



Reimagine customer engagement



The webinar series

FEB to OCT 2021

ACROSS HEALTH

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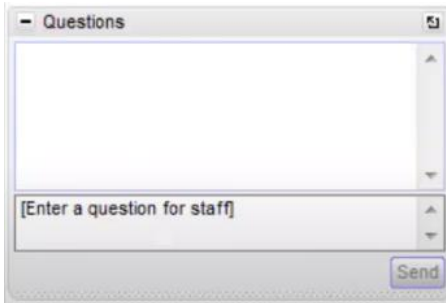
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2019-2020: Blip or shift? Key trends in the HCP mix

Webinar #1 – THU 25/02

Ground rules

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

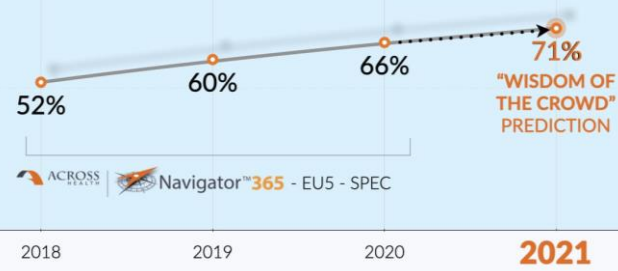


- **Please give us your feedback!**
 - Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!
- The webinar will be **recorded** and made available after the session. We will send you an email with the details

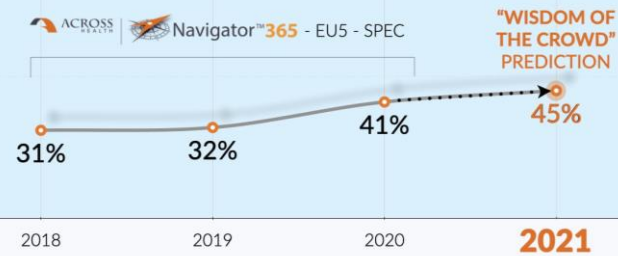


This is what 100+ respondents said in January 2021...

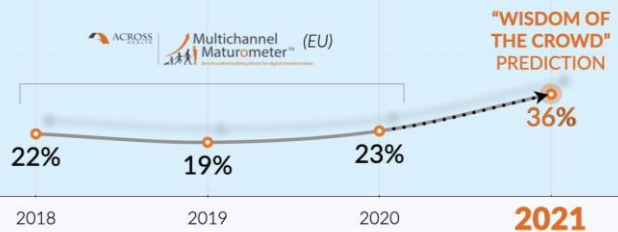
1. HCP INTEREST in digital pharma offerings



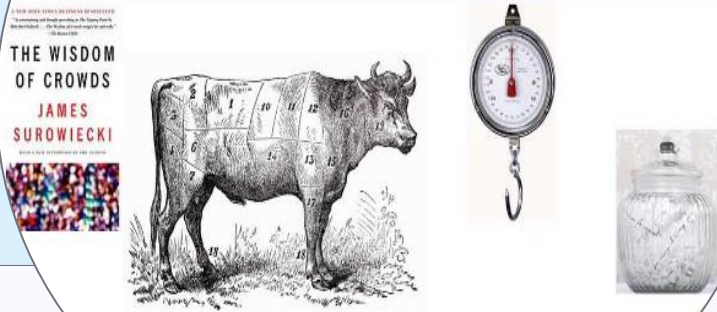
2. HCP SATISFACTION with pharma digital communication



3. SHARE OF MARKETING BUDGET allocated to digital



The Wisdom of Crowds



Agenda

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

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

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

 **FIERCE**
Pharma
February 1, 2021



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% |

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



www.across.health/offering/navigator

DEMO

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

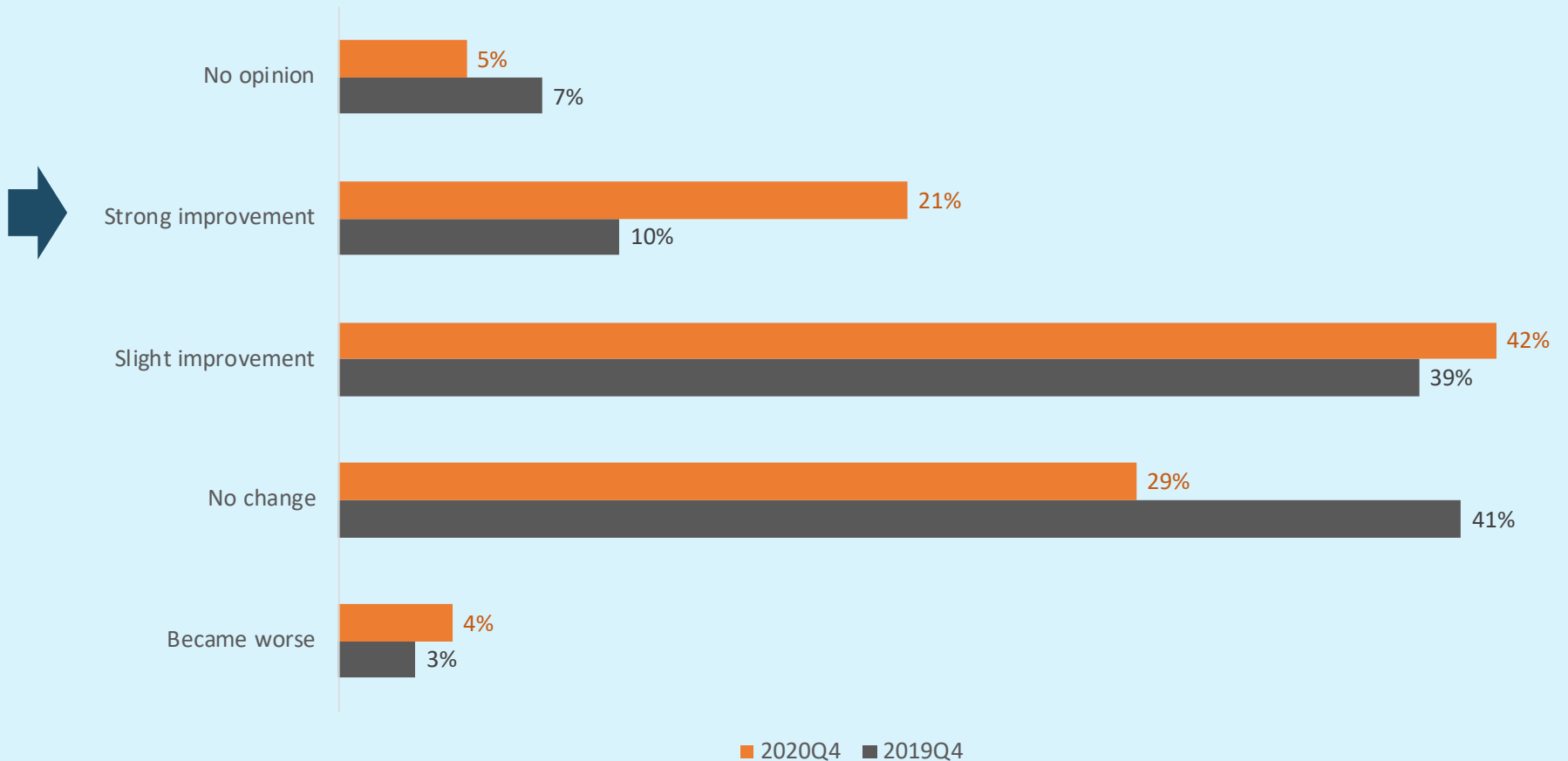
* Maturometer 2020

Agenda

- 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

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



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%

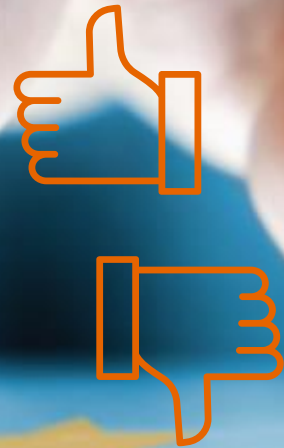
Is **satisfied** with pharma's digital offerings (33%)

