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!
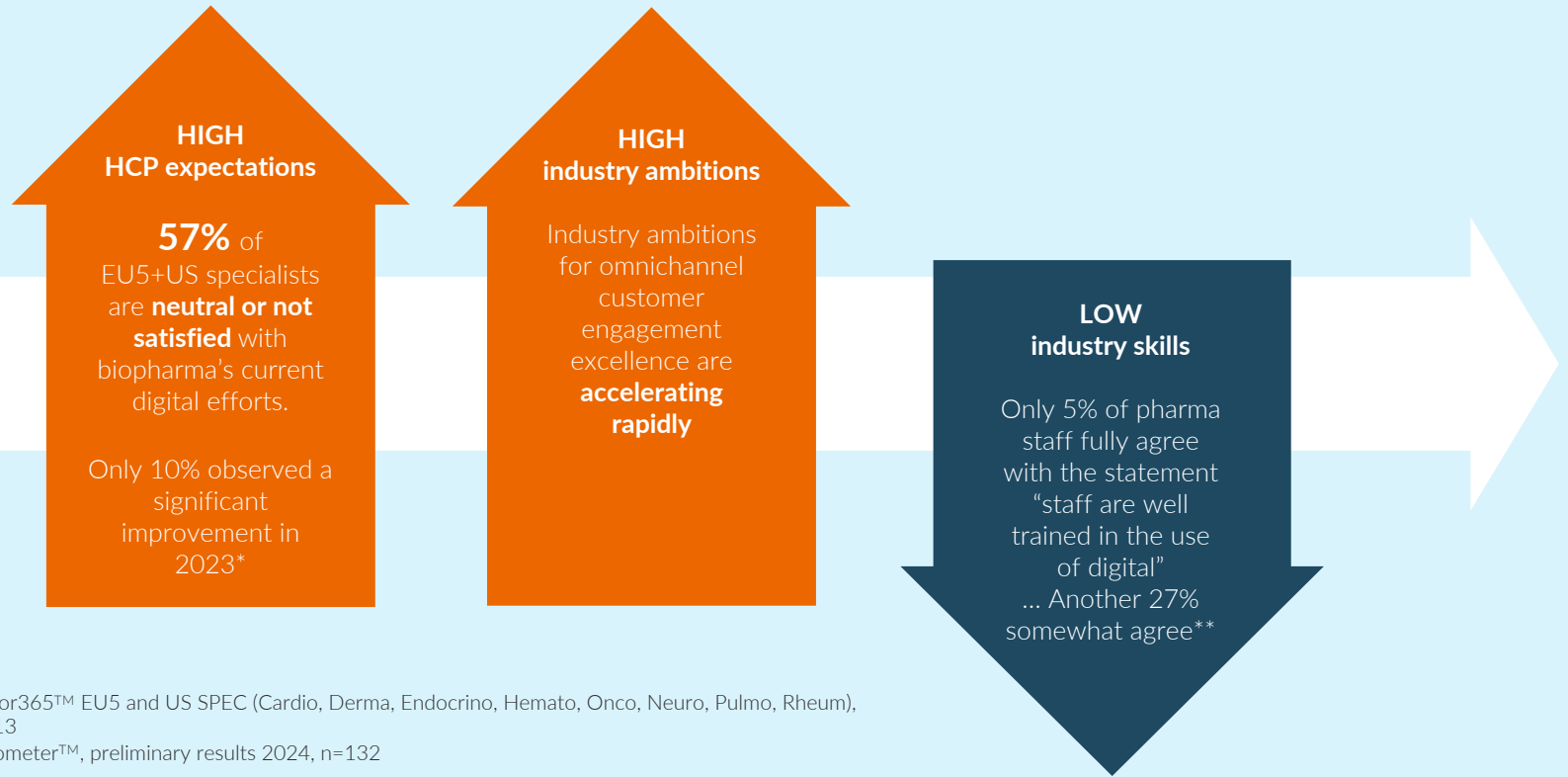
- Too high HCP expectations
- Too high industry ambition
- Industry skills on Omnichannel are low
- All of the above

Omnichannel customer engagement is becoming the next normal...

So what's the issue?

**HIGH
HCP expectations**

57% of EU5+US specialists are **neutral or not satisfied** with biopharma's current digital efforts.

Only 10% observed a significant improvement in 2023*

**HIGH
industry ambitions**

Industry ambitions for omnichannel customer engagement excellence are **accelerating rapidly**

**LOW
industry skills**

Only 5% of pharma staff fully agree with the statement "staff are well trained in the use of digital" ... Another 27% somewhat agree**

*Source: Navigator365™ EU5 and US SPEC (Cardio, Derma, Endocrino, Hemato, Onco, Neuro, Pulmo, Rheum), 2023 Q3, n=5,613
**Source: Maturometer™, preliminary results 2024, n=132

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Pre-Covid, digital demand was already rising steadily

2019

? How **important** are Pharma's digital channels?

18%

27%

54%

- Very unimportant: 8%
- Slightly unimportant: 10%
- Neutral: 27%
- Slightly important: 41%
- Very important: 13%

Reimagine customer engagement
Webinars

ACROSS HEALTH
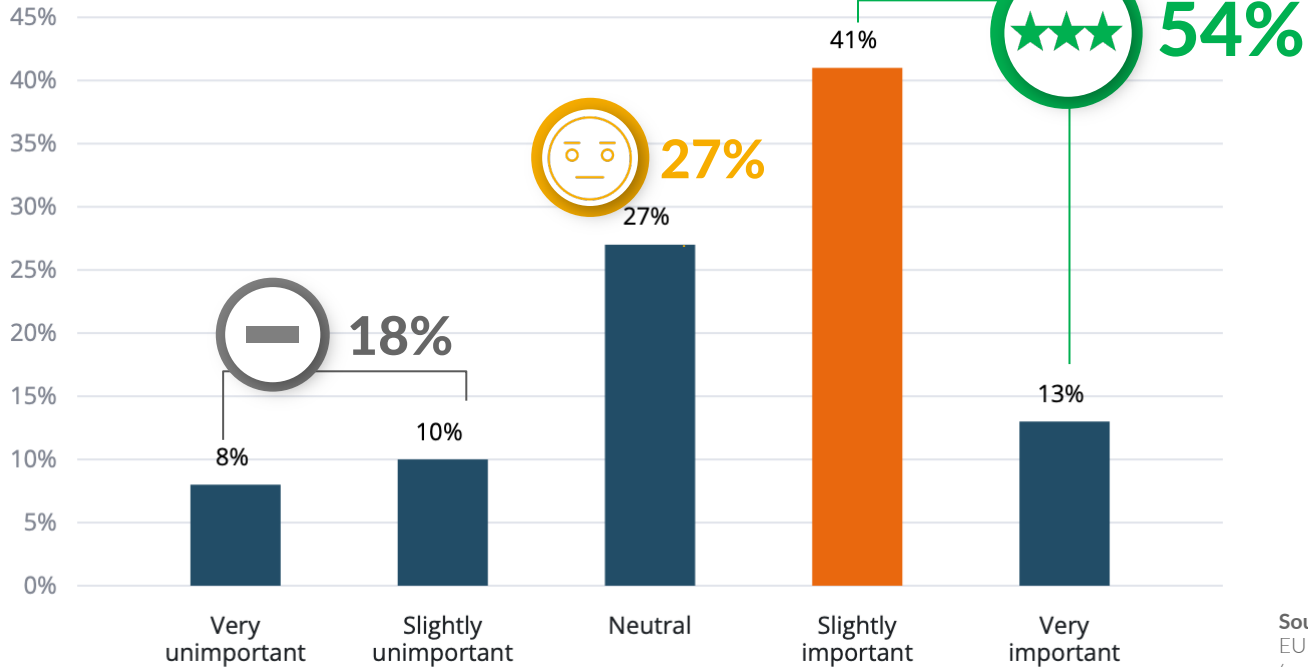
Today, a large majority of HCPs say digital channels from pharma are important

Reflecting the ubiquitous adoption of digital services in everyday life

? How **important** are Pharma's digital channels?

