![indegene logo]

MCM
MATURITY
INDEX

AN INDEGENE PERSPECTIVE

"Indegene's perspective on understanding the maturity of multichannel marketing (MCM) initiatives of pharma companies with consideration to 2 main attributes – customer centricity and operational efficiency also elaborating on the key enablers that are pivotal to improving an organization's MCM Maturity quotient."

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Executive Summary

Although initially perceived as reluctant adopters, pharma companies are riding on the wave of digital revolution these days. They cannot risk standing on the periphery by only providing transactional, point-in-time solutions and are hence making the transition by implementing digital campaigns and initiatives that support content that is sourced globally, yet is tailored to local needs. They are exploring a multitude of initiatives to engage better with the customers (healthcare providers [HCPs]) across various channels. However, it remains to be seen if the efforts invested in these initiatives are actually leading to fruition.

One of the approaches to appraise the efforts of the pharma companies is a Multichannel Maturity Model that provides a holistic perspective on the effectiveness of their initiatives on 2 broad parameters, namely customer experience (Cx) and operational excellence (Ox).

I. CUSTOMER EXPERIENCE

The voice of customers (HCPs) gauges the efforts driven by the pharma companies, with a focus on customer centricity

II. OPERATIONAL EXCELLENCE

It is the degree of efficiency in channeling the organization's resources while delivering customer experience

To qualify as an organization that is truly ahead of its competitors in terms of MCM maturity, pharma companies should ensure that several enablers such as content, analytics, channels, culture, infrastructure, operations, and organization structure are all moving in tandem with each other and in the right direction. This report seeks to lay a foundation to elucidate the MCM maturity model as well as briefly describe the key enablers that should be focused upon to improve an organization's MCM maturity quotient.

Research Scope

To gauge the feedback of these target customers, we reached out to a pool of HCPs (in the USA) as a part of our research for the whitepaper to understand their take on the MCM initiatives of the pharma companies.

Companies mentioned in this report are as follows:

AstraZeneca   Pfizer   NOVARTIS   MERCK

Bristol-Myers Squibb   Bayer   gsk GlaxoSmithKline   Lilly

AMGEN   novo nordisk®   SANOFI   Boehringer Ingelheim

Celgene   Mylan®   TEVA TEVA PHARMACEUTICALS USA   Allergan

abbvie   GILEAD   Roche   Shire

Introduction
Multichannel Marketing in Pharma

Pharma companies are exploring and leveraging a slew of MCM strategies backed by robust analytics to increase their engagement with HCPs. They should push the envelope by exploring new technologies and channels to make the experience more valuable, convenient, and personalized for their customers. Digitally mature industries have set the benchmark very high in terms of how they engage with their customers. Pharma companies can take a page from their book to implement similar customer engagement initiatives by moving all critical levers (content, infrastructure, channels, etc.) in a synchronized manner, while also being able to optimize these initiatives through analytics enablement to track performance. However, it still remains to be seen if these efforts also eventually translate into value add for the end customers – the HCPs.

The survey results reveal that only 37% of the HCPs feel that their preferred mode of channel (such as iDetail aid/Email/Web/MSL/Seminar, etc.) is able to address their content-related requirements from the pharma companies. This brings us to the point that we are trying to drive home that pharma companies should become more cognizant and receptive of customer feedback while at the same time should be able to optimize on their MCM operations. A pertinent question to be asked at this juncture is – how can pharma companies identify the areas that they need to focus on in order to realize the value of all the investments that they are making on the digital front? What can be the roadmap to success on the digital journey and what would be the next steps that can be undertaken in this direction?

One way to look at all the above questions would be to assign an MCM Maturity score to all pharma companies, which will not only give them a relative ranking as to how they fare with respect to each other but also help them to zero in on tactical measures that would help them move forward on the maturity continuum. Hence, without further ado, let us take a deep dive into the crux of the report – The MCM Maturity Model.

[1]We surveyed HCPs based out of the US and from specialties – Neuro, Oncology, and Metabolic.

Holistic MCM Maturity Model

Indegene MCM Maturity Model for driving unified customer experience is Indegene's point of view on how this digital transformation journey can be planned. The overall maturity is measured over 2 key parameters – Cx and Ox. A balance between both these parameters is imperative to ensure that all the possible levers are streamlined to move in tandem with each other. The various levels in the continuum are defined as below:

LEVEL 0
Traditional Product Centric Outreach

- Majority of the engagement is via traditional/legacy channels (non-digital) and is product centric
- Limited/few channels in the MCM stack initiated

LEVEL 1
Multichannel Product Centric Experience

- Multiple channels apart from the legacy ones are in use (good mix of digital and non-digital tactics in play)
- There is little/no integration across channels (siloed operations)

LEVEL 2
Integrated Customer Outreach

- The Channels operate in sync
- Data integration is done across all the channels