+29%

56%

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

-5%



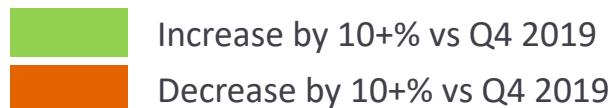
% in brackets are from the 2019 set

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

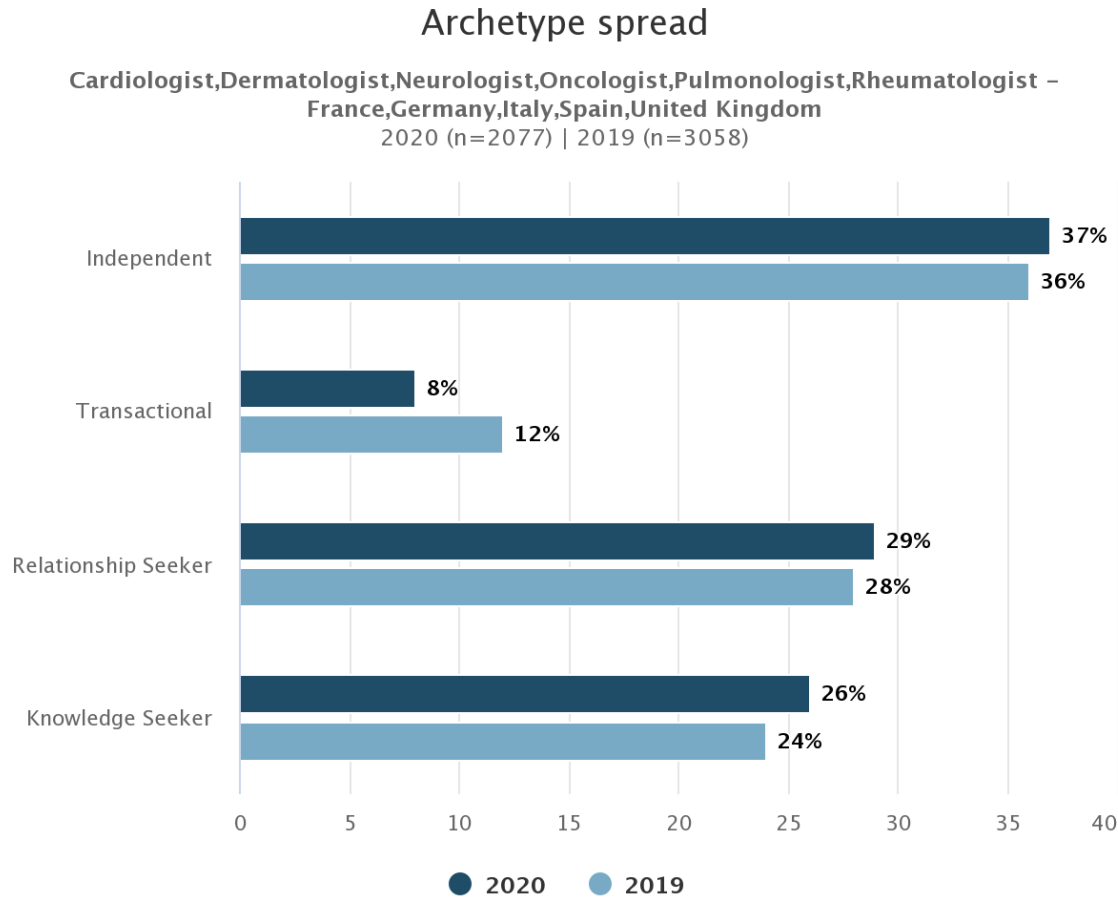
| | Q4 2020 | | Q4 2019 | |
|-----------------|-------------|-------------|-------------|-------------|
| | % Important | % Satisfied | % Important | % Satisfied |
| FR | 49% | 41% | 46% | 39% |
| DE | 51% | 34% | 43% | 22% |
| IT | 69% | 42% | 69% | 44% |
| SP | 74% | 51% | 78% | 41% |
| UK | 64% |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



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



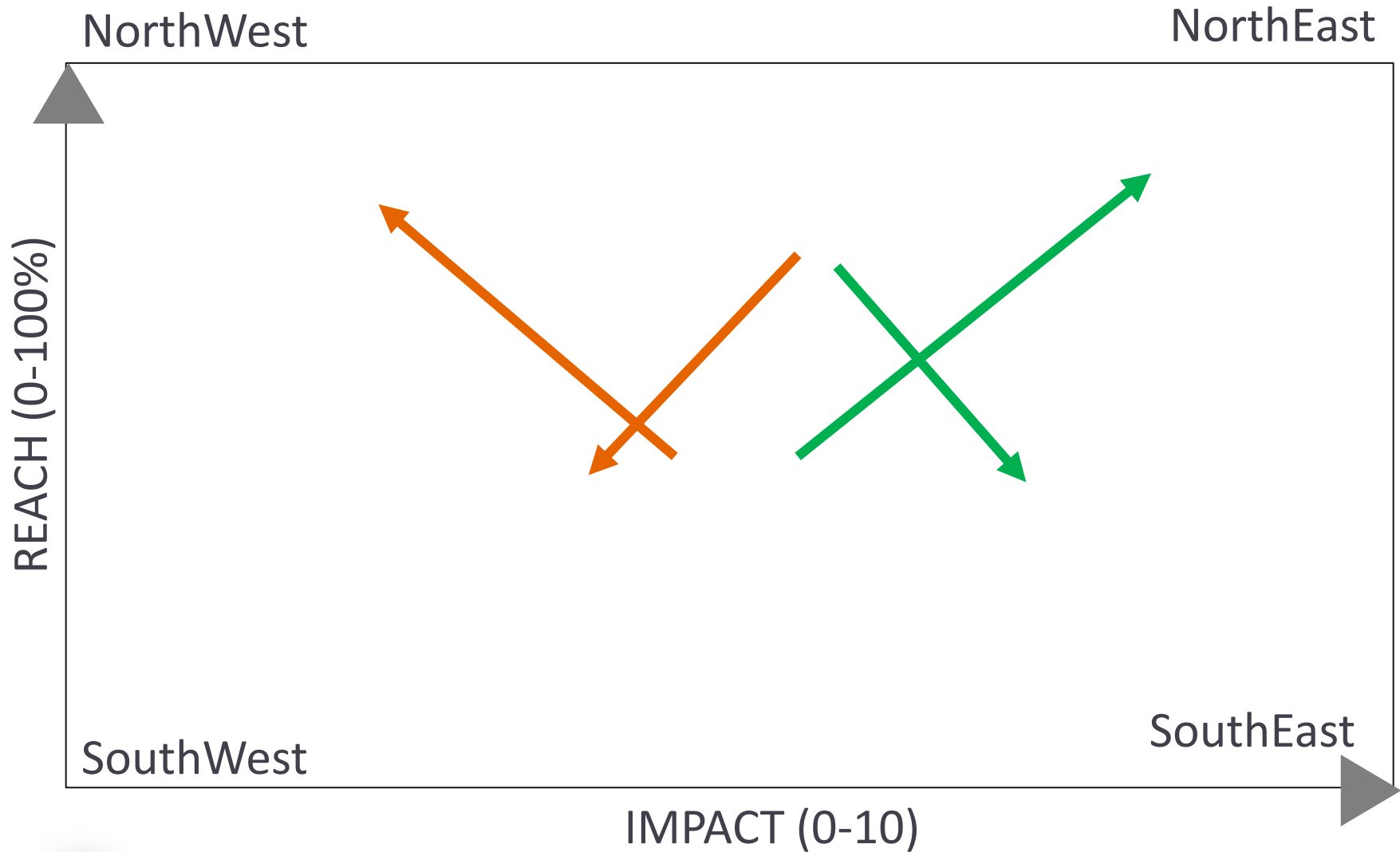
And internet time increases only 10% to 75 mins/weekday