64%

23%

13%

Very unimportant	Slightly unimportant	Neutral	Slightly important	Very important
5%	8%	23%	45%	19%

2023

Reimagine customer engagement

Webinars

ACROSS HEALTH
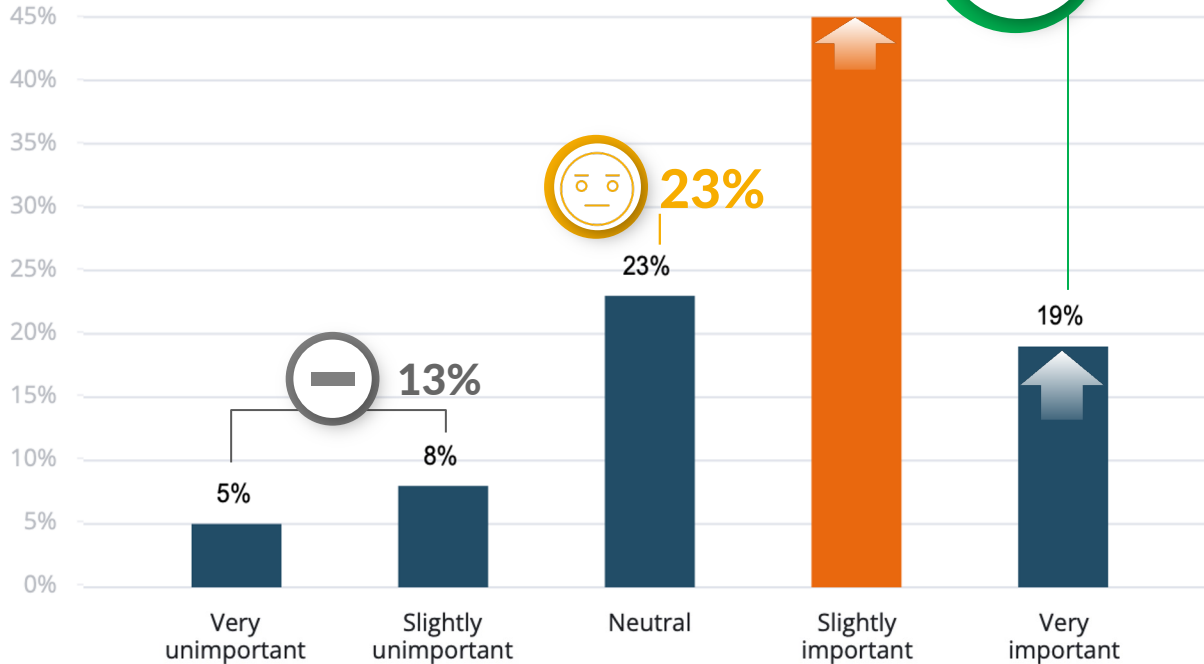
In 2019, only 1 in 3 HCPs were satisfied with pharma's digital offerings

2019

*How **satisfied** are you with Pharma's digital offerings?*

24%

43%

33%

29%

17%

5%

2%

4%

0   1   2   3   4   5

Navigator365™ Core

Reimagine customer engagement   Webinars

ACROSS HEALTH
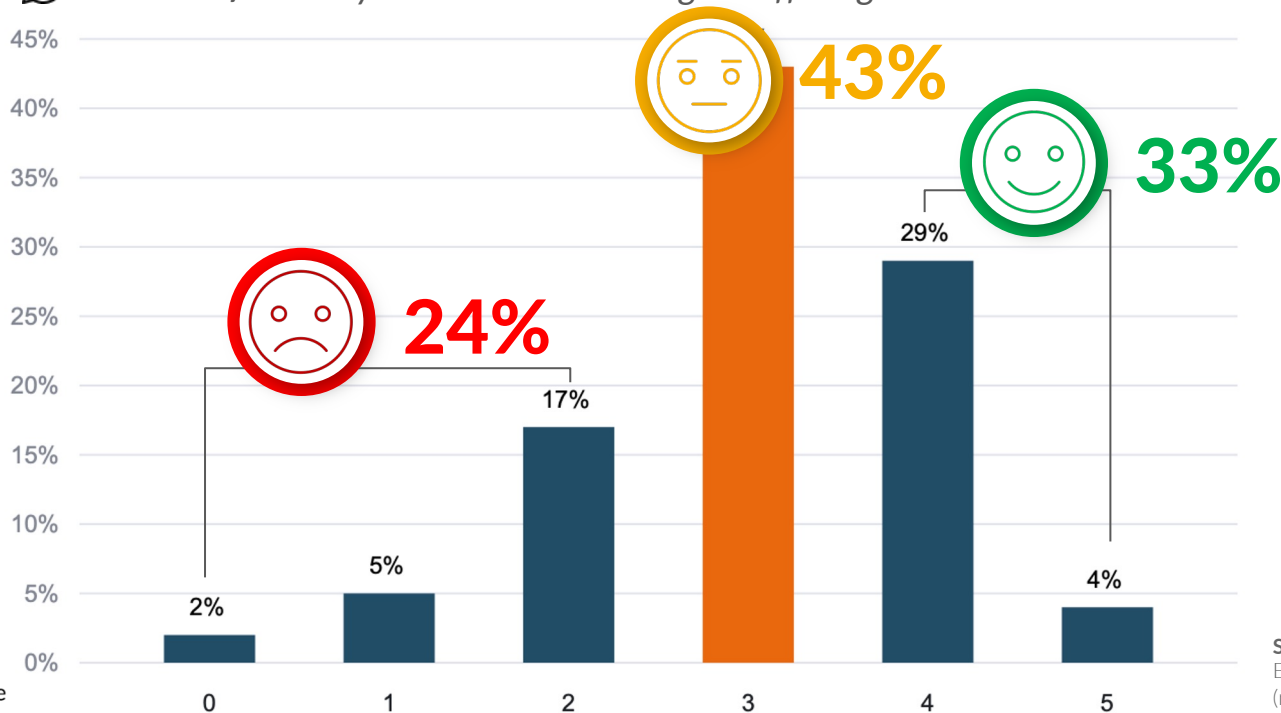
Significant improvements have been achieved: can we be satisfied?
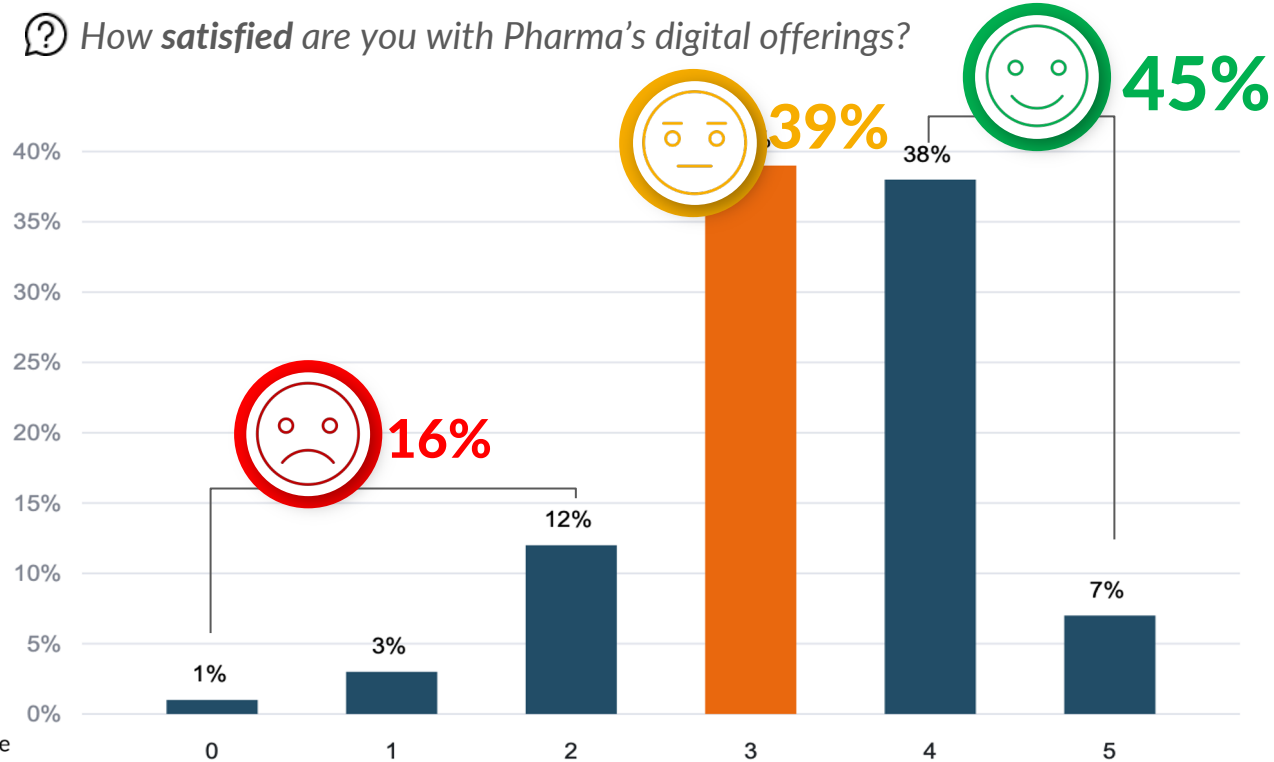
2023

❓ How **satisfied** are you with Pharma's digital offerings?

