

Veeva 2015 Life Sciences Promotional Content Management Survey

SUMMARY OF PRELIMINARY RESULTS

The *Veeva 2015 Life Sciences Promotional Content Management Survey* explores the industry's progress in transitioning from manual and disparate processes to more automated methods of managing promotional materials from creation and review through expiry and withdrawal.

Drawn from the experiences and opinions of regulatory, marketing, and medical leaders from around the globe, the goal of this research is to understand the key capabilities required to improve compliance and speed to market.

This preliminary report details the current landscape of systems in use, identifies capabilities needed to improve compliance, and charts the industry's progress in adopting systems to meet its end-to-end compliance needs.

Summary of Preliminary Findings

- Most respondents (88%) say they rely upon multiple systems and methods to manage promotional content and, on average, companies use a total of four systems.
- The primary systems or methods used to manage promotional content among those surveyed vary and include paper and email (35%), internally-developed systems (22%), generic content management platforms (19%), industry-specific review and approval systems (17%), and industry-specific, end-to-end promotional content management systems (7%).
- When asked about their primary systems, half of respondents (52%) have automated the content review and approval portion of their promotional materials management process, yet many report they are missing capabilities they say would improve compliance.
- More than three out of four are unable to report on where claims and content are used (81%) or electronically withdraw outdated content from multiple channels (77%).
- However, majorities say end-to-end system capabilities such as audit trail functionality (83%), multichannel content withdrawal (78%), and reports on where claims and content are in use (76%) would improve compliance.
- Satisfaction with key capabilities needed for compliance varies widely based upon the system used. Those using end-to-end systems report greater satisfaction (ranging from 88% to 100% satisfied) with key compliance capabilities as compared to those using all other systems (45% to 66% satisfied).

Number and Types of Systems Used for Promotional Content Management

Respondents were asked how many systems or tools their company uses to manage their promotional materials globally (Figure 1). Nearly all (88%) use multiple systems, with an average of four systems in use. Nearly one in three (31%) use between five and twenty systems, suggesting most companies have multiple breakpoints in their promotional materials management process.

