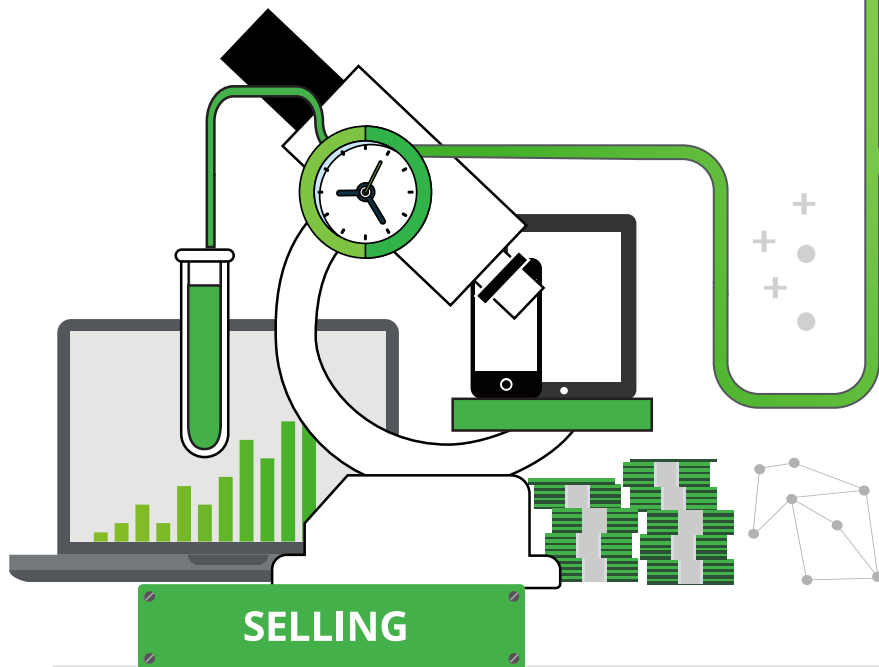


## Selling

### Commercial Analytics

Driving commercial outputs based on omnichannel and sales analytics



#### SETTING THE SCENE

Between Marketing and Selling, different strategies drive different outcomes:

- We see companies investing in **superior commercial execution** as product and cost leadership are no longer sufficient.
- However, companies struggle to see the **business outcome** of their investment in digital capabilities.
- They also struggle to **scale up investments** from single pilot to global leverage.

Commercial Analytics provides a **framework to structure strategy definition** and its execution. Instead of a random investment in capabilities, we propose a strategy-led approach with a framework of commercial archetypes:

- Hypothesis: For a given market segment, only **one archetype** applies.
- The archetype combines **target outcomes**, **value drivers**, related **capabilities** and **digital/ analytical enablers**.



#### BUSINESS RESULTS



##### Benefits

- Drive **top-line growth** by better understanding your customers which ultimately allows you to engage with the right customer segments through the right channels, sharing the right content at the right time based on real-time dashboards **powered by Tableau**.
- Sales and marketing **efficiency and effectiveness** measures can reduce operating cost (by up to 30%).
- Achieving **customer centricity** increases brand advocacy (1:16), leads to higher spend (up to 140%), longer tenure (+5 years longer) and reduces cost-to-serve (by up to 35%).
- An **innovative service model** allows the transformation of businesses in distracted markets and product segments to renewed profitability.



##### Lessons Learned

- Just adding digital tools does not lead to business improvement; focus and measures do.
- Link every digital investment to an expectation of business outcome, and drive and track the realization of it.



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## CONFIGURING FOR SUCCESS

The CE framework provides a structured feedback guide, starting from a strategy archetype selection through value drivers to the analytics capabilities required.

1

### Where will we play?

Archetype heatmap



2

### How will we win?

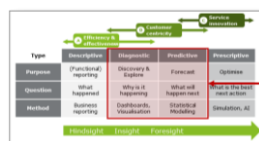
CX framework



4

### How do we configure and execute?

Analytics embedded in routines



3

### What capabilities do we need?

Value driver selection



## A CLIENT REFERENCE STORY

Accelerated by the pandemic, a major Pharmaceutical company asked Deloitte to optimize the engagement process with HCPs to improve marketing and sales efficiency, relying on digital and non-digital channels ranging from face-to-face visits to direct email marketing and rep-triggered emails, each one affecting HCP engagement in its own manner.

### APPROACH

Our segment-specific recommendations are estimated to increase the contribution of short-/mid-term marketing activities over total sales by **3 percentage points**. In order to achieve these results, Deloitte:

- Developed a **customer segmentation** based on HCPs channel and content preferences.
- Measured **channels impact** on customer engagement for optimizing the channel mix.
- Built a **sales correlation and causality model** to quantify the impact of commercial strategies over sales.