🙁 **16%**

😐 **39%**

🙂 **45%**

Score	Percentage
0	1%
1	3%
2	12%
3	39%
4	38%
5	7%

Navigator365™ **Core**

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ACROSS HEALTH

Bram Van Leeuwen
Global Digital Director Oncology at Sanofi

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Webinars

ACROSS
H E A L T H

Poll 2: What proportion of total pharma marketing budget is spent on digital?

- Less than 10%
- Between 10 and 25%
- Between 25% and 50%
- More than 50%

Positive long-term digital spend trend, though stagnating at pre-Covid level

PERCENTAGE OF DIGITAL SPEND

14% 16% 19% 22% 19% 23% 27% 28% 32% 23%

2015 2016 2017 2018 2019 2020 2021 2022 2023 2024

Higher investment = Better outputs
Right?
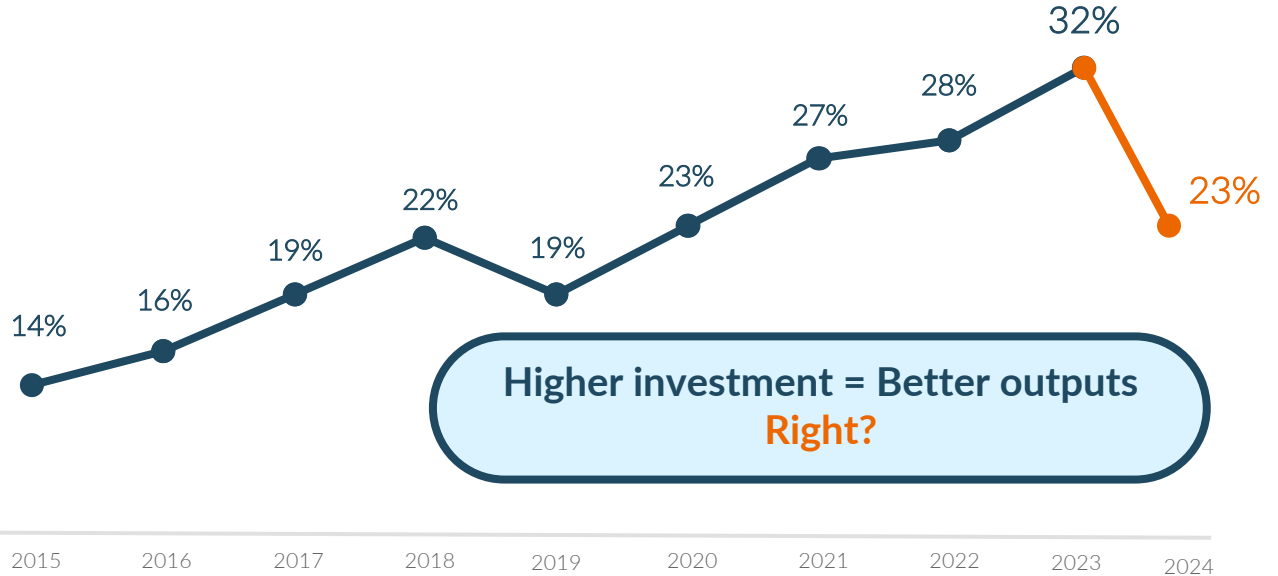
Maturometer™ 2024 n=90 (preliminary results)

Reimagine customer engagement Webinars

ACROSS HEALTH

Understand who the customers are

Develop relevant and inspiring content that informs and engages

CUSTOMER

DATA

CONTENT

DATA

DATA

CHANNEL

Effective use and optimization of engagement channels

Effective use of data to develop insights that lead to specific, informed actions
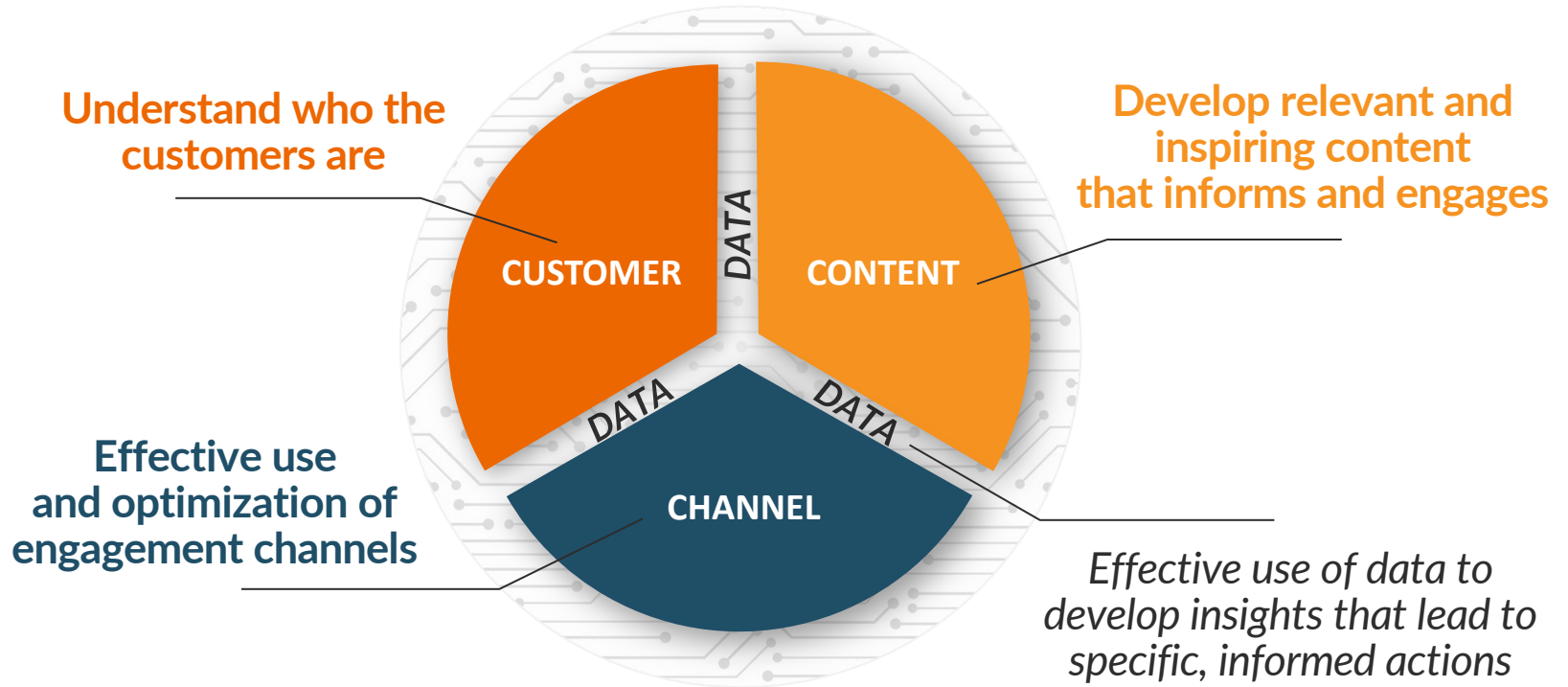
Is it possible for performance to improve if staff are not well trained?

2024

A scatter plot titled with axes "IMPORTANCE FOR MY COMPANY" (horizontal: LOW, MEDIUM, HIGH) and "PERFORMANCE OF MY COMPANY" (vertical: LOW, MEDIUM, HIGH). Data points plotted:

- Technology (HIGH importance, MEDIUM performance)
- Cross funct teams
- Board support
- Customer journey
- Change mgmt
- Innovation culture
- Channel acceptance
- Customer journey
- 360° HCP database
- Cx program
- Content
- Well trained
- AI
- Channel mix

Maturometer™ 2024 n=132 (preliminary results)

Reimagine customer engagement Webinars

Poll 3: Do you feel that you have sufficient knowledge of all opportunities offered by digital for your business activities?