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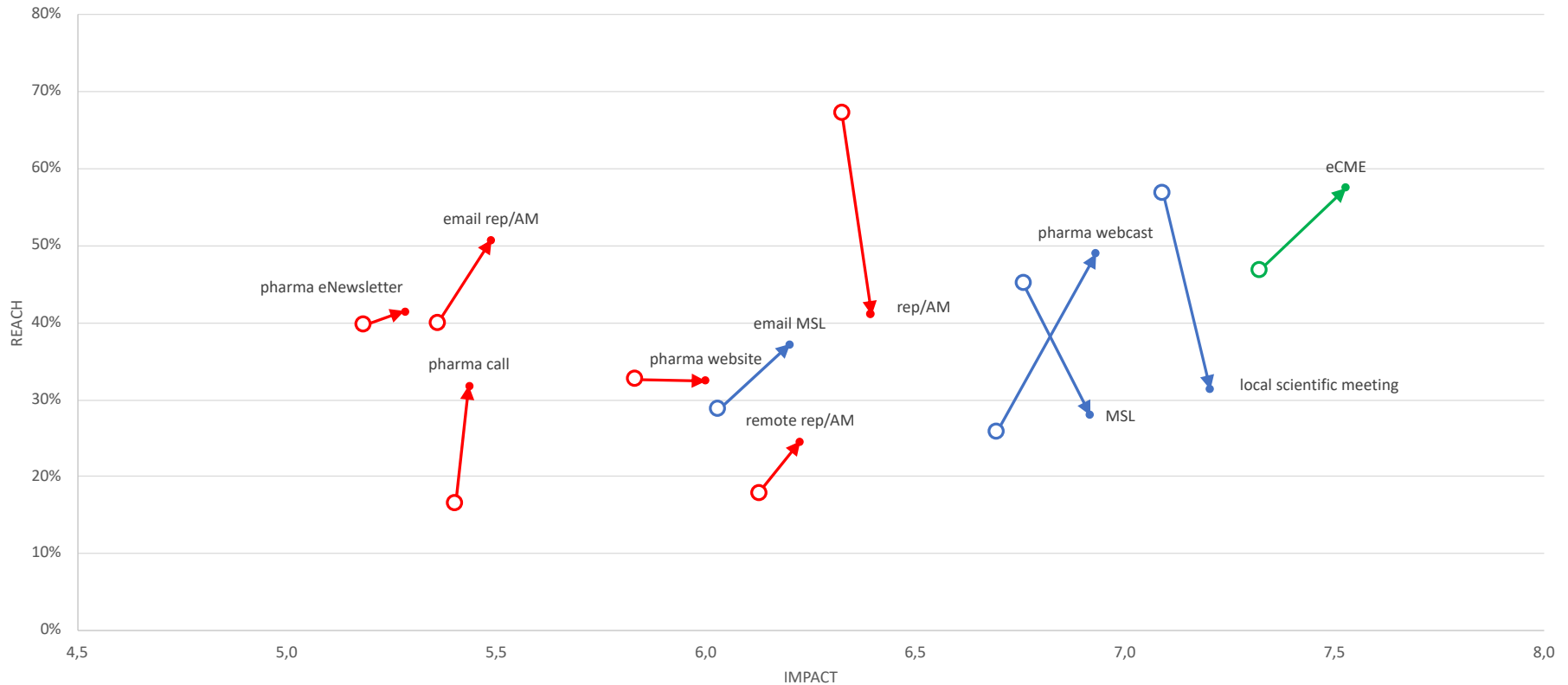


