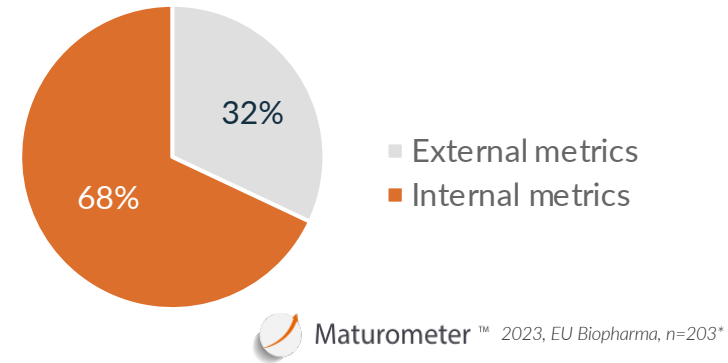
Respondents that don't consider benchmarking irrelevant

How satisfied are you with your current omnichannel benchmarking activities?

- Satisfied — 35%
- Neutral — 52%
- Dissatisfied — 13%

Maturometer™ *2023, EU Biopharma,, n=94***
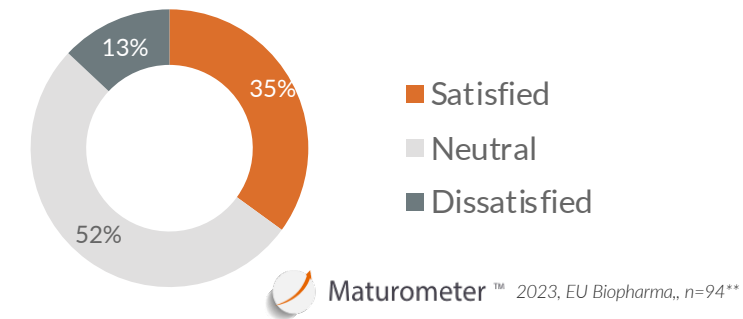
**Respondents have experience with omnichannel benchmarking*

Reimagine customer engagement · Webinars

ACROSS HEALTH

Just focusing on internal effectiveness while ignoring customer perception and competitors might lead to a wrong strategic direction

INTERNAL
BENCHMARKING

CUSTOMER PERCEPTION?

Capitalise on opportunities

**COMPETITORS?**

Anticipate industry trends and stay ahead

Agenda

1. Why all the stars are aligned for Cx Benchmarking

2. In search of the ultimate KPI for evaluating pharma performance

3. Correlation analysis between Cx Excellence and business outcome (client cases)

4. Navigator Cx Benchmark for providing actionable OCX insights

5. Holistic KPI framework for impact measurement

Webinars

$$\text{ROI} = \frac{\text{Net return on investment}}{\text{Cost of investment}} \times 100$$

"WHAT'S THE ROI OF THE TIME WE SPEND FIGURING OUT ROI?"
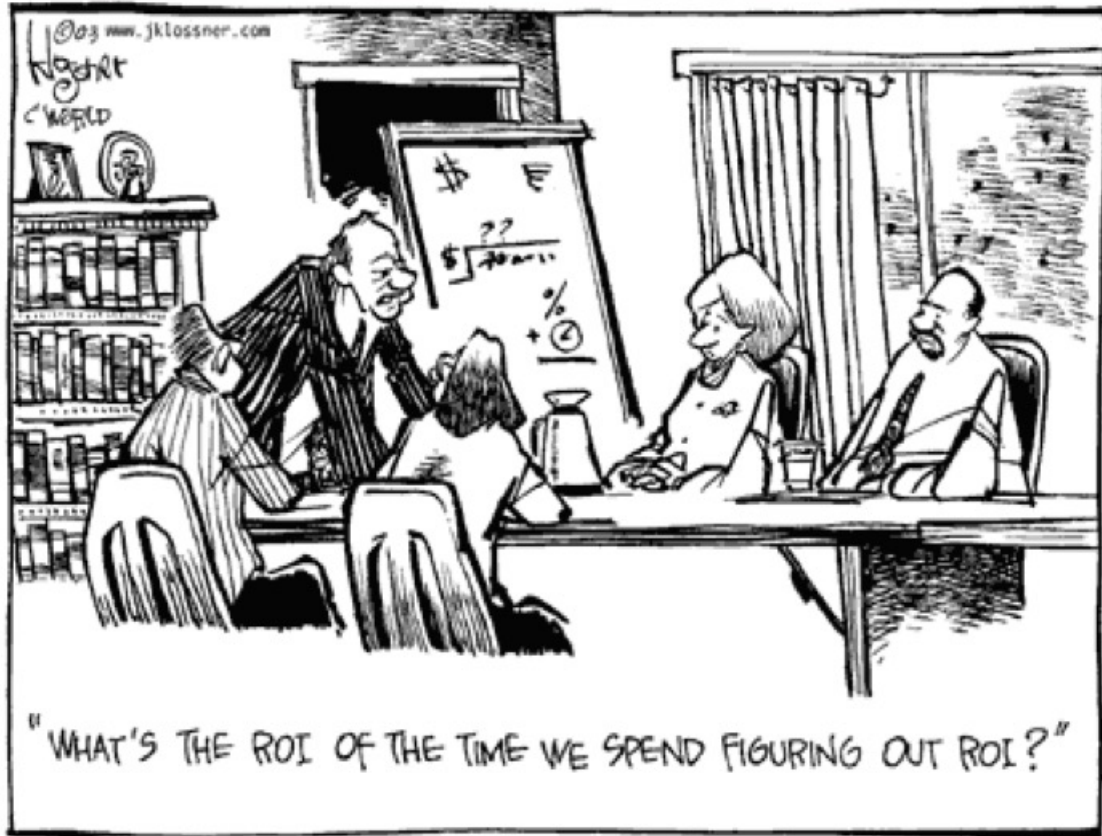
Measuring ROI: some prickly issues

- How to isolate the revenue impact of digital activities from F2F activities?

- Over which time period do you calculate the revenue impact?

- How holistic a view of costs should you take? Clear set of direct costs – but what about indirect costs?

- How to predict future impact if conditions change? (new competitor, price/ reimbursement change / Gx entry / …)

- How do you assess the value of activities for which ROI cannot be measured (patient outcomes, brand equity, customer satisfaction, …)?

Company-level vs. **Brand level** KPIs: how do they differentiate?

Example – US oncologists 2023 (Navigator365 Core) and breast-cancer treaters (Navigator365 Cx Benchmark)

Company	COMPANY LEVEL*			BRAND LEVEL**	
	CSAT	CES	NPS	CES	NPS
Merck	1st (72%)	2nd (48%)	1st (4)	2nd (64%)	1st (37)
Pfizer	3rd (71%)	2nd (48%)	2nd (2)	3rd (60%)	3rd (7)
Novartis	5th (66%)	1st (50%)	3rd (-2)	3rd (60%)	4th (0)
AstraZeneca	4th (68%)	4th (45%)	4th (-5)	1st (66%)	2nd (24)
Bristol Myers Squibb	1st (72%)	5th (44%)	5th (-6)	-	-
HILO delta	6%	6%	10	6%	37

CSAT = Customer Satisfaction Score
CES = Customer effort Score
NPS = Net Promoter Score

Source: Navigator365™ Core, US oncologists, 2023 (n=200)
***Source: Navigator365™ Cx Benchmark, US breast cancer, 2023 (n=101)*

Company-level vs. Brand level KPIs: how do they differentiate?

Example – US oncologists 2023 (Navigator365 Core) and breast-cancer treaters (Navigator365 Cx Benchmark)

Company	COMPANY LEVEL*			BRAND LEVEL**	
	CSAT	CES	NPS	CES	NPS
Merck	1st (72%)	2nd (48%)	1st (4)	2nd (64%)	1st (37)
Pfizer	3rd (71%)	2nd (48%)	2nd (2)	3rd (60%)	3rd (7)
Novartis	5th (66%)	1st (50%)	3rd (-2)	3rd (60%)	4th (0)
AstraZeneca	4th (68%)	4th (45%)	4th (-5)	1st (66%)	2nd (24)
Bristol Myers Squibb	1st (72%)	5th (44%)	5th (-6)	-	-
HILO delta	6%	6%	10	6%	**37%**

CSAT = Customer Satisfaction Score
CES = Customer effort Score
NPS = Net Promoter Score

