

Market Research and Analytics Capability

Enabling analytics, empowering customer insights

December, 2014



ENABLING TECHNOLOGY,
EMPOWERING PRODUCTIVITY



Netcom Background

- Founded in 1987
- Corporate office and Global Development Centre located in Edison NJ with a offshore location in Pune, India

Key Focus Area

- Analytics and Market Research
- Mobile Applications Development
- Enterprise Management
- Custom Software Development
- Assessment Services

Key Partnerships

SAS, Web Trends, At Task, Kxen, CA

Our Clients

Over 200 Clients, over 40% in Fortune 1000

Our Clients and Partners

Projects	Customers	Partners
<p>Market Research and Analytics</p> <p>Digital Analytics</p> <p>Web/Mobile Application Development</p>	 <p>Bristol-Myers Squibb Together we can prevail.*</p>  <p>NJM Insurance Group</p>  <p>Bio-Technology General Corp. Evolving Pharmaceuticals</p>  <p>FOLKSAMERICA REINSURANCE COMPANY</p>  <p>BEAR STEARNS</p>  <p>AMC</p>  <p>PNC</p>	 <p>sas THE POWER TO KNOW.</p>  <p>ca</p>  <p>ASENTECH</p>
<p>Network Infrastructure</p> <p>Network Management Services</p>	 <p>Allstate You're in good hands.</p>  <p>NASDAQ</p>  <p>Merrill Lynch</p>  <p>JPMorgan</p>  <p>LEHMAN BROTHERS</p>  <p>Sun Microsystems</p>  <p>BEAR STEARNS</p>	 <p>ca</p>  <p>CISCO</p>

Market Research and Analytics

- Qualitative Solution Overview
- Recall Studies
- Market Assessment
- Rapid Response Analytics
- Awareness, Trial and Usage Study
- Global – EU Market studies and evaluation

Program Evaluation and ROI Analytics

- Telesales
- Marketing Mix Modeling

Digital Analytics

- Web Analytics
- Mobile Analytics
- Listening Platform

Performance Management

- Dashboard Solution
- Reporting Solution
- Analytic Information Hub
- Project Management

Qualitative Solution Overview

Recall Studies

Market Assessment

Rapid Response Analytics

Awareness, Trial and Usage Study

Global – EU Market studies and evaluation

Marketing Operations Management

**Strategic
Planning**

Forecast
Sales, Develop
Marketing Budget,
Optimize
Resources
(Market Research
Managed Care
& Analytics)

**Content
Management**

Create, Save and
Archive Contents
For Marketing
Campaigns,
Physician and
Patient Education,
Document
Management

**Multi-Channel
Campaign
Management**

Target Customer
Segment, Select
Campaign,
Schedule and
Deliver Campaigns,
Measure Campaign
Performance
(Market Research
& Analytics)

**Workflow
Automation**

Approval
Management

Qualitative Solutions Overview

Netcom provides a broad range of qualitative research services:

- Experienced moderators who specialize exclusively in pharmaceuticals, biotech and medical device research
- Broad work with all respondent types, including physicians, payers, patients, pharmacists and various other health care providers

Typical study objectives include:

- Message Recall
- Market assessment
- Disease overview
- Market evolution
- Identification of unmet needs
- Competitive assessments
- Identifying key product attributes
- Product profiling and concept testing
- Pricing, reimbursement, and value proposition assessments

Traditional Qualitative Methodologies



- Telephone interviews (US, and Global, including interviews with pharmacists, physicians, payers, patients, etc.)



- Face-to-face interviews



- Focus groups - including both in-person & on-line chat room options

Message recall study has successfully supported message effectiveness.

24-48 Hour Post-Detail Recall

Online 24- to 48-hour post-detail surveys ensure accuracy of physicians' recall of sales rep discussion.

Unaided and Aided Recall

Rapid Recall employs both unaided and aided recall methodologies as well as core and component selling messages.

100% Target List Match

Sample is stratified and selected from clients' own target pharmacist/physician universe.

Message recall studies are designed to monitor message compliance and the effectiveness of sales force promotional efforts.

Methodology

Online 24- to 48-hour
post detail survey

Sample stratified and
selected from clients'
own physician target
universe

Physicians pre-
screened to ensure
they recall being
detailed

Determines significant
differences in physician
recall between
messages

Utilizes Benchmark
Database to benchmark
performance

Utilizes advanced
analytics to identify
components of a
successful call

Uses

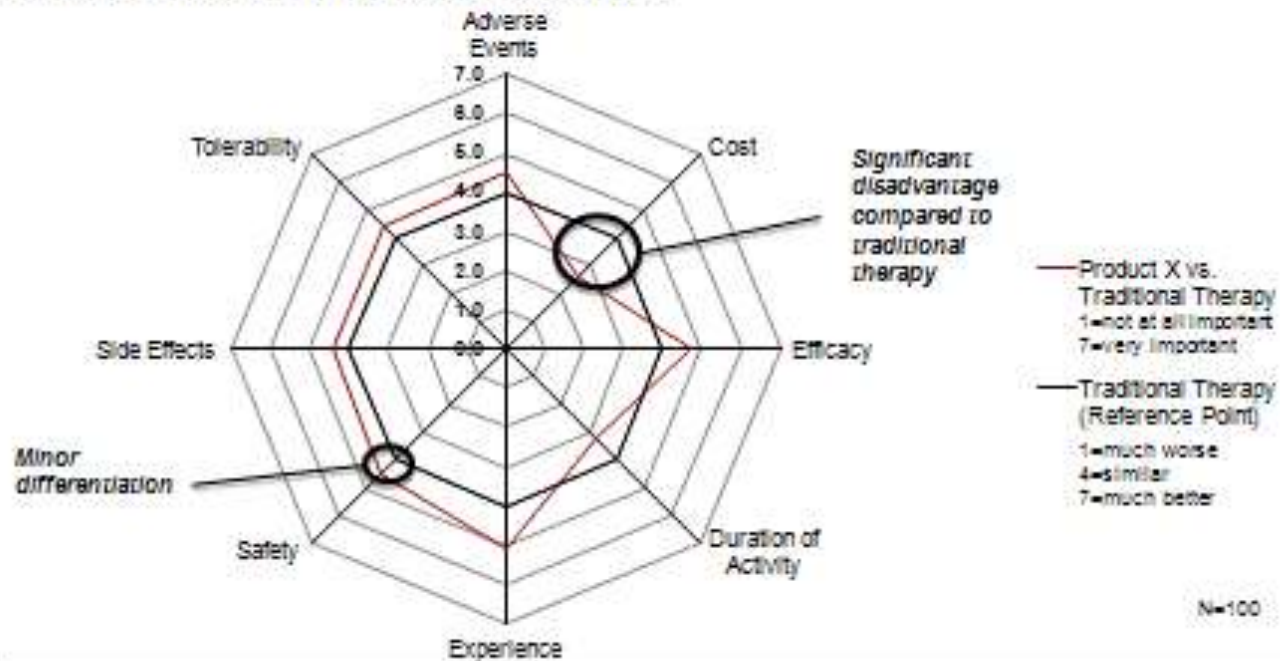
Clients have used Recall to

- Diagnose opportunities to improve sale execution and effectiveness
- Assess need for additional support materials to substantiate messages (e.g., reprints, clinical trial data)
- Develop sales training programs to address how to use specific materials, handle objections, tailor messages to certain specialties/segment, and deliver the most effective detail
- Get an early read on competitive counter-activities and insights on future utilization
- Determine which messages are having the most impact on brand performance
- Enhance district-level incentive compensation initiatives

Recall studies have helped a large number of pharmaceutical clients to improve the effectiveness of their field forces and optimize sales.