Number of Different Promotional Content Management Systems Used

Base: Total respondents with systems, N=225

Average number of systems = 4

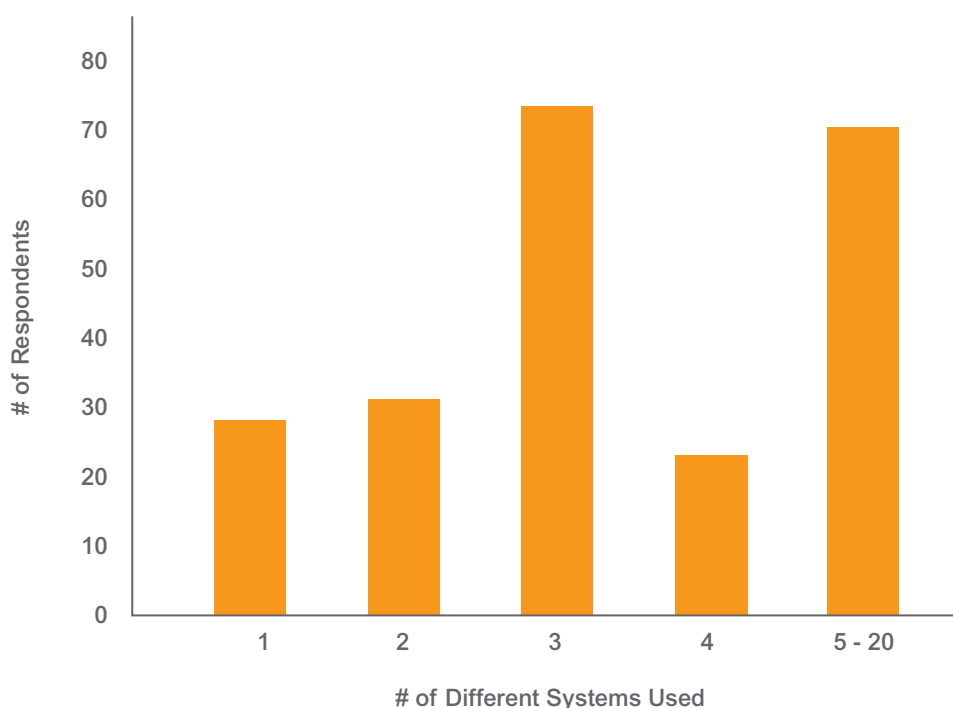


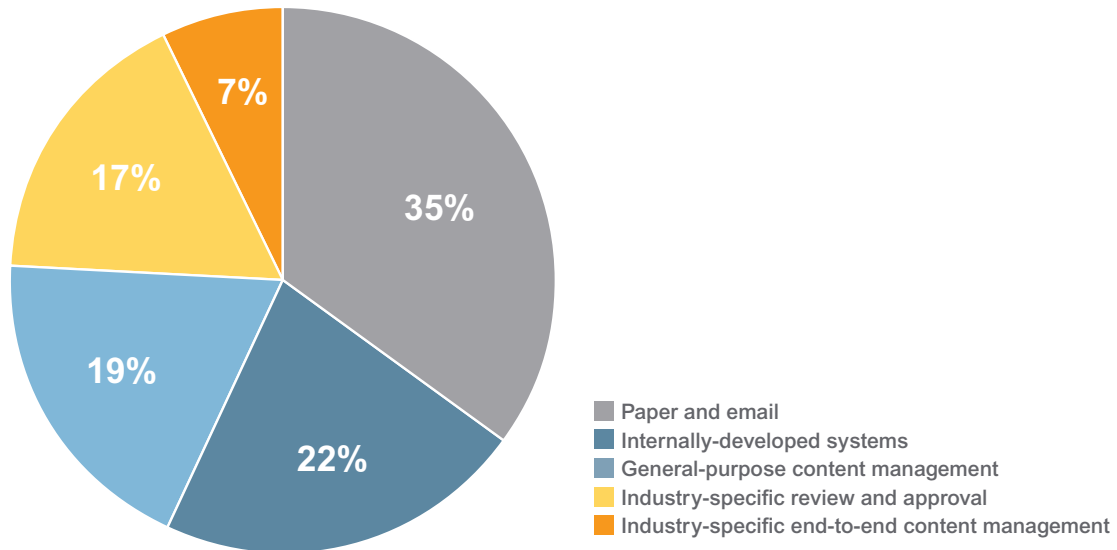
Figure 1

Efforts over the past 15 years to evolve from paper-based processes to more automated methods include the use of automated review and approval products and newer, end-to-end systems that manage promotional content from creation through expiry and withdrawal.

But when it comes to a company's primary system for managing promotional content (Figure 2), the largest cohort of respondents (35%) continues to rely on a combination of paper and email. More than one in five (22%) use internally-developed systems, and 19% say they use general-purpose content management systems. Another 17% use legacy, industry-specific tools that focus primarily on automated review and approval of promotional content. A minority (7%) use newer end-to-end life sciences-specific solutions that include review and approval workflow, a digital asset library, claims management, reporting, and automated multichannel distribution and withdrawal capabilities.

Primary System Used to Manage Promotional Content

Base: Total respondents, N=227



What is the primary system or tool you use to manage the review and approval portion of the promotional content management process? Select one. (Q.5)

Figure 2

Although 52% of respondents have automated the review and approval portion of the process, supplementary systems are still required. Survey findings show that respondents use an average of four systems to manage their promotional content.

Looking at the variety of systems and methods in use in addition to primary systems, majorities of respondents still rely upon email (60%) or local/cloud file shares (60%) as one or more of the systems used. The next most prevalent method is paper, in use by 40% of respondents.

Taking a closer look, survey findings show increased usage of a number of supplemental content management systems among those with review and approval systems versus those with end-to-end systems. Respondents with review and approval systems use email and paper twice as frequently as respondents with end-to-end systems (41% versus 20%, respectively, for email and 26% versus 13%, respectively, for paper).

