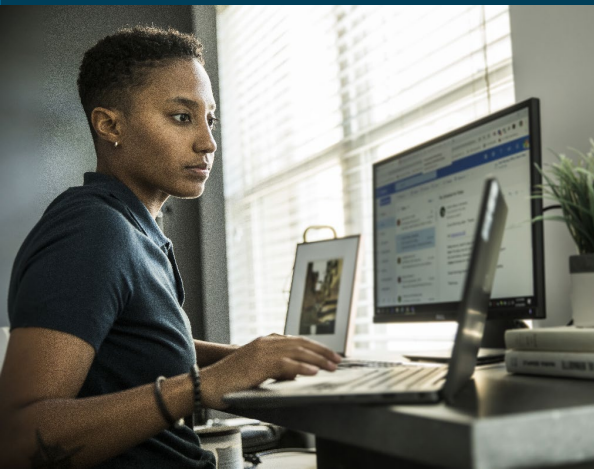


“How can I accelerate the review of promotional material to drive more effective use of marketing resources without incurring additional risk?”

The problem

Compliance review and risk mitigation efforts are often disjointed and slow, causing organizations to lose pace with the growing regulatory obligations of commercial and medical content.



Modern marketing practices such as **consumer personalization** and **omnichannel engagement** require high volumes of marketing material and rapid distribution. **Promotional review systems and processes should be rebuilt** to achieve these new marketing objectives.



Speed to market and label changes

Accelerated product launch timelines and more frequent label changes is increasing the volume of content that requires review and approval



Mounting regulatory pressures

The regulatory landscape continues to evolve, exposing patient-facing promotional materials to more regulatory risk.



Digitization and personalization

New methods of generating digital content introduce additional risk by increasing the speed and variety of health care provider (HCP) and patient interactions



The need to do more with less

There is an industry-wide push to maximize output and efficiency with already overburdened resources

The need

Competitive organizations require ways to organize their view of the increasingly complex environment of regulations and standards while still accelerating their review workflow.



To adapt to these mounting pressures, we have helped our client to achieve up to a **50-70% reduction** in review & approval timelines.

Keeping pace with rapid changes to digital marketing strategies

Our industry leading experience means we are prepared to handle the challenges that arise when attempting to incorporate artificial intelligence (AI) models to make your marketing processes more effective. IntelliDoc has been designed to **rationalize marketing's compliance obligations** so your team can spend more effort **focusing on creating** and coordinating the distribution of effective product campaigns.

Critical processes in your marketing review lifecycle



Change impact tracking

How does your organization scale to enforce multiple regulatory and compliance objectives for marketing collateral?



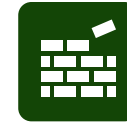
Quality assurance review

How do your marketers manage to create and coordinate product campaigns amidst a growing number of regulatory standards?



Reference tagging and linking

How do you ensure that claims made in marketing collateral are appropriately substantiated in up-to-date reference materials?



Reusable content validation

How do you measure the accuracy of how content is assembled from the library of existing content already within your organization?

Do it with IntelliDoc

IntelliDoc integrates with existing systems containing your label, standards, and other regulatory information to alert you of required responses and revisions.

IntelliDoc processes digital collateral against configured rulesets and flags potential risks informed by your compliance, regulatory, and brand objectives.

IntelliDoc provides a suite of automated tagging and linking features in a user-friendly interface that continuously becomes more accurate as volume increases.

IntelliDoc facilitates third-party analysis of the expectations you have for your modular content and automatically identifies when it is assembled inappropriately.

Services that extend innovative technology

Change impact tracking



We assist business teams in sourcing and organizing relevant compliance and regulatory content and provide a dedicated team to develop document templates for consistent identification of key changes and resulting downstream activities.

Enhanced quality assurance



We engage with content enablement teams to help maintain a central record of channel specific quality and brand content standards, gather requirements for proposed rule changes, and regularly propose updates to a change committee for governance decisions.

Reference tagging and linking



We solicit feedback from end users; ecosystem vendors; brand managers; pre-quality check stakeholders; and medical, legal, and regulatory (MLR) reviewers, in order to make periodic improvements to how our model identifies claims and cites medical studies accurately and consistently.

Reusable content validation



We engage and liaise with the content creation digital teams to understand upcoming feature changes and periodically perform incremental releases to maintain platform compatibility and provide decomposition of the latest digital creation tool templates

Ongoing Support

We provide cloud-based services with single-sign on and multi-factor authentication (MFA) assistance (scalable to meet performance (speed) and concurrency (multi-user) requirements and backed-up daily, archives retained for a rolling period)

Deloitte's Digital Content Transformation Services powered by IntelliDoc™

Automate content review processes to help improve consistency and increase speed to market

Modernize risk management through **intelligent workflow and automation** of your company policies, brand, and content standards, and regulatory and legal compliance criteria

IntelliDoc is a platform designed to integrate digital FTEs and Deloitte domain advisors with your promotional review processes:

- IntelliDoc comes **pre-loaded with configurable rulesets** to automate risk identification such as accepted usage of brand names and applicable inclusion of disclaimers
- **Machine learning (ML)** and **natural language** models may perform review of complex domains
- Plus, **custom rulesets** specific to your organization and industry are available from our multi-disciplinary team of technologists and content professionals
- IntelliDoc may be integrated with your existing process and martech stack



Significantly reduce content review time

Automation works with you to do more with less with near real-time review that may replace processes that typically take days or weeks

How it works in practice



Content submission

- Content is uploaded with metadata that dictates which rulesets are applied
- IntelliDoc supports both basic rules, such as spelling and reference citation applicability, as well as brand and region-specific rules



Automated review

- Content is reviewed and analyzed against pre-configured rulesets
- IntelliDoc's interface identifies content requiring judgment from Marketers, Regulatory, Medical, and Legal reviewers



Disposition alerts

- Users review flagged content alerts and then makes necessary edits to content
- Additional review workflows have been identified as planned features to implement modular content review, reference tagging, and advanced AI/ML validation



Approve and report

- Content is accepted by the user and stored within the application for future reference
- Annotated PDF versions of reviewed content and report is available to export and upload to data asset management systems

Digital Content Transformation – IntelliDoc marketing content review

IntelliDoc has been implemented at multiple large international financial institutions as a technology solution to help organizations accelerate marketing content governance and review through application of intelligent rules in a visual interface and workflow to assist in fulfilling brand standard, compliance, and regulatory objectives.

Client problem



- Client produces a significant amount of marketing content across 20+ marketing jurisdictions sourced from multiple third-party creative firms.
- Each piece of content needed to be reviewed for adherence to a complex matrix of brand standards and compliance rules.
- Each creative firm produced marketing content to varying quality standards and formats making it difficult to implement a standard review process.
- Client incurred lengthy review cycles which represented significant cost due to the manual nature of the current review process.

Our approach



- Introduced near real-time, machine-assisted review features via IntelliDoc and configured brand and compliance standards as rules to automatically identify document improvement areas
- Configured reporting and multi-level workflow features to monitor content progress and provide historical audit trails
- Collaborated through frequent meetings to capture user feedback and drive iterative agile releases for rule improvements and features.

Key solution capabilities

MACHINE LEARNING – NATURAL LANGUAGE PROCESSING – DOCUMENT DECONSTRUCTION
BUSINESS RULES – WORKFLOW PRIORITIZATION – AUDIT TRAIL GENERATION

Outcomes and value



- IntelliDoc reduced review cycles from two weeks to less than a day by providing near real-time automated review of marketing content.
- An updated review workflow reduced excessive review iterations with third-party designers preventing costly additional designer review workshopping.
- Automated processes replaces the time intensive manual processes of review analyst allowing them to spend time on higher value-adding activities and ultimately reviewing more content.
- By consistently applying brand and compliance standards to all content, content quality was consistently higher.
- Client leadership gained increased visibility into their process through detailed reporting metrics and dashboards which enabled them to shorten the content lifecycle by quickly identifying pain points and bottlenecks.
- Client was now able to fast-track time sensitive content through the review workflow by assigning priority review activities to available review analysts.

Digital Content Transformation – IntelliDoc automated template processing

IntelliDoc has been implemented at multiple large international financial institutions as a technology solution to help organizations accelerate marketing content governance and review through application of intelligent rules in a visual interface and workflow to assist in fulfilling brand standard, compliance, and regulatory objectives.

Client problem



- Client worked with high net-worth individuals and used proposal templates to communicate annual performance and sell additional services.
- Performing review of populated templates to identify unapproved or prohibited updates was highly manual, difficult to manage, inefficient, and prone to oversight due to varying compliance standards.
- The lengthy review process led unpredictable content timelines and ultimately extended the revenue cycle for bankers

Our approach



- A technology solution featuring a browser-based workflow application which enables the automated processing of financial proposal templates.
- The solution automatically detects unapproved content or prohibited template alterations as configured through discussions with the client.
- Additional brand and compliance rules were configured to review content added by salespeople.
- Introduced multi-level approval workflows incorporating user roles to accelerate and govern end-to-end review processes.

Key solution capabilities

MACHINE LEARNING – NATURAL LANGUAGE PROCESSING – DOCUMENT DECONSTRUCTION
BUSINESS RULES – MAKER CHECKER AUTOMATION – MODULAR CONTENT REVIEW

Outcomes and value



- IntelliDoc accelerated the end-to-end content development and approval process providing salespeople the opportunity to more frequently interact and deliver quality financial services.
- By automating elements of their current manual proposal review compliance process, analyst and sales resources could now spend more time on higher value-adding activities requiring judgment, relationships, or special knowledge.
- Our solution demonstrated the ability to drive more effective governance throughout the approval process with specified review hierarchies, document archival, and audit trails; providing evidence to substantiate adherence to client's compliance objectives
- The solution provided near real-time feedback from the review process and reinforced appropriate template usage.
- Leadership could gain greater insight into review workflow trends as more detailed data enabled a process to generate and review relevant reporting metrics

Schedule an IntelliDoc demo

Contact our experienced team for more information and to schedule a demo

— Let's talk.



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