Market Assessment and Primary Research Product Positioning

Two main aspects in the positioning of Product X – superior safety profile and costs benefit of reduced adverse events, do not resonate well with participating physicians.



Positioning on cost effectiveness of Product X may be limited based on assumptions of limited adverse event concerns.

Define Business Issue

Pharmacist Universe (SKIPTA)

Develop Survey

Sample stratified and selected from pharmacist target universe

Develop Discussion Guide

Analyze Results and Generate Reports

Traditional Qualitative Methodologies



- Telephone interviews (US, and Global, including interviews with pharmacists, physicians, payers, patients, etc.)



- Face-to-face interviews



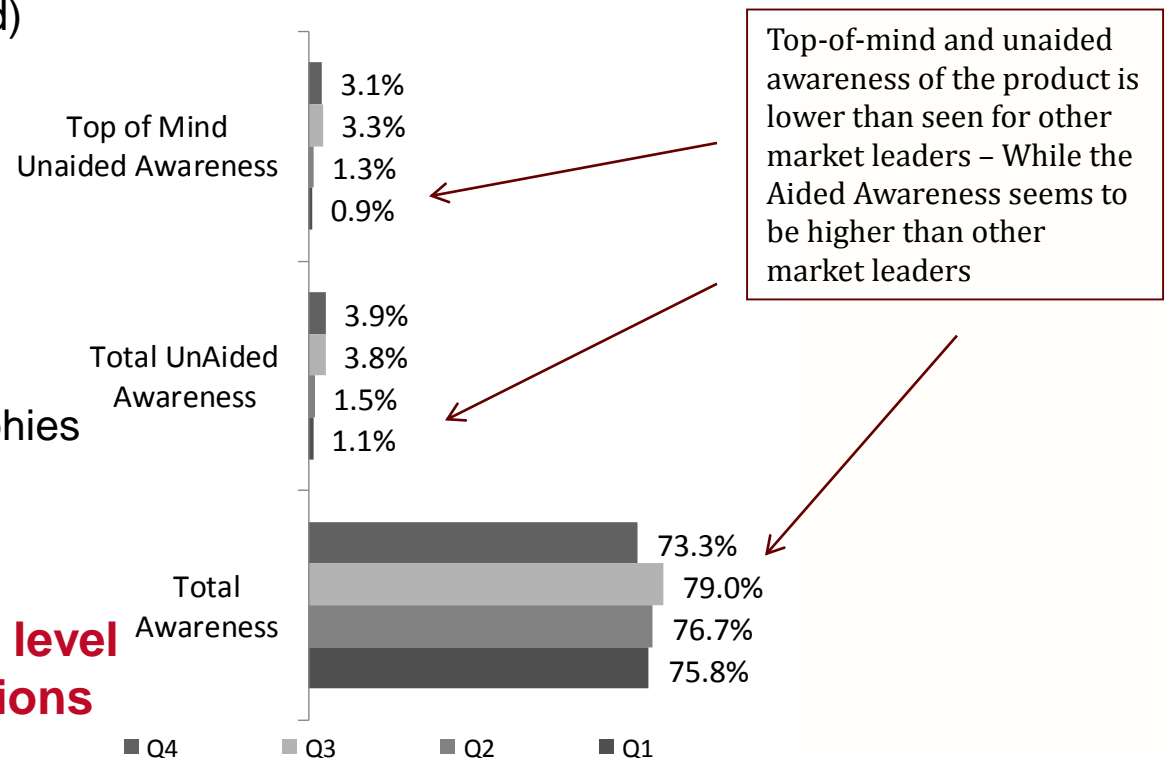
- Focus groups - including both in-person & on-line chat room options

Awareness, Trial & Usage (ATU) Study

Accurately track how the products are being perceived and used by capturing the following key parameters:







- Awareness (aided and unaided)
- Attitude or Opinions
- Product attribute ratings
- Brand equity and usage
- Physicians' treatment philosophies
- Prescribing behaviors

Identify reasons for certain level of awareness and implications for different scenarios



Global-EU Market Studies and Evaluation

Netcom's staff has significant experience conducting primary research with a wide array of respondents across the globe. Our primary focus area is conducting research in the US, Canada, and EU5 countries, with a growing focus on Asia and Latin/South America.

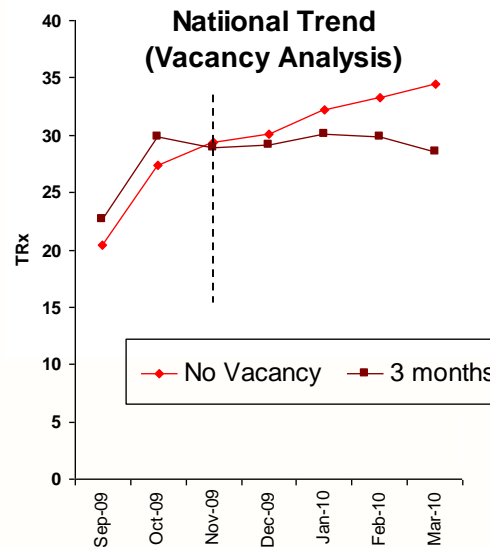
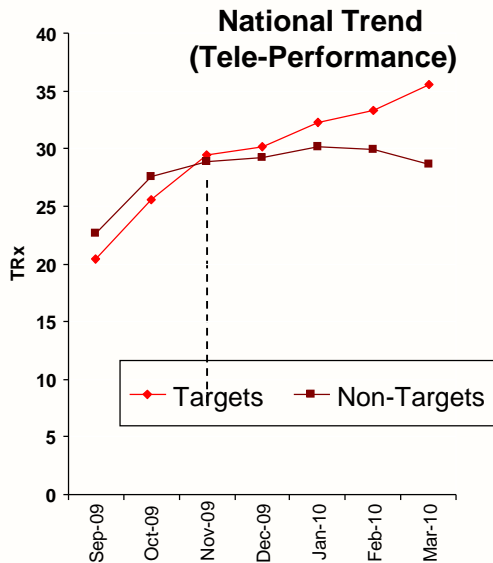
Respondent Types		Channels	Regions	
Pharmacists	Pharmacy Directors	Patients	MCOs	US 
Physicians	Medical Directors	Caregivers	PBMs	Canada 
NPs	Contracting Directors	Support Groups	GPOs	EU5 
Nurses	Quality Directors	Pharmacists	Hospitals / Institutions	CEE 
Office Managers	Employer HR / Benefits		LTC Facilities	Asia 
Hospital Administrators	Pharmacists		Specialty Pharmacy	LA 