The channel “compass” in C19 times



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

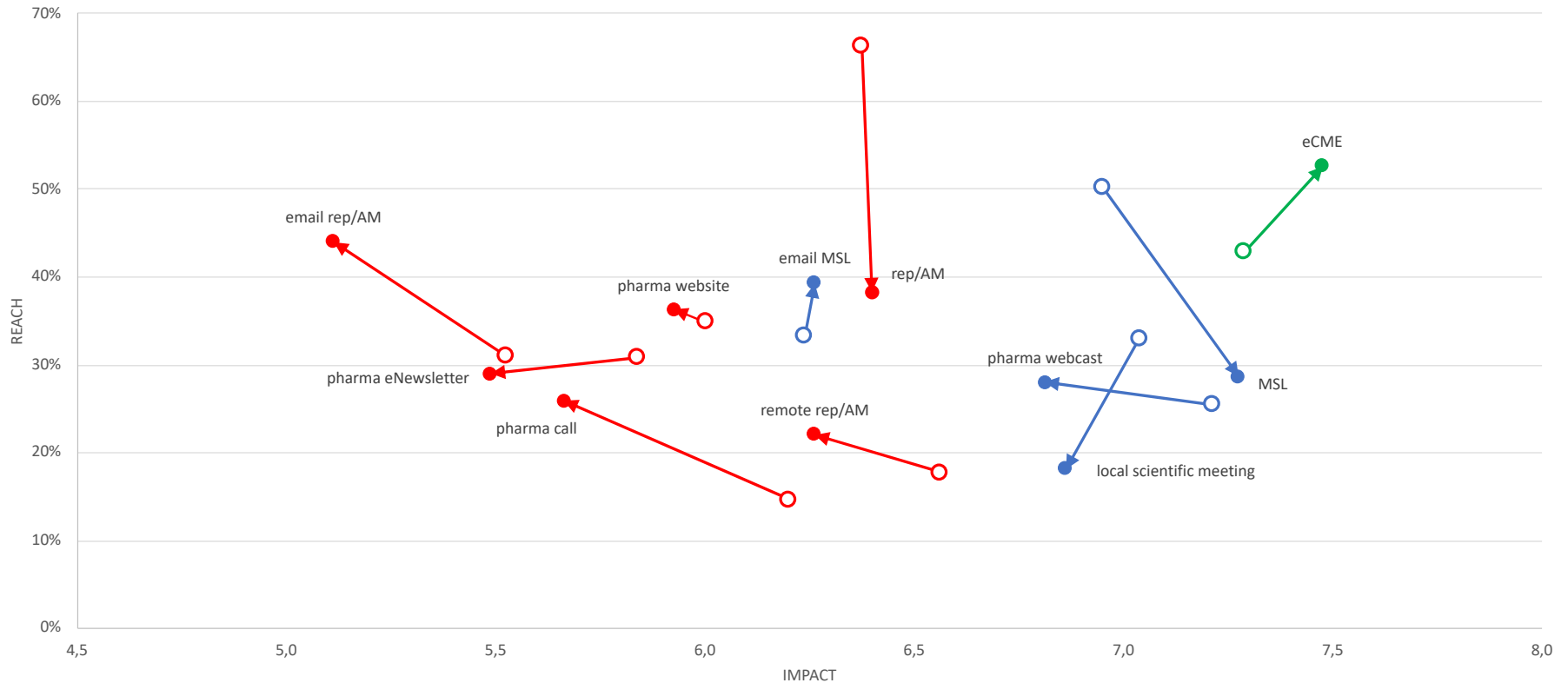
CHANNEL PERFORMANCE EVOLUTION 2019Q4 VS 2020Q4 - EU5 SPECIALISTS



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

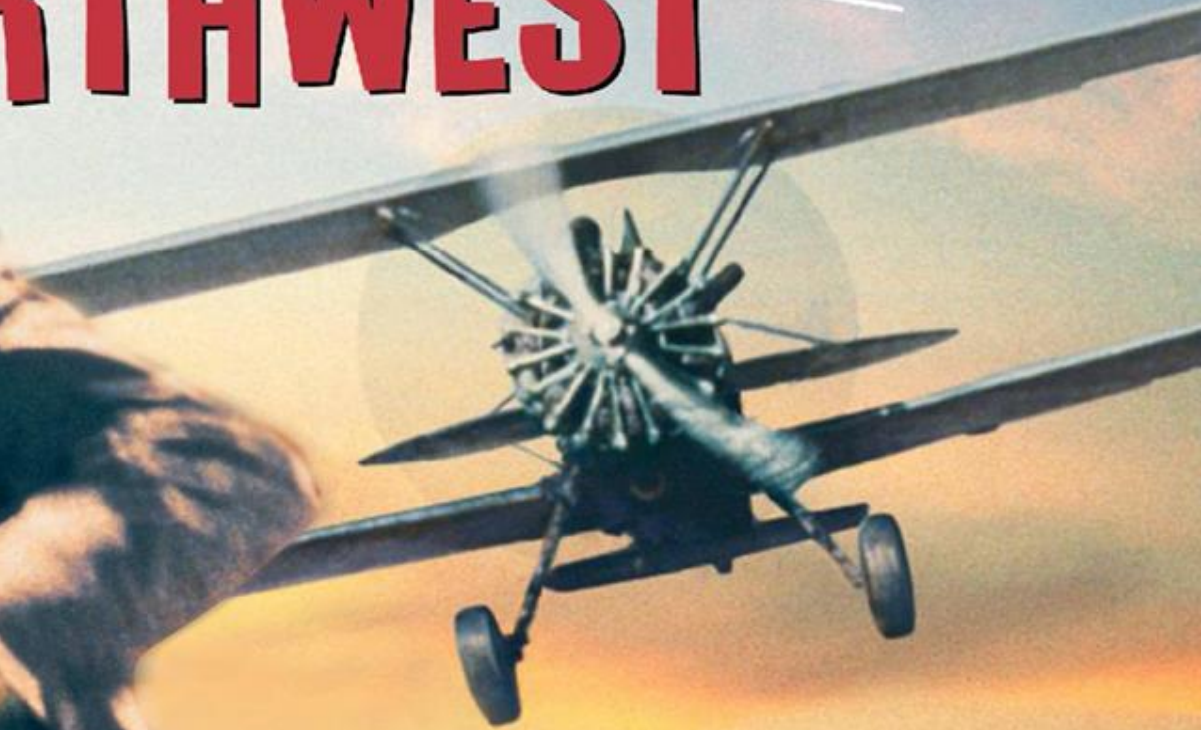
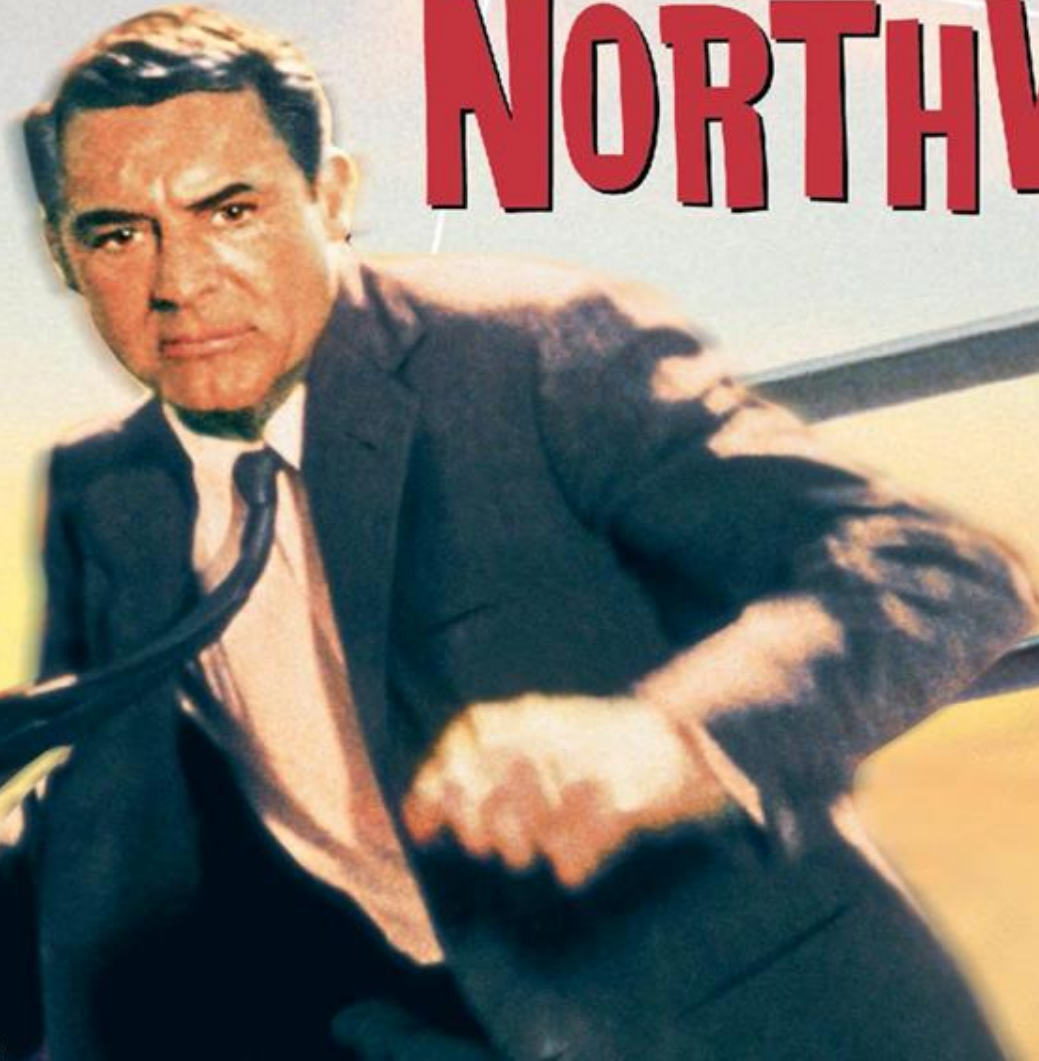
Among US specialists, reach BUT NOT impact of most pharma digital channels increased – NORTH-WEST (except for Marketing digital = WEST)