### OUTCOMES

Advanced HCP segmentation



Sales correlation and causality model



One-pager summarizing results and providing tailored recommendations



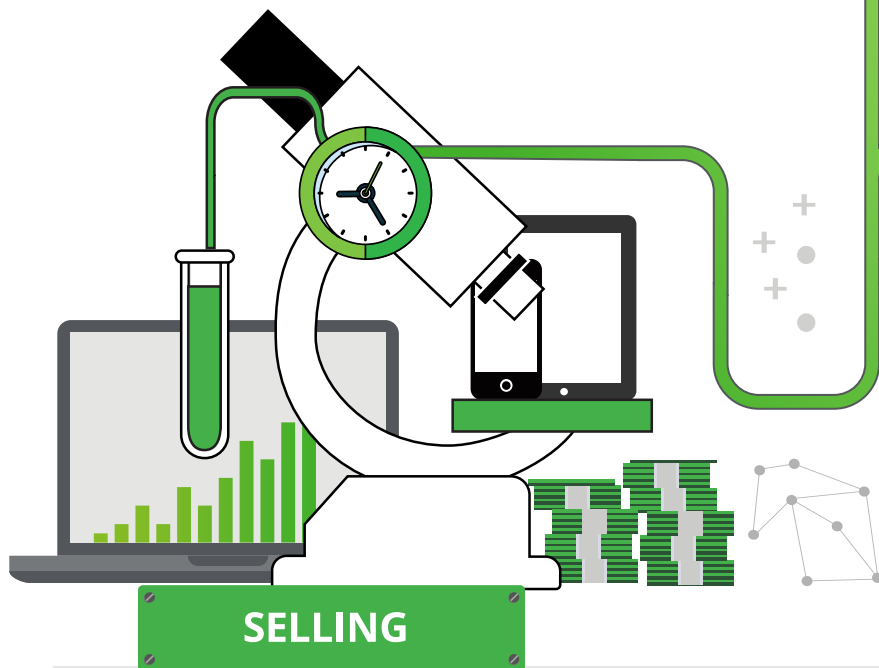
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## Selling

### Direct Sales

Exploiting digital tools to achieve an omni-channel operational structure



#### SETTING THE SCENE

- Direct selling is primarily used in key markets for generics and large-scale med-device sales, allowing Sales Reps to track leads, opportunities and orders, similar to sales in the Consumer industry.
- The majority of direct sales are repeat business and about re-stocking, through engagement with e.g. pharmacies, hospital pharmacies, or self-dispensing doctors.
- In the case of Med devices for example, there is a larger sales process around the opportunity, directly identifying and engaging decision makers and follow on sales e.g. managed services/ maintenance.
- Due to the COVID-19 pandemic, there are core challenges and therefore incentives to update current organisational strategy to direct sales:



Increased regulatory requirements for products



Effective customer segmentation and targeting vs. Key Account Management



Margin erosion due to greater competition



Use of digital channels and reduced physical access to HCPs



#### BUSINESS RESULTS

- **Enhanced productivity:** by deploying a standardised solution, productivity is improved and resources are optimized
- **Customer experience improvements:** with the creation of an omni-channel experience, interactions with customers are tailored and contribute to a seamless purchasing process
- **Increased ROI:** by leveraging resources, digital solutions can offer growth opportunities and increased customer interactions and sales



Identify and reach new customers



Differentiated customer support experience across the order process



Improved customer insights and understanding of requirements



Gross to net pricing optimization



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## CONFIGURING FOR SUCCESS

Current challenges can be addressed through primary business opportunities:

### Omnichannel strategy enablement

- Tailored marketing and data-driven customer experiences to optimise engagement with HCPs and build business agility through an integrated and standardised system platform



### Touchless order process

- Ensure a smooth E2E order process for customers, preventing manual intervention (e.g. pricing, product attributes)



Organisations need to conduct a set of key activities in establishing an optimised direct sales function:

### Strategy

- Design direct go-to-market strategy
- Revise sales operating model
- Define customer engagement strategy



### Planning

- Plan sales force sizing / area optimization
- Consider key account management
- Consider territory & account management



### Execution

- Implement sales methodologies
- Rely on sales culture
- Sales training and skills
- Talent management



### Rewards

- Clarify sales incentives
- Measure performance
- Set compensation & incentives
- Quota management



## A CLIENT REFERENCE STORY

The client leadership approached Deloitte with regards to two key issues regarding its old commercial excellence strategy - with the era of corporate digitalization, there was an ever-growing need to i) make their organisation more customer-centric externally, and ii) drive greater operational efficiency throughout all of their commercial functional areas, including Marketing, Sales (Contract & Order Management) and Customer Service functions by converting their current multi-channel back-end setup to an **omni-channel operational structure**, where all channels are integrated in one platform, making optimal use of best in class tools.