Tele-performance Evaluation Marketing Mix Modelling

Tele-Performance Evaluation-Test Control Analysis

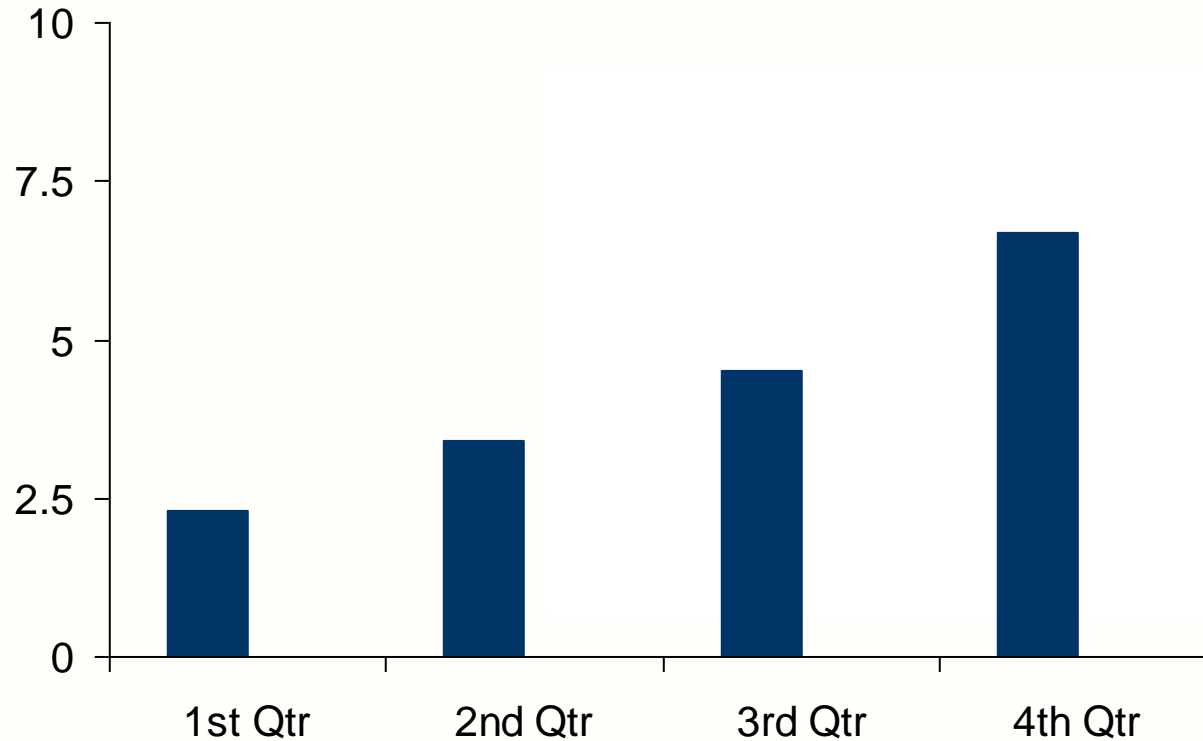
Evaluates the Effectiveness of Tele-performance

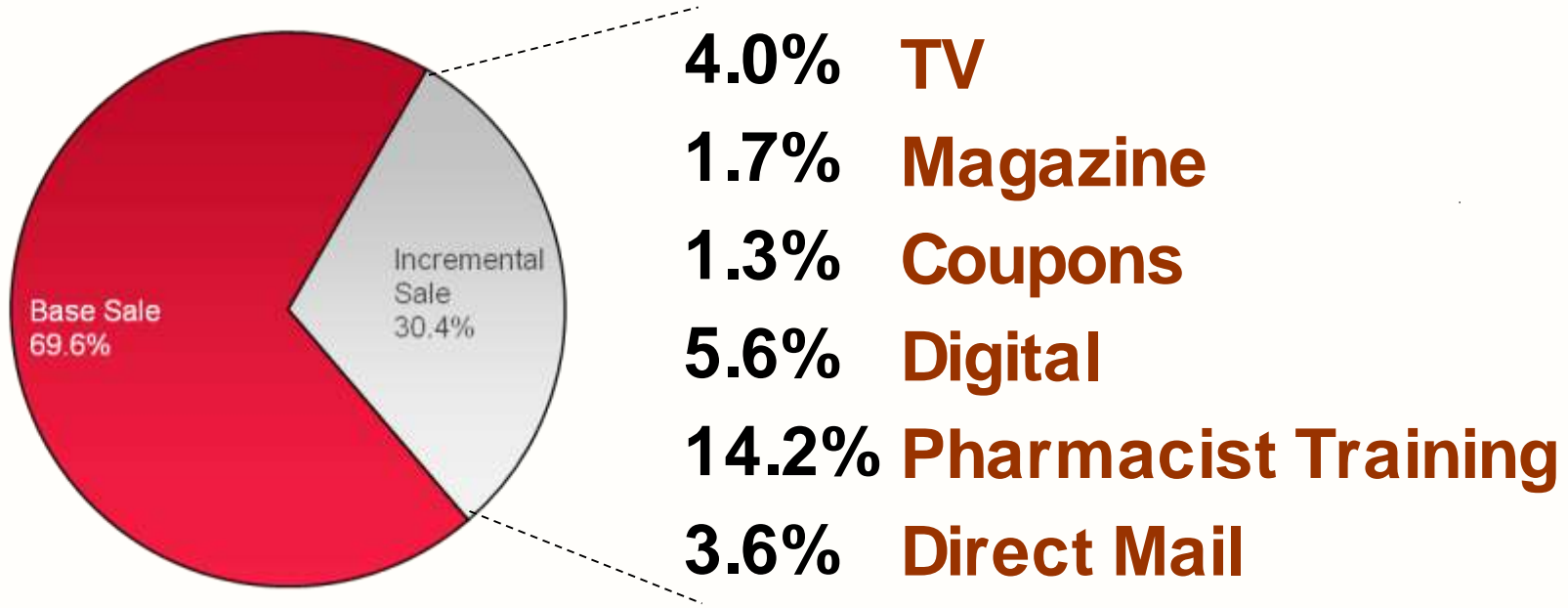
- **Other Regional Marketing Initiatives**
 - Tele-detailing
 - Voucher
 - Coupon
- **Territory Vacancy**



Tele-Performance Evaluation - ROI Estimation

Tele-performance ROI By Quarter for 2011



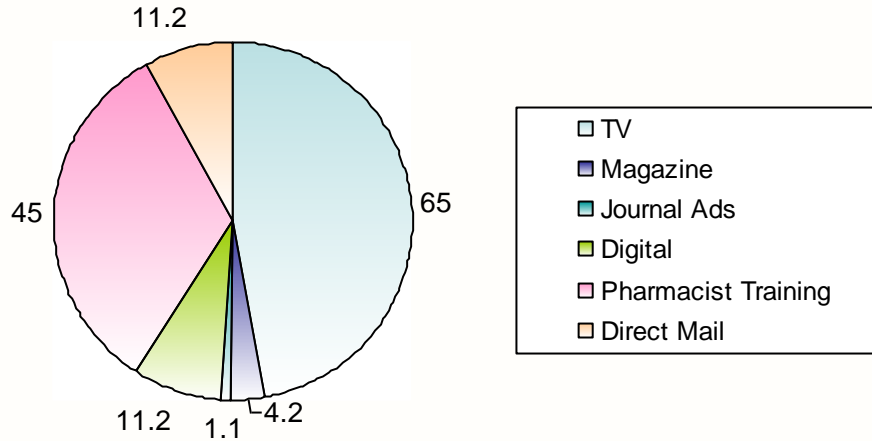


Base Sales: Natural demand for the product driven by economic factors like pricing, long-term trends, seasonality, and also qualitative factors like brand awareness and brand loyalty.