- Totally insufficient
- Insufficient
- Between insufficient and sufficient
- Sufficient
- Totally sufficient

50% of staff feel they do not have enough knowledge to leverage omnichannel opportunities

⊘ **Do you feel that you have sufficient knowledge of all opportunities offered by digital for your business activities?***

14%	36%	36%	13%	2%

■ More than sufficient   ■ Between sufficient and insufficient   ■ Totally insufficient

■ Sufficient   ■ Insufficient

🥚 **Maturometer™2024** n=132 (preliminary results)

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Big gaps in staff capability remain... even after all these years

⑦ Do you agree with the statement: *"Staff are well-trained in the use of digital"?*

Year	Fully agree	Somewhat agree
2015 MTM	5%	38%
2019 MTM	7%	34%
2020 Covid	3%	38%
2021 MTM	8%	31%
2022 MTM	12%	44%
2023 MTM	4%	35%
2024 MTM*	5%	27%

■ Fully agree ■ Somewhat agree

*Preliminary results
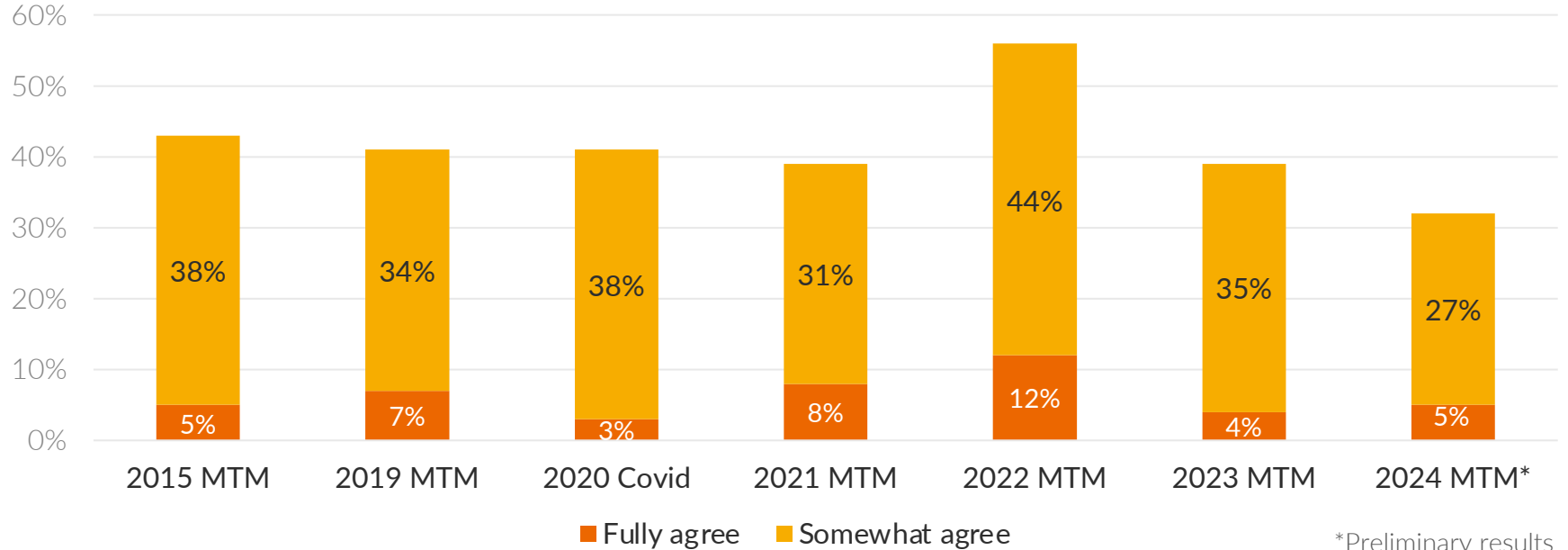
Maturometer™ 2015-2023

Omnichannel capability building is a core component for successful change

The OC Maturity Index

Our variation on the Gleicher formula* states there are **four key dimensions for successful change**, and they ALL need to be present to ensure robust change.

Successful change

Concrete first steps
+
Capability to change
+
Clear vision & goals
+
Need for change

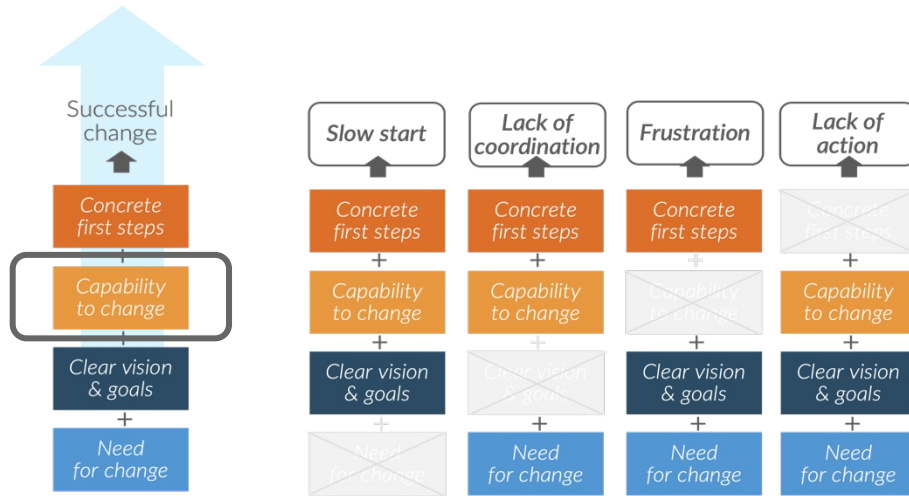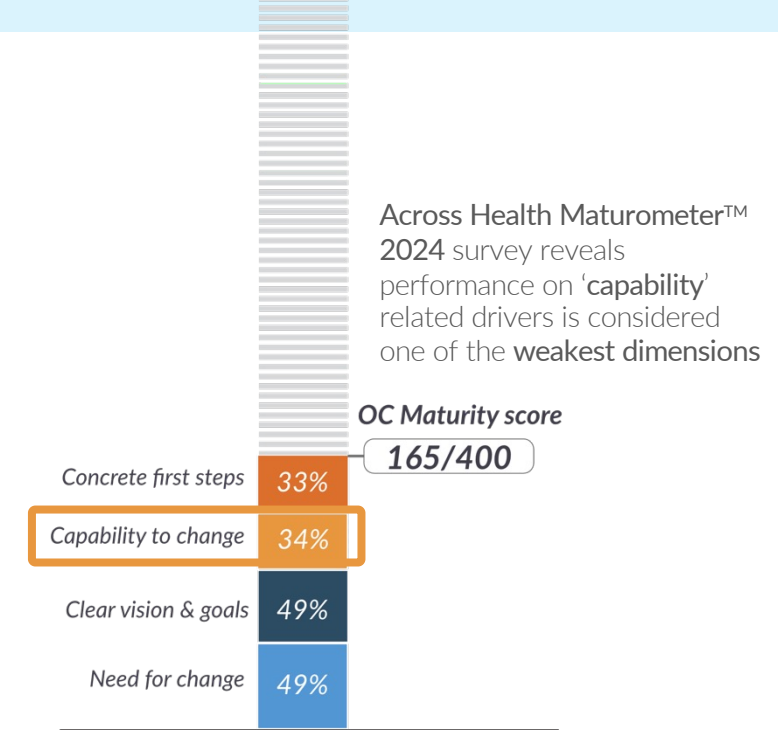| Slow start	Lack of coordination	Frustration	Lack of action
Concrete first steps	Concrete first steps	Concrete first steps	Concrete first steps
+	+	+	+
Capability to change	Capability to change	Capability to change	Capability to change
+	+	+	+
Clear vision & goals	Clear vision & goals	Clear vision & goals	Clear vision & goals
+	+	+	+
Need for change	Need for change	Need for change	Need for change

* Inspired by Dannemiller's variation of the Gleicher formula (Source: Dannemiller and Jacobs, Changing the way organizations change. A revolution of common sense. Journal of Applied Behavioural Science (1992))

OMNICHANNEL MATURITY

Across Health Maturometer™ 2024 survey reveals performance on '**capability**' related drivers is considered one of the **weakest dimensions**

OC Maturity score

165/400

Concrete first steps	33%
Capability to change	34%
Clear vision & goals	49%
Need for change	49%

"How is my company doing in this area"
PERFORMANCE, EU Biopharma, 2024, Interim analysis (n=132)

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OMNITOPIA™ combines knowledge, skills and mindset development with a superior retention rate

90%
of what we
say and do

70%
of what we
say & write

50%
of what we
hear and see

30%
of what we
see

20%
of what we
hear

10%
of what we
read

Doing
the real thing

Simulating
the real
experience

Participating
in a discussion

Watching
a demonstration

Watching
a movie

Looking
at pictures

Hearing
words

Reading

ACTIVE

PASSIVE

Information
Retention Rate

Confucius

*"I hear and I forget.
I see and I remember.
I do and I understand."*

Serious simulation game

5 rounds, each round starts from scratch

Round 1
- Discover digital in an omnichannel commercial context
- Build an impactful OCE plan on top of an existing, traditional one
- Learn about customer segments, channels and training resources

Round 2
- Build an impactful OCE plan on top of an existing, traditional one
- Learn about the impact & reach of channels (MCQs)
- Learn about analytics on past investments

Round 3
- Plan according to customer preferences around 6 personas
- Right content, channel and interaction preference
- Discover the insights provided by dashboards

Round 4
- Go omnichannel
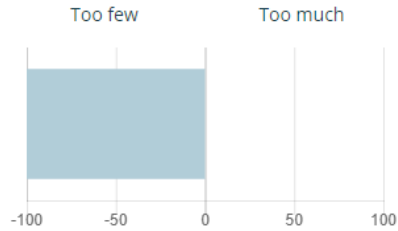- Learn about data-driven planning

Round 5
- Learn about agile planning

Conquer the hearts of customers in the omnichannel age

OMNITOPIA™

A SERIOUS GAME

by ACROSS HEALTH

ACROSS HEALTH

Building strong customer experience for various personas

Interactive actionable data to drive customer experience

Digital affinity

Too few	Too much

-100   -50   0   50   100

Content affinity

Too few	Too much

-100   -50   0   50   100

Interaction preference

Too few	Too much

-100   -50   0   50   100
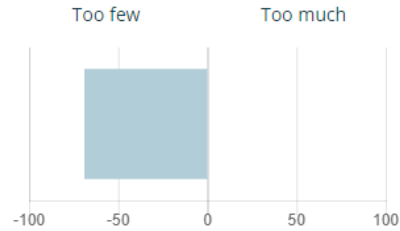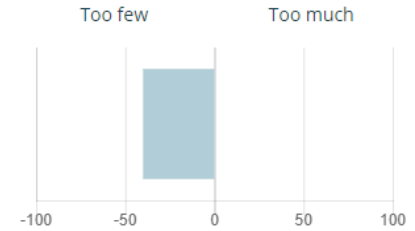
Frequency Satisfaction

Research shows that the optimal amount of contact points (in MCQ) is around 7.