### APPROACH

- The Deloitte team helped launch the program, a global initiative to be rolled out over more than 50 countries, including the redesign of various aspects of the client's operating model, e2e processes and architecture for four key functional areas, including Order Management, Customer Relationship Management, Contract Lifecycle Management, and Marketing.
- Deloitte supported the client in embedding core capabilities around Salesforce, Marketing Cloud and Order Management applications to support the future omni-channel ambitions.

### OUTCOMES

**Functional Capability Maps (Market, Sell, Serve & Support)**



**Customer Experience & Journeys**



**Process Maps & System Architecture Design**

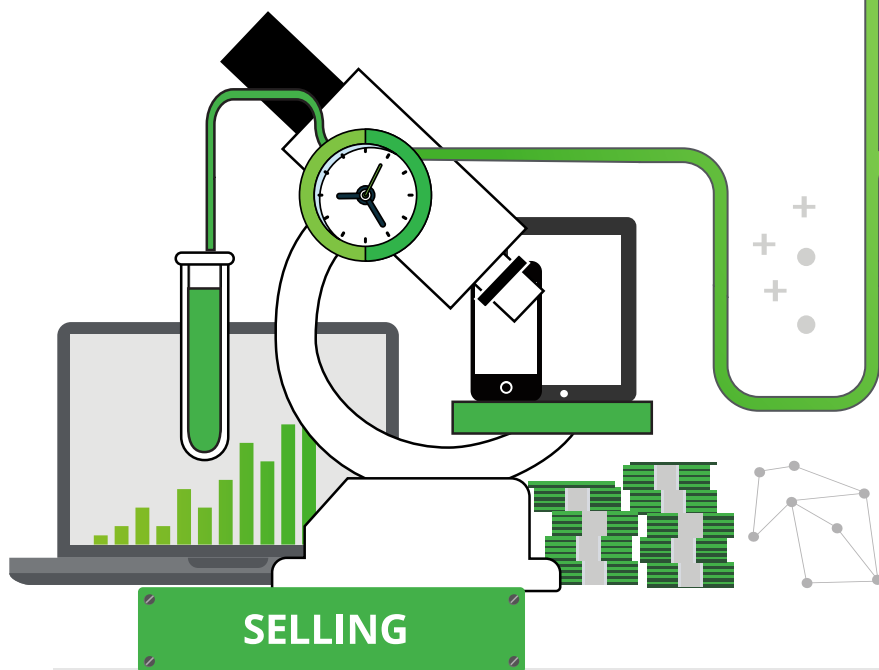


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## Selling Indirect Sales

**Enhancing indirect sales process effectiveness and efficiency through advanced analytics and digital segmentation**



### SETTING THE SCENE

- Indirect selling (i.e. through sales reps) is the primary model used by Pharmaceutical companies for increased use of their prescription & speciality drugs, representing the largest revenue driver.
- Due to its nature however, revenue attribution is difficult to forecast and there are core challenges which have been accelerated and emphasised as a result of the COVID-19 pandemic.



Increasing regulatory requirements for availability to prescribe



Greater use of digital channels and reduced physical access to HCPs



Margin protection in face of generic competition



Complexity in matching internal data (no. of calls, product details) to external data (sales in period)



Effective customer segmentation and targeting vs. Key Account Management



Rise of the direct patient-consumer relationship and impact on sales engagement with HCPs



### BUSINESS RESULTS

- Enhanced channel optimization: the marketing mix can be balanced following the impact on engagement of each channel (e.g., increase direct email marketing by 30% while reducing face-to-face visits by 10%).
- Avoid marketing saturation: closer management and distribution of digital marketing material depending on the length of the campaign.
- Increased ROI: by leveraging resources, our solutions can offer growth opportunities such as increased digital engagement index, customer interactions and sales by more than 50% on the short and mid-term marketing activities contribution on total sales.



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## CONFIGURING FOR SUCCESS

Current challenges can be addressed through primary business opportunities:

### Implement digital engagement platforms

- Creation of a new, customer-centred digital ecosystem to optimise engagement and approaches to sales with HCPs



### Use of data driven sales analytics and insights

- Adoption of advanced data analytics through integrated services to better understand both customer needs and sales performance data in real time



Organisations need to conduct a set of key activities in establishing an optimised indirect sales function

### Strategy

- Revise sales operating model
- Define HCP engagement strategy



### Planning

- Consider key industry trends
- Consider current limitations brought by the pandemic



### Execution

- Use advanced analytics on big data
- Report and cluster preferences into HCP segments



### Rewards

- Optimized sales process
- Measure performance with agreed KPIs



## A CLIENT REFERENCE STORY

Accelerated by COVID-19, the client asked Deloitte to optimize the engagement process with Health Care Professionals (HCPs) to improve marketing and sales efficiency. We leveraged advanced analytics to develop a customer segmentation along with measuring channels impact and building a sales correlation and causality model to quantify the impact of commercial strategies over sales.