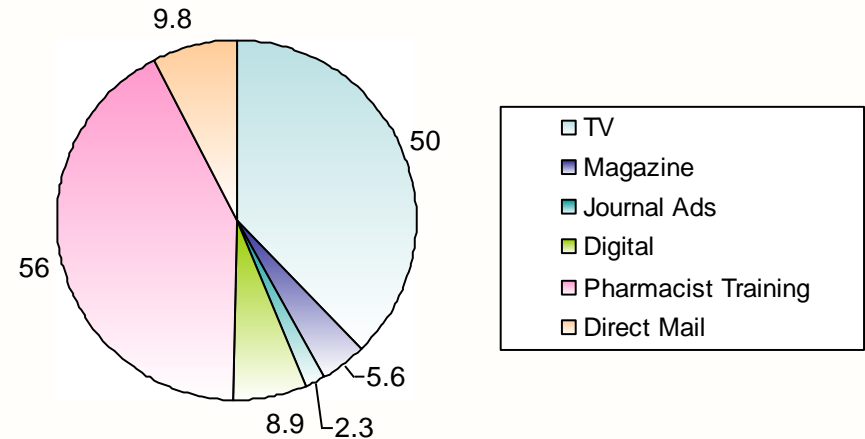
Incremental Sales: Incremental sales are the component of sales driven by marketing and promotional activities.

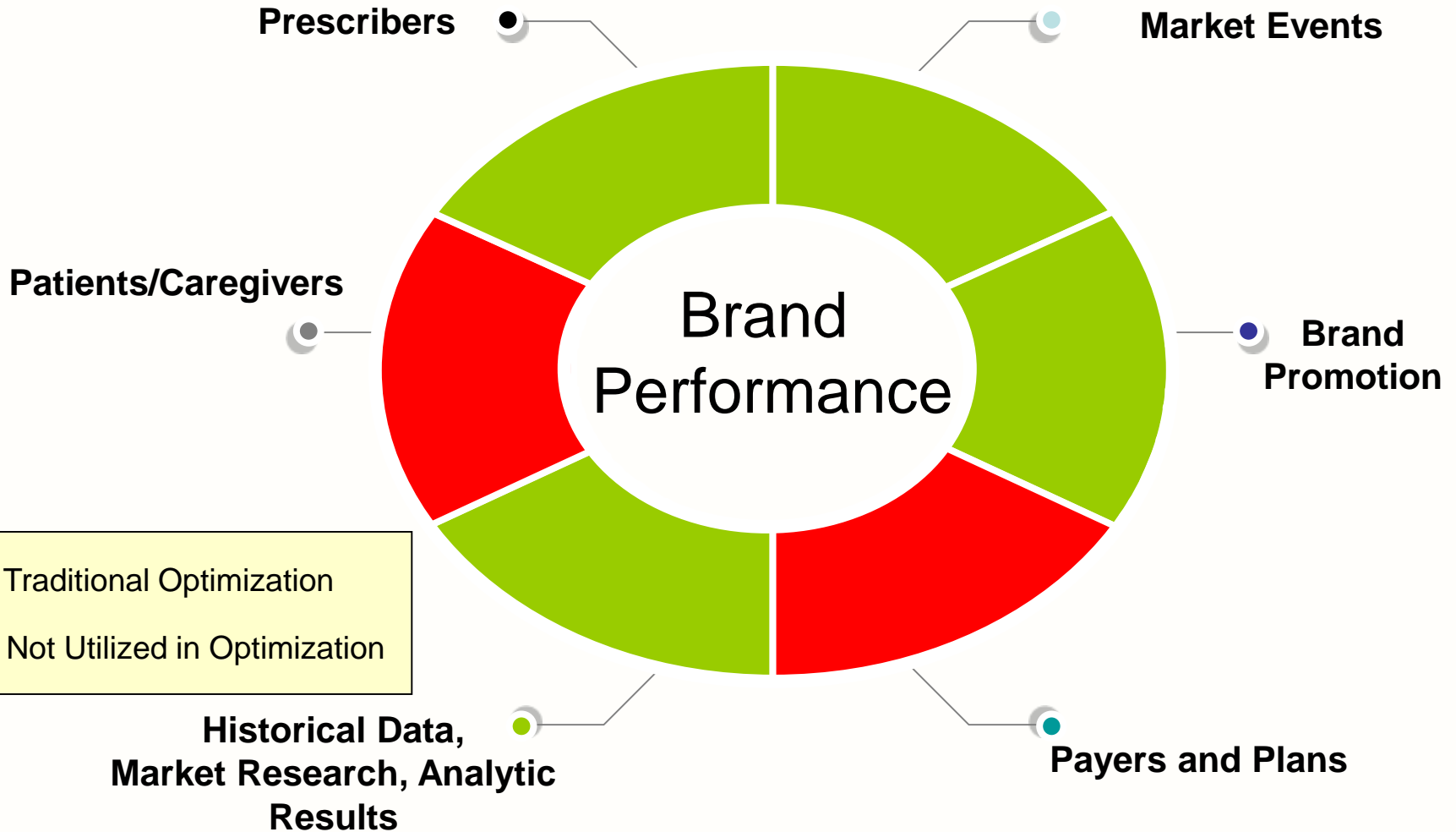
Portfolio Optimization - Marketing Mix Modelling

Optimal Marketing Spend (\$MM) By Activities: 2012



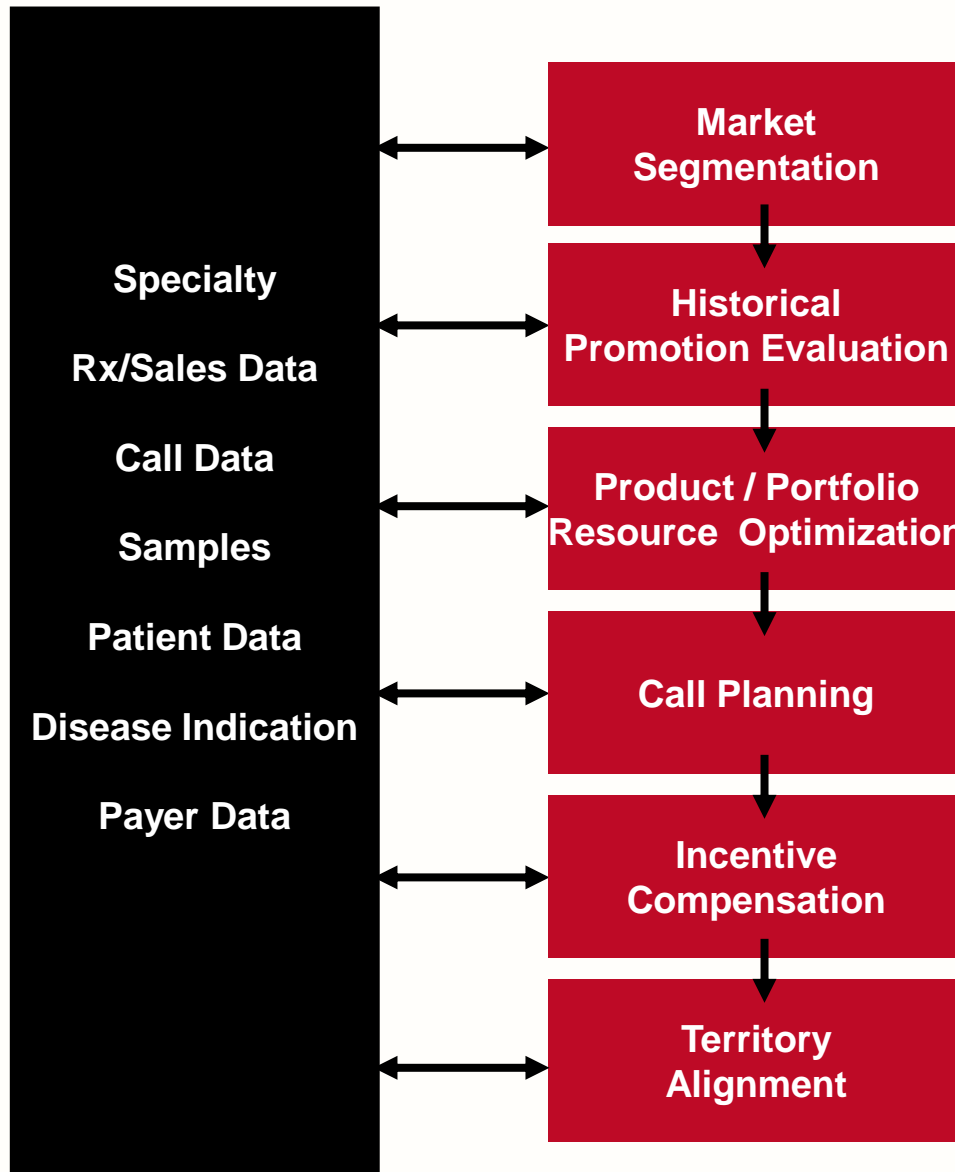
Marketing Spend (\$MM) By Activities: 2011