Your previous round's average amount of MCQs per HCP per year was 8

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Was your focus on **Global or Local**?
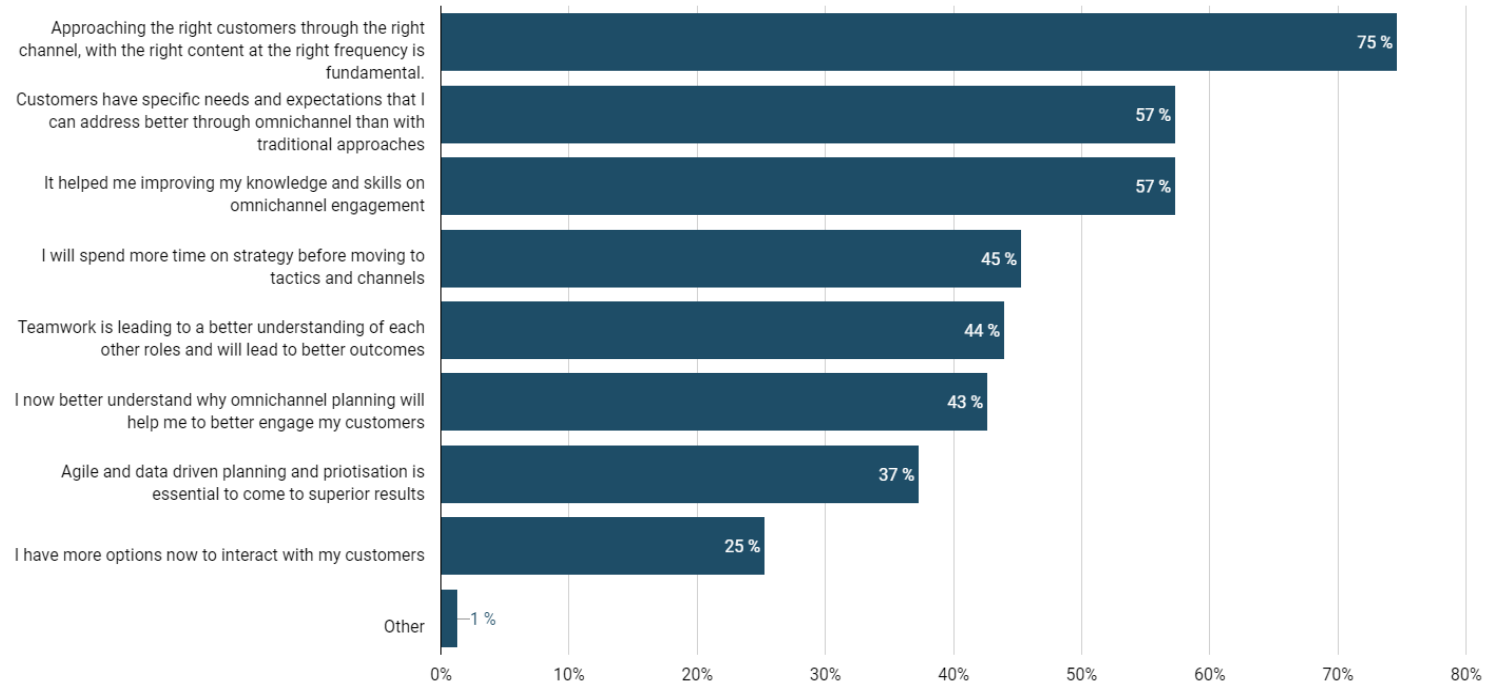Or both?

Key learnings from the simulation game

(?) *What are your **key learnings** from this training experience?*

Key learning	%
Approaching the right customers through the right channel, with the right content at the right frequency is fundamental.	75 %
Customers have specific needs and expectations that I can address better through omnichannel than with traditional approaches	57 %
It helped me improving my knowledge and skills on omnichannel engagement	57 %
I will spend more time on strategy before moving to tactics and channels	45 %
Teamwork is leading to a better understanding of each other roles and will lead to better outcomes	44 %
I now better understand why omnichannel planning will help me to better engage my customers	43 %
Agile and data driven planning and priotisation is essential to come to superior results	37 %
I have more options now to interact with my customers	25 %
Other	1 %