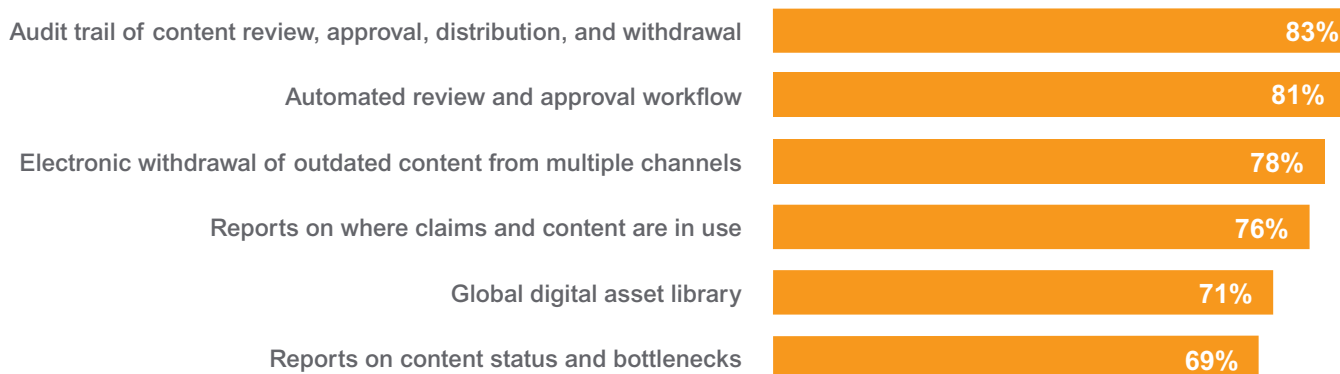
Capabilities Needed for Compliance

Respondents were asked if adding particular advanced promotional content management system capabilities to their primary system would improve regulatory compliance (Figure 3). The most frequently cited capabilities to improve compliance are end-to-end audit trail (83%), automated review and approval workflow (81%), and multichannel withdrawal of outdated content (78%).

Promotional Content Management System Capabilities that Would Improve Compliance

Percent rating each capability as somewhat or significantly improving compliance

Base: Total respondents excluding “Not applicable – already have this capability in our system”



How would the following promotional content management system capabilities impact regulatory compliance?
(Q.10)

Figure 3

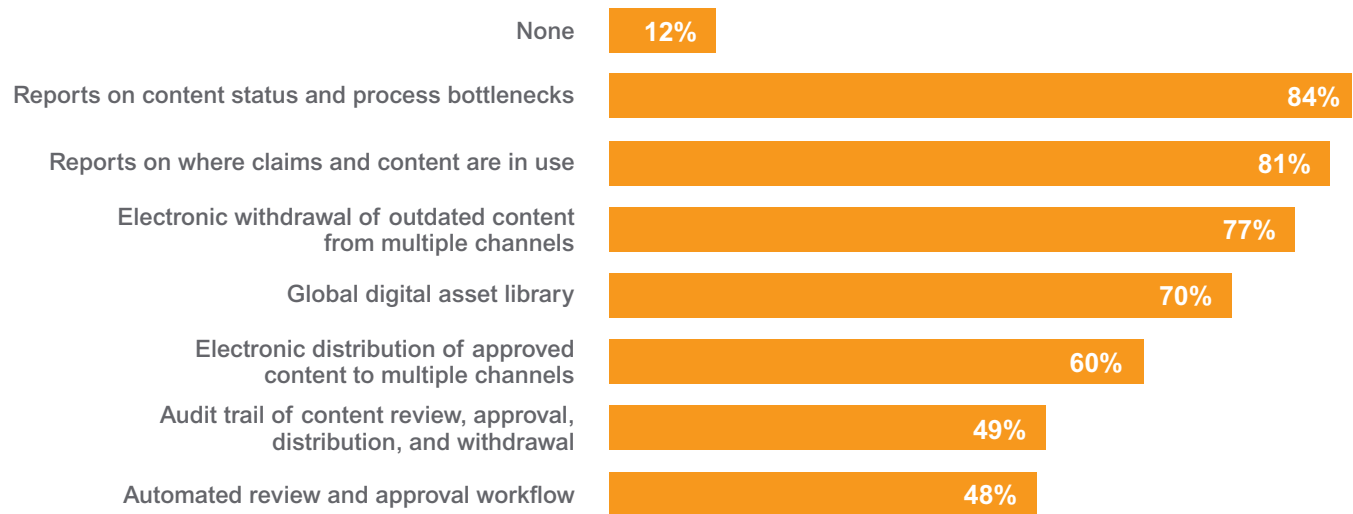
However, most report they are missing some, if not all, of these fundamental capabilities needed for compliance (Figure 4). Almost half (49%) do not have primary systems that provide an end-to-end audit trail to manage promotional content throughout its lifecycle, even though this capability is most frequently noted as one that would improve compliance. And while more than three-fourths of respondents (76%) say reports on where claims and content are in use would aid compliance efforts, 81% of respondents' primary systems do not include this capability.