CHANNEL PERFORMANCE EVOLUTION 2019Q4 VS 2020Q4 - US SPECIALISTS



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

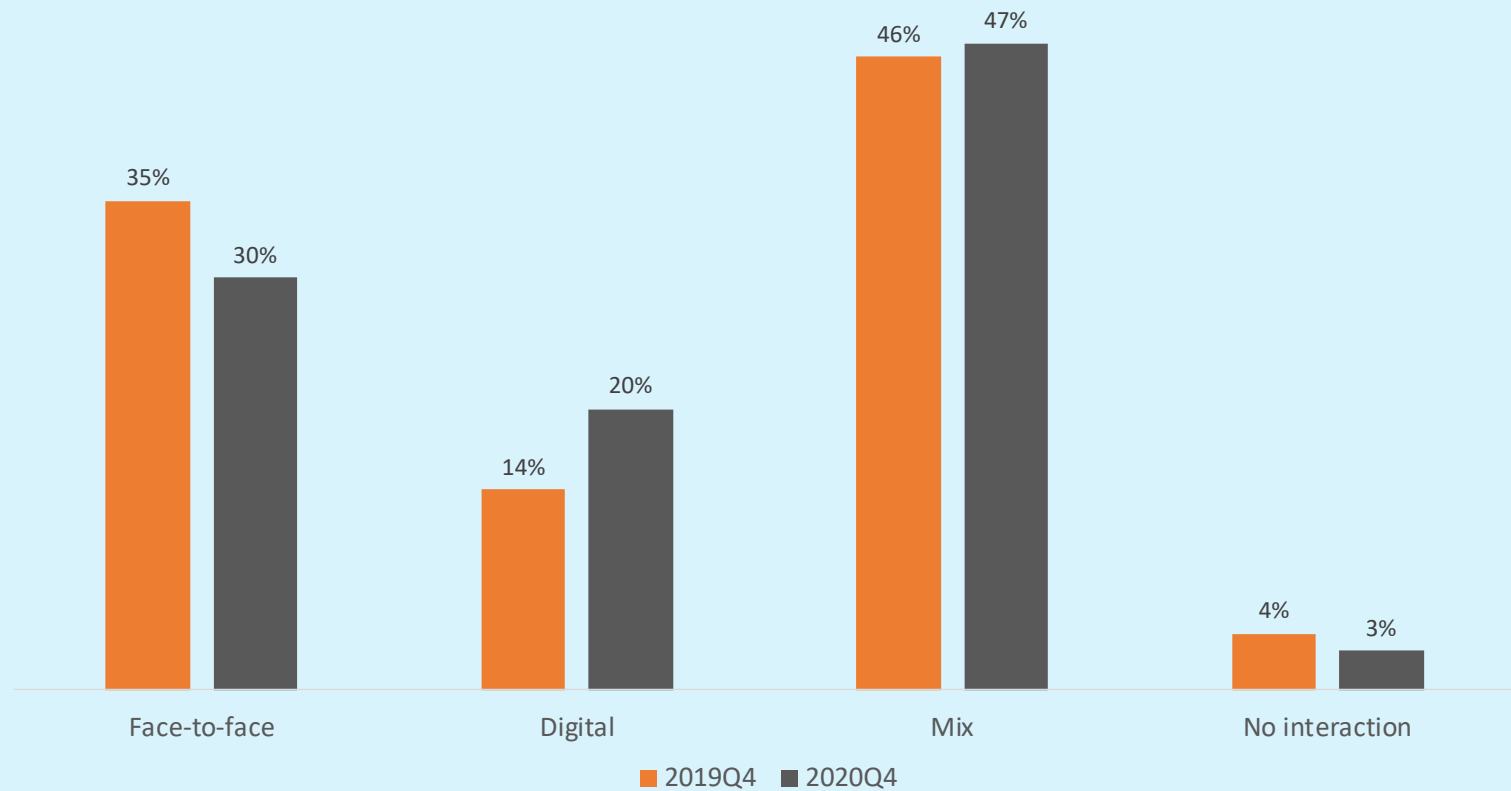
C19's
NORTH EAST vs
NORTHWEST



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

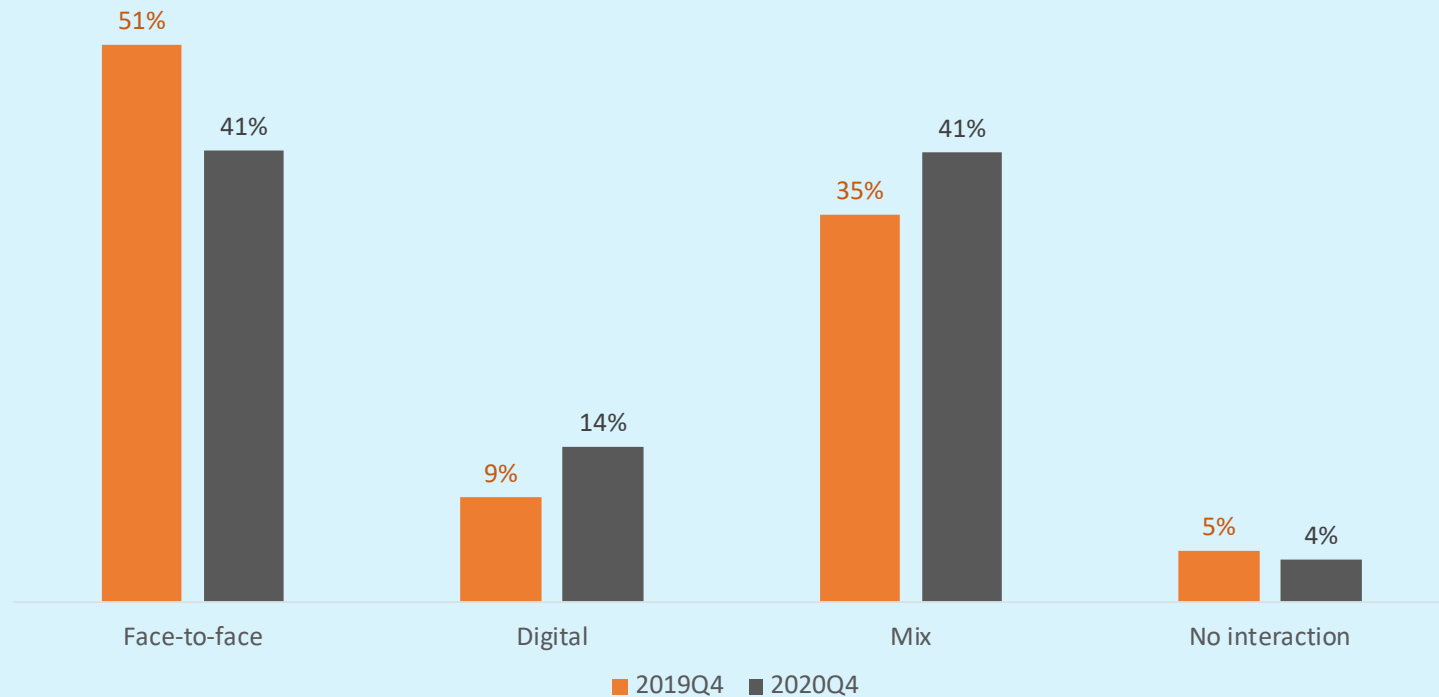


Navigator Specialists EU5 2019 Q4, N = 4104
Navigator Specialists EU5 2020 Q4, N = 2780