OMNITOPIA™ FIELD COMMERCIAL   Post-game survey, n=583

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To what extent are the game concepts applicable to participants' daily jobs?
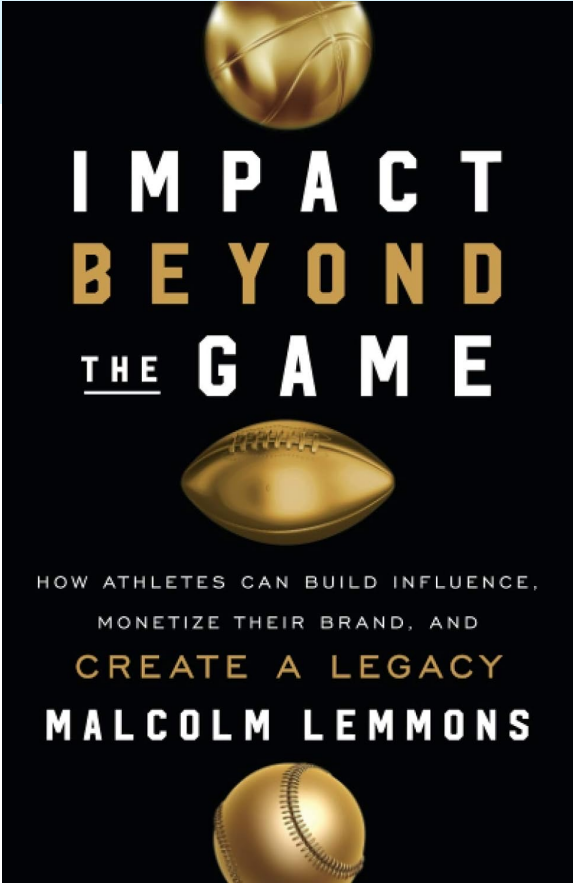
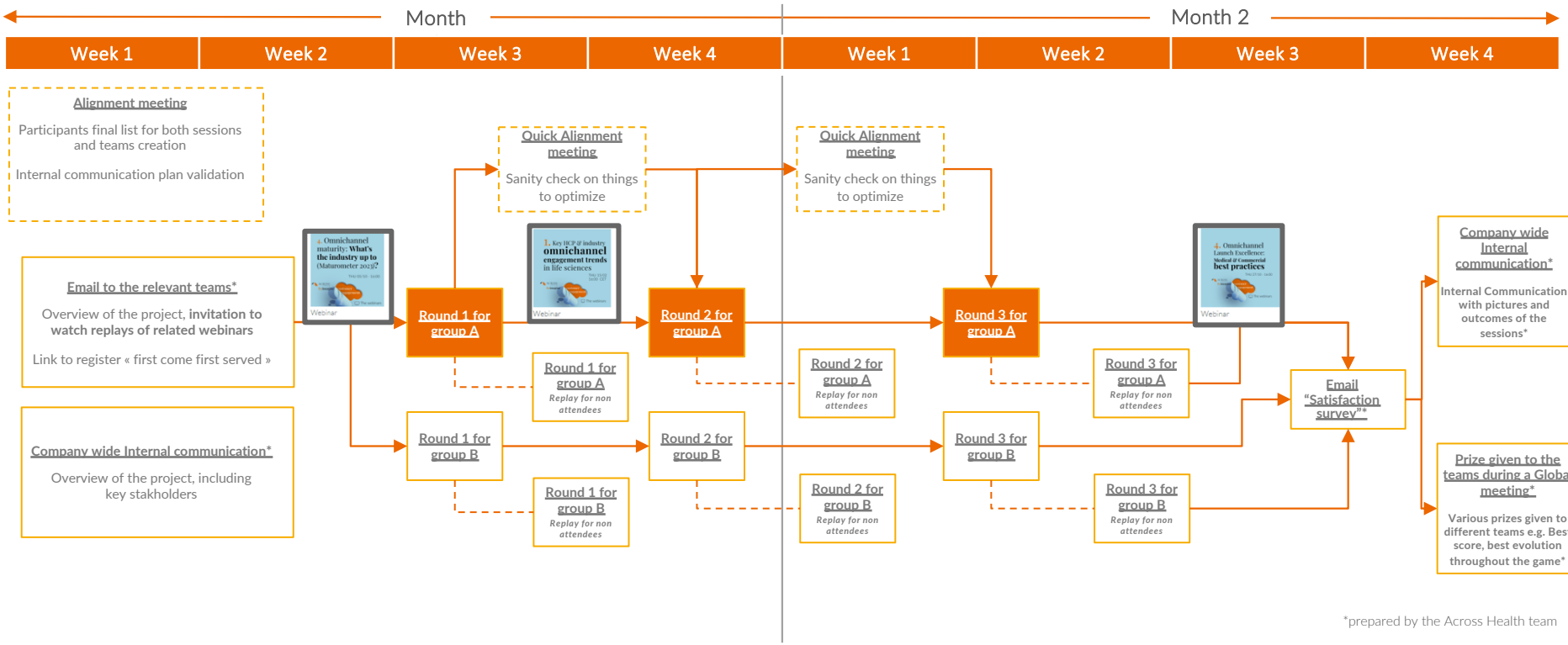(?) *To what extent are the concepts that you learnt applicable to your daily jobs*
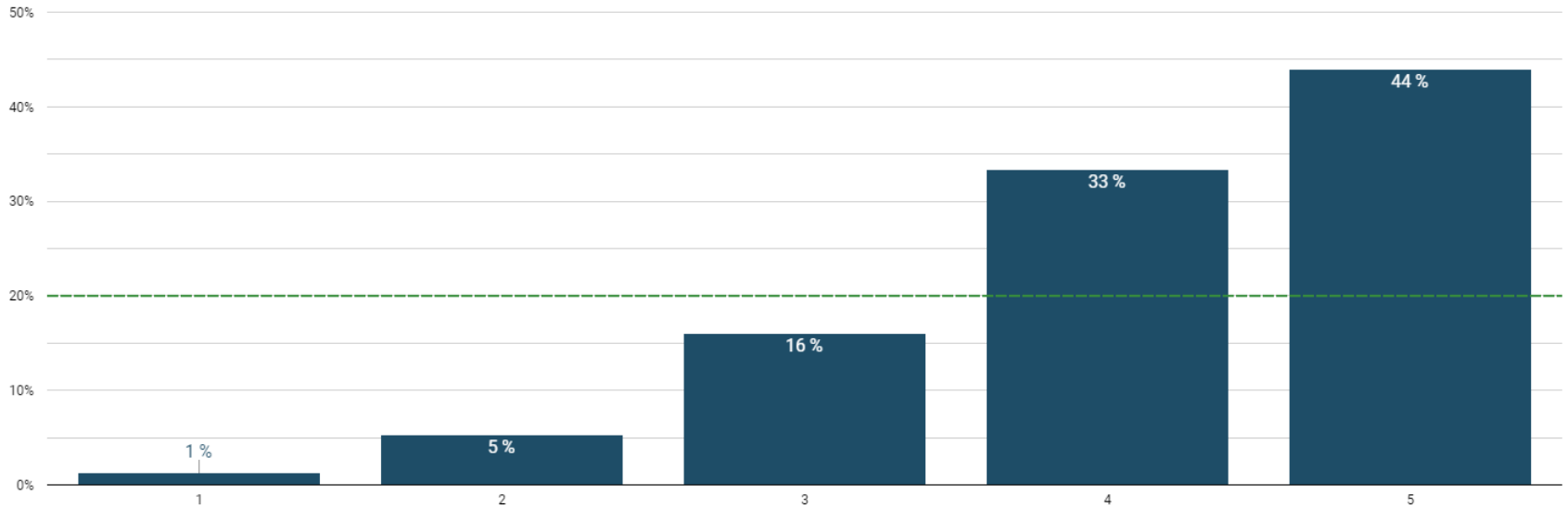
OMNITOPIA™ FIELD COMMERCIAL   Post-game survey, n=583

How are you ensuring **implementation of the key learnings** from Omnitopia?

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Example of OMNITOPIA™ project process and internal communication

Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4

Alignment meeting

Participants final list for both sessions and teams creation

Internal communication plan validation

Quick Alignment meeting

Sanity check on things to optimize

Quick Alignment meeting

Sanity check on things to optimize

Company wide Internal communication*

Internal Communication with pictures and outcomes of the sessions*

Email to the relevant teams*

Overview of the project, **invitation to watch replays of related webinars**

Link to register « first come first served »

Round 1 for group A

Round 2 for group A

Round 3 for group A

Round 1 for group A
Replay for non attendees

Round 2 for group A
Replay for non attendees

Round 3 for group A
Replay for non attendees

Email "Satisfaction survey"*

Company wide Internal communication*

Overview of the project, including key stakeholders

Round 1 for group B

Round 2 for group B

Round 3 for group B

Round 1 for group B
Replay for non attendees

Round 2 for group B
Replay for non attendees

Round 3 for group B
Replay for non attendees

Prize given to the teams during a Global meeting*

Various prizes given to different teams e.g. Best score, best evolution throughout the game*

*prepared by the Across Health team

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Example of a game action plan template

Omnichannel Day - Learnings & Application

OCE Team [ ]   Brand team [ ]

What learnings will we apply in our brand team?

What is holding us back to apply these learnings in our brand team?

On each of the axes, mark where your brand team is with regards to each OCE pillar and explain why

Why?

RIGHT CUSTOMER

Not sure | Stakeholders being identified | Stakeholders identified + in CRM | Full segmentation in place

RIGHT CONTENT

Not sure | Assume the content we deliver is appreciated | Hear the content we deliver is appreciated | Know the content we deliver is spot-on

RIGHT CHANNEL

Not sure | Channels used are not right ones | Assume the channels used are appreciated | Know that we use the preferred channels
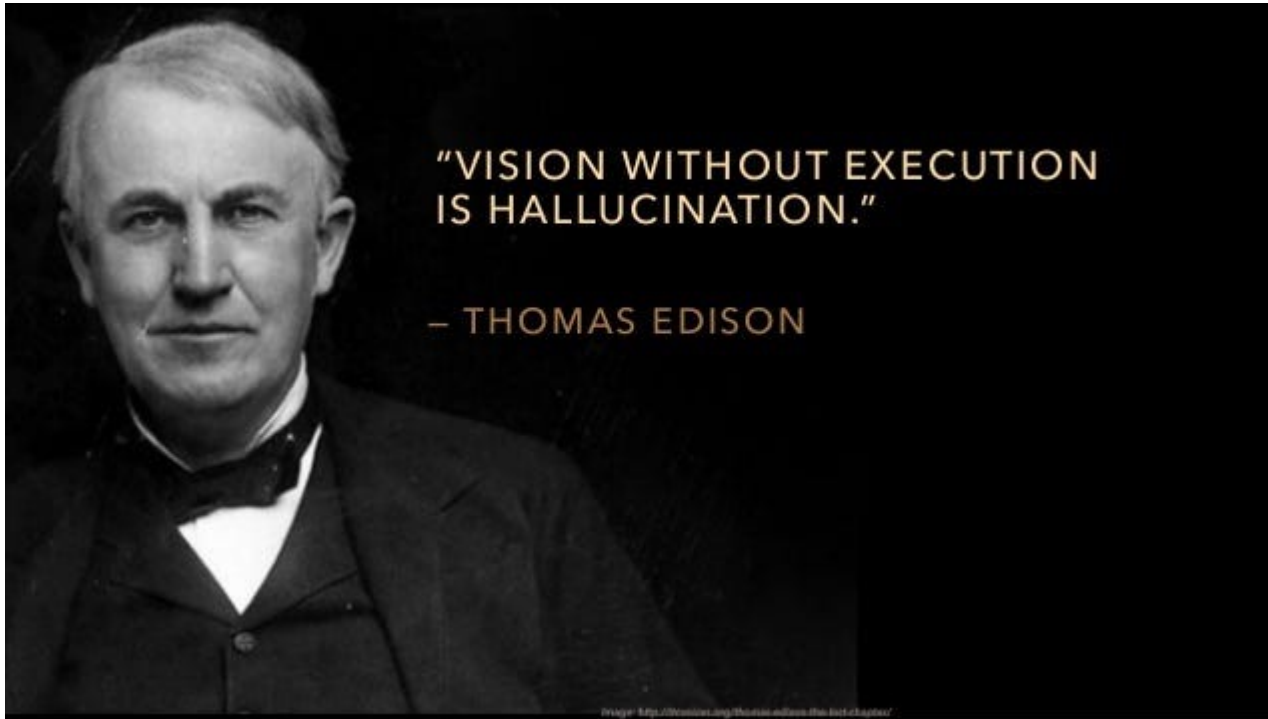
RIGHT FREQUENCY

Not sure | Don't think we interact at the right frequency | Think we interact at the right frequency | Know we interact at right frequency

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Poll 4: How would you upskill reps on omnichannel?