And nearly one in eight respondents (12%) say none of the capabilities asked about in the survey are provided by their primary promotional content management system.

Promotional Content Management Capabilities Lacked by Primary Systems

Percent reporting capability not provided by primary system

Base: Total respondents, N=227



Which capabilities does your primary promotional content management system or tool provide?

Select all that apply. (Q.6)

Figure 4

One of the most pressing compliance concerns among life sciences companies is preventing regulatory citations by ensuring outdated content is retired. Yet, 77% of respondents say they are unable to electronically withdraw content from multiple channels as part of their primary system. When asked about the principal method used to verify content has been withdrawn from the market, most (76%) don't perform any verification, manually verify, or rely on third parties.

These findings demonstrate practices that further increase regulatory risk and underscore the need to move to more advanced, end-to-end systems.

System Satisfaction with Key Compliance Capabilities

Findings reveal that when it comes to satisfaction with key compliance capabilities, responses vary widely based upon the system used.

While half of respondents (52%) have adopted digital solutions with automated review and approval workflow, the use of multiple supplemental systems indicates these solutions are insufficient in managing the full lifecycle of promotional materials.

Survey results also show lower satisfaction with primary systems that lack end-to-end promotional content management capabilities. End-to-end life sciences-specific systems, by contrast, have the highest levels of satisfaction, ranging from 88% to 100% satisfaction, as compared to all other systems, which range from 45% to 66% satisfaction (Figure 5).

Users of end-to-end systems report 100% satisfaction with their primary system's adherence to compliance requirements across channels. Meanwhile, just 54% of all other users report satisfaction with their primary system on this measure.

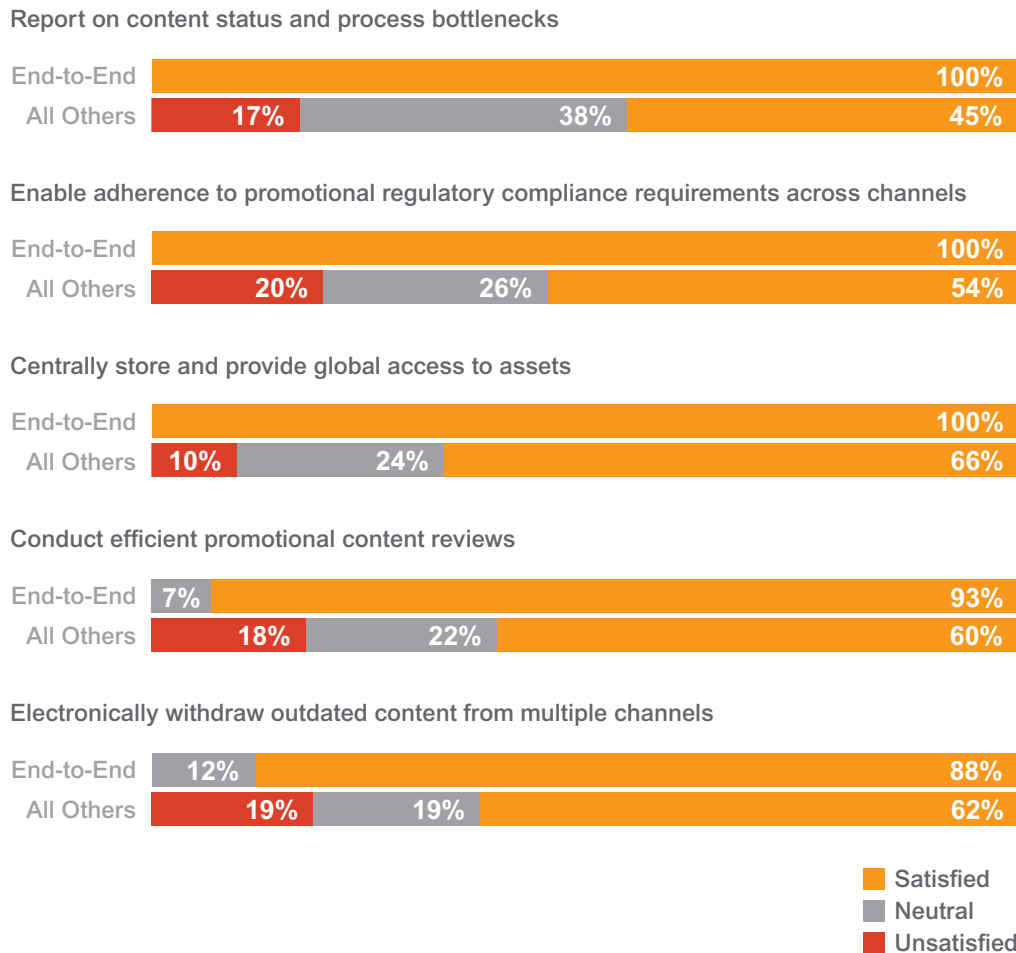
When it comes to the ability to electronically withdraw outdated or expired content from multiple channels, 88% of end-to-end system users say they are satisfied, versus 62% of all other respondents.