LEVEL 3
Omni-organizational Integrated Experience

- Unified and integrated experience is delivered by global/regional/country teams across brands, across channels, and across business units (BUs)
- Organization-wide customer centricity is initiated

LEVEL 4
Personalized Experience With Operational Accountability

- Highly personalized experience is provided for specific/individual customer segments (eg, HCP segments)
- Accountable MCM communication is initiated (strong correlation between MCM and business outcomes)

LEVEL 5
Personalized Multi Stakeholder Journey with Overall Accountability

- Orchestration of personalized experiences is initiated across diverse customer segments (Key Opinion Leaders [KOLs], HCPs, patients, government bodies, think-tanks, and policy makers)

This model offers a calibrated approach to ascertain the current maturity level of an organization on a set of 7 levers – 3 Vertical Levers and 4 Horizontal Levers. These levers are defined as follows:

Vertical Levers of the MCM Model

These are the functional levers that should be pushed and moved in an integrated manner to help an organization achieve its MCM objectives.

Content	Data and Analytics	Channel
Degree of personalization, atomicity, analytics enablement, KPI optimization, and automation	Quality of data aggregation across customer touchpoints and integration with operations and business outcomes	Standards in channel operations in context of supporting rich and personalized customer experience

Horizontal Levers of the MCM Model

The horizontal layer comprises the enablers at the organizational level that are like hygiene factors for any MCM initiative to work well.

Infrastructure
Availability and application of marketing technology stack across the digital supply chain

Operations
Quality of workflows, processes, and division of labor across functions and across vendor ecosystem

Organization
Team structures and capabilities across brands, across BUs, and across markets

Culture
Collaboration, decision-making, and risk-taking abilities across teams and across functions

> ## All these levers must move in tandem and like a well-oiled machinery to enable an organization to move in the right direction of the MCM Maturity Continuum

Pharma companies are leaving no stone unturned to realize return on investment (ROI) on their initiatives on the digital front; however, in spite of all these efforts, and unfortunately so, such initiatives have often not lived to their full potential and have fallen short of the original promise.

Perhaps, the single biggest reason is lack of robust and well-coordinated interplay among all the underlying levers – content, channel, data and analytics, infrastructure, organization, culture, and operations. With reference to the example below (Figure 1), even though an organization may have made greatest investments in state-of-the-art marketing tech stack, the overall MCM maturity could still be toward the lower end of the spectrum, as other levers such as infrastructure, operations, and culture have not been pushed in the right direction. For pharma companies, this portends a need to make systemic and integrated efforts at the organizational level rather than operating in silos.

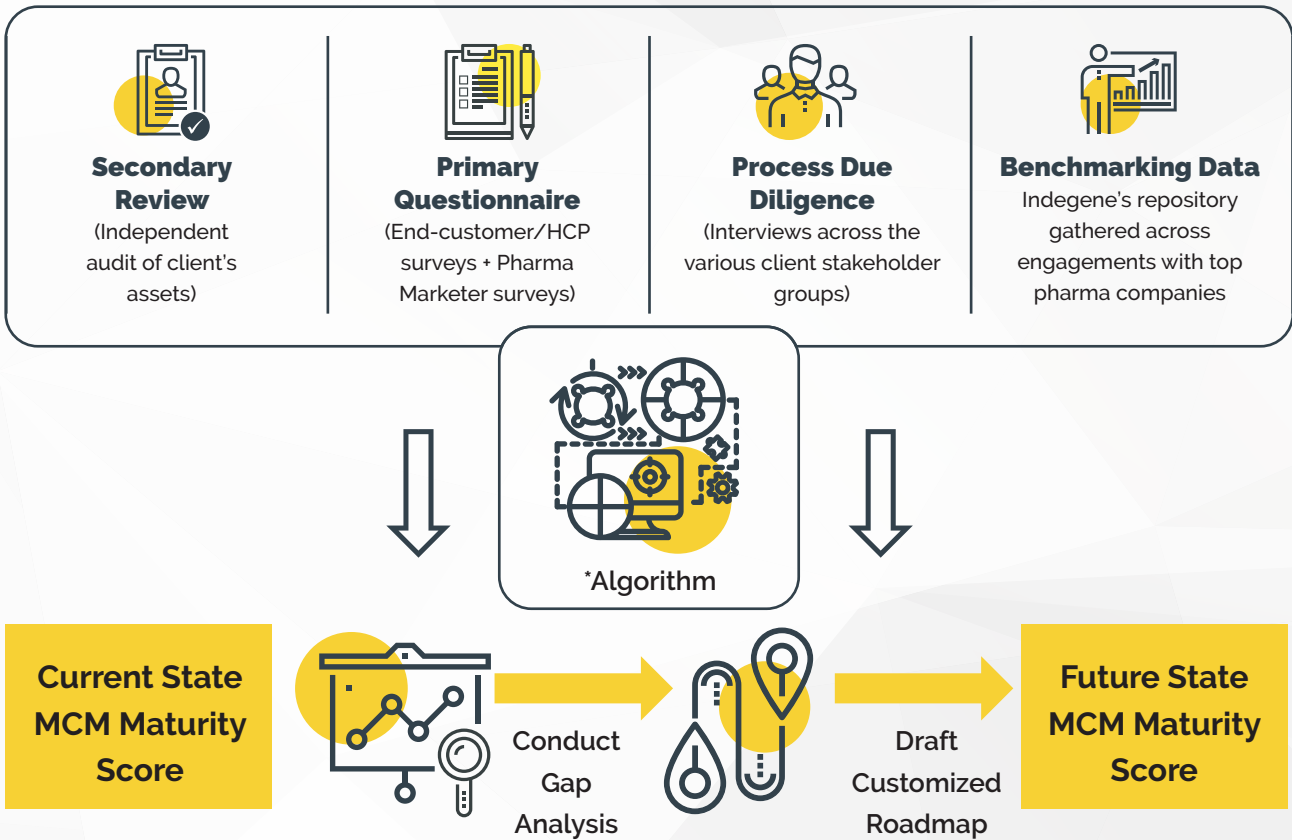**Figure 1:** Illustrative variation of maturity levels across all levers.

