Sales & Marketing *success* driven by behavioral change

measurable & sustainable business results

IMS Learning Solutions Case studies
Our Core Salesforce Effectiveness Programs

Salesforce
- Call Optimization
- Segmentation & Targeting
  - Call Planning

Key Account Management
- Segmentation & Targeting
  - Implementation

Line Management
- Area Planning & Management
- Segmentation & Targeting
  - Design
- Salesforce Effectiveness I
- Salesforce Effectiveness II

Senior Management
- Marketing for Non-Marketer

Leadership
- Induction Training
- Expert Modules

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Case Study: Sales Force Effectiveness

SFE training initiative results in significant and measurable improvement in terms of call effort and market share.

Call Effort before workshop

Call Effort after workshop

Market Share before workshop

Market Share after workshop

Call Frequency vs. Market Potential

Market Share vs. Market Potential

Source: Deciles established with IMS sales data, calls from client’s call activity data
Measures done 2 months prior to training and 4 months post-delivery

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Case Study: Area Planning and Management

Our APM Program helped one top MNC client in the Philippines achieve absolute value growth of Php 116M.

**Background**

Company had been under-performing over the last 22 months in their Cardio-Metabolic business.

General Manager commissioned IMS to help strengthen the sales force capabilities focusing on Cardio-Metabolic First-line managers as immediate priority through the APM Program to turn around the business.

**Approach**

- Conduct Design Meeting with Senior managers involved in the roll-out of the program to discuss program objectives and deliverables.
- KPIs used in the program were customized based on client’s internal measures.
- Conduct Training using cutting-edge Simulation methodology.
- Participants will accomplish planning implementation tool using own district data and build business plans.

**Take-Away**

Client becomes the 3rd fastest growing MNC in the Philippines (+31% over last year) after the program.

~85% of First-line managers achieved EI above 100%.

New processes have been set up to align resource allocation strategies of sales and marketing.
Case Study: Segmentation & Targeting

Maximising revenue pre-patent expiry for a blockbuster with enhanced physician profiling, segmentation and targeting.

Background

A major multinational pharmaco seeks a targeting model that provides better strategic opportunity for product lifecycle management than their existing one.

A targeting model that will improve physician profiling and differentiation utilising advanced methodologies.

They also seek robust change management throughout the engagement to align sales and marketing and all management levels to ensure the new targeting approach is implemented well to maximise revenue.

Approach

- Improve current physician profiling, segmentation and targeting for the brand assessing both current usage and potential
- Determine the current and forecasted usage and potential per physician
- Financially quantify the expected returns from optimising sales force resources on the new targeting list
- Deliver a change management and training programs to ensure optimal implementation by the field force

Take-Away

Identified an upside potential of $23 mill through optimising sales force deployment, with existing resources.

Stakeholders at all levels of management and across both sales and marketing aligned and fully engaged to implement the new physician profiling, segmentation and targeting approach.

Success of project leads to rollout across 7 other brands in the primary and hospital portfolio.

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Maximising revenue pre-patent expiry for a blockbuster with enhanced physician profiling, segmentation and targeting (continued from previous slide)

**Approach**

XYZ has selected a scenario that increases reach to 90% across all segments with call frequency of 6 on A/B and 5 on C/D segments; *incremental potential upside is +$22.9 mill*

<table>
<thead>
<tr>
<th>IMS Segment</th>
<th>Dr Count</th>
<th>Avg Product Sales</th>
<th>Avg Market Sales</th>
<th>Avg Market Share</th>
<th>Drs Called on</th>
<th>Reach</th>
<th>Call Freq.</th>
<th>Total Calls</th>
<th>Drs Called on</th>
<th>Reach</th>
<th>Call Freq.</th>
<th>Total Calls</th>
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<tbody>
<tr>
<td>A</td>
<td>5,316</td>
<td>824</td>
<td>1,473</td>
<td>56.0%</td>
<td>4,753</td>
<td>89%</td>
<td>8.56</td>
<td>40,677</td>
<td>4,784</td>
<td>90%</td>
<td>6</td>
<td>28,706</td>
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<td>82%</td>
<td>6.95</td>
<td>29,978</td>
<td>4,747</td>
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<td>21,180</td>
<td>586</td>
<td>1,080</td>
<td>54.3%</td>
<td>17,813</td>
<td>84%</td>
<td>7.82</td>
<td>139,258</td>
<td>19,062</td>
<td>90%</td>
<td>6</td>
<td>105,036</td>
</tr>
</tbody>
</table>