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

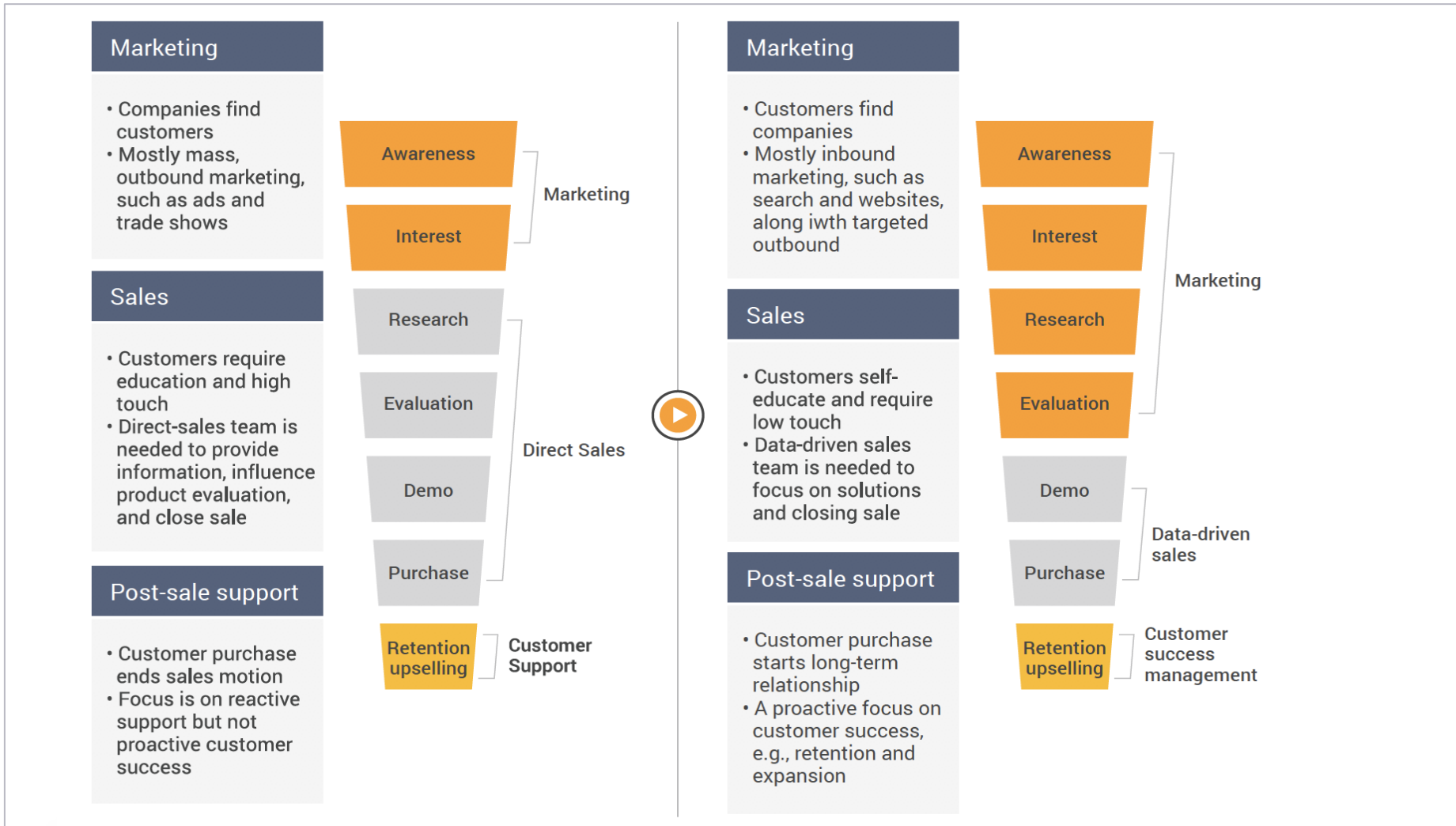
REPEAT: More segmented approaches are needed going forward

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

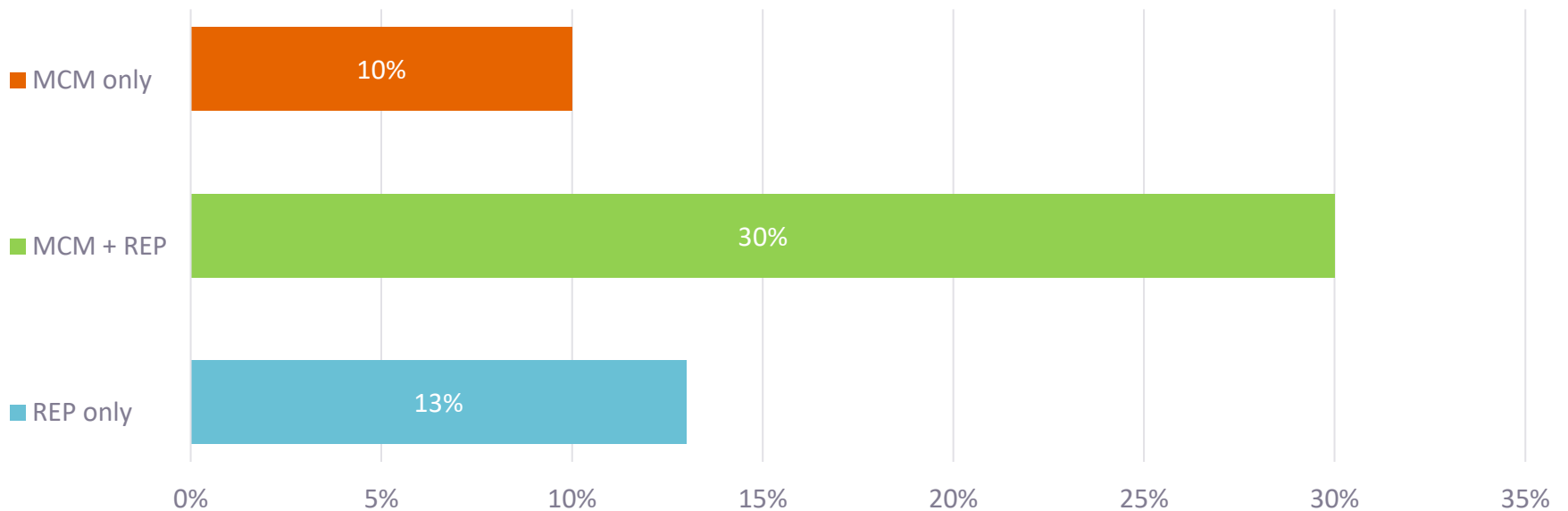


Source: BCG

Omnichannel sales & marketing WORKS!