Reimagine customer engagement · Webinars

ACROSS HEALTH

Brand NPS can vary dramatically between indications and treater types

NPS RANGE BY DATASET - EUROPEAN SPECIALISTS, 2022-2023

■ Average NPS

N=2,348
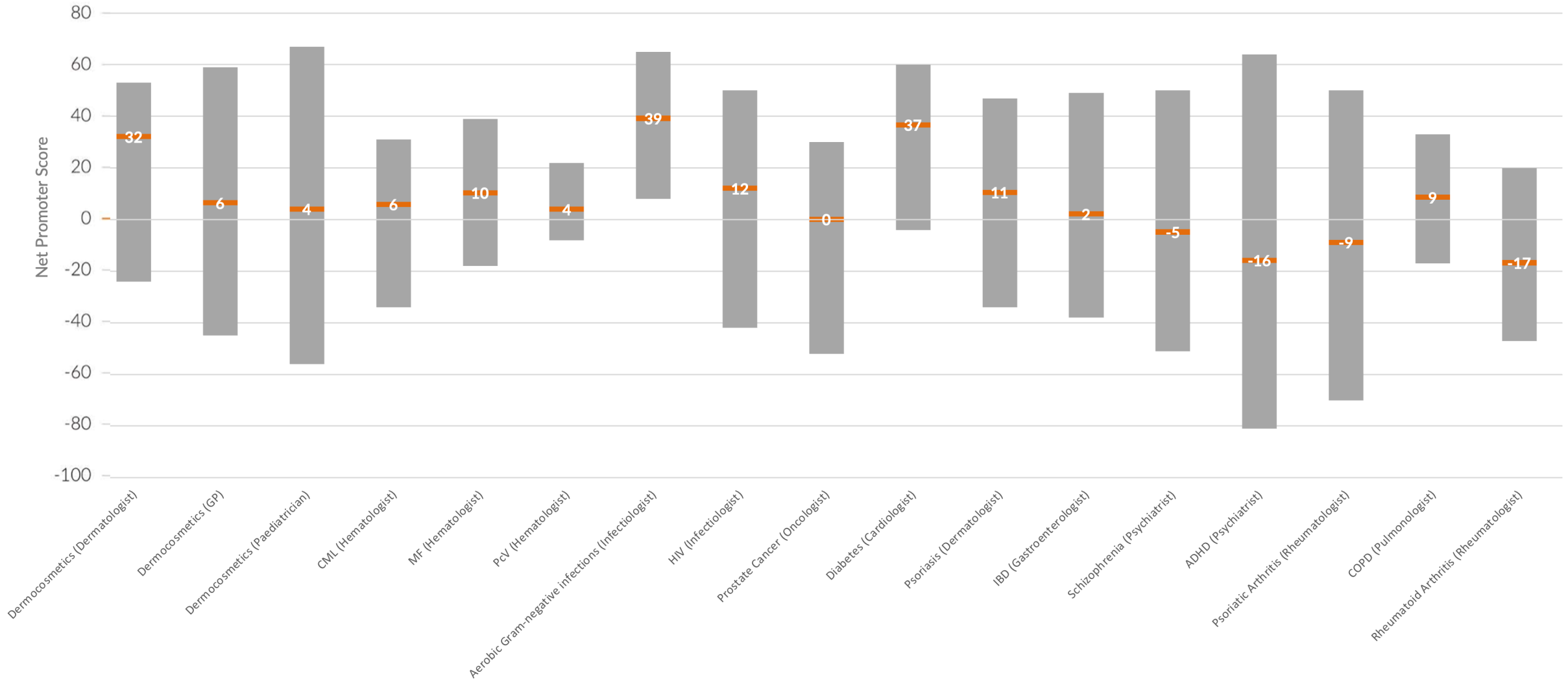
NPS Definition

On a scale from 0 to 10, how likely are you to recommend this brand to your peer?

0/10 1 2 3 4 5 6 7 8 9 **10**/10

DETRACTORS   PASSIVES   PROMOTERS
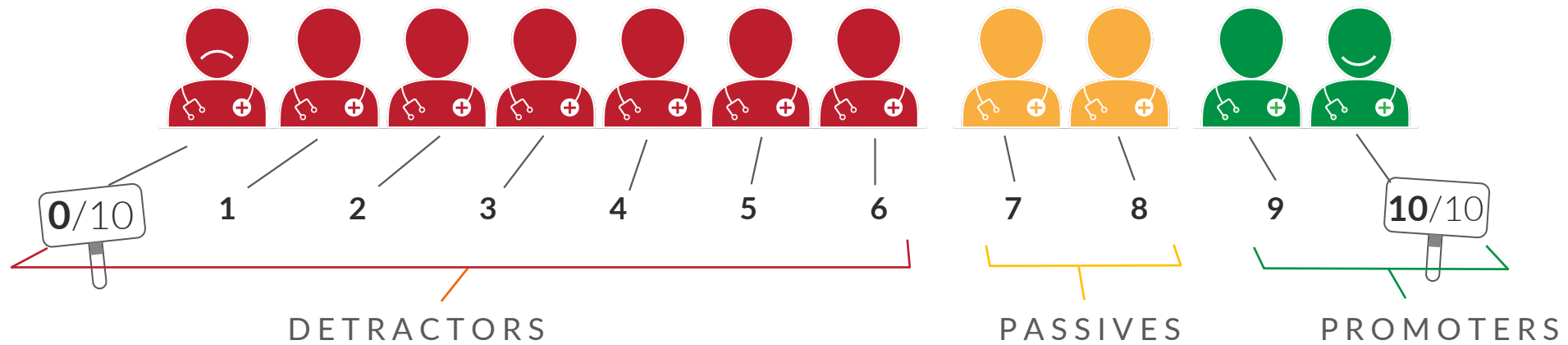
NPS = % OF **PROMOTERS** − % OF **DETRACTORS**

© Across Health

Reimagine customer engagement   Webinars   ACROSS HEALTH

Which driver is most influential in defining HCP brand preference (NPS) in majority of specialties and markets ?

1. Brand attributes (e.g. efficacy/ tolerability/ dosing/…)
2. CX attributes (i.e high quality engagements with the brand)
3. Brand attributes and Cx attributes have an equal weight

High NPS ratings from 'promoters' and 'passives' are primarily **driven by Cx**

% OF SPECIALISTS WHOSE NPS RATING WAS DRIVEN BY CX FACTORS

- % Cx-driven for promoters
- % Cx-driven for passives
- % Cx-driven for detractors

N=1,005

Avg: **70%**
Avg: **67%**
Avg: **44%**
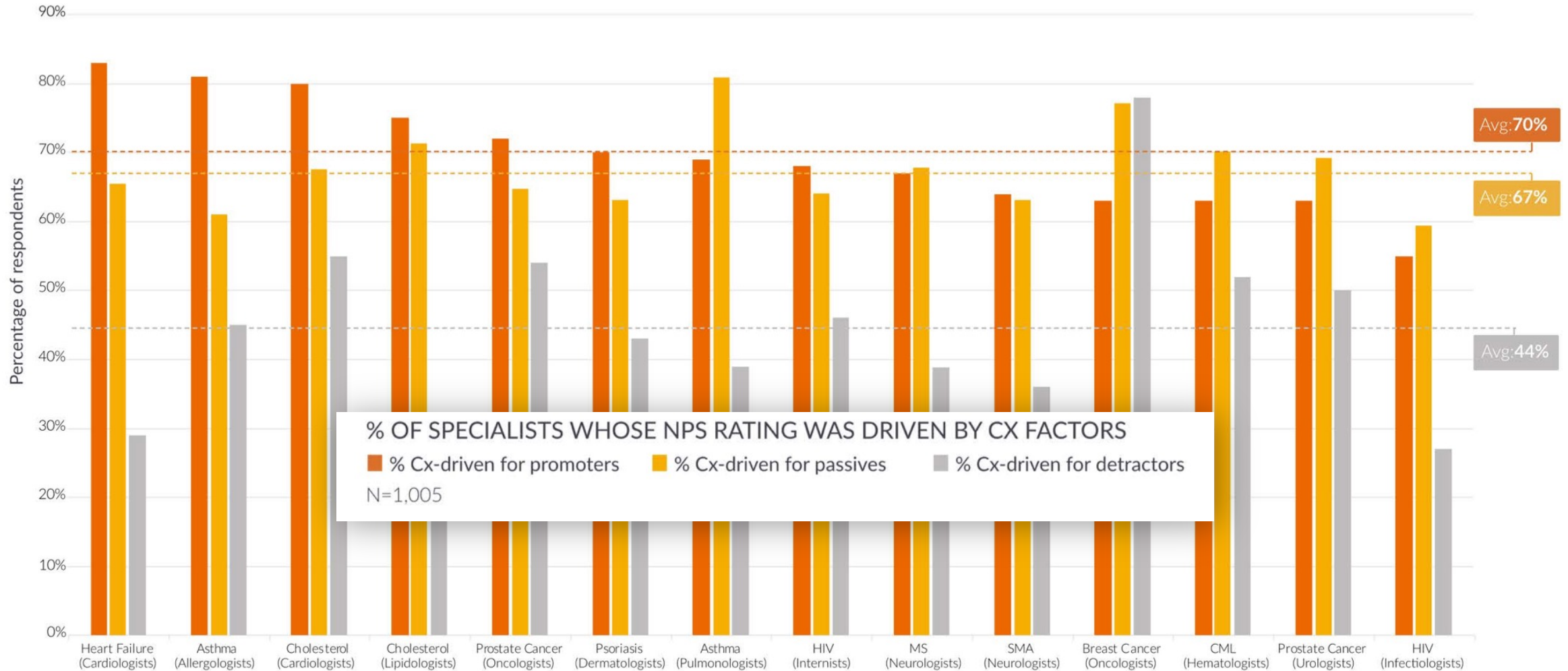
Source: Navigator365™ Cx Benchmark, US specialists, Q4 2022–Q1 2023

Reimagine customer engagement
Webinars

ACROSS HEALTH

What drives an optimal Cx according to HCPs ?