**INCORPORATING PHYSICIAN PROFILE**

- **Improve current physician profiling, segmentation and targeting** for the brand assessing both current usage and potential
- **Determine the current and forecasted usage** and potential per physician
- **Financially quantify the expected returns from optimising sales force resources** on the new targeting list
- **Deliver a change management and training programs** to ensure optimal implementation by the field force

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Our Core Marketing Excellence Programs

Local Marketers & Non-Mkt staff
- Marketing for Non-Marketer
- Introduction to Product Management

Product Managers
- Tactical Marketing
- Effective Marketing Communications
- Segmentation & Targeting Implementation
- Why Market Research

Senior Product / Brand Managers
- New Product Launch
- Practical Forecasting

Senior Marketing Executives
- Strategic Marketing
- Health Economics

Induction Training
Expert Modules
Leadership
Questionnaires would be sent two weeks before the open course commencement to the confirmed participants to understand their relevant experience in the areas of the marketing planning process, and what are the key topics they may wish to learn from the course.

The course is delivered with clear explanation of each concept/topic, followed by discussions and simulation practices.

The course is a simulation based training, the participants, in a group of three would discuss about the case study presented in the simulation, reach consensus and key in their group decisions, the computer would then present their group result.

Debrief would be conducted based on the inputs of each group of participants in the simulation case study, learning points would be drawn with a view to highlight and remind the participants how the marketing planning process could be further improved in their daily tasks.

Background
Pharma companies want their product executives & product managers to enhance their effectiveness through learning the following:

1) Grasping clear concepts of the entire marketing planning process.

2) Writing practical & implementable marketing plan.

3) Understanding of what goes into a thorough situation analysis and what constitute a good SWOT summary.

4) Good appreciation of STP (segmentation, targeting & positioning) and how this part affect the subsequent development of the tactical action plan development.

Scope
The three days course focus on Focuses on how to build a good marketing plan:
Marketing analysis ; Targeting
Getting into the mind of the prescriber
Determining strategy ; Positioning; Action planning

Approach

<table>
<thead>
<tr>
<th>Understanding the learning needs</th>
<th>Lecture &amp; Discussion</th>
<th>Simulation practice</th>
<th>Simulation Debrief</th>
<th>Participants Presentation &amp; Summary</th>
</tr>
</thead>
</table>

- Questionnaires would be sent two weeks before the open course commencement to the confirmed participants to understand their relevant experience in the areas of the marketing planning process, and what are the key topics they may wish to learn form the course.
- The course is delivered with clear explanation of each concept/topic, followed by discussions and simulation practices.
- The course is a simulation based training, the participants, in a group of three would discuss about the case study presented in the simulation, reach consensus and key in their group decisions, the computer would then present their group result.
- Debrief would be conducted based on the inputs of each group of participants in the simulation case study, learning points would be drawn with a view to highlight and remind the participants how the marketing planning process could be further improved in their daily tasks.

Take-Away
The participants are able to have a comprehensive & clear understanding and appreciation of each element of the entire marketing planning process.

These would help to ensure the participants know exactly what to look out for in writing a practical & implementable marketing plan.
Case Study: Effective Marketing Communications

Our EMC Program helped one top MNC client in Taiwan achieve significant improvement in marketing communication.

**Background**

The Marketing Director was frustrated with low quality current Marketing Communication materials. Commissioned a customised, in-house program to focus on the development process itself so that product managers can more effectively transform ideas/concept into actual communication materials, taking into account key considerations and principles. Program carried out in 3 phases.

**Approach**

- **Assessment & Gap analysis**
- **Key Findings & Team Briefing**
- **Course Development & Validation**
- **Training Workshop**
- **Follow-Up Workshop**

- **Pre-Training Evaluation** → **Training** → **Follow-up Session**

A complete offer: from process design to implementation....

- Phase 1 - Evaluation of current materials (baseline) to determine key areas for improvement. This enables a customised training program relevant to the needs of the participants.
- Phase 2 - Training with hands-on workshops and case studies.
- Phase 3 - Follow-up to evaluate new materials developed after Phase 2 (actual implementation). This is to consolidate and firm up specific skill sets.
- Customized toolkit for PMs for continued effectiveness.

**Take-Away**

Product managers improved in all parameters for effective marketing materials by average of 30%. The participants were also trained to look out for and avoid common mistakes. A customised toolkit was designed to guide and evaluate all future development of marketing communication materials. With the toolkit, the Marketing Director is now able to appraise PMs work based on a common platform.
Case Study: Marketing Excellence Gap Assessment And Workshop

Background
This Asian healthcare company needed to build up marketing excellence competency and ensure that the ownership for the desired changes are led by Marketing Managers. This was required to ensure that the objectives of their learning and training activities are achieved. To enable marketing managers lead the desired change, the client engaged IMS to conduct an assessment and workshop to clarify the elements of desired environment, and obtain agreement among Marketing Managers on actions to move forward.

