

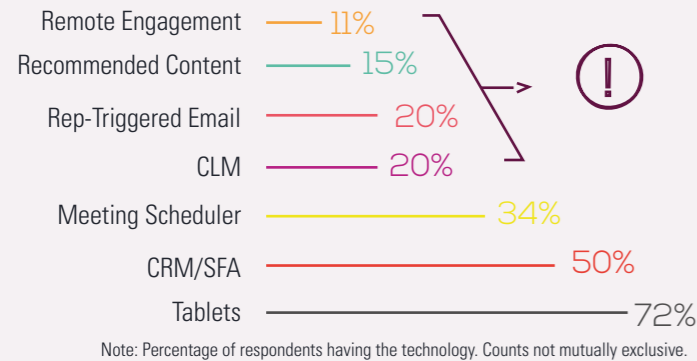
Gauging the Digital Savviness of Healthcare Sales Rep

By "Availability" and "Perceived utility" of digital tools that enable HCP engagement and activation

At global, regional, industry segment, and rep role level



Technology Availability



- Most prevalent or core HCP engagement tools such as tablets, CRM/SFAs, and meeting schedulers are still not available with about half of global rep respondents.
- The second wave of technologies like CLM and rep-triggered email seem undervalued as almost 80% of respondents do not have access to these tools.
- More modern tools like content recommendations and remote engagement are still rare as over 85% of reps do not have access to these tools.

Global View

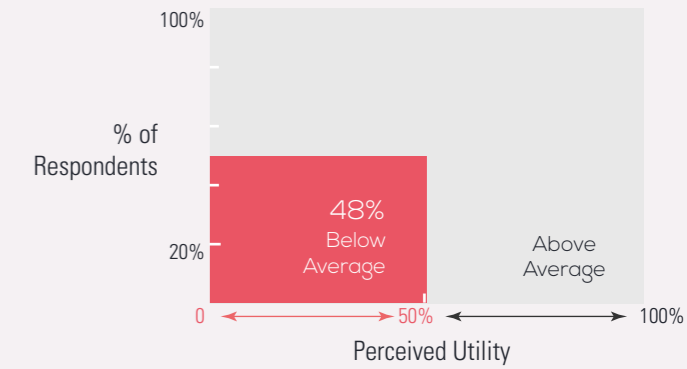
The respondents were asked to rate the helpfulness (Utility) of the tools available to them on a scale of 0% to 100%. Let's consider 50% as the average perceived utility.

Nearly half (48%) of the respondents, globally, perceive "below average" utility of the available tools. About 50% of such respondents definitely have CRM/SFAs.

Digital leaders need to inquire if the available technologies pose:

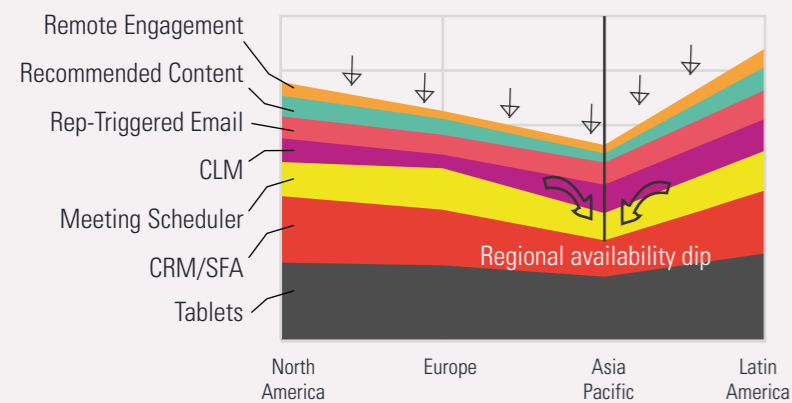
- Business issues, such as lack of training, skills, etc.
- User issues, such as ease of use, offline access, etc.
- Customer issues, such as wrong channel-mix, irrelevant content, etc.

Perceived Utility

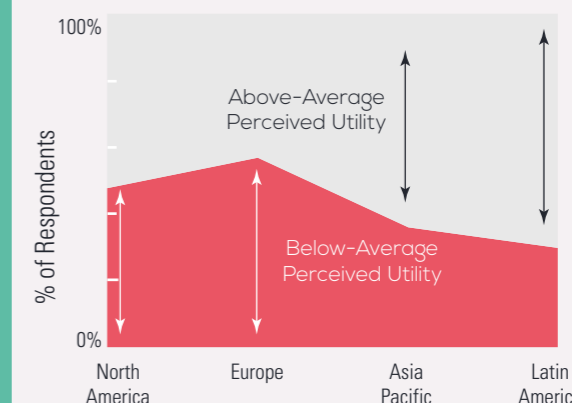


Regional Topography

Digitally Forward or Digitally Behind?