### APPROACH

By leveraging marketing and sales data and coupling them with advanced analytics and machine learning, the project team has:

- Developed a customer segmentation based on Health Care Professionals (HCPs) channel and content preferences.
- Measured channels impact on customer engagement for optimizing the channel mix.
- Identified saturation points to define the optimal balance of effort among channels.
- Built a sales correlation and causality model to quantify the impact of commercial strategies over sales.

### OUTCOMES

The proposed advanced digital segmentation strategy allowed to:

- Build tailored customer engagement strategies to drive top-line growth by engaging with the right Health Care Professionals (HCPs) through the right channels, leveraging the right content and at the right time.
- These new customer engagement strategies were expected to increase the contribution of short/mid-term marketing activities over total sales by three percentage points.

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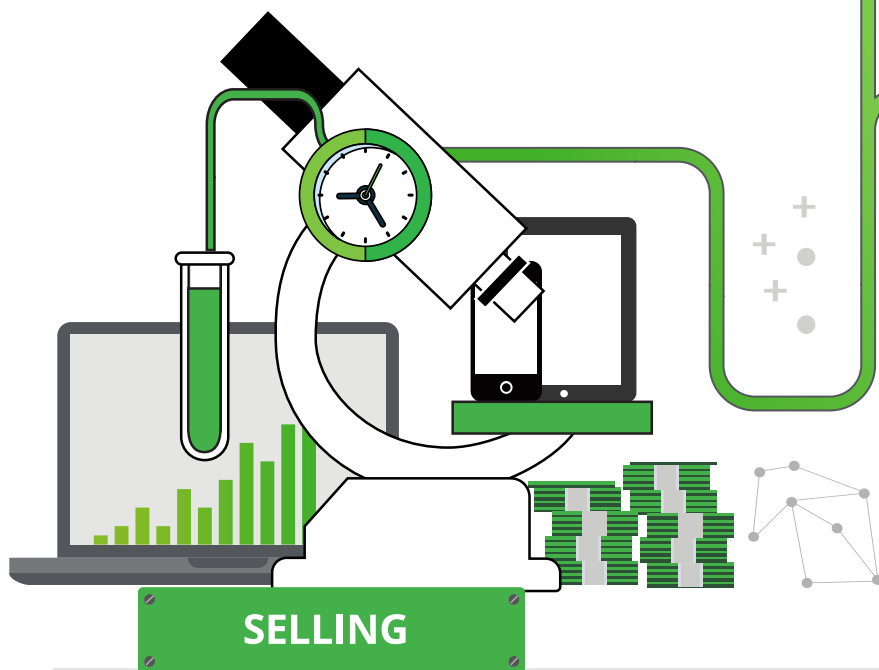
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## Selling

### Cost to Serve Analyses

**Cost to Serve Analyses to improve operational margin and better serve customers**



**SELLING**



#### SETTING THE SCENE

**Operating margin is under pressure, but it is not well understood.**

- Most organisations have a good understanding of their Gross Margin. However only a few can report or manage the operating margin of individual divisions, brands, customer groups and/or channels., due to the large proportion of indirect (and unallocated) costs, lack of understanding of 3rd party supplier rationalisation and labour /non labour costs.
- This makes it difficult to make objective decisions on resource allocation and investment at a global, regional or affiliate level.

**The issue is becoming vital for the life science industry across all markets.**

- The pace of change in Life Sciences is accelerating. Market complexity is increasing, launch prices and in market margins are being squeezed, and investors are challenging resource allocation.
- Being able to quickly and effectively make informed investment and resource allocation decisions is more important than ever.



#### BUSINESS RESULTS

Operational Levers	Associated impact
Optimize portfolio	Divest assets realising cash across functions and cap amount of customers serviced direct based on materiality
Alter the customer value proposition	Customer segmentation to ensure level of focus and investments align to materiality, reduce product complexity and logistical complexity for customers
Alter the market delivery model	Moving from indirect to direct distribution
Understand operational model and order to cash setup	Enhance efficiency and reduce complexity to generate improvement hypotheses and what will improve the bottom line
Compare Return on Marketing and Market access expenditure	Optimize expenditure and level of market-specific branding
Improve pricing and rebate management	Implement strong pricing and approval policies with standardized pricing and operational adherence