Scope
Marketing excellence workshop to clarify direction and enable continuous learning objectives

Approach
- Objective
  - To clarify where to focus in leading strategic direction to our marketers
  - To develop a plan how to support our team from continuous learning & develop perspectives
- Deliverables
  - Analysis of current biz priorities
  - Desired behaviors
  - Process development to the desired behaviors
  - Action plan by the marketing leaders
  - Support identification
- Pre-workshop questionnaires completed by Marketing staff to understand current levels of understanding and competencies around the marketing excellence areas
- Workshop sessions to review assessment, agree on desired behaviors and action plans
- Review one month after the workshop to review status on challenges and opportunities discussed during the workshop

Take-Away
The client BU Heads had a clearer understanding of Marketing Excellence and what they must do to enable the effectiveness of the learning programs.

The client was also able to understand were their Marketing Team can improve in terms of Market Excellence critical areas.

They also realized the need for a more robust and specific learning programs for Marketing in order to achieve their objectives.
Case Study: Japan War Gaming

Background
Global pharma company wanted to prepare for competitive scenarios when completely new mode of action drug will be entering into their market. The objectives of the project is:
1) Share common knowledge of the target market and competitors products
2) Build realistic competitors scenarios of product positioning and messages to crystallize their product strengths
3) Build counter position scenarios to defend their own products
4) Based on the new counter positions of their products, build short-term marketing plan

Approach
- Develop 2-day curriculums, “War game book”
- Design physician segmentations for KOL panel collection
- Create KOL recruiting & prep package and recruit KOL panels
- Brief KOLs on program objectives, Delphi session approach and each brand’s medical information
- At the Execution, split the brand team into 4 groups in charge of competitors brand and 1 group for their own brand
- Based on the war game book, each team will conduct various analysis to build their target patient and Drs, strength & weakness, positioning statement and key message, which were reviewed by management team
- Based on the work done above, create presentation to panel KOLs to test Drs reaction against each brand
- KOL will assign their current pool of patients to each brand they prefer after the presentation
- Based on the Dr’s reaction to their own brand and competitors positioning, create short-term marketing plan to counteract with competitors

Scope
The two days War Gaming session for brand team to build short-term marketing plan to counteract against new competitors:
- Build “Market Book” providing in-depth market trend information
- Build “company book” providing competitors “all you need to know” information

Take-Away
The participants are very clear of each competitor’s positioning and how Drs would react to them. With the competitive situation taken into place, they were able to build more realistic short-term marketing plan as well as long-term marketing plan.
Case Study: Building A Marketing Academy

**Client Situation:**
- Client had no internal training program for its Marketing staff
- All Marketing training courses were outsourced to several training agencies with little coordination
- Disconnection between concepts and daily life (No integration of client’s specific tools)
- Overall, the current approach was costly and inefficient

**How we made the client successful:**
- IMS built the structure of the client’s Marketing Academy, linked to their professional pathway and competency mapping
- The Marketing Academy covered all Marketing-related training needs, from newly-hired PMs to senior marketing directors
- Each training module has been customized to integrate client’s templates and systems

**Results and Benefits:**
- All Marketing staff will go through a global training curriculum, consistent across geographies and adapted to local context
- Workshops make use of the most sophisticated training materials as well as client’s internal tools
- All training modules are integrated in the Academy to avoid any gaps between programs
- The Academy is continuously updated according to client’s requirements
- Costs are significantly reduced
A few facts and feed-back on this initiative

- The Marketing Academy was initially developed to cover Asia-Pacific & Middle-East and has progressively being extended to Europe (eastern and then western) and Latin America
  - E-modules and on-line reviews have been introduced to add value to the face-to-face workshops, providing a blended learning approach that also provides effective measurement of learning outcomes

- Client Feed-back:
  
  "In a short period of time, IMS has been able to create all training modules completely adapted to our Marketing philosophy. Especially for the level 1 program, we were really impressed by the flexibility with which our internal planning tool was integrated in the simulation-based workshop. As for the level 2 program, we feel very confident in having an excellent module for the coming years. If this excellent level of training is maintained, we look forward to a long-lasting co-operation"

Regional Marketing Director
Asia-Pacific & Middle-East