Driver	GLOBAL n=2096	US n=1036	EU5 n=1680	APAC n=453
Knowledgeable staff	1st	2nd	1st	1st
Easy to contact/engage with	2nd	1st	2nd	2nd
Respects my time	3rd	3rd	3rd	4th
Fast response/feedback	4th	4th	4th	3rd
Knows my professional interests	5th	5th	5th	6th
I can get information & service through any channel	6th	6th	6th	5th
Knows & respects my channel preference	7th	7th	7th	7th

Source: Navigator365™ Cx Benchmark, all specialists, 2023

Reimagine customer engagement Webinars

ACROSS HEALTH

Agenda

1. Why all the stars are aligned for Cx Benchmarking

2. In search of the ultimate KPI for evaluating pharma performance

3. Correlation analysis between Cx Excellence and business outcome (client cases)

4. Navigator Cx Benchmark for providing actionable OCX insights

5. Holistic KPI framework for impact measurement

Reimagine customer engagement Webinars

ACROSS HEALTH

The ultimate hypothesis we wanted to test

Data extracted from
Navigator Cx Benchmark
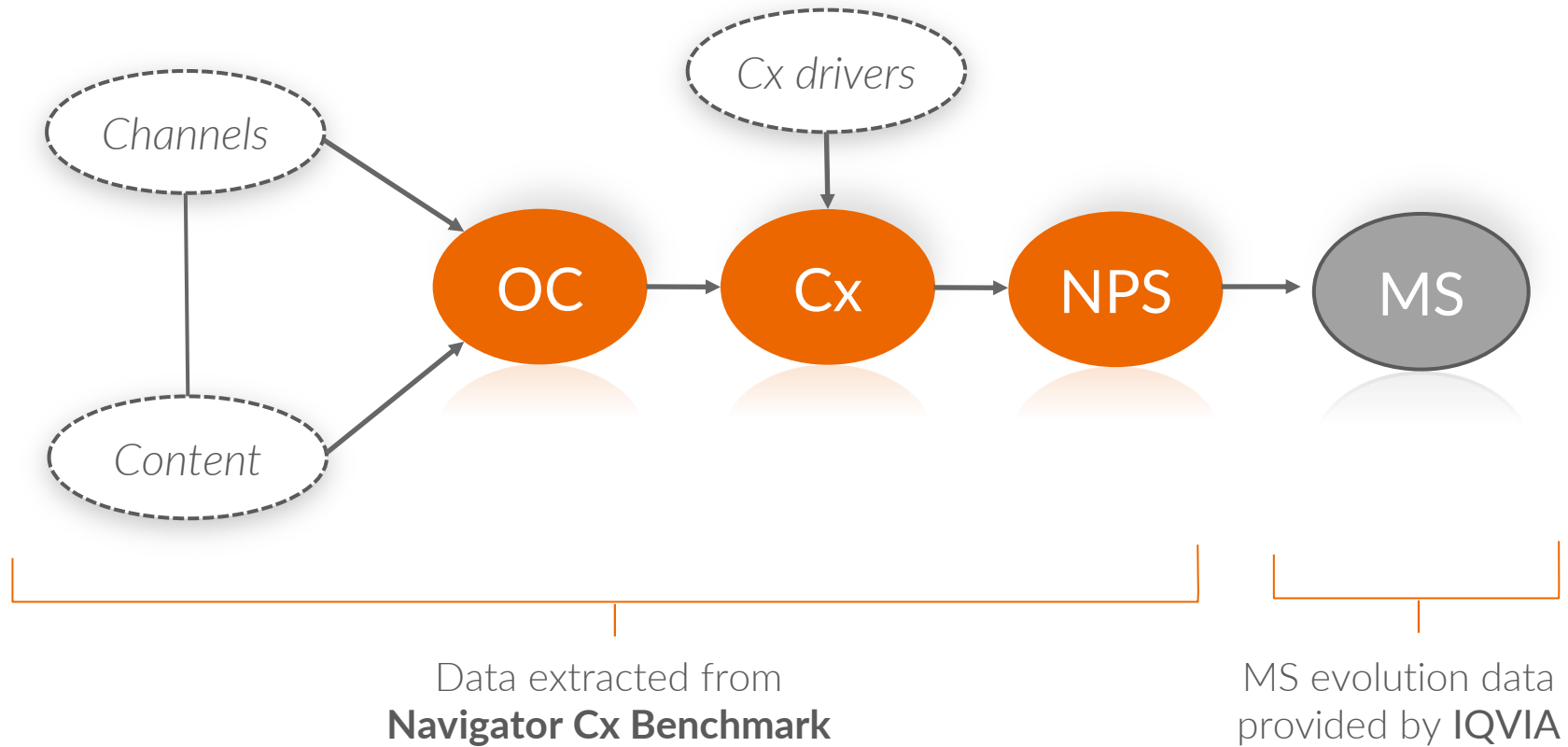
MS evolution data
provided by **IQVIA**

Case study 1

*Analysis in 'infectiology' market with limited # players
based on N = 301 prescribers in 7 markets*

We demonstrated the **correlation between
OC, Cx, NPS and MS% evolution**
leveraging Navigator CX Benchmark data

Cx is strongly correlated with NPS...can we tie Cx excellence to business outcomes?

NPS DRIVERS - INFECTIOLOGIST

N = 301

Legend: ■ Brand-related ■ Mix ■ Cx-related

% Promoters (9-10) — PROMOTORS

Brand	Brand-related	Mix	Cx-related
Brand A (52%)	39%	6%	55%
Brand B (44%)	45%	6%	50%
Brand C (28%)	22%	4%	74%

% Passives (7-8) — PASSIVES

Brand	Brand-related	Mix	Cx-related
Brand A (40%)	36%	4%	60%
Brand B (40%)	29%	8%	63%
Brand C (43%)	41%	4%	56%

% Detractors (0-6) — DETRACTORS

Brand	Brand-related	Mix	Cx-related
Brand A (8%)	57%	10%	33%
Brand B (16%)	45%	5%	50%
Brand C (29%)	56%	5%	38%

Source: Navigator365™ Cx Benchmark, 2023

Reimagine customer engagement · Webinars

ACROSS HEALTH

Cx is strongly correlated with NPS...can we tie Cx excellence to business outcomes?

NPS DRIVERS - INFECTIOLOGIST EU5
N=250

Legend: ■ Brand-related ■ Mix ■ Cx-related

% Promoters (9-10)	PROMOTORS	Brand-related	Mix	Cx-related
Brand A (52%)		39%	6%	55%
Brand B (44%)		45%	6%	50%
Brand C (28%)		22%	4%	74%

% Passives (7-8)	PASSIVES	Brand-related	Mix	Cx-related
Brand A (40%)		36%	4%	60%
Brand B (40%)		29%	8%	63%
Brand C (43%)		41%	4%	56%

% Detractors (0-6)	DETRACTORS	Brand-related	Mix	Cx-related
Brand A (8%)		57%	10%	33%
Brand B (16%)		45%	5%	50%
Brand C (29%)		56%	5%	38%

Detractors should first be convinced of product parity/superiority; <u>Cx is a distant second</u>

Source: Navigator365™ Cx Benchmark, 2023

Reimagine customer engagement · Webinars

ACROSS HEALTH

Cx is strongly correlated with NPS...can we tie Cx excellence to business outcomes?