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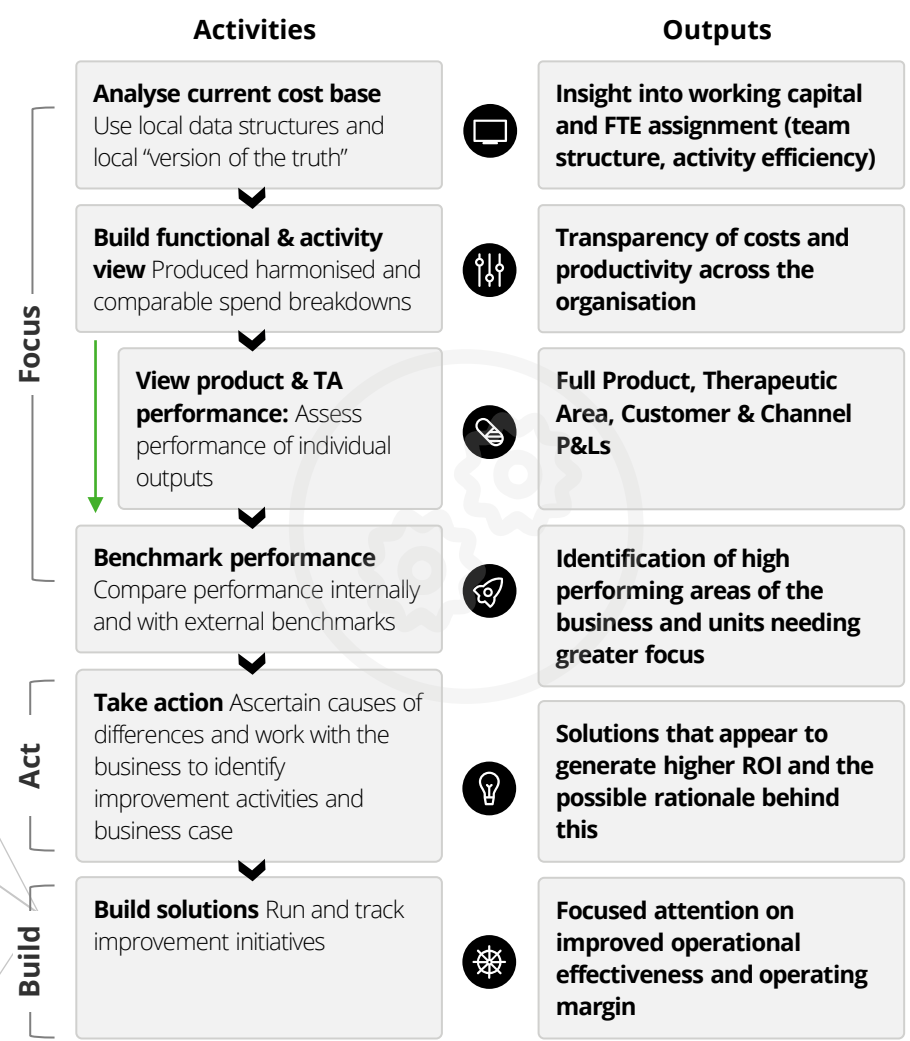
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## CONFIGURING FOR SUCCESS



## A CLIENT REFERENCE STORY



The client believed there was opportunity to improve their operating margin and wished to identify and capitalise on opportunities to optimise pricing, savings, overheads and cost of sales. Deloitte performed an assessment of key product areas providing recommendations into a full scale solution.

### APPROACH

Deloitte used a bottom-up hypotheses-driven approach, to establish the financial baseline and identify a series of cost saving opportunities.

- Detailed cost allocation methods were defined with relevant business functions (operations, finance, commercial).
- Transactional, master (product and customer), and cost data collected from numerous systems and loaded into a SQL database.
- Cost allocations performed and output table linked to QlikView for quick interrogation and visualization.
- Outputs validated and user interface designed to client specification.

### OUTCOMES

A portfolio of opportunities worth CHF1-2.5m net margin improvements was realised with key benefits:

- Established a standard pricing and discounting framework for improved margins.
- Actions in place to address the tail of margin eroding products to drive profitability.
- Provision of Cost-to-Serve analytics to review profitability and costs from gross sales to net margin for orders, customers, products to an order line level and investigate areas as required.