- Educate on how Omnichannel may improve customers satisfaction
- Train reps only on the use of some digital channels
- Identify early ambassadors and train them first
- No training. Let them focus on their face-to-face activities

Is there a plan to implement it at the level of **the salesforce**?

A specific game for the fieldforce

Round 1
- Build an impactful engagement plan for your region
- Manage call capacity and plan according to HCP restrictions
- Discover information and resources that will allow you to orchestrate your plans through several actionable channels
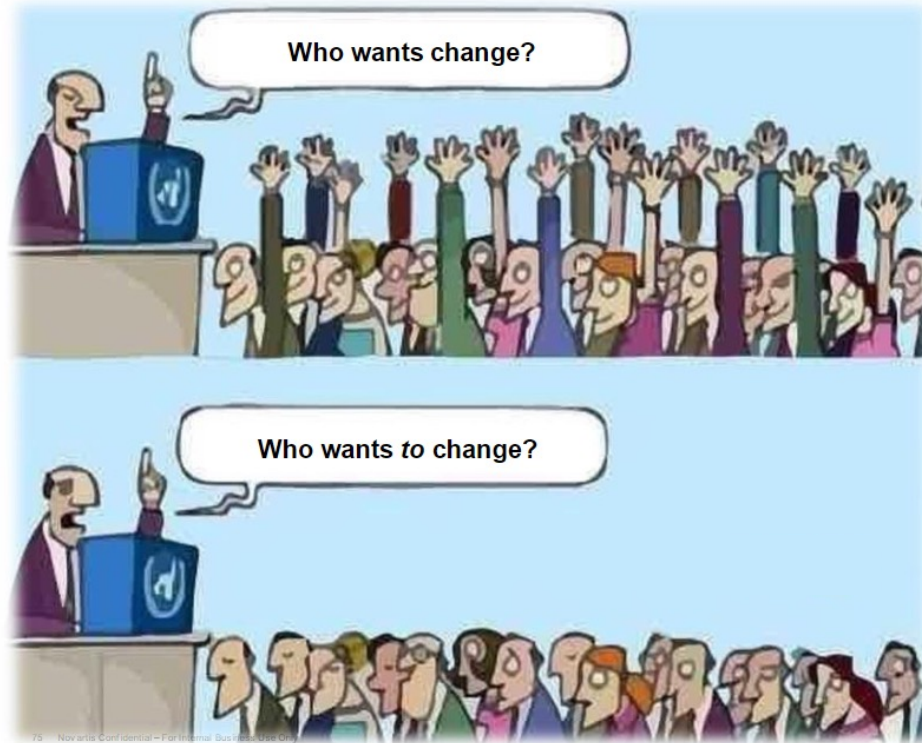- Learn about the impact & reach of channels (MCQs)

Round 2
- Plan according to customer preferences around 6 personas
- Discover new information and resources
- Right content, channel and interaction preference

Round 3
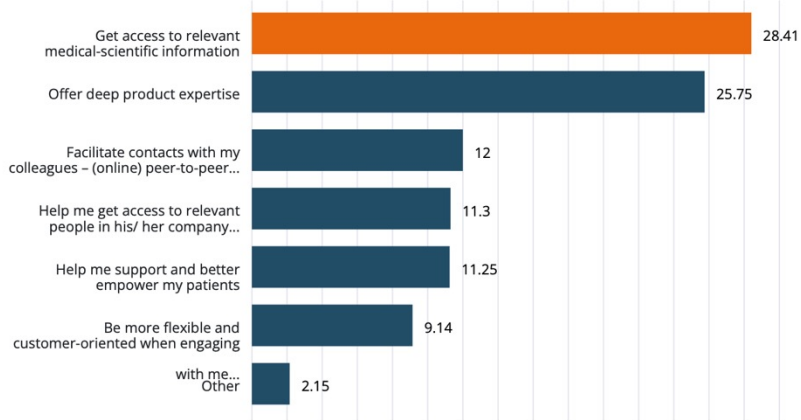- Learn about data driven planning
- Go rep-omnichannel

Conquer the hearts of customers in the omnichannel age

OMNITOPIA™
FIELD COMMERCIAL

A SERIOUS GAME

by ACROSS HEALTH

And ensure your fieldforce delivers added value – it is expected today

Most valuable contribution of rep/am for practice

Cardiologist , Neurologist , Dermatologist , Oncologist , Rheumatologist , Endocrinologist , Hematologist , Pulmonologist - United Kingdom , France , Germany , Italy , Spain | N=4031

Contribution	Score
Get access to relevant medical-scientific information	28.41
Offer deep product expertise	25.75
Facilitate contacts with my colleagues – (online) peer-to-peer...	12
Help me get access to relevant people in his/ her company...	11.3
Help me support and better empower my patients	11.25
Be more flexible and customer-oriented when engaging with me...	9.14
Other	2.15

HCPs were asked to distribute 100 points to no more than 3 options
Score = sum of points averaged among HCPs

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Importance of content quality attributes

Cardiologist , Neurologist , Dermatologist , Oncologist , Rheumatologist , Endocrinologist , Hematologist , Pulmonologist - United Kingdom , France , Germany , Italy , Spain | N=4031
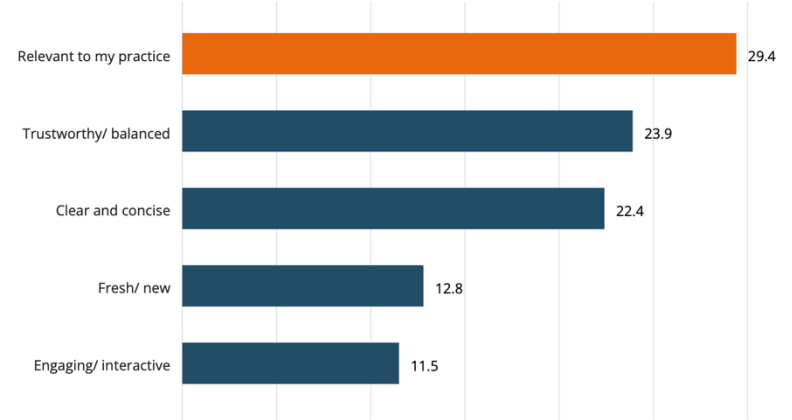
Attribute	Score
Relevant to my practice	29.4
Trustworthy/ balanced	23.9
Clear and concise	22.4
Fresh/ new	12.8
Engaging/ interactive	11.5

HCPs were asked to distribute 100 points to no more than 3 options
Score = sum of points averaged among HCPs

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Source: Navigator365™ Core, EU5 Specialists Q3 2023 (n= 4,031))

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Strong correlation between omnichannel performance & customer experience

OMNICHANNEL EXCELLENCE / CX PERFORMANCE CORRELATION - 2022-2023

▲ Brand 1 ◆ Brand 2 ■ Brand 3 (launch brand) ● Brand 4

CX performance = 0.033 + 0.91 x OC performance
*R^2 = 0.88, correlation = 0.94*

Customer Experience Performance (%)

Omnichannel Performance (%)

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

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Strong correlation between customer exprience & NPS

