

With social distancing and varied forms of shelter in place regulations across the nation, pharma organizations are impacted in multiple ways:

All forms of personal sales activities are suspended for the time being

For all non-essential / critical therapy needs, HCPs are requiring patients to use remote counseling options

Day-time physicians who are not on call for emergencies services are at risk of being furloughed by hospitals



Sales Force Impact

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| <ul style="list-style-type: none"> • Sales rep detailing and rep organized events have most impact at this stage • With remote detailing, it will be harder to convert a new writer who may still be on the fence on the product advantage | <ul style="list-style-type: none"> • As sales rep's messaging reinforces the patient selection for therapy, new to brand conversion may be impacted with lower access to prescribers | <ul style="list-style-type: none"> • Rep's tenure and customer relationship will play a big role in maintaining the product usage. Reps who are in the process of creating new relationships in the territory will find it harder to maintain momentum |
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Business Impact

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| <ul style="list-style-type: none"> • Companies with launches in an established portfolio will fare better than brands in a new TA portfolio • Overall we will expect impacts to physician and patient conversion | <ul style="list-style-type: none"> • With remote patient counseling we will expect prescribers to maintain the course vs. trying new therapy. This will impact growth expected from treatment switches | <ul style="list-style-type: none"> • Symptomatic / chronic therapies are expected to ride the situation with fewer impacts compared to asymptomatic conditions • Products facing "leaky bucket" situation will find it hard to ebb the flow |
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HCP Engagement Strategies for Now, Q2 and the Back-Half of the Year

Action	Executables	Benefits/Risks	Timing
Target specific customers (Prescriber and Accounts)	<ul style="list-style-type: none"> Identify target customers with higher propensity to respond to brand messages Incorporate rep relationships into targeting universe Quantify/execute against best short-term engagement activities 	<ul style="list-style-type: none"> Maintain/grow sales in most responsive markets with customers who react most favorably to brand message In unpredictable times the ability to dynamically shift targets and message is critical 	Now through the back-half
Optimize NPP Channels for maximum impact	<ul style="list-style-type: none"> Identify most effective and efficient NPP channels Assess minimum cost/maximum impact media vehicles and campaigns Balance broad reach vs. specific target customers based on brand priorities and market conditions 	<ul style="list-style-type: none"> Most companies have limited means of measuring and evaluating NPP effectiveness Typically, 30 – 40% of media spend is either inefficient, or worse Often the millions of dollars of inefficiencies can be identified and used to either preserve operating profits, or re-targeted to more executable areas in a crisis 	Now through the back-half
Simulate impact of reduced budgets across product portfolio	<ul style="list-style-type: none"> Identify strategies to reduce budgets leveraging data informed processes vs. an axe 	<ul style="list-style-type: none"> Prioritize budget reduction needs across product portfolio based on limiting the revenue/profit downside Identify where to maximize budget reductions while limiting the revenue/profit downside 	Now through the back-half
Leverage flexibility and targetability of paid digital media	<ul style="list-style-type: none"> Shift variable budgets to target highest value customer segments w/specific campaigns in specific geographies 	<ul style="list-style-type: none"> Budget flexibility as well as creative flexibility delivers both short-term revenue impact and cost saving Ability to rapidly deploy and test variety of offers and creative in different markets/geos to see what works 	Now through the back-half
Rapid deployment of in-market testing capabilities	<ul style="list-style-type: none"> Customer segment specific offers quickly deployed, tested and evaluated for effectiveness 	<ul style="list-style-type: none"> Quickly understand and activate against changing consumer behaviors by market and time period to gain competitive advantage Ability to test multiple campaigns, concepts and pricing tactics against specific audiences in multiple geos to determine most impactful strategies for driving sales 	Now through the back-half





Patient Engagement Strategies
for Now, Q2 and the Back-Half of the Year

Action	Executables	Benefits/Risks	Timing
Target patients in-home through power of digital media	<ul style="list-style-type: none"> Determine the most effective Digital campaigns across paid and owned channels to target patients Balance broad reach vs. specific target customers based on brand priorities and market conditions 	<ul style="list-style-type: none"> Leverage holistic and unified marketing platforms to target customer segments in real-time, in-home to maintain product demand and continuity of care Most companies have limited means of measuring and evaluating patient effectiveness Often the millions of dollars of inefficiencies can be identified and used to either preserve operating profits, or re-targeted to more executable areas in a crisis 	Now through the back-half
Leverage patient opt-in extensively	<ul style="list-style-type: none"> Create optimal CRM strategy to keep patients engaged 	<ul style="list-style-type: none"> With reduced access to physician and pandemic worries, patients would be looking at external support In asymptomatic disease situations, patients may be distracted 	Now through the back-half
Expand on patient support activities	<ul style="list-style-type: none"> Scale patient support activities and ensure patients are made aware of support activities through digital media and CRM strategy 	<ul style="list-style-type: none"> With financial impact of pandemic, patients may be at risk of therapy discontinuation or opting for low cost solutions if they are not aware of available financial support options With low access to their physician office, it's essential for pharma organizations to ensure patients are aware of support activities through external tactics 	Back-half



Business Driving ‘Actionables’ for Executive Teams During Period of Uncertainty



Business Planning Strategies
for Now, Q2 and the Back-Half of the Year

Action	Executables	Benefits/Risks	Timing
Creating competitive advantage	<ul style="list-style-type: none"> Simulate the benefits and costs of sustaining or increasing paid media SOV 	<ul style="list-style-type: none"> Determine the benefit of increasing paid media SOV vs. competitors Simulate effects of decreased competitive spend to identify corresponding impacts of decreases of, maintenance in, or increases of paid media 	Now through back-half
Estimate downside impact of economic conditions and reduced distribution	<ul style="list-style-type: none"> Scenario planning, modeling varying external and operational elements 	<ul style="list-style-type: none"> Enable finance, ops and planning to quantify downside impact of radically altered external and operational conditions War-game marketing strategies and tactics based upon best, likely and worst case scenarios 	Now through back-half
Real-time war gaming and scenario planning	<ul style="list-style-type: none"> Take advantage of holistic data and analytics to build investment plans based on “back-to-business” timing 	<ul style="list-style-type: none"> Have plans and investment scenarios ready to activate as conditions improve Gain alignment on alternative plans based on a range of market conditions and timing Quickly gain competitive advantage and share in the back half 	Now through back-half