Resource Allocation Process Optimal Reach and Frequency

EMPOWERING PRODUCTIVITY



Changes in market segmentation will reflect in territory alignment / incentive compensation and territory alignment in the marketing resource optimization process.

Reach right audience with relevant message and compelling site experience.

Web Analytics

Mobile Analytics

Listening Platform

E-Commerce Sells Products

KPI:

- Cost Per Conversion
- Order Value
- Items Per Completed Cart
- Conversion Rate
- Conversion Rate for Campaign X
- Shipping Cart Abandonment Rate

Content Generates New Visitors and Page Views

KPI:

- User Growth for Given Period
- Traffic Growth for Given Period
- Traffic from Search Engine
- Average Page Views per Visit
- Percent Low/Medium/High Time Spent Per Visit

Lead Generation Sells Services

KPI:

- Page Bounce Rate
- Cost Per Visitor
- Cost Per Conversion
- Revenue Per Visitor
- Conversion Rate
- Conversion Rate for Campaign X

Customer Support Help Users

KPI:

- User Growth for given Period
- Traffic Growth for given Period
- Page Views per Visit
- Percent New Visitors
- Percent Returning Visitor
- Percent Visitor using Search

- **Landing Page**
- **Specific Call to Actions (CTA)**
- **Video**
- **White Papers**
- **Promotions**
- **Lead Generation Form**
- **Special Offers**
- **Printable Coupons**

Sample Engagement Metrics

Length of Visit	# of Visitors	%
1 Min.	318,000	89%
2 Min.	10,560	3%
3 Min.	7,440	2%
4 Min.	5,040	1%
5 Min.	3,840	1%
> 5 Min.	12,000	3%

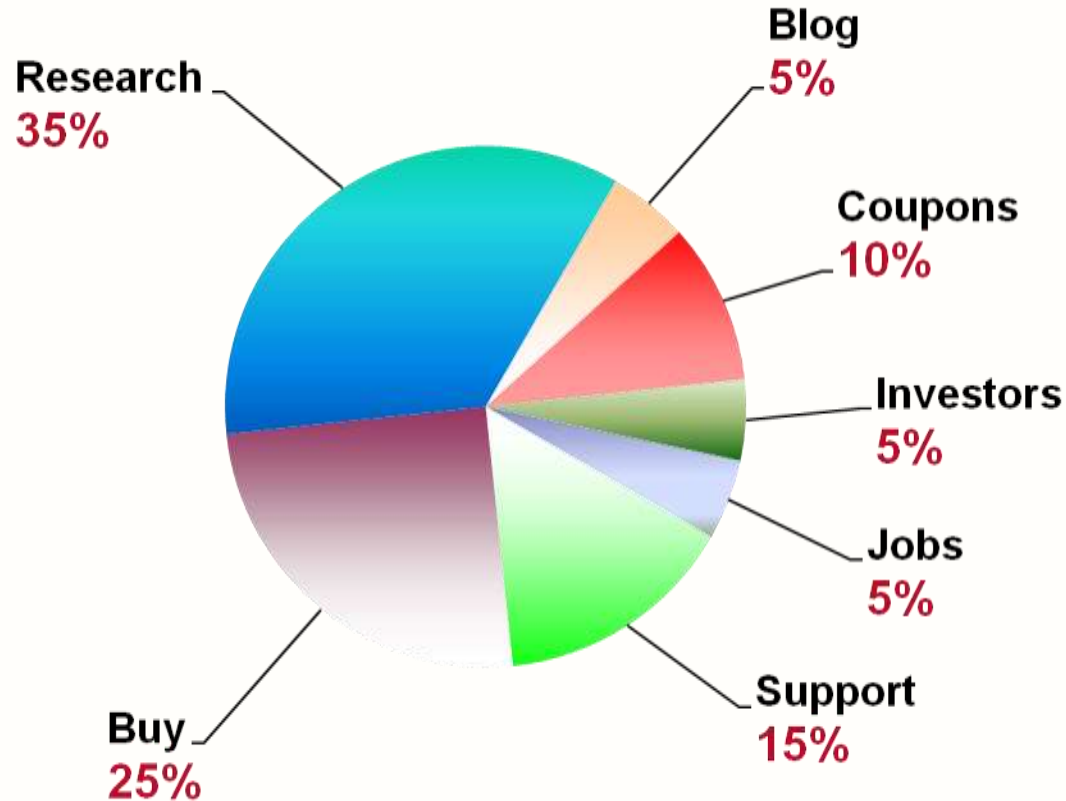
Gap Between Visits	# of Visitors	%
0 Days	15,000	54%
1 Day	4,500	16%
2 Days	3,200	12%
3 Days	2,400	9%
4 Days	1,500	5%
> 4 Days	1,000	4%

What can we do to keep the visitor to stay over 1 minutes and visit more often.

Link specific media placement to actions on your web site and determine which attributes influence user behavior

Visitors	Media	Site	Actions
Impression	Search	Page Name Visits	Form
Response	Display	Bounce Rate	CTA
\$/Response	Social	Engagement Rate	Purchase
Conversion Rate	Video	\$ per Engagement	

- **Spend – How much am I paying to get my message out there**
- **Impressions – How many eye balls are exposed to my message**
- **Response – How many people are compelled by my message**
- **Cost/Response – How much does it cost me to get a visitor to my site**