	Traditional Product Centric Outreach	Multichannel Product Centric Experience	Integrated Customer Outreach	Omni Organizational Integrated Experience	Personalized Experience With Operational Accountability	Personalized Multi Stakeholder Journey With Overall Accountability
Content					●	
Channel				●		
Analytics				●		
Infrastructural			●			
Operational		●				
Organizational				●		
Cultural		●				

Indegene's approach to arriving at the MCM Maturity score

To arrive at an organization's MCM maturity, a thorough assessment of the current state can be deployed that includes several data inputs such as surveys, audits, etc. At Indegene, the Indegene Discover Methodology (Figure 2) includes a comprehensive diagnostic tool to assign a score to each of the 7 critical levers. Based on the score for each lever, holistic organizational MCM maturity is calculated. Once the maturity level has been gauged, a thorough gap analysis can be conducted. Indegene partners with its customers to co-develop a customized roadmap to determine how each lever can be moved to nudge the organization toward greater holistic MCM maturity. To enable this transition, the repertoire includes a comprehensive suite of templates (financial, governance, and processes), operating models, and technology/platform recommendations that are tailor made and optimized to cater to the client's unique needs.

This bundled offering is rolled out for the client and is monitored over short-, medium-, and long-term milestones. Quick wins are established and an entire benefits realization track is formulated to gauge the success of this approach.

Figure 2: Indegene Discover Methodology.

Secondary Review
(Independent audit of client's assets)

Primary Questionnaire
(End-customer/HCP surveys + Pharma Marketer surveys)

Process Due Diligence
(Interviews across the various client stakeholder groups)

Benchmarking Data
Indegene's repository gathered across engagements with top pharma companies

*Algorithm

Current State MCM Maturity Score

Conduct Gap Analysis

Draft Customized Roadmap

Future State MCM Maturity Score

Indegene Discover Methodology is a comprehensive diagnostic tool that gauges the current MCM maturity of an organization by triangulating data from sources such as end-customers surveys (HCP surveys), interviews across various client stakeholder groups, independent asset audits, and Indegene's benchmarking data repository from other clients. A cumulative score emanating from these data sources indicates how the organization is performing currently and helps identify the gaps that need to be plugged to move to the next level.

*Algorithm: assigning weightages to all parameters and normalizing data to arrive at cumulative scores

Epilogue and Closing Thoughts

Pharma companies are re-strategizing their priorities in order to become digitally savvy. In doing so, they are making internal organizational realignments, investing in marketing technologies, and partnering with strategic vendors to enable transformation.

To support this transition seamlessly, the Indegene MCM Maturity Score is the prism to offer pharma companies a 360 degree viewpoint to gauge if they are pressing the right buttons to reap maximum benefits and stay ahead of the competition. Through our well-researched and holistic "Indegene Discover" methodology, we can help pharma companies with the assessment of their current state in terms of MCM Maturity. With this analysis as the baseline, we will conduct a gap analysis and devise a customized roadmap to help our client climb up on the maturity continuum.

If you are a Pharma Marketer and are keen to understand more about how your digital capabilities fare vis-à-vis your competitor, please contact us at *marketing@indegene.com* to understand more about our consultative "Indegene Discover" methodology and how it may benefit your business.

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ABOUT PHARMA*FUTURE*™

PharmaFuture™ (www.pharmafuture.org) is a global thought-leadership forum for senior pharmaceutical executives. Its objective is to present the market realities through credible market research and bring together senior leaders of the industry in an interactive setting to discuss key challenges facing the industry, to share experiences, and to brainstorm ideas and solutions to drive better health and business outcomes.

PharmaFuture™ is an initiative of Indegene—a leading global healthcare solutions company that integrates medical/pharma expertise, technology, analytics, and operational excellence to address some of the big challenges in the industry.