Across Health case study

Referral uptake (+%) by type of promotion



If you want to learn more...new Veeva whitepaper in collaboration with Across Health



Whitepaper

The Power of Sales and Marketing Collaboration for Omnichannel Engagement



<https://go.veeva.com/eu/the-power-of-sales-and-marketing-collaboration-for-omnichannel-engagement>



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 Rank | FR | | | DE | | | IT | | | ES | | | UK | | | US | | |
|------------------|------|------|-------|------|------|-------|------|------|-------|------|------|-------|------|------|-------|------|------|-------|
| | 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

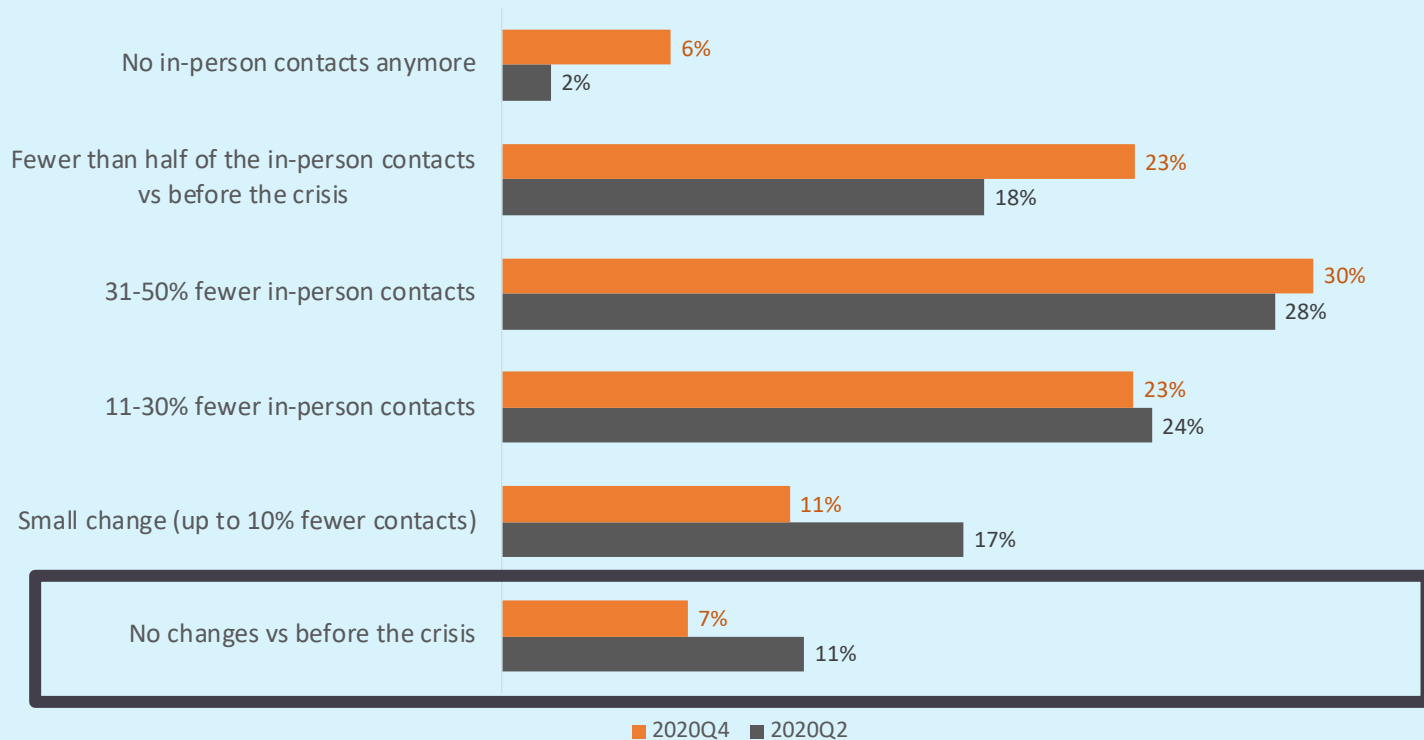
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Blip or shift? Only 7% expects NO change in rep calls going forward...

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)

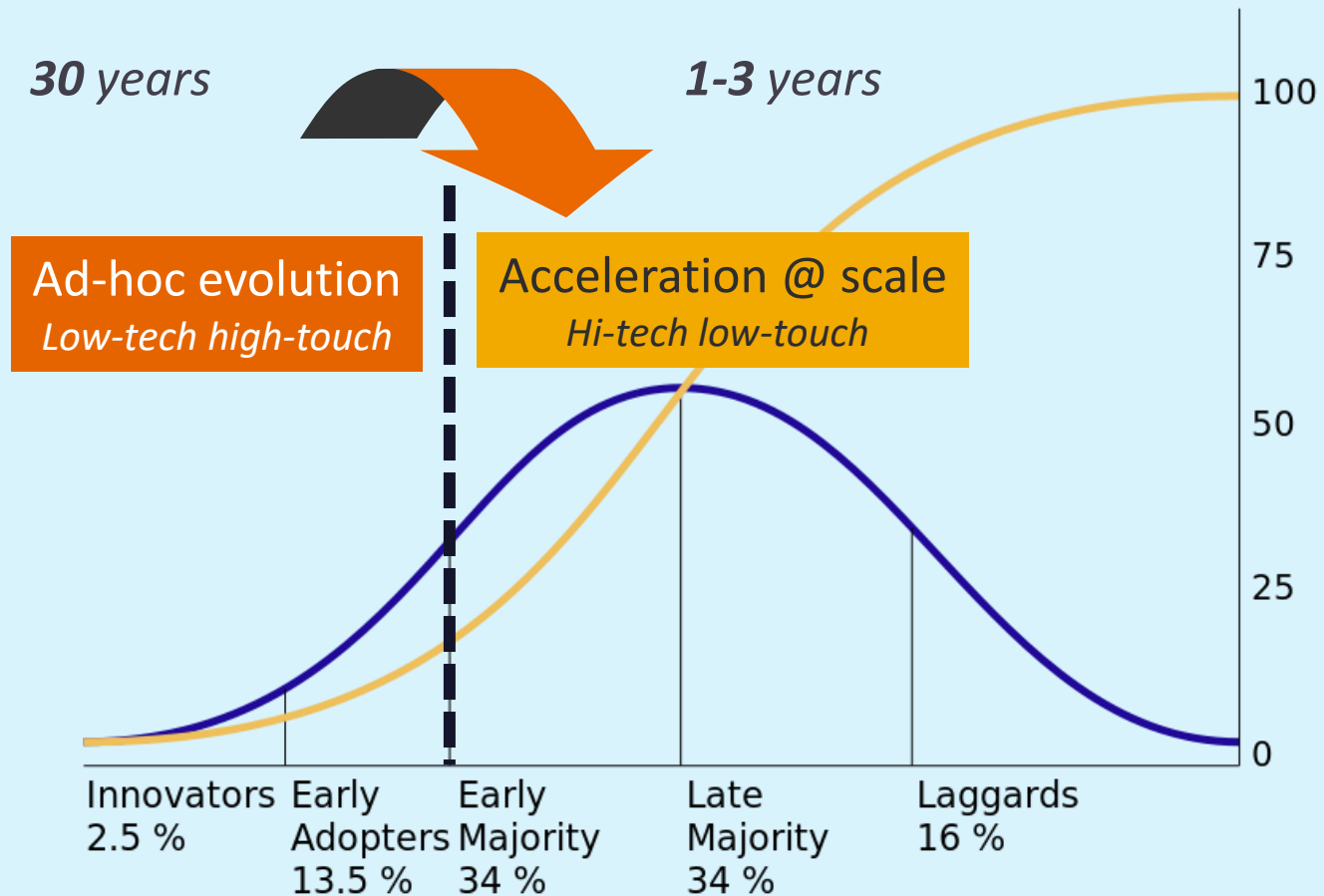
FR (14%), DE (5%), IT (6%), ES (3%), UK (6%)

