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Deloitte 2022–3 Medical Affairs Benchmark Study Summery

Small- to large global bio-pharma companies interviewed

- 12 Heads of Global Medical Affairs
- 6 Leads of Global Medical Operations
- 5 **Business Unit/Region/Field Medical Leads**

External drivers and priority initiatives to address the drivers



Complex Evidence Generation

Increasingly complex evidence generation requirements have made organizations enhance their data analytics and evidence generation capabilities



Diminishing Access to HCPs and changing HCP Preferences

HCPs are increasingly requesting different ways of interactions and access to tailored content to address their unique needs through channels of their preference. This could lead organizations to invest in structured content management capabilities, omnichannel capabilities, and non-traditional means of engagement

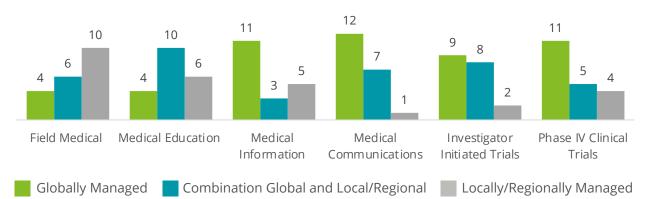


Expanding External Stakeholder Base – Payers and Patients To expand the external stakeholder base, companies are striving to provide a coordinated payer experience across functions and enhancing ways of engagement with patients to drive patient centricity

Degree of centralization of medical affairs functions

Key Findings:

- Organizations surveyed are moving to a more global model doing so can allow them to better take advantage of digital capabilities leading to greater efficiencies
- Companies surveyed are centralizing repeatable operations like medical information and Ph4 trial management in order to better align with global strategy/messaging and achieve efficiencies through automation and AI
- Functions requiring local interactions with the medical community like Field Medical remain locally managed, but many companies surveyed are instituting global tools, standards and education programs



Common methods to measure medical affairs effectivness

Field Medical

commonly used effectiveness measures according

desire to move to more patient outcome measures,

to respondents. Survey participants indicated the

but few have made real progress in achieving this

Operational metrics and surveys are the most

Key Finding:

goal.

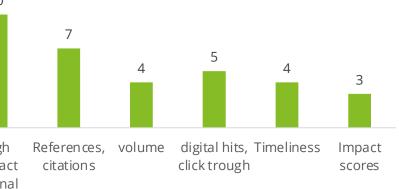


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Publications

Key Finding:

Leading companies surveyed consider the total publication lifecycle when measuring effectiveness. This includes timing related to key conferences; digital activity; and adoption of publication findings in Clinical Standards of Care.



Digital capabilities to help drive effeciency and improve customer communications

The Benchmark Study survey included 15 guestions across multiple Medical Affairs capabilities including MSL Interactions, Medical Information, and Publications. Highlights include:

89%	surveyed implemented or are implementing a medical-specific CRM	 The type and extent of CRM data that can be shared is a challenging topic Medical Affairs leaders surveyed are trying to solve for with Commercial and Legal colleagues Depending on the therapeutic area, many companies are extending CRM to include Payers and Patient Organizations, further increasing the need for information sharing within the organizations
83%	of respondents implemented or are implementing physician-only Medical Information portals	HCPs generally view physician portals as necessary, but few manufacturer-supplied portals are in line with their preferences and do not meet the fundamental requirement to find all information in one central location
65%	surveyed implemented or are implementing structured content authoring for non- promotional content development	The use of structured content authoring is largely limited to promoting content reuse for standard medical inquiry responses . Leading companies surveyed are using this capability to support the customer's growing desire to access clear concise , "bite size" information on demand . Developing an efficient process to review this content, while maintaining Compliance, can be challenging
65%	of respondents are implementing digital capabilities to support omnichannel	 Many Medical Affairs organizations are working with Commercial colleagues to develop an enterprise-wide Omnichannel capability; Others are focusing on Medical Affairs touchpoints first with a long-term plan for joining in a cross-functional effort. Of the Medical Affairs organizations implementing omnichannel, only 37% surveyed report they are implementing a comprehensive medical interactions repository needed to properly support this capability

change over time?

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Medical Affairs will use digital capabilities to drive actions and messages across all channels

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Future of medical affairs

Survey respondents were asked the question: At a high level, how do you expect the role of Medical Affairs to

Collaborative evolution of Medical Affairs roles

Medical Affairs will be an equal partner with Commercial and *R&D* to set company strategy

Early involvement in pipeline Medical Affairs will be involved in pipeline strategy & discussions

Digitally-driven Medical Affairs team

Contextualization of clinical data

Medical Affairs will meet the demand of HCPs by delivering complex scientific conversations and providing needed context

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