And, for every area measured, those using end-to-end systems report no dissatisfaction with compliance-related capabilities.

System Capabilities Satisfaction

Those using end-to-end systems compared to those using all other systems

Base: Total respondents indicating primary system had given capability, N varies



What is the primary system or tool you use to manage the review and approval portion of the promotional content management process? Select one. (Q. 5)

Which capabilities does your primary promotional content management system or tool provide? Select all that apply. (Q. 6)

Rate your satisfaction with your primary promotional content management system or tool's ability to: [respondents rated multiple capabilities] Select one answer per row. (Q. 7).

Figure 5

Conclusion

The *Veeva 2015 Promotional Content Management Survey* reveals the life sciences industry is midstream in its transition from paper and manual processes to a fully digital approach to promotional content management.

Over the past decade, many companies have automated a portion of the process through the adoption of promotional content review and approval systems. But continued reliance upon supplemental manual processes or external systems shows that, despite this progress, gaps remain. Most companies cannot manage all promotional content functions using their primary system, and in fact, an average of four systems are used to do so.

A key requirement of any promotional content management system is that it helps life sciences companies maintain regulatory compliance at every step in the process. But many respondents express dissatisfaction with their ability to execute key compliance functions using their primary system.

However, those using end-to-end promotional content management systems express significantly higher satisfaction with their ability to manage compliance-related functions. These end-to-end systems automate processes and provide control throughout the lifecycle of promotional assets, across channels and regions.

The research provides insight into the particular end-to-end capabilities that respondents believe would improve compliance if added to their primary system, including full content lifecycle audit trail, automated review and approval workflow, visibility to where claims and content are in use, and multichannel withdrawal of outdated content. The way forward should include these capabilities to improve user satisfaction with promotional content compliance, and reduce the number of systems needed to execute all promotional content management processes from creation and review to expiry and withdrawal.

Survey Methods and Respondents

The survey consisted of 14 questions, several of which included sub-questions with response matrices. To qualify for the survey, respondents must be involved in the life sciences promotional content management processes, and working at a pharmaceutical or biotech company at a manager level or higher, in the role of marketing, marketing operations, regulatory, healthcare compliance, or medical affairs. The global survey was commissioned by Veeva Systems and conducted by Fierce Markets.

Of the 230,000 individuals invited to take the survey, a total of 3,046 surveys were initiated, the majority of which were terminated based on qualification questions gauging their role and level within the organization. A total of 480 surveys were completed. A total of 193 unverified responses were eliminated, yielding 227 qualified respondents. The survey was fielded globally, where 62% of verified respondents were from the U.S. and 38% were from non-U.S. regions.

Contact

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