NPS DRIVERS - INFECTIOLOGIST EU5
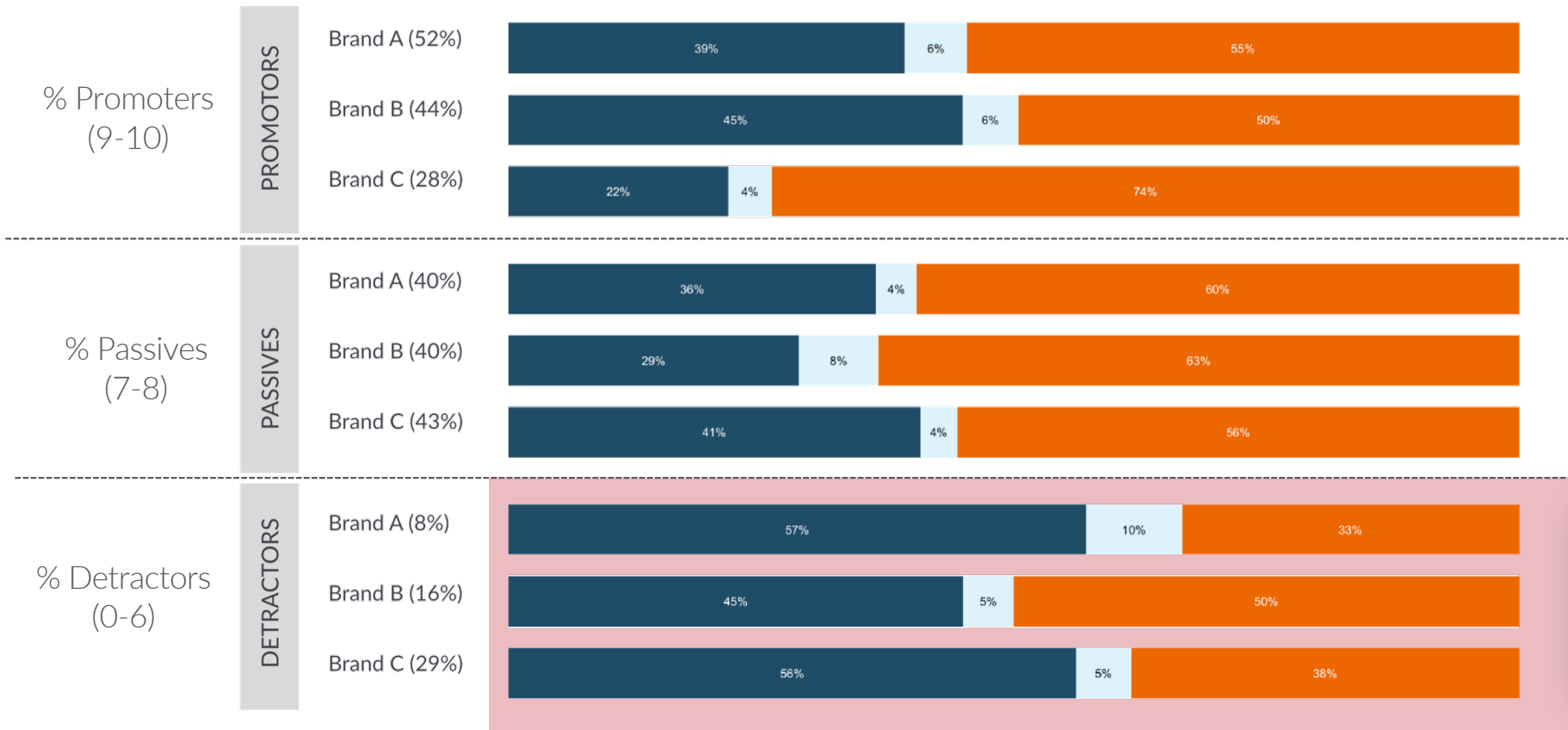N=250

Legend: ■ Brand-related ■ Mix ■ Cx-related

% Promoters (9-10) — PROMOTERS

Brand	Brand-related	Mix	Cx-related
Brand A (52%)	39%	6%	55%
Brand B (44%)	45%	6%	50%
Brand C (28%)	22%	4%	74%

% Passives (7-8) — PASSIVES

Brand	Brand-related	Mix	Cx-related
Brand A (40%)	36%	4%	60%
Brand B (40%)	29%	8%	63%
Brand C (43%)	41%	4%	56%

How can you "delight" **passives** through a superior Cx **to become promoters**?

% Detractors (0-6) — DETRACTORS

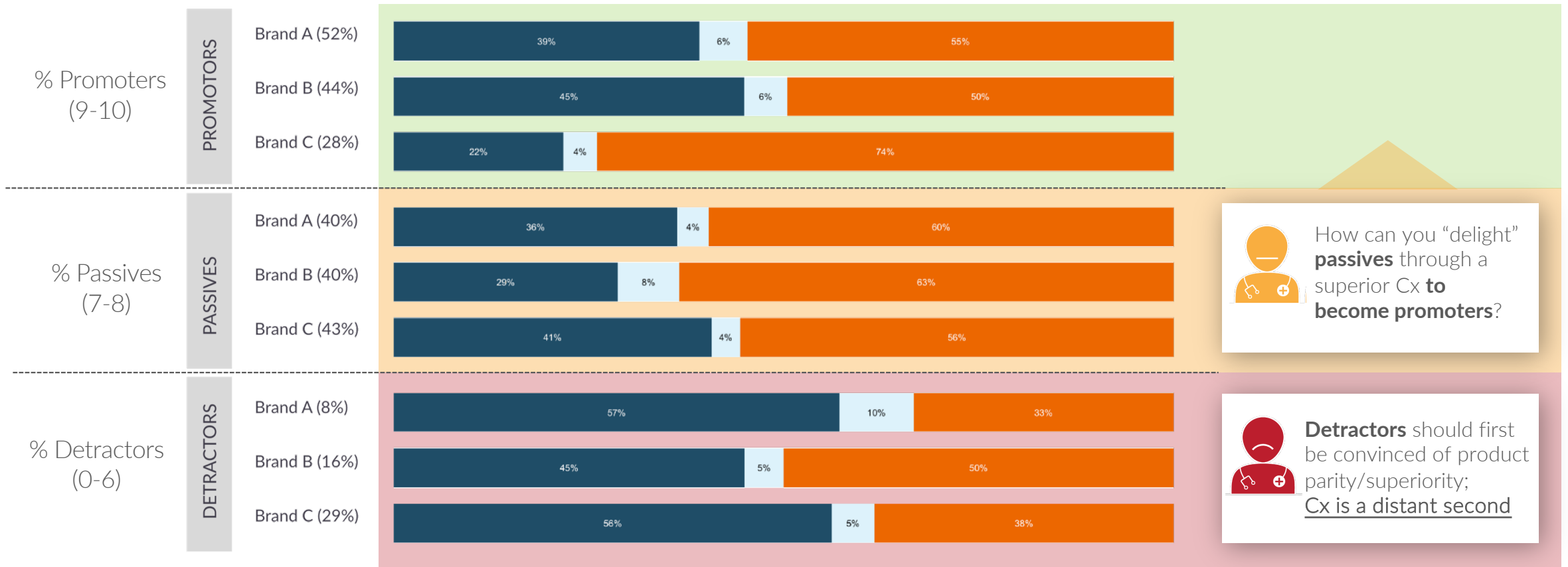| Brand	Brand-related	Mix	Cx-related
Brand A (8%)	57%	10%	33%
Brand B (16%)	45%	5%	50%
Brand C (29%)	56%	5%	38%

Detractors should first be convinced of product parity/superiority; Cx is a distant second

Source: Navigator365™ Cx Benchmark, 2023

OMNICHANNEL EXCELLENCE / CX PERFORMANCE CORRELATION -   2023

▲ Brand 1   ◆ Brand 2   ■ Brand 3 (launch brand)   ● Brand 4
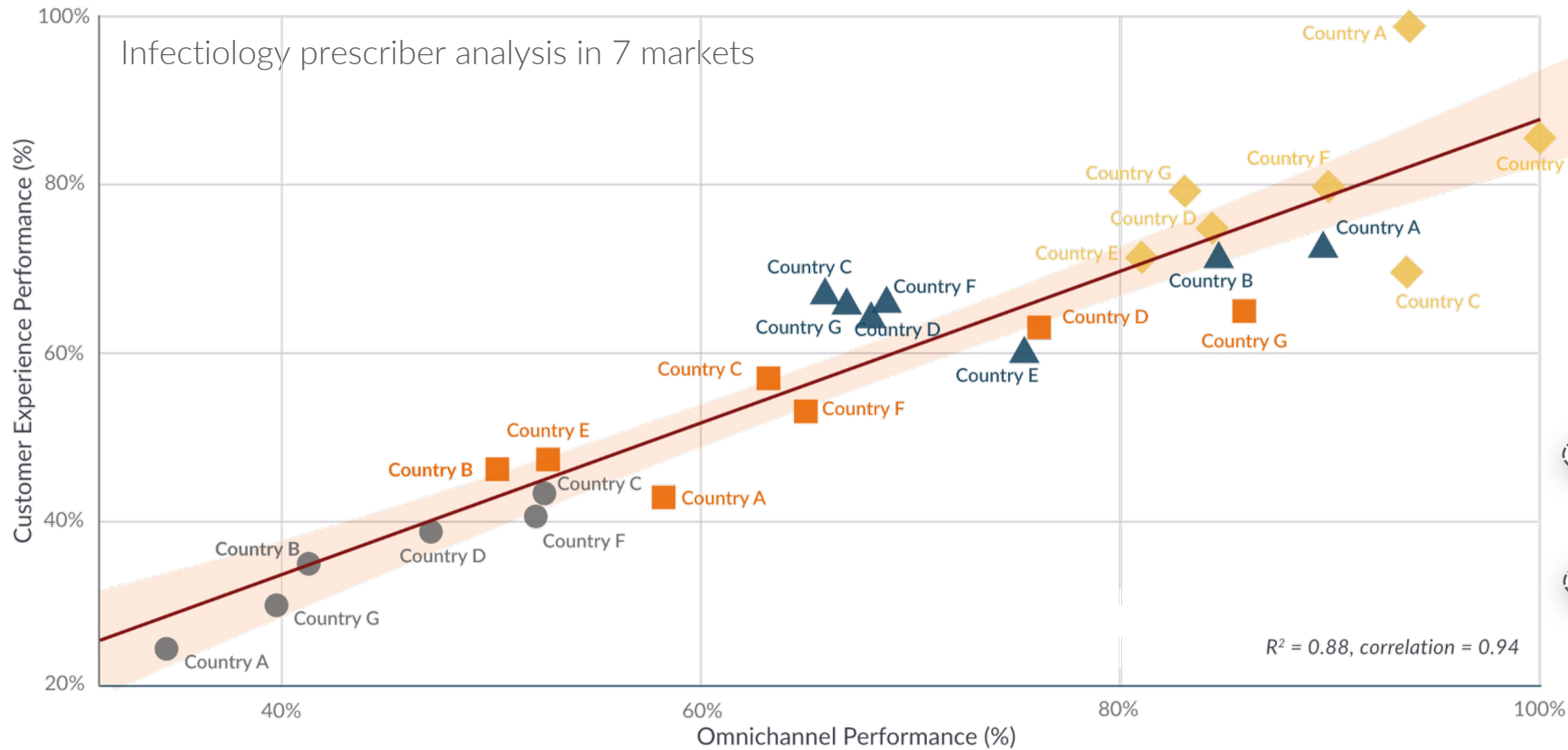
Omnichannel excellence is strongly correlated with Cx performance