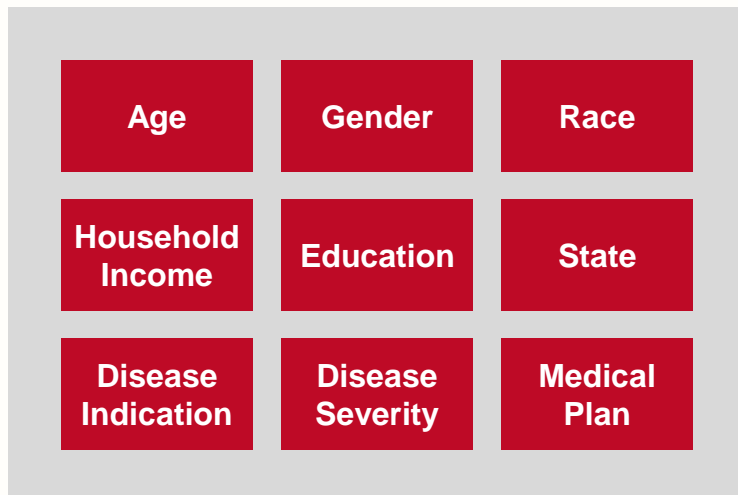


35% Researchers can be converted into Buyers

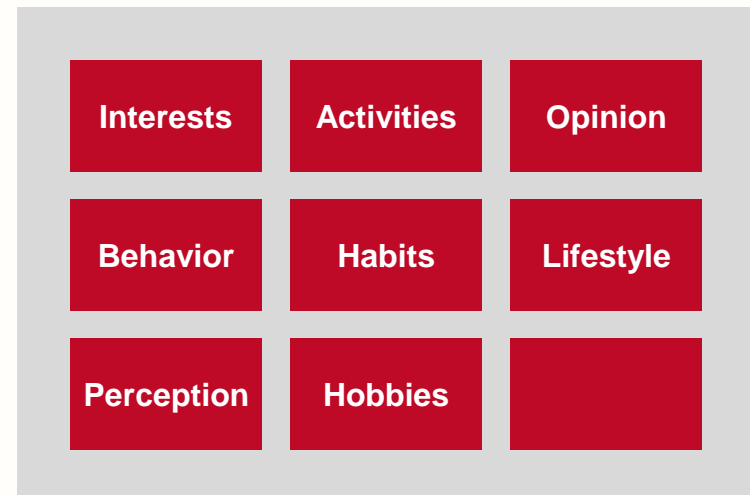
Visitor information can be captured using web survey and click stream data.

Who is just looking and who is looking to buy – Provide relevant contents and offers based on visitor behavior scoring and segmentation,.

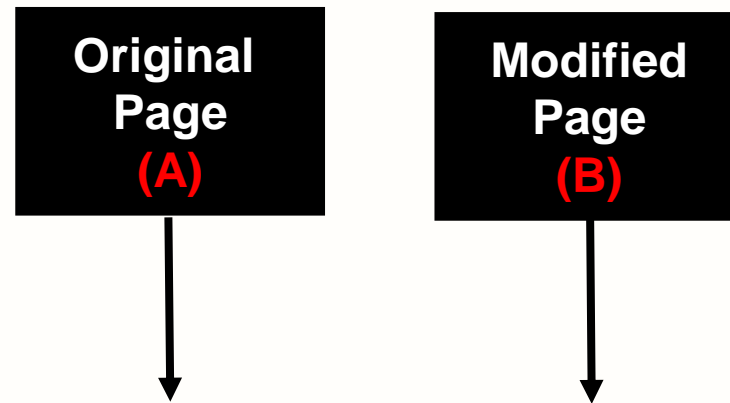
Demographics



Psychographic



- **Test big changes to layouts, outcomes could be more clicks through conversion, lower bounce rate and more sales.**
- **From landing page, portion of live traffic is sent to original page (A) and the rest is sent to modified page (B) and monitor the web performance for conversion rate or other KPIs.**



If performance of page B is better than A, then select page B, otherwise revert back to original page for all users.

Mobile Device Information

- Model
- Manufacturer
- Screen Resolution

Visitor Identification

- Number of Visits/Unique Visits
- Unique User Identification
- Repeat Visits
- Long Term Customer Loyalty
- Record Click from Advertisement