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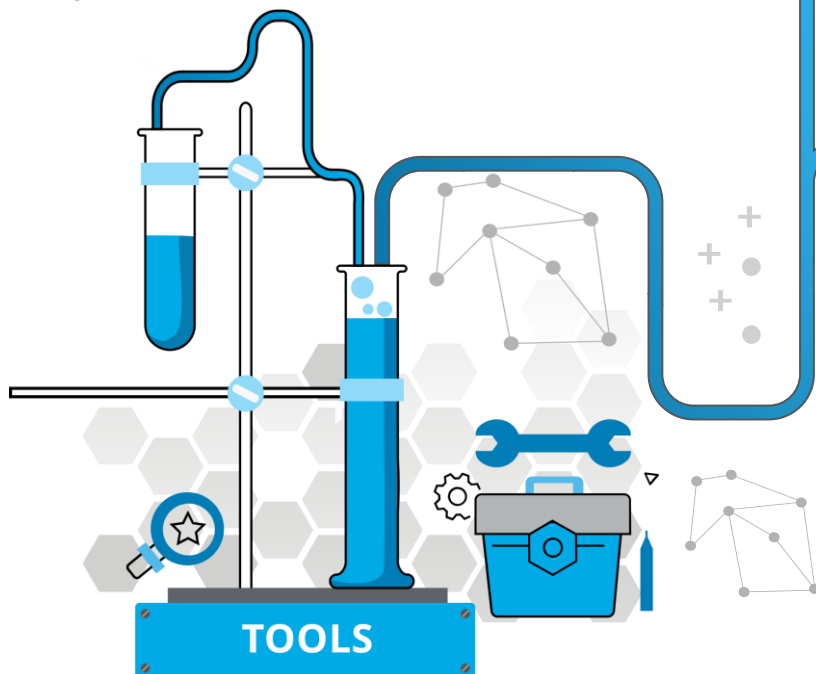
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## Tools

### F.A.I.R (Findable, Accessible, Interoperable and Reusable) Data & Analytics

**Better and faster insights through advanced data management**



#### SETTING THE SCENE

- Data is the new oil. Leading companies are investing in their data capabilities to drive revenue growth, reduce operating cost and ensure data compliance
- F.A.I.R is an established framework that defines the key principles that data needs to adhere to in order for an organization to create value from data and break data silos

##### Key principles of F.A.I.R. approach:

- **Findable:** Capability to search for and find data you need.  
Ambition → Google search-like experience
- **Accessible:** Capability to request and receive access to data you need.  
Ambition → Amazon shopping cart-like experience
- **Interoperable:** Capability to integrate data in an automated, cost-effective and performant manner (i.e. latency, data quality, security etc.)  
Ambition → Simplicity of integrating different Cloud native data sources
- **Reusable:** Capability to reuse data (and data artefacts like reports, analysis or models) without undue effort  
Ambition → Self-explanatory data whose data quality is verified



#### BUSINESS RESULTS

##### Revenue & Growth

- **Innovate**  
Boost innovation to impact **top line growth** by 5-10%
- **Establish ownership in business** to ensure business value delivery
- **Cross-functional collaboration** and shared use of data

##### Cost & Efficiency

- **Reduce cost**  
Improve data processes to reduce **total cost of data & analytics** by 20-30%
- **Automate**  
Reduce **operational costs** through automation and insights by 5-10%
- **Less time spend** doing data activities (e.g. searching and cleansing data)

##### Compliance & Security

- **Create a data-driven culture**  
Enable **better decision making** based on consistent and trusted data
- **Reduced risk** of legal / regulatory issues related to data or analytics
- **Increased insight** in data issues enables more effective resolution



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## CONFIGURING FOR SUCCESS

### Overarching prerequisites:

*Not all data is created equal. Define critical data to focus on (typically, 20-30% of all data)*

*Metadata (i.e. data about your data) is the DNA of FAIR. Provide machine-readable metadata*

*Find a sponsor with authority to invest and understanding of the current state of data and data issues*

1

#### FINDABLE

- Find out what data people spend time looking for and what's the value of finding it faster
- Technology used: Data catalog tool with knowledge graph technology

2

#### ACCESSIBLE

- Establish who is allowed / should have access to what data and assign data owners
- Technology used: Data catalog with self-service request and data provisioning capability



4

#### REUSABLE

- Focus on improving data quality and assigning of required metadata to data to provide context
- Technology used: Data catalog with DQ and metadata capabilities

3

#### INTEROPERABLE

- Identify OLAP and OLTP requirements to define default data integration patterns and standards
- Technology used: ETL/ELT vendors, Cloud data platforms, DWs,



## A CLIENT REFERENCE STORY

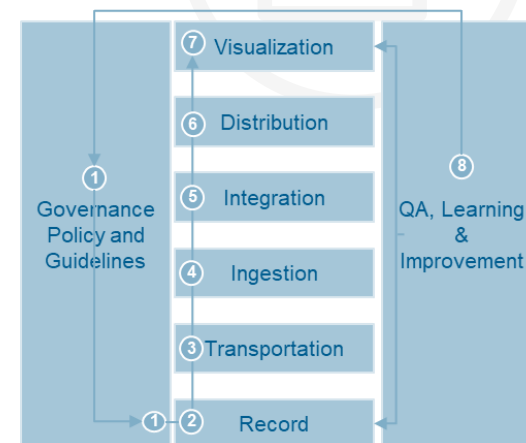
- A large pharmaceutical organisation identified optimizing the use of their operational clinical trial data as a priority to boost innovation at a lower cost, and asked Deloitte to support this initiative.