- Latin America is a digitally forward territory with most of its respondents reporting high availability and above-average perceived utility of the digital tools.
- North America with medium availability and average perceived utility also stands as a digitally forward territory, although after Latin America.
- Europe stands as a digitally backward territory as it shows medium availability and below-average perceived utility.
- Asia Pacific is also considered as a digitally backward territory because despite having above-average perceived utility, availability of digital tools is low with responding healthcare sales reps (HSRs).



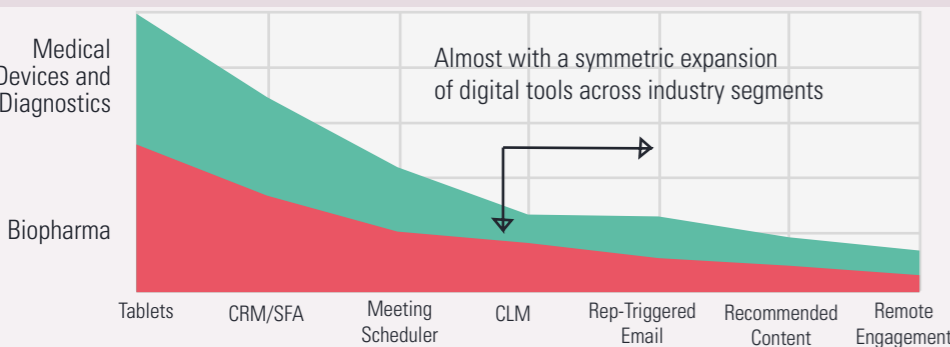
LATAM AND APAC:
Above-Average Perceived Utility

NAM:
Average Perceived Utility

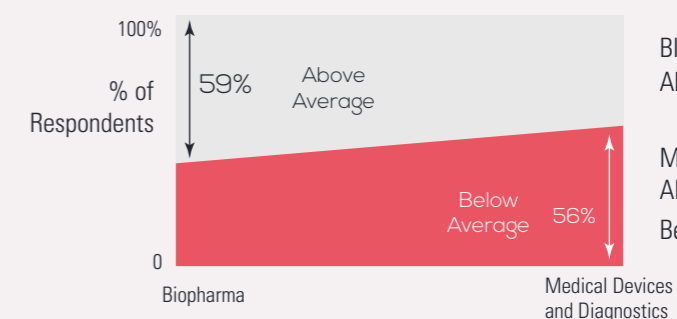
EUROPE:
Below-Average Perceived Utility

Industry Segment

Digitally Forward or Digitally Behind?



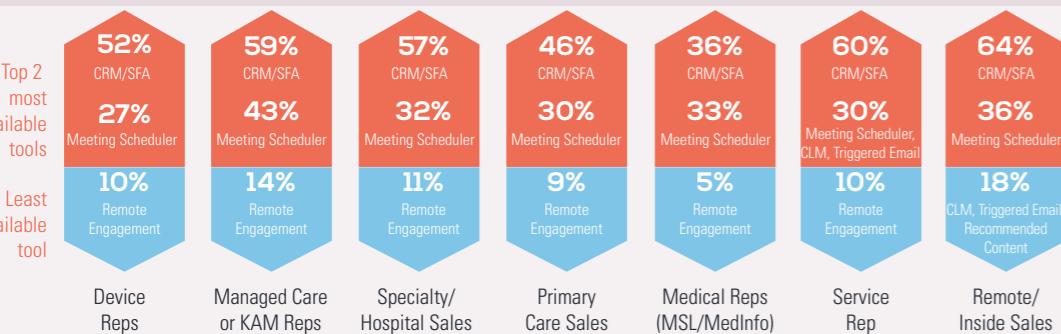
- No alarming insights are drawn when we compare the two segments – biopharma (biotech and pharmaceuticals) and medical devices and diagnostics.
- Biopharma segment is slightly more digitally forward with a higher percentage of respondents having more access to technologies and above-average perceived utility.



BIOPHARMA:
Above-Average Perceived Utility

MEDICAL DEVICES AND DIAGNOSTICS:
Below-Average Perceived Utility

At Rep Roles Level



- Nearly half of the respondents across all rep roles are not digital savvy due to low or no availability and below-average perceived utility of the digital tools.
- Remote engagement is the least available tool across all rep roles, except for remote/inside sales.