Infectiology prescriber analysis in 7 markets

Customer Experience Performance (%)

Omnichannel Performance (%)

$R^2 = 0.88$, correlation = 0.94

Source: Navigator365™ Cx Benchmark, specialty redacted, 2023 (n=301)

Channels → OC → Cx → NPS → MS
Content
Cx drivers

ACROSS HEALTH
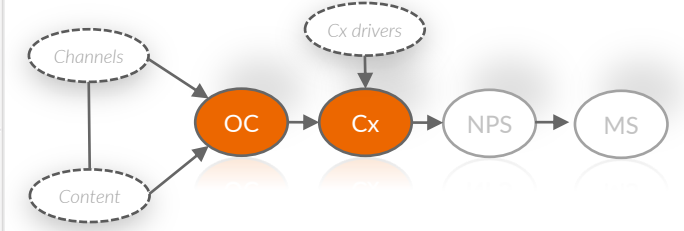
CX PERFORMANCE / NPS CORRELATION - 2023

▲ Brand 1   ◆ Brand 2   ■ Brand 3 (launch brand)

Infectiology prescriber analysis in 7 markets

Cx is strongly correlated with NPS

NPS (y-axis): 0, 20%, 40%, 60%, 80%

Customer Experience Performance (%) (x-axis): 40%, 60%, 80%, 100%

Country F, Country B, Country C, Country A, Country B, Country D, Country E, Country A, Country G, Country C, Country G, Country F, Country E, Country D, Country A, Country E, Country C, Country F, Country B, Country D, Country G

$R^2 = 0.62$, correlation = 0.78
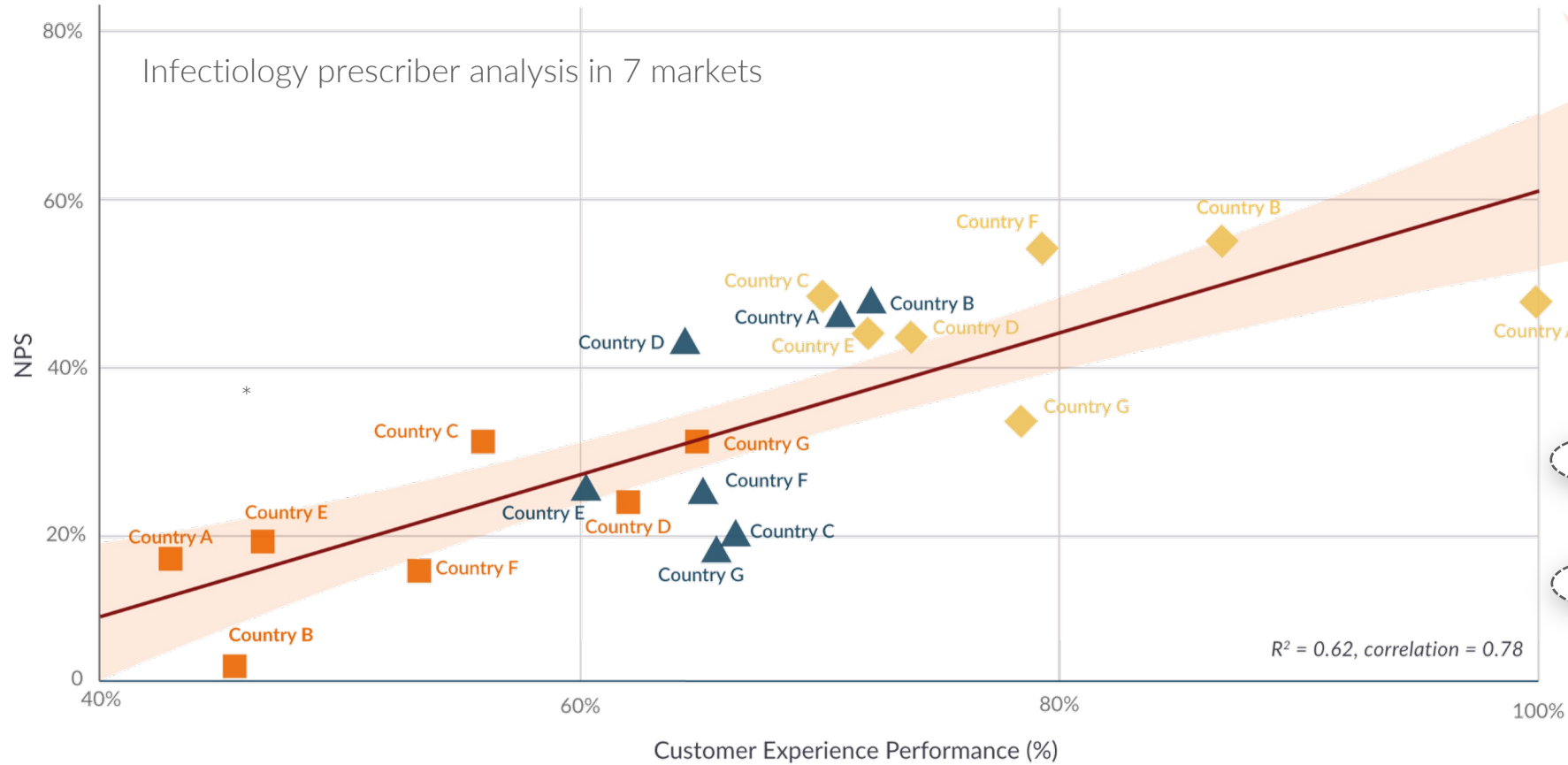
Channels, Content, Cx drivers, OC, Cx, NPS, MS
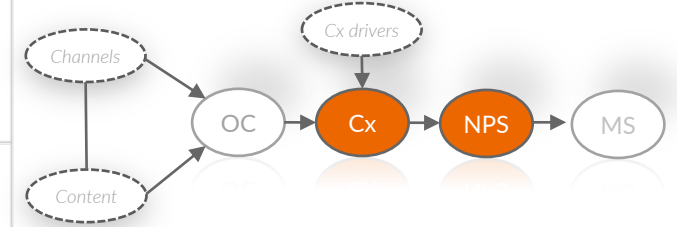
Source: Navigator365™ Cx Benchmark, specialty redacted, 2023 (n=301)

* Net Promoter Score (NPS) is calculated by subtracting the percentage of detractors from the percentage of promoters. Only prescribers are taken into consideration.