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

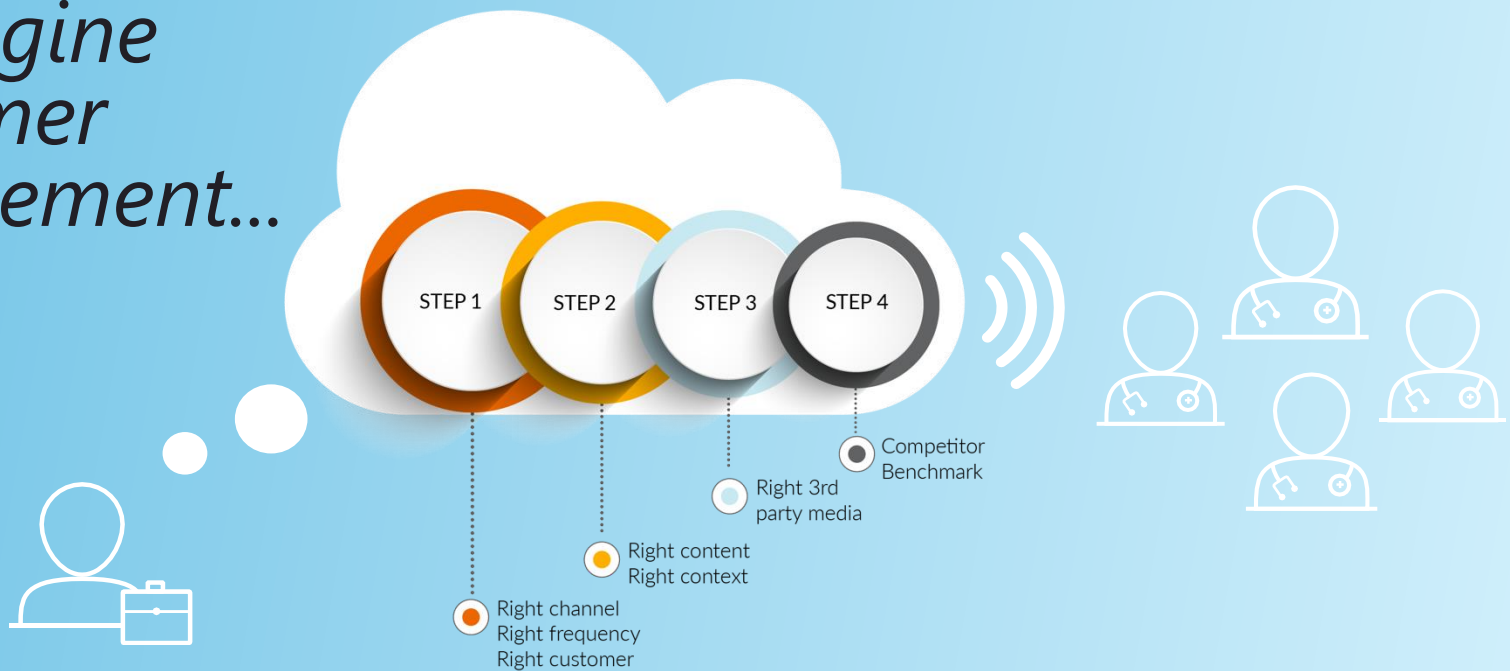


New Mindset ?

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



Reimagine
customer
engagement...



Navigator™ 365

Your compass for omnichannel customer engagement in life sciences

for the post-C19 era

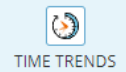
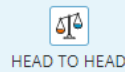
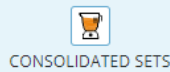
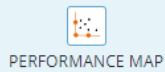
www.across.health/offering/navigator **DEMO**

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

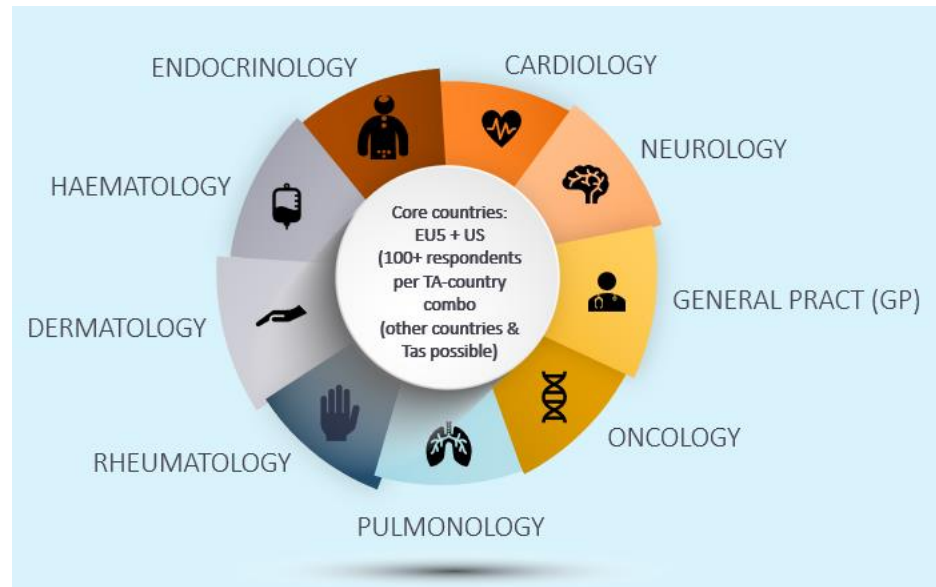


Navigator™ 365

FULL REPORTS **POWERTOOLS**



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





Evidence and experience are at the heart of any actionable omnichannel strategy, resource allocation and digital transformation. These unique qualities are tightly interwoven in our proven end-to-end 4i service framework (Insight, Innovation strategy, Intelligent execution & Impact), and further boosted by our two unique self-service product suites (Navigator365 and Scala365).

Our products and services work seamlessly together in a comprehensive customer engagement ecosystem, reducing your time to customer & business impact significantly.

self-service
product suites

services
4i framework

evidence &
experience

SELF-SERVICE PRODUCT SUITES

Navigator™ 365

- Navigator365 Core**
Get inspired by truly actionable OCE insights
- Navigator365 Planner**
Translate your OCE strategy into a robust plan
- Navigator365 Tracker**
Track your OCE campaign for high impact

Scala™ 365

- Scala365 Game**
Simulate your OCE ambitions
- Scala365 Learning**
Boost your omnichannel capabilities
- 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

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 Game

IMPACT

Measure & optimize for superior customer experience & business results

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

Key product catalyst:

- Navigator365 Tracker

INTELLIGENT EXECUTION

Execute the strategy & monitor for optimal impact

- Programme management
- Coaching & change mgt
- Campaign orchestration

Key product catalyst:

- Scala365 Learning

Want to know more? Then simply sign up for the remaining 6 webinars



Reimagine customer engagement



 The webinar series

FEB to OCT 2021

1. *2019-2020: Blip or shift? Key trends in the HCP mix Feb. 25th 16h CET (TODAY)*
2. **The power of marketing & sales collaboration for Omnichannel engagement** Mar. 25th 16h CET
3. **Omnichannel upskilling: transforming customer-facing teams into OCE experts** Apr. 20th 16h CET
4. **Measuring ROI in life sciences? Not a black & white story** May 11th 16h CET
5. **Maturometer 2021** June 24th 16h CET
6. **Navigator365 advanced uses** Sep. 16th 16h CET
7. **Omnichannel Launch Excellence in the Never Normal** Oct. 21st 16h CET

www.across.health/2021-webinars





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