Amplity
HEALTH

Remote Engagement & Outsourcing Survey Results

An Amplity Health White Paper

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Survey Respondents

Pharma and Biotech decision makers (N=30) who influence the Remote Engagement strategy.

Where Survey Respondents Reside

California **23%**

New York **20%**

New Jersey **13%**

Massachusetts **10%**

N. Carolina **10%**

Pennsylvania **10%**

Georgia **3%**

Illinois **3%**

Indiana **3%**

Texas **3%**

Percentage of Survey Respondents

Influence over Remote Engagement Strategy

I make the final decision alongside other stakeholders 47%

Heavily involved in the process, but not in making the final decision 43%

I alone make the final decision 10%

Percentage of Survey Respondents

Survey Respondents

Industry

Pharmaceuticals
80%

Biotechnology
17%

Medical devices
3%

Percentage of Survey Respondents

Department

Sales
57%

C-Suite/Executive
30%

Marketing
13%

Percentage of Survey Respondents

FIRM SIZE   Total Sales of your firm

$10B or more	**$5B–$9.99B**	**$1B–$4.99B**	**$500M–$999M**
33%	17%	30%	20%

Percentage of Survey Respondents

Pre-COVID & Current
Remote Engagement Strategy

Remote Engagement
Strategy Shift

Pre-COVID

Only 40% of respondents had a Remote Engagement Strategy

Did you have Remote Engagement Strategy pre-COVID?

YES   40%

NO   60%

Percentage of Survey Respondents

Current

87% of survey respondents will have a "significantly" or "somewhat" more emphasis on Remote Engagement

Emphasis change on Remote Engagement

Significantly MORE 67%

Somewhat MORE 20%

Unchanged 7%

Somewhat LESS 3%

Significantly LESS 3%

Percentage of Survey Respondents

Pre-COVID Remote Engagement Strategy

- Remote Engagement was considered a "Secondary Sales Strategy"
- Companies that had a Remote Engagement Strategy, only 25% of respondents considered Remote Engagement a "Primary Sales Strategy"
- Clients focused primarily on "digital" and "webinars" for their Remote Engagement strategy

> " We worked with several technology solution providers to develop a piggyback strategy off of existing telemedicine technology to engage HCPs (both practices and institutions) for sales, education and monitoring. The goal was to replace the normal F2F interaction with a more efficient strategy that utilized less specialized manpower. – C-suite/SVP "

> " Inside sales [Remote Engagement] would run campaigns to get reorders, etc. – Marketing Manager "

> " [A] virtual sales strategy to cover white space and vacant geographies, back-fill open defined territories while hiring, training, leave of absence, etc. is in process; white space marketing to open and fill geographies to help with alternate channels to reach HCPs. – Executive Director Marketing "

Current Remote Engagement Strategy Survey Responses

"WHAT SPECIFICALLY HAS CHANGED WITH REGARDS TO YOUR REMOTE ENGAGEMENT STRATEGY"

> " There was a huge change; suddenly our customers are much more open to our digital remote engagement strategy than before. **We feel the digital acceleration has been advanced by 6 years.** "

> " Went from very little remote to contingency plans for 100% remote. "
>
> – Regional Sales Director

> " Before the focus was perhaps 25%, now it is 100%.
>
> – C-suite, Senior Director Medical Affairs "

> " We're still in the evaluation stage of determining whether remote engagement will have a permanent role within our organization once F2F contact becomes more routine. This requires weighing the ROI over time (remote efforts require more infrastructure and initial investment, obviously), and make a direct comparison between the two channels to determine how complimentary the in-person/remote approaches really are. — C-Suite, Director/SVP "

Current Remote Engagement Strategy Survey Responses

"WHAT SPECIFICALLY HAS CHANGED WITH REGARDS TO YOUR REMOTE ENGAGEMENT STRATEGY"

"
It is very important. Low volume providers can be managed via remote engagement.

– Specialty Sales Development Executive
"

"
Increased budget towards remote engagement.

– National Sales Manager
"

"
Effective so far because pandemic is affecting everybody and every function or industry. Therefore, it is a necessity at this moment, and it is effective. However, once things are [headed] to the new norm, face to face interactions will continue to be critical.

– Sales Director
"

"
Heavier investment in Digital Tools to engage customers. Education of sales team for remote engagement.

– Director of Marketing
"

Ranking Remote Engagement Strategies

THESE STRATEGIES ARE RANKED FROM 1–6 WITH 1 BEING THE BEST RANKING.

- A very strong and clear interest in the Reach, Frequency, High-Decile Accounts and Partnership with Field Sales

- "Vacancy Management" and "Whitespace" are less important

SURVEY RESULTS

Strategy	Ranking
Reach	2.9
Frequency	2.9
High-decile accounts	3.3
Partnership with Field Sales	3.4
Vacancy Management	4.1
Whitespace	5.4

Remote Engagement for Different Types of Brands

Brand Data

- The "Maturity of the Brand" was only important for 23% of respondents when employing a Remote Engagement strategy.