### APPROACH

- Use cases for improvement were selected from surveying the Clinical Ops community.
- Data was reviewed as part of the use case improvement options; an assessment of FAIR maturity helped to identify the priorities for action.
- In mapping the *ingest-curate-use* data flow across the existing IT landscape, several improvement points were identified, including a dedicated search functionality and easier access to sensitive files.

### OUTCOMES

- FAIR governance was established and subsequently enriched, use case by use case.
- Setup learning and continuous improvement of data management to enhance insights.



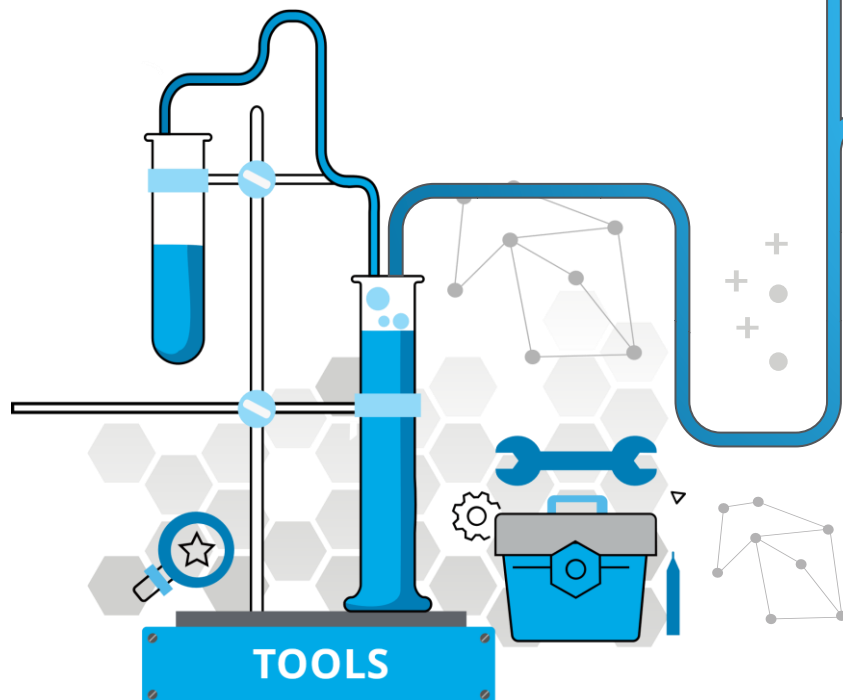
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## Tools – Selling

### Sales Effectiveness

Providing a tailored customer service with Salesforce tools designed for Life Sciences companies



#### SETTING THE SCENE



##### Objective

- Enable Healthcare organizations to provide efficient and personalized care coordination, engagement, and outreach to boost sales and revenues.



##### Tools

- **Deloitte** build a couple of tools based on the **Salesforce platform**:
- **PatientConnect**: the tool offers Comprehensive patient services and engagement platform for life sciences.
- **ConvergeHEALTH™ Connect**: for Life Science and for Health Plan, it is a flexible platform to deliver consistent high-touch patient engagement and assist Healthcare organizations by creating comprehensive care models improving care delivery through the expanding footprint of overall patient care.



#### BUSINESS RESULTS



##### PatientConnect

- Streamline Access and Drive Patient Engagement.
- Gain and Act on Critical Patient Insights#.
- Educate, and Maximize Therapy Adherence.
- Support Provider and HCP Engagement.



##### ConvergeHEALTH™ Connect

- Medical cost migration through increased patient engagement and optimized care plans.
- Drive improved patient engagement with multi-channel model.
- Enable a 360o view of the whole patient care, support and clinical staff.
- Measure and improve patient experience through feedback loops and outreach communication.
- Facilitate strengthening of Health Care Provider partnerships.



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## CONFIGURING FOR SUCCESS

**Deloitte Digital has the capabilities for a successful implementation of sales effectiveness tools.**

Create a new, customer-centred digital ecosystem, relying on creativity and hybrid approaches



Define and execute a patient centric strategy, deploying a personalized solution



Integration of services and benefits through connected apps and devices



Use advance data analytics and exchange services to better understand the customer



## A CLIENT REFERENCE STORY

A healthcare firm wanted to enable patient engagement for Oncology by connecting patients, doctors and data to improve patient outcomes.

### APPROACH

- The client's customer engagement process was largely manual, with patient-safety teams completing paperwork and following up with emails to patients and physicians.
- Deloitte supported with the implementation of PatientConnect and offered the ability to track care plan, provide assistance programs and response monitoring.