- **Web Trends**
- **Omniure Site Catalyst**
- **Coremetrics Online Analytics**

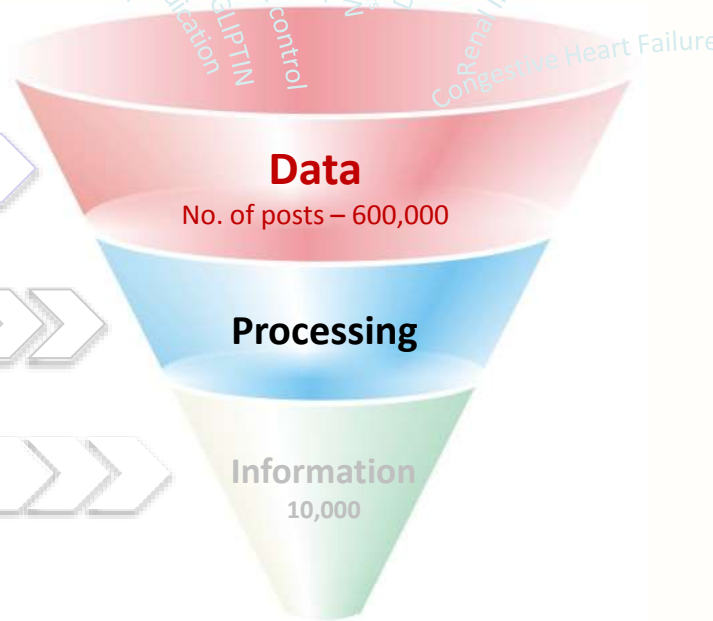
Concept - Noise to Information

Noise Millions of sites and posts to listen



Configuration, validation and optimization

Algorithm for data sanitization

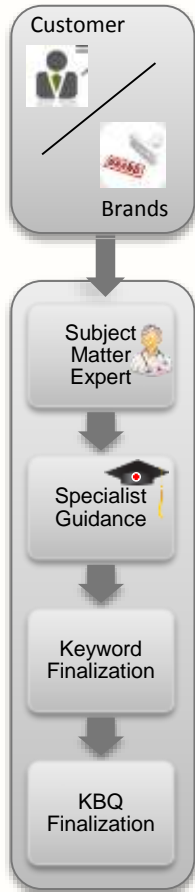


Actionable Insights

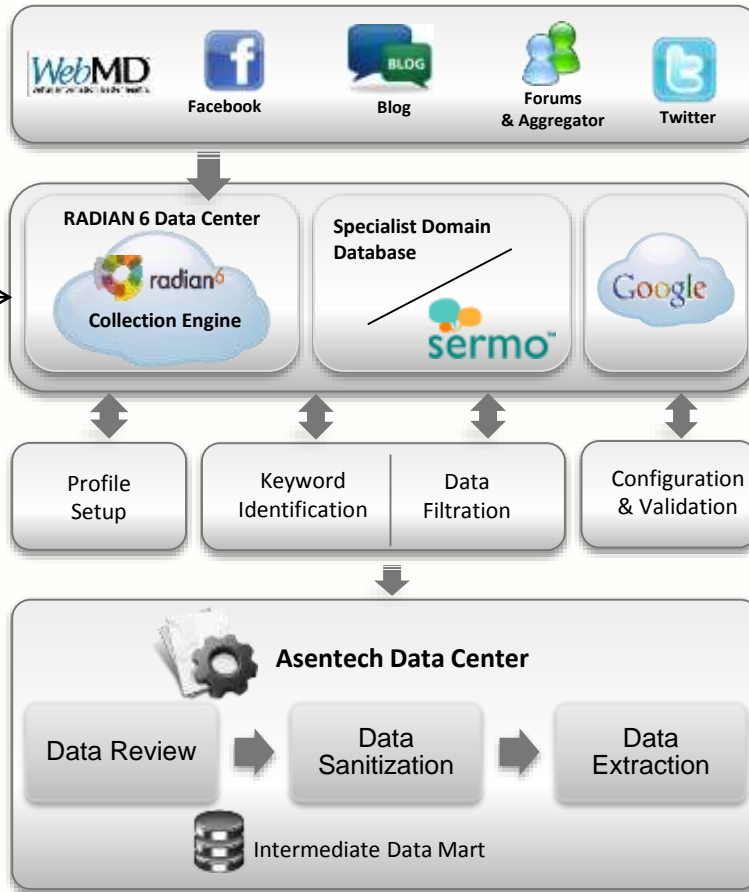


Listening Platform & Analytics: Architecture

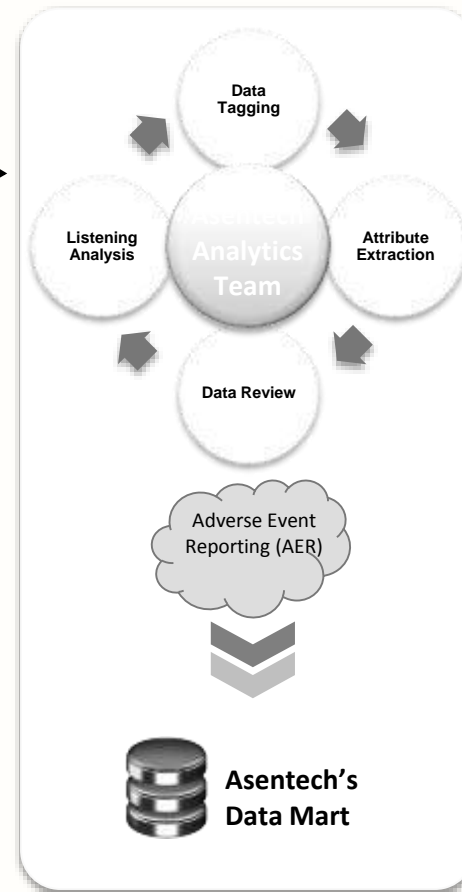
Requirements Gathering



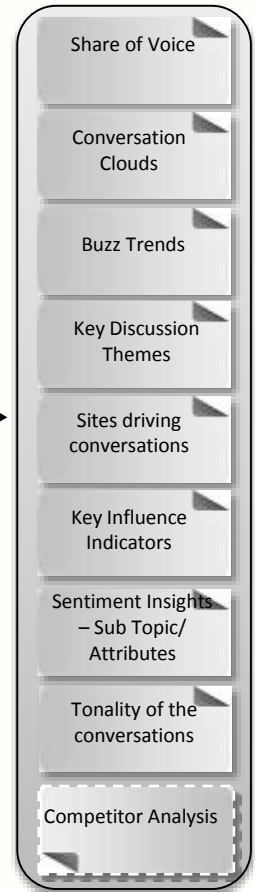
Listening Process



Listening Analytics



Reports & Actionable Insights



Dashboard Solution
Reporting Solution
Analytic Information Hub
Project Management

Finance & HR

- Financial Consolidation Reporting
- P&L Analysis by Division / Business Unit
- IFRS / GAAP / SOX Compliance
- Risk Management & Sustainability Report
- Workforce and Benefits Analysis



Executive

- Balanced Scorecard
- Performance Management
- Predictive Analysis
- What-if Analysis
- Activity-Based Management



Clinical Trial Management

- Planning and forecasting
- Manufacturing, packaging, shipping, and distribution
- Inventory management and QA/QC
- Reporting, traceability, and reconciliation



Sales & Marketing

- Sales Performance
- Sample Management
- Physician Visit Management
- Drug Campaign Management



Drug Product Quality

- Raw Material Procurement
- Compliant Manufacturing
- Laboratory Management
- Equipment Maintenance