- "Type of HCP Target" was cited by 50% of respondents when employing a Remote Engagement strategy

Low vs. High Complexity Brands

- Respondents are likely to employ a Remote Engagement Strategy for High Complexity Brands (86% vs. 57%)

Low Complexity Brands (n=14)

Likelihood to use Remote Engagement strategy

Very likely 43%

Somewhat likely 14%

Neither likely nor unlikely 29%

Somewhat unlikely 7%

Very unlikely 7%

Percentage of Survey Respondents

High Complexity Brands (n=14)
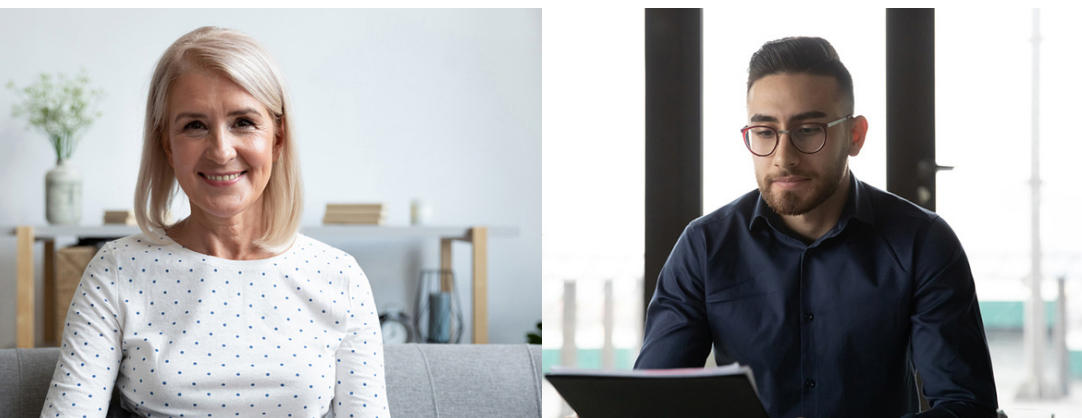
Likelihood to use Remote Engagement strategy

Very likely 43%

Somewhat likely 43%

Somewhat unlikely 14%

Percentage of Survey Respondents

Key **Takeaways**

- Pre-COVID, 60% of respondents did NOT have a Remote Engagement Strategy

- COVID-19 has dramatically moved up the timelines for the digital transformation of a firm's salesforce

- Because of the COVID-19 Pandemic, 87% of Survey Respondents now say they will have a "greater emphasis" on remote engagement

- Reach, Frequency, Focus on High-Decile Accounts and Partnership with Field Sales were the most important factors when considering a Remote Engagement strategy

- High complexity brands & the type of HCP target were main factors behind implementing a Remote Engagement strategy

  – High complexity brands and harder to access HCPs require multi-channel approaches to effectively engage

Pre-COVID & Current Outsourcing Strategy for Remote Engagement

Outsourcing More
in the Future?

IN THE FUTURE, NEARLY 57% OF SURVEY RESPONDENTS WILL BE OUTSOURCING MORE.

Outsource more or less?

Outsource significantly more	**7%**
Outsource somewhat more	**50%**
No change	**36%**
Outsource somewhat less	**7%**

Percentage of Survey Respondents

"Outsource More"
Why Was this Said?

- 29% of respondents mentioned "Flexibility" as a reason
- 35% of respondents mentioned "ROI" or "Cost" as a reason
- 24% of respondents mentioned "lack of expertise" or "headcount" as a reason

> Need to increase efficiency of customer-facing by exploiting novel routes.
>
> – Director of Supply Chain

> To have flexibility in managing resources.
>
> – Sales – Business Excellence

> Flexibility, geographic expansion, ROI, internal prioritization of other oversight functions.
>
> – Director Commercial Strategy

> Cutting headcount, however the need to still engage customers.
>
> – Regional Sales Director

> Increase flexibility and avoid having to retrain entire workforce on new covid-19 regulations.
>
> – C-suite VP Operations

> To lower costs of running offices.
>
> – Head of Sales & Marketing

What are your considerations
when deciding to outsource?

" Cost-cutting is always a factor, but this is secondary to the sales generated - if an outsourced process can yield the same results for less money and reduced headcount, it's attractive. But if service (or brand perception or sales) decreases, the opportunity is significantly less attractive. **– C-suite, Director/SVP** "

" With increased usage of technology in future, contracted sales force may also play a role supplementing the own sales force. **– Sales Director** "

" We weigh the quality and degree of control vs. the cost.
– Head of Strategy for Sales and Marketing "

" Need to increase efficiency of customer-facing by exploiting novel routes. **– Director of Supply Chain** "

What are your considerations
when deciding to outsource?

> Primarily cost, along with the complexity of interaction between customer/HCP and company. – C-suite, Director SVP

> To have flexibility in managing resources.
>
> – Sales Business Excellence

> Both offer flexible options, but cost is the primary factor.
>
> – VP Operations

> Increase flexibility and avoid having to retrain entire workforce on new covid-19 regulations. – VP Operations

Key **Takeaways**

- 57% of Survey Respondents are looking to outsource more in the future, only 7% will outsource less.

- Increasing use of new platform technologies and the need to integrate those digital strategies into existing sales teams, are the key reasons firms will outsource more.

  - How firms adapt to rapidly changing markets and technologies will be key to future success

  - Outsourcing provides an easier way to meet changing market conditions

- Firms are relying more heavily on outsourcing because they believe outsourcing provides additional

  - Flexibility

  - Cost Savings

  - Increased ROI

  - Experience and Expertise