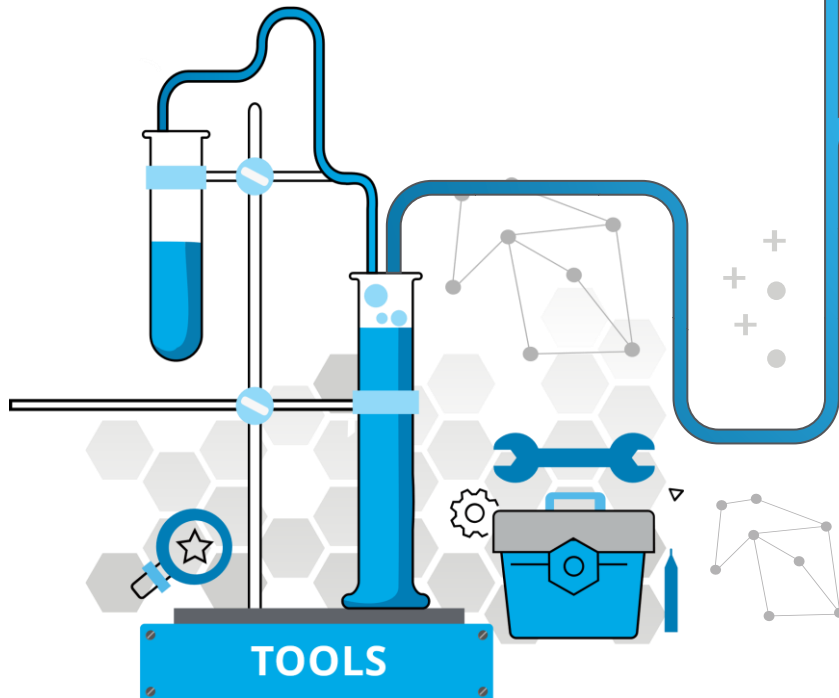
### OUTCOMES

- Deloitte delivered a step-change in implementation and productivity, optimizing resources and customer experience.
- Deloitte defined the basis to tackle the entire patient journey with the tool, covering diagnosis with primary care visits and pathology screening, care planning and long term planning with monitoring and palliative care.
- This allowed to increase patient satisfaction and increased the usage of advanced tools.

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## Tools – Selling Automation & AI (Robotic Process Automation)



### SETTING THE SCENE

- Robotic Process Automation (RPA) tools can help businesses increase the efficiency and effectiveness of their operations faster at a lower cost than other automation approaches.
- Activity in RPA will continue to grow and develop across all industries, with organisations increasingly seeing deployments reaching enterprise scale.

#### Organisations are at different stages of automation maturity:



- Organisations not already considering automation will miss significant opportunities for efficiency, **quality enhancement, risk mitigation, innovation**, and ultimately **growth**



- Organisations developing digitised ways of working and now seeking to scale these solutions



- Organisations that are starting to move beyond RPA into **intelligent automation**



### BUSINESS RESULTS



#### RPA tools are best suited for processes with repeatable, predictable interactions. The benefits of RPA solutions go beyond cost reduction and include:

- Decreased cycle times and improved throughput.
- Flexibility and scalability.
- Reduced operational costs.
- Improved data capturing and accuracy (i.e. removal of human errors).
- Improved employee morale – freeing up time and enabling them to conduct more value added / strategic tasks.
- Increased time to focus on innovation and customer satisfaction.



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## CONFIGURING FOR SUCCESS

**When preparing to deploy RPA, it is important to account for the following factors:**

Determine which transactional processes are ideally suited for RPA to achieve quick wins through tactical initiatives



Design an operating model that clearly defines roles and responsibilities, and measurable goals for your new ecosystem



Establish appropriate change management and governance processes, and get executive buy-in to facilitate deployment



Redefine performance management through training to encourage continual improvement, and ensure best possible outcomes



Identify change champions who will lead the robotic transformation and be first point of call for staff



Articulate alignment between automation strategy and corporate strategy to ensure employees understand the reasoning and are more willing to adopt required changes



## A CLIENT REFERENCE STORY

A pharmaceutical company wanted to deliver a step-change in productivity that would enable it to manage current and future Adverse Events (AE) reports without adding to its cost-base, compromising quality, or jeopardising compliance. Deloitte leveraged RPA to outline how this ambitious objective could be achieved.

### APPROACH

- The client's AE follow-up process was largely manual, with patient-safety teams completing paperwork and following up with emails to patients and physicians.
- Deloitte supported the strategy and identified activities to be automated, designing a roadmap and initial pilot programme.
- As a compliance process under constant scrutiny from the regulatory authorities, Deloitte performed a systems validation to demonstrate adherence to regulatory compliance.

### OUTCOMES

- Deloitte delivered a step-change in productivity, freeing up resources to focus on value-adding and strategic activities, and manage future workloads without increasing costs, compromising quality, or jeopardising compliance.
- The solution has improved job-satisfaction for patient safety teams, and led to improved response rates from healthcare professionals.
- Pharmaceutical companies, their regulators, and the patient population now have greater confidence in the safety and efficacy of marketed medicines.

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