Reimagine customer engagement   Webinars

ACROSS HEALTH

NPS / MARKET SHARE EVOLUTION CORRELATION - 2022-2023

▲ Brand 1   ◆ Brand 2   ■ Brand 3 (launch brand)
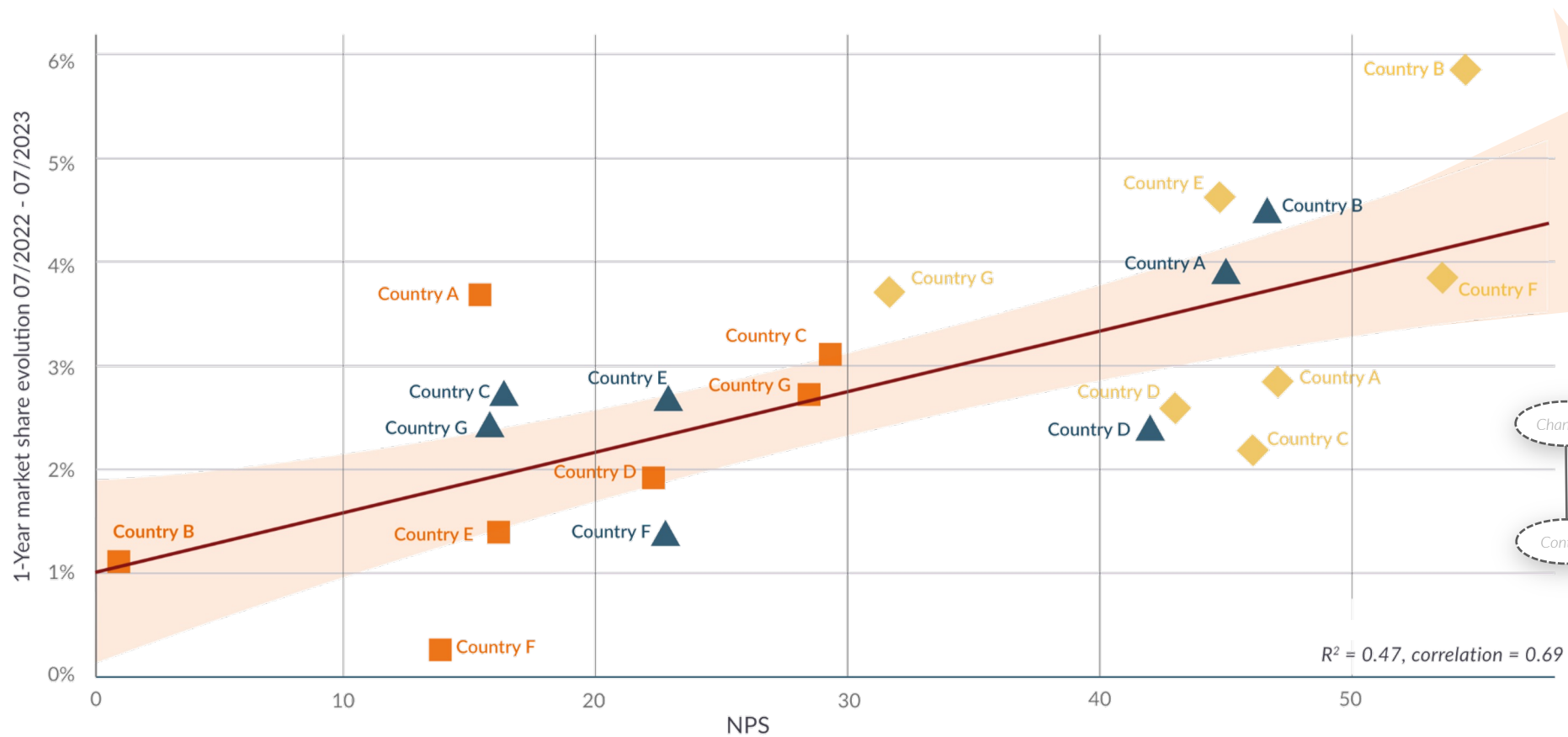
Higher NPS corresponds to increased market share
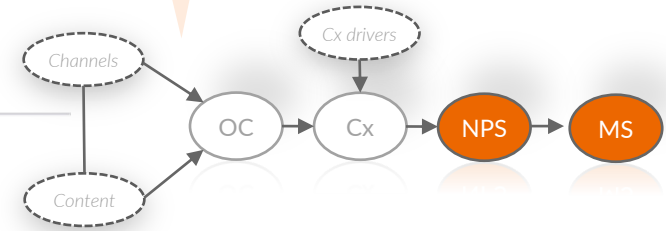
$R^2 = 0.47$, correlation = 0.69

Source: Navigator365™ Cx Benchmark (n=301) and client data, 2022-2023

Net Promoter Score (NPS) is calculated by subtracting the percentage of detractors from the percentage of promoters. Only prescribers are taken into consideration.

Reimagine customer engagement

The webinar series

Case study 2

*Analysis in **competitive 'dermatology' market with many brands** based on N = 252 prescribers in 5 markets*

We demonstrated the **correlation between OC, Cx, NPS and MS%** evolution leveraging Navigator CX Benchmark data

Cx seems to be a strong driver of NPS

NPS DRIVERS - DERMATOLOGIST EU5
N=252

Legend: ■ Brand-related ■ Mix ■ Cx-related

PROMOTORS

Brand	Brand-related	Mix	Cx-related
Brand F (43%)	44%	5%	51%
Brand C (42%)	42%	3%	55%
Brand A (40%)	46%	3%	51%
Brand D (36%)	41%	1%	58%
Brand E (29%)	41%	1%	58%
Brand G (22%)	41%	9%	50%
Brand B (15%)	43%	3%	54%

PASSIVES

Brand	Brand-related	Mix	Cx-related
Brand F (41%)	41%	2%	57%
Brand C (41%)	43%	2%	55%
Brand A (39%)	45%	4%	51%
Brand D (50%)	48%	2%	50%
Brand E (51%)	52%	3%	45%
Brand G (48%)	46%	3%	51%
Brand B (51%)	48%	4%	48%

DETRACTORS

Brand	Brand-related	Mix	Cx-related
Brand F (16%)	62%	2%	35%
Brand C (17%)	53%	7%	40%
Brand A (21%)	78%	4%	19%
Brand D (14%)	64%	6%	31%
Brand E (20%)	64%	4%	32%
Brand G (29%)	69%	5%	26%
Brand B (35%)	70%	2%	28%

Source: Navigator365™ Cx Benchmark, 2023

Reimagine customer engagement — Webinars

ACROSS HEALTH

OMNICHANNEL PERFORMANCE / CX PERFORMANCE CORRELATION - 2023

Customer Experience Performance (%) vs Omnichannel Performance (%)

Brand F
Brand E
Brand D
Brand C
Brand A (launch brand)
Brand G
Brand B
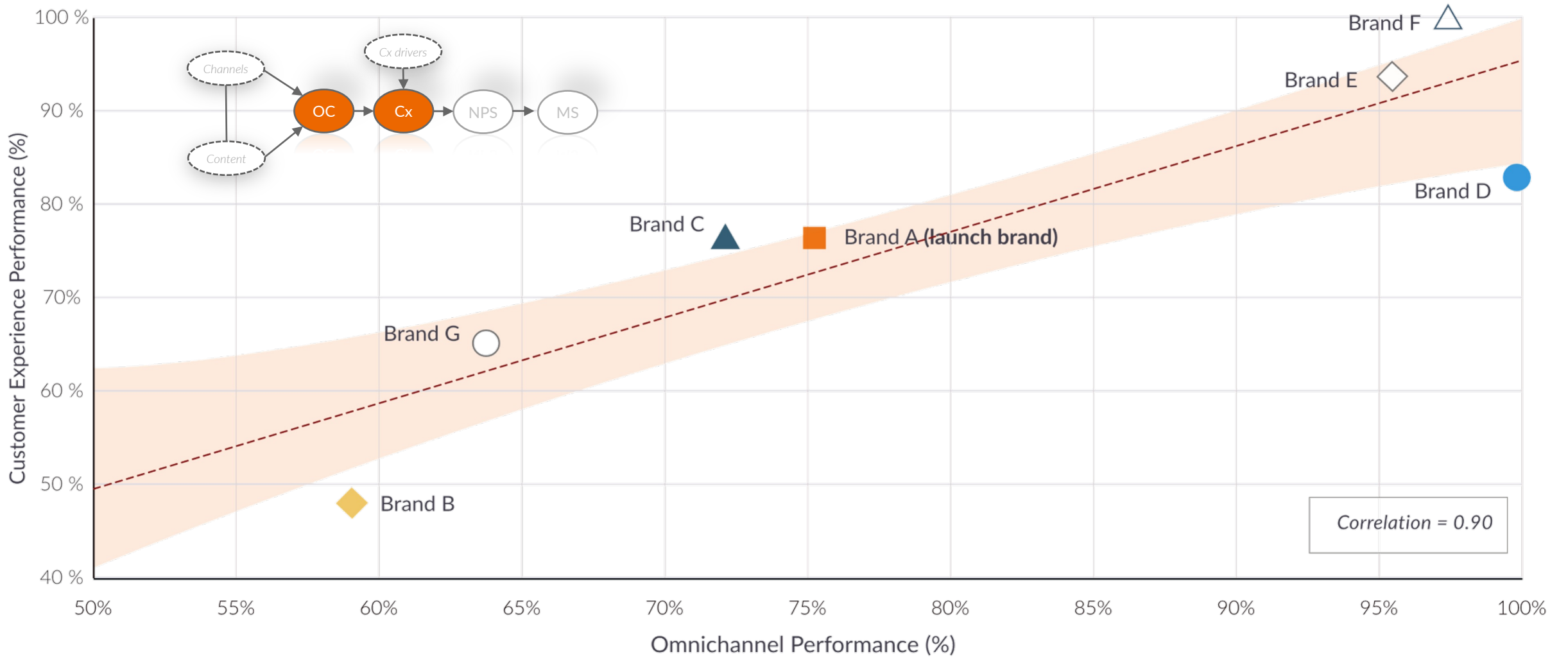
Correlation = 0.90