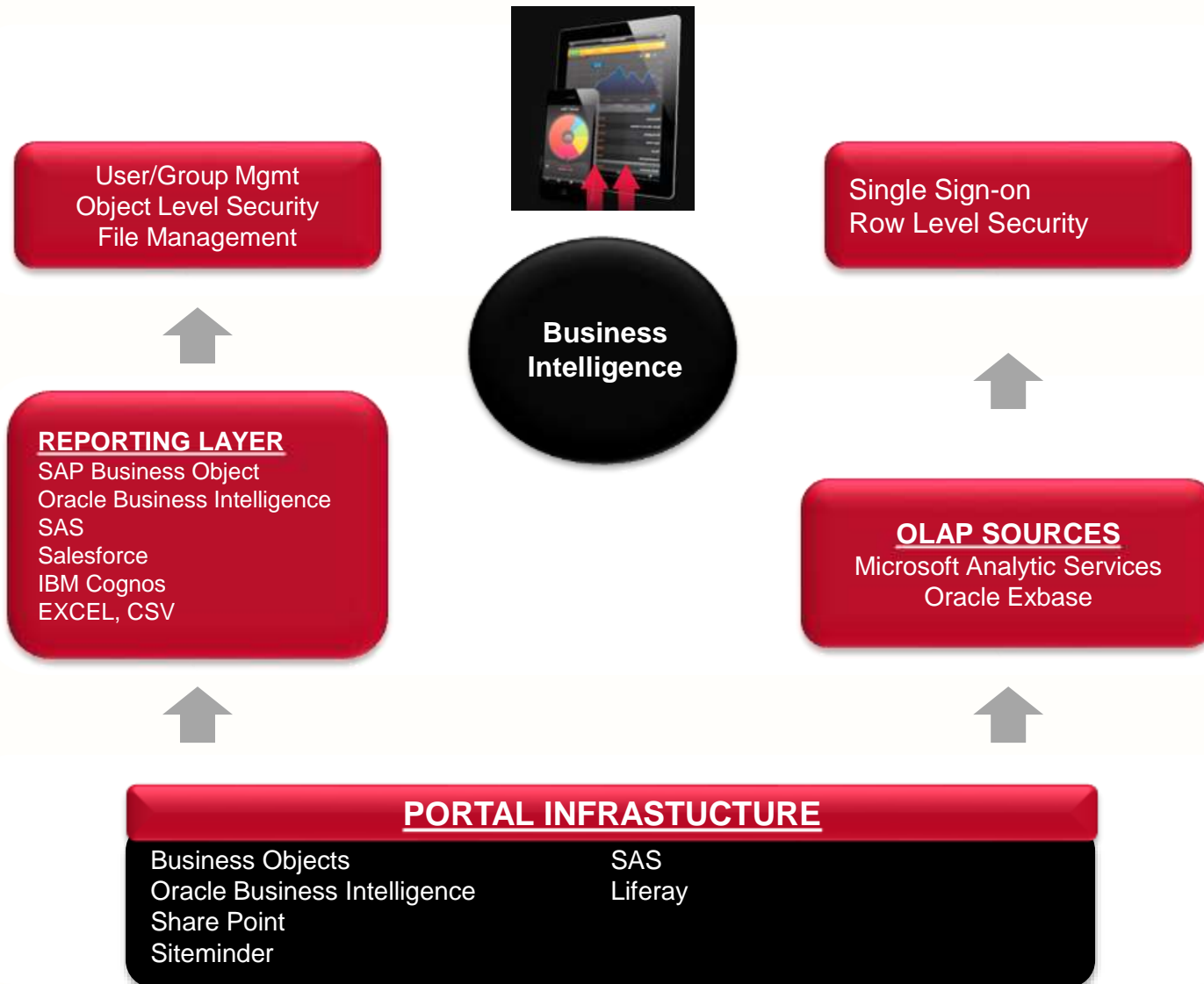


Time to Market Management

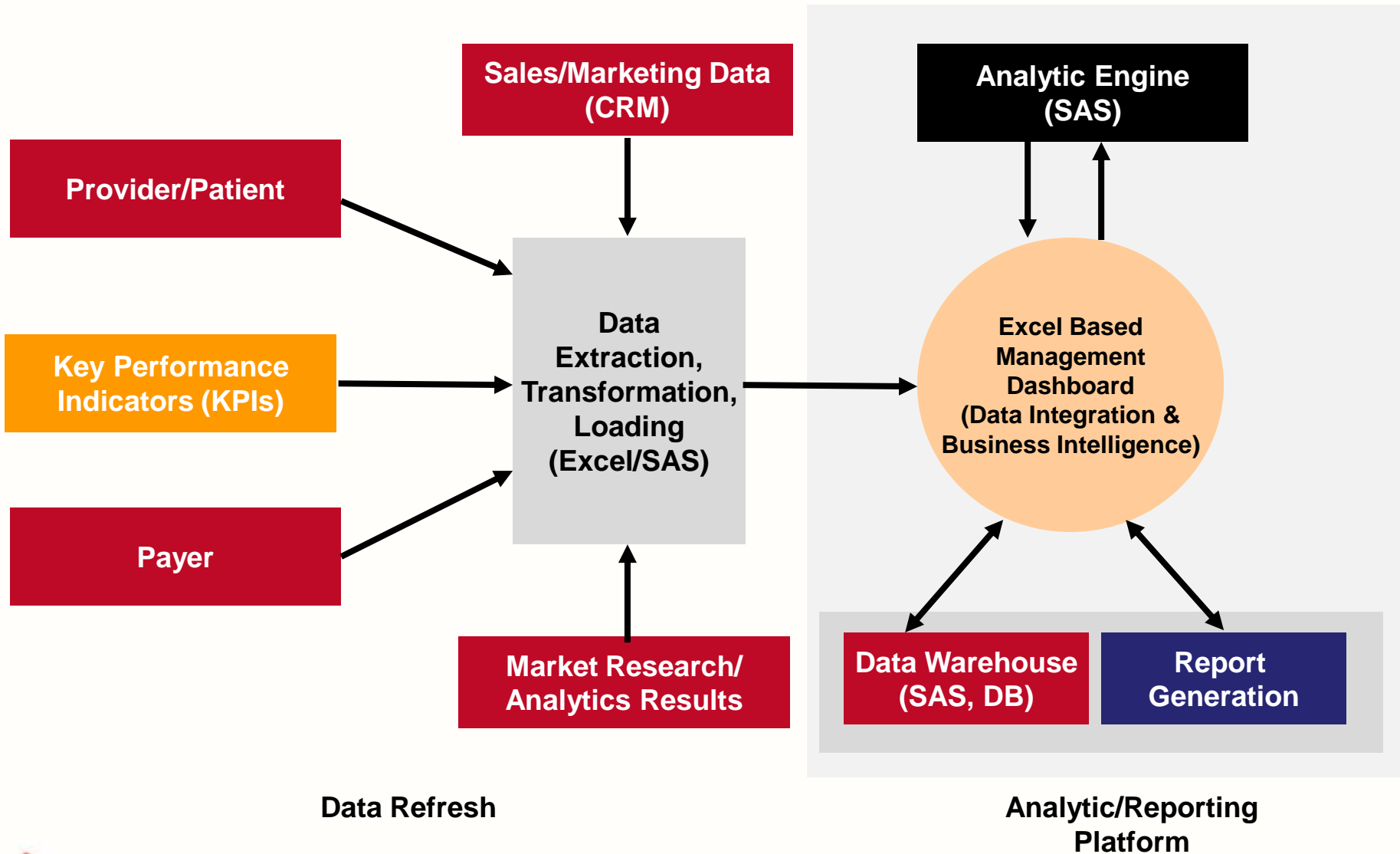
- R&D Administration
- Drug Discovery
- Drug Development
- Regulatory Submission



Dashboard
Analysis
Reporting

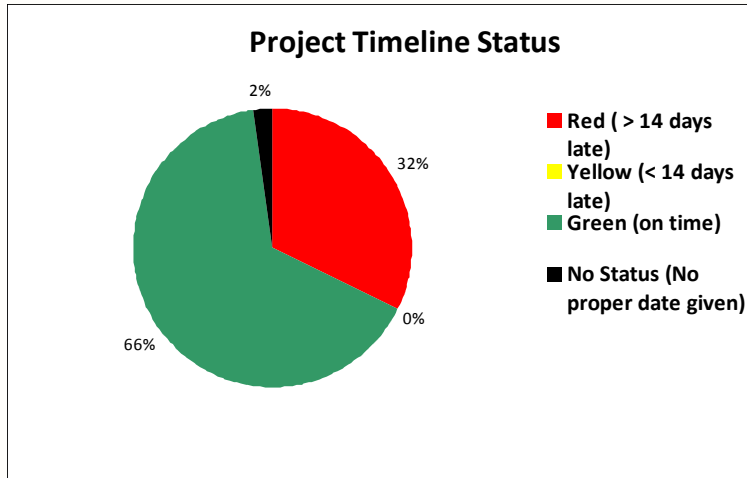


Analytic Information Hub

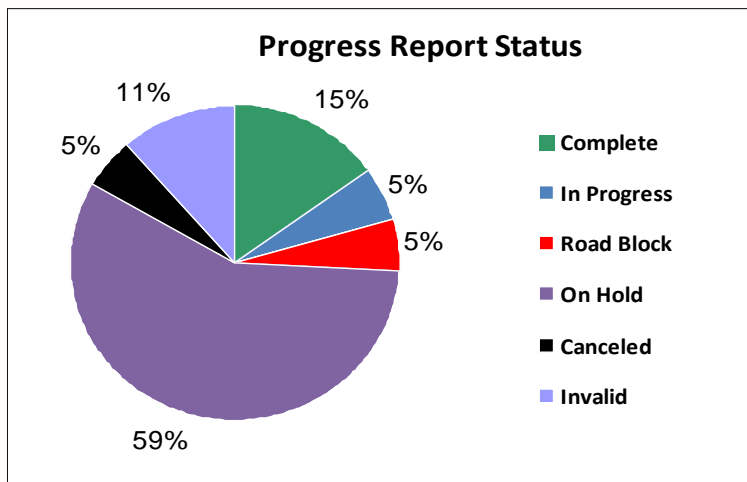


Project Management Dashboard

- Dashboard displays task status summary for user selected functional area as follows:



- Project Time Line Status summarizes the tasks status as follows:
 - Green – Completed Tasks or tasks which are not late.
 - Yellow – Tasks which are less 14 days late
 - Red – Tasks which are late by 14 days or more



- Project Report Status summarizes the tasks status as follows:
 - Complete – Completed tasks
 - In Progress – Incomplete Tasks which are not blocked
 - Road Block – Incomplete tasks which can not proceed
 - On Hold – Incomplete tasks which are on hold
 - Canceled – Cancelled tasks are removed from project plan
 - Invalid – Start or end dates are not valid dates.

Thank You