CX PERFORMANCE / NPS CORRELATION - 2022-2023

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

$NPS = -28 + 90 \times CX\ performance$
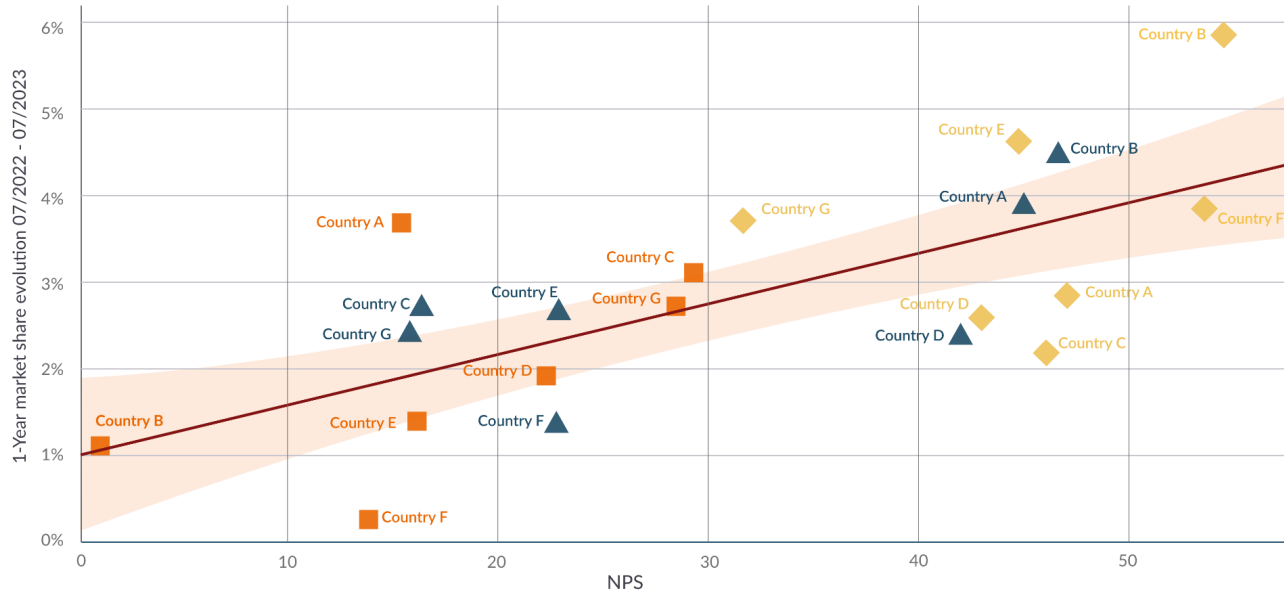$R^2 = 0.62,\ correlation = 0.78$
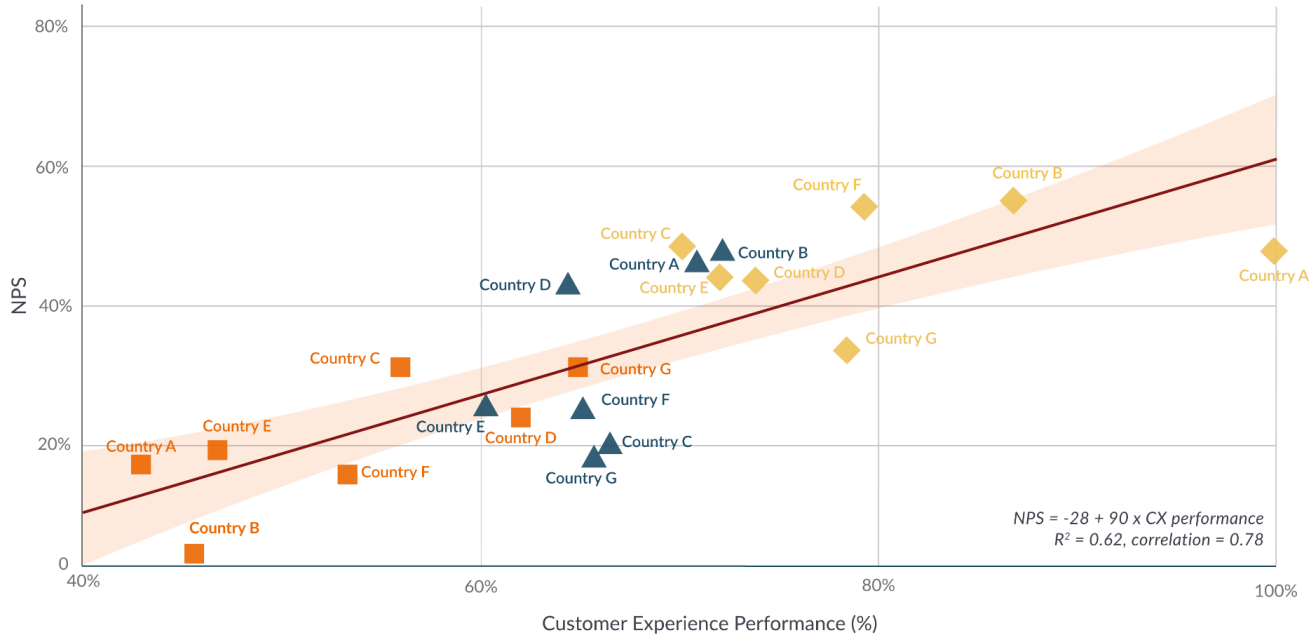
Source: Navigator365™ Cx Benchmark, specialty redacted, 2023 (n=301)

Strong correlation between NPS & market share evolution

NPS / MARKET SHARE EVOLUTION CORRELATION - 2022-2023

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

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

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Conclusions

- Omnichannel capability building is a **fundamental enabler** of change

- Participating in the Omnitopia Omnichannel Olympics was a fantastic experience, demonstrating you can learn while having **fun**, and increase **teamwork** and **collaboration** while **competing**

- Omnichannel requires this **collaboration between departments**, to ensure the right content is communicated at the right pace through the right mix of channels to each of your customer segments/personas

Reach out to find out more about our special offer

OLYMPITOPIA GAMES 2024

OMNITOPIA™

Take up the **SERIOUS GAME CHALLENGE!**

Across Health — a precision value & health team

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Webinars 2024

Question time!

Want to know more? Join us on our upcoming webinar

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REPORT
EU- BIOPHARMA

Maturometer™ 2024

EU-Biopharma report

Proprietary information
September 2024
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ACROSS HEALTH

🖵 The webinar series

UPCOMING

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

To sign up:

across.health/2024-webinars

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Please give us your feedback!

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

Capability building as part of our **end-to-end omnichannel consulting services** – built on a robust evidence base

ACROSS HEALTH

a precision value & health team

Discover how our strategic consulting services can help you develop a dynamic and executable omnichannel customer engagement strategy that puts the customer at the centre of every interaction.
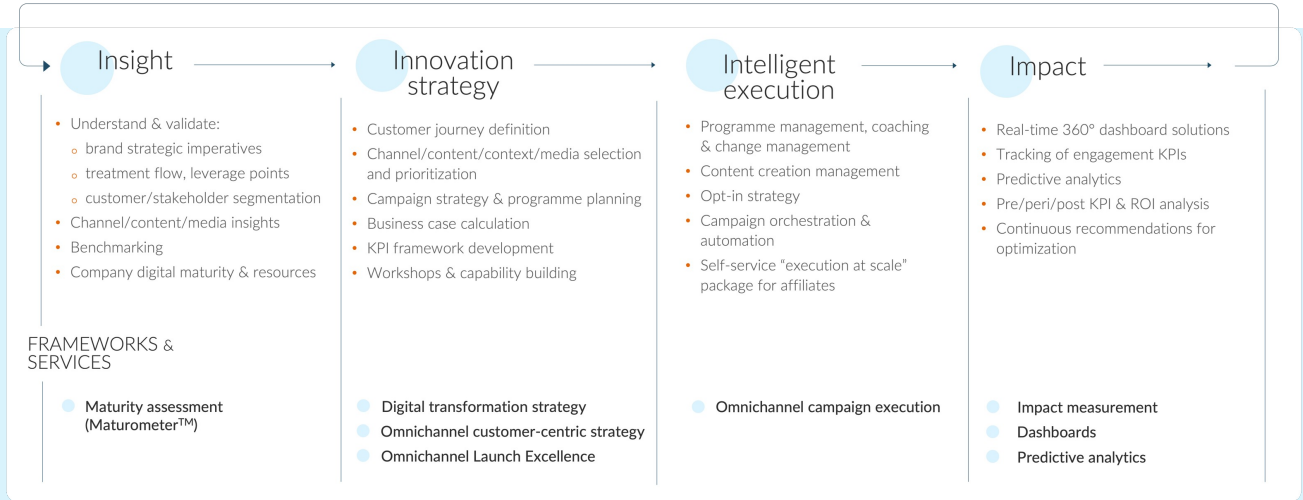
Our **interactive and engaging workshops** offer a hands-on approach, bringing our proprietary data to life and offering unique insights and actionable strategies tailored to your brand's specific challenges and opportunities.

Co-create your own transformative journey with the support of our expert guidance and exclusive data insights.

across.health/omnichannel-consultancy-services

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

- Maturity assessment (Maturometer™)

- Digital transformation strategy
- Omnichannel customer-centric strategy
- Omnichannel Launch Excellence

- Omnichannel campaign execution

- Impact measurement
- Dashboards
- Predictive analytics

PRODUCTS

Navigator**365**™

- Navigator365™ **Cx Benchmark**
- Navigator365™ **Core**
- Navigator365™ **Payer**
- Navigator365™ **Planner**
- Navigator365™ **Tracker**

Omnitopia™

More info
across.health/omnitopia

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https://www.across.health