- Analysis for EU5 Dermatologists
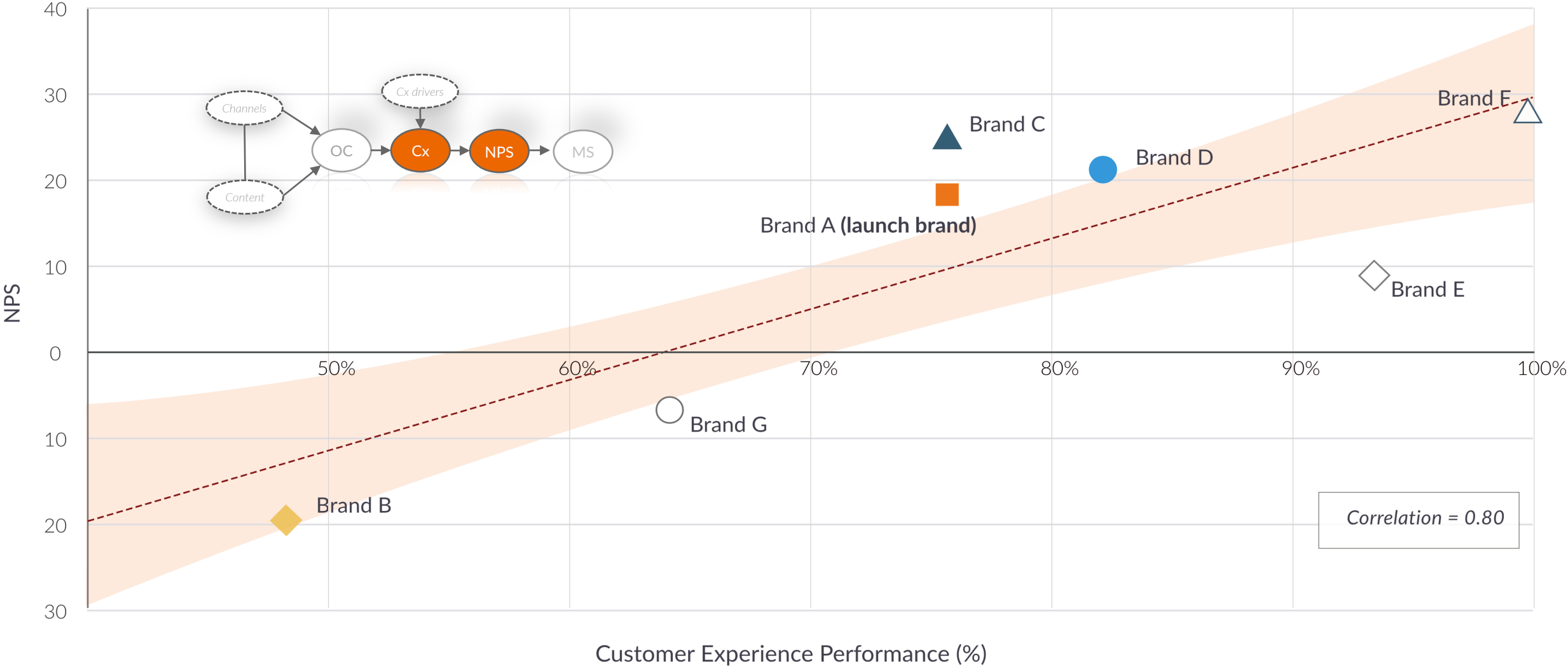
NPS / MARKET SHARE EVOLUTION CORRELATION - 2023
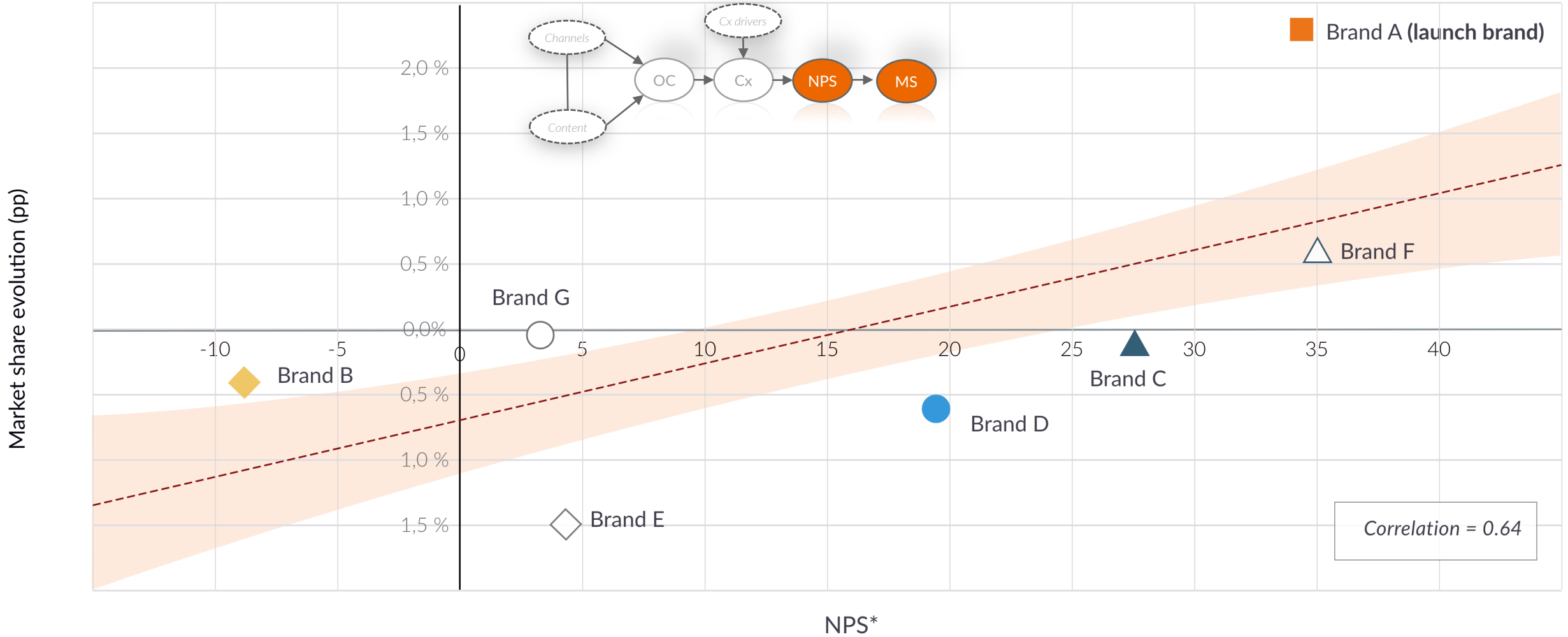
Market share evolution (pp)

NPS*

Brand A (launch brand)

Brand F

Brand G

Brand B

Brand C

Brand D

Brand E

Correlation = 0.64

Reimagine customer engagement

Webinars

ACROSS HEALTH

Agenda

1. Why all the stars are aligned for Cx Benchmarking

2. In search of the ultimate KPI for evaluating pharma performance

3. Correlation analysis between Cx Excellence and business outcome (client case)

4. Navigator Cx Benchmark for providing actionable OCX insights

5. Holistic KPI framework for impact measurement

Use **Navigator365™ Cx Benchmark** insights to improve your brand OCE leadership & CX

Navigator365™ **Cx Benchmark**

1 Identify which **strategic channel decisions** to make for improving the **competitive position** of your brand

2 Understand which **channel & content attributes to address** for improving **customer engagement**

3 Discover which **CX attributes to improve** for your brand to drive **OCE leadership**

Customer engagement strategy → **Context of execution** → Omnichannel engagement → Customer Experience → NPS → Market Share → ROI

ACROSS HEALTH **Strategy Services**

Brand success requires effective omnichannel management

Reimagine customer engagement · Webinars

A uniquely actionable wealth of benchmarking insights

Navigator365™ Cx Benchmark

32 channels,
5 overall brand-level KPIs,
5 content attributes and
4 channel attributes

32 CHANNELS

COMMERCIAL

- Banners *
- Pharma content on 3rd-party *
- Pharma eNewsletter
- Pharma website (physicians)
- Remote rep/KAM
- Rep/KAM email
- Self-detail

- Conference booth *
- Journal ad *
- Pharma DM/newsletter
- Rep/KAM F2F visit
- Rep/KAM F2F visit with tablet
- Rep/KAM phone call
- Sample

MEDICAL

- eMedical education
- MSL email
- Pharma app
- Pharma podcast
- Pharma webcast
- Remote MSL
- Social media (physicians) *

- International scientific meeting
- Local scientific meeting
- MSL F2F visit
- MSL F2F visit with tablet
- MSL phone call
- Pharma service centre
- Phase IV

PATIENT

- Pharma website (patients)
- Social media (patients) *

- Patient education brochure
- Patient support programme

Online ●
Offline ■

5 BRAND-LEVEL KPIs
- NPS & DRIVERS
- CX & DRIVERS
- CUSTOMER EFFORT SCORE
- OMNICHANNEL & CHANNEL BREADTH
- PATIENT CENTRICITY

5 CONTENT ATTRIBUTES
- RELEVANT TO PRACTICE
- TRUSTWORTHY/BALANCED
- CLEAR/CONCISE
- FRESH/NEW
- ENGAGING/INTERACTIVE

4 CHANNEL ATTRIBUTES
- RIGHT FREQUENCY
- RIGHT TIME
- EASE OF ACCESS/USE
- PERSONALIZED APPROACH

Paid or 3rd-party channel

Reimagine customer engagement ☐ Webinars
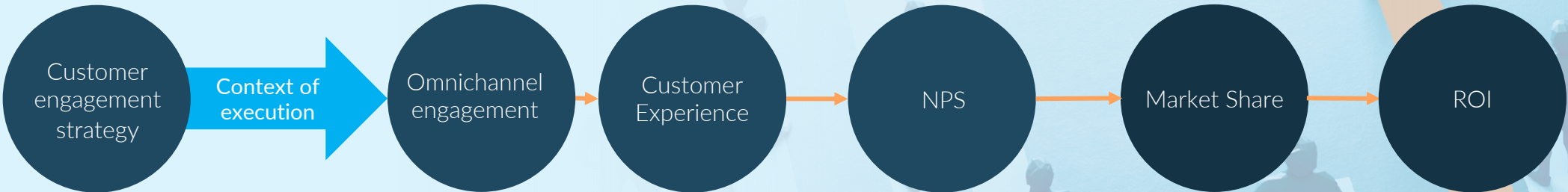
ACROSS HEALTH

Agenda

1. Why all the stars are aligned for Cx Benchmarking

2. In search of the ultimate KPI for evaluating pharma performance

3. Correlation analysis between Cx Excellence and business outcome (client case)

4. Navigator Cx Benchmark for providing actionable OCX insights

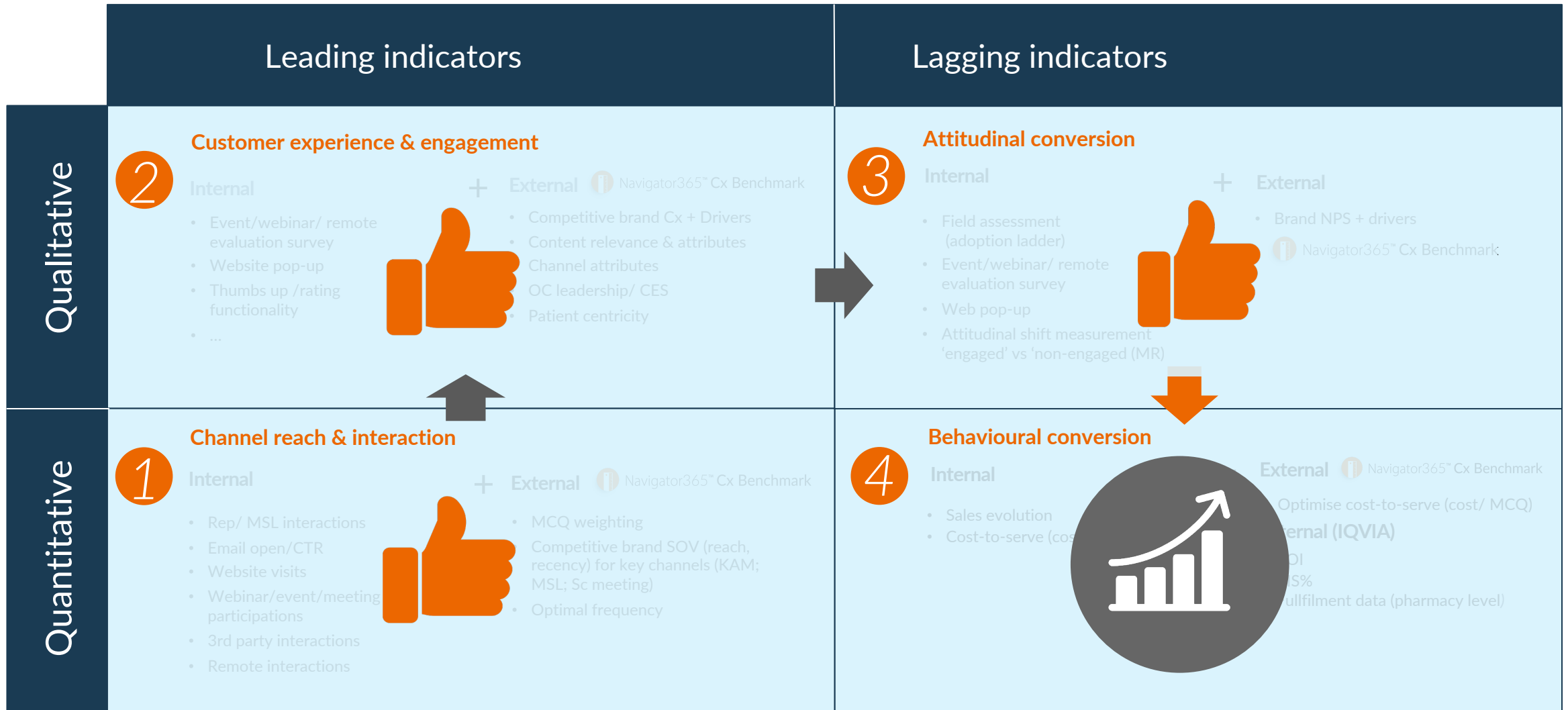5. Holistic KPI framework for impact measurement

Reimagine customer engagement Webinars

ACROSS HEALTH

Impact = f (**REACH**, ENGAGEMENT, CONVERSION, ADVOCACY, **RETURN**/**COST**)

Impact = f (**NEOCORTEX** + LIMBIC)

A holistic KPI framework leveraging both INTERNAL and EXTERNAL KPIs for demonstrating business impact

	Leading indicators	Lagging indicators
Qualitative	**Customer experience & engagement** ②	**Attitudinal conversion** ③
	Internal + **External** Navigator365™ Cx Benchmark	**Internal** + **External**
	• Event/webinar/ remote evaluation survey • Website pop-up • Thumbs up /rating functionality • …	• Competitive brand Cx + Drivers • Content relevance & attributes • Channel attributes • OC leadership/ CES • Patient centricity	• Field assessment (adoption ladder) • Event/webinar/ remote evaluation survey • Web pop-up • Attitudinal shift measurement 'engaged' vs 'non-engaged (MR)	• Brand NPS + drivers Navigator365™ Cx Benchmark
Quantitative	**Channel reach & interaction** ①	**Behavioural conversion** ④
	Internal + **External** Navigator365™ Cx Benchmark	**Internal** **External** Navigator365™ Cx Benchmark
	• Rep/ MSL interactions • Email open/CTR • Website visits • Webinar/event/meeting participations • 3rd party interactions • Remote interactions	• MCQ weighting • Competitive brand SOV (reach, recency) for key channels (KAM; MSL; Sc meeting) • Optimal frequency	• Sales evolution • Cost-to-serve (cos	Optimise cost-to-serve (cost/ MCQ) ernal (IQVIA) OI S% ullfilment data (pharmacy level)

Reimagine customer engagement — Webinars

ACROSS HEALTH

ACROSS HEALTH
a precision value & health team

Reimagine customer engagement

Webinars **2024**

Beverly Smet
SVP Global Accounts
+ 32 478 64 28 46
beverly.smet@a-cross.com

Vanessa Huichard
Senior Strategy Consultant
+ 33 6 79 70 62 53
vanessa.huichard@a-cross.com

Question time!

Want to know more? Join us on our upcoming webinars

Reimagine customer engagement

📺 The webinar series

FEB to OCT 2024

To sign up:

across.health/2024-webinars

- **Omnichannel Launch Excellence:** The pivotal role of Medical Affairs THURSDAY, MAY 23TH 16H CET

- **Omnichannel upskilling:** Transforming customer-oriented teams into customer engagement experts THURSDAY, JUNE 13TH 16H CET

- **Omnichannel transformation:** Where's the industry at? (Maturometer™ 2024) TUESDAY, OCT 1ST 16H CET

The 2024 survey is now open... (We need your input!)

Omnichannel transformation
in life sciences: evolution or revolution?

Maturometer™ 2024

MATURITY

www.across.health/maturometer2024

Reimagine customer engagement — Webinars

ACROSS HEALTH

Please give us your feedback!

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

Talk to us about how our strategic consulting services – fuelled by the latest HCP and industry insights pulled from our **Navigator365™** and **Maturometer™** research – can help accelerate your journey towards delivering an unparalleled omnichannel customer experience.

https://www.across.health