



Life Sciences Data and Analytics Services for Sales and Marketing Services PEAK Matrix™ Assessment with Service Provider Landscape 2020

Life Sciences IT Services (ITS)

Market Report – December 2019: Complimentary Abstract / Table of Contents

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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Background and scope of the research

The traditional methods of sales and marketing are failing due to the changing landscape of the life sciences industry. Data and Analytics (D&A) is revolutionizing the industry as analytics-based insights are replacing instinct-based decision-making. Sales and marketing is the biggest adopter of D&A within life sciences and uses it to design strategies for the function. The industry is moving from simple descriptive models that were used to analyze existing trends, to highly sophisticated predictive and prescriptive models, in order to define a future growth strategy.

To support enterprises in their journeys, service providers are ramping up capabilities through life sciences-specific partnerships and acquisitions. This, in turn, is driving the need for on demand research and market intelligence as well as an understanding of supply trends in life sciences D&A services. Everest Group's life sciences ITS research program addresses this market need by analyzing outsourcing trends and service provider capabilities in life sciences D&A services for sales and marketing.



In this report, we analyze the capabilities of 16 global IT service providers specific to the life sciences sector. These service providers are mapped on the Everest Group PEAK Matrix™, which is a composite index of a range of distinct metrics related to a provider's capability and market impact. We focus on:

- IT D&A services for sales and marketing market trends for life sciences
- The landscape of service providers for life sciences D&A services for sales and marketing
- Assessment of the service providers on several capability- and market success-related dimensions

Scope of this report:



Geography
Global



Industry
Life sciences (pharmaceuticals, medical devices, biotechnology, and other life sciences¹)



Services
D&A services for sales and marketing

¹ Includes healthcare data & information services and medical products distribution

Overview and abbreviated summary of key messages

This report examines the 2019 life sciences D&A for sales and marketing services provider landscape and its impact on the life sciences market. It focuses on service provider position and growth in the life sciences sales and marketing services market, changing market dynamics and emerging service provider trends, assessment of service provider delivery capabilities, and key life sciences digital services provider profiles

Some of the findings in this report, among others, are:

Life sciences D&A market

- The overall life sciences D&A service market is a US\$2.5 billion+ opportunity
- We expect the global life sciences D&A services market to grow at 12-17% over 2018-2021 globally
- Growth in the life sciences D&A services market, will be driven by availability of big data, technological advancements, and the growing adoption of analytics in various life sciences segments

Factors responsible for growth of D&A in sales and marketing

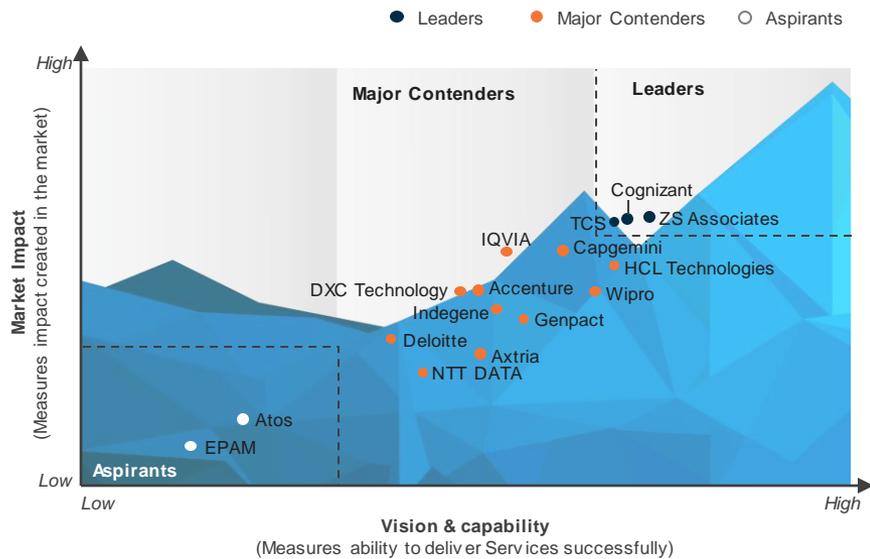
- The customer landscape is changing with multiple parties responsible for sales decisions including networks, physicians, health maintenance organization (HMOs), hospitals, and patients
- The changing regulatory environment is pushing for more structured data. This has driven the collation and standardization of data, which can then be used for analytics
- Value-based pricing is increasing the pressure on the life sciences firms and reducing their profit margins. Traditional sales and marketing efforts that were focused on volume are now changing to a model with a focus on ROI
- A larger volume of data is available that provides insights into customer behavior, the impact of marketing techniques, and the ways to improve marketing ROI. The marketing data available is helping to track ROIs from various marketing initiatives across channels, locations, products of self and competitors, thereby providing an opportunity to optimize them

Service provider delivery capability

- Life sciences D&A services for sales and marketing services providers can be categorized into leaders, major contenders, and Aspirants on a capability-market-share matrix
- ZS Associates, Cognizant & TCS are the current leaders in the life sciences D&A services for sales and marketing market. However, several service providers are emerging as major contenders

This study offers four distinct chapters providing a deep dive into key aspects of the life sciences D&A for sales and marketing services market; the exhibits below illustrate the depth of the report

Assessment of Life Sciences D&A Services for Sales and marketing



Note 1 PEAK Matrix specific to payment integrity service of healthcare payers
 Note 2 Assessments for Accenture, Atos, Deloitte, EPAM, IQVIA, and ZS Associates exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers of payment integrity solutions

Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1	●	○	●	●	●	○	●	●	○
Service provider 2	○	○	○	○	○	○	●	○	○
Service provider 3	○	●	○	○	●	○	○	○	○
Service provider 4	○	○	○	○	●	○	○	○	○
Service provider 5	●	●	○	○	○	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	○	○	○	○	○	○	○
Service provider 8	○	○	○	○	○	○	○	○	○
Service provider 9	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
●	●	●	●	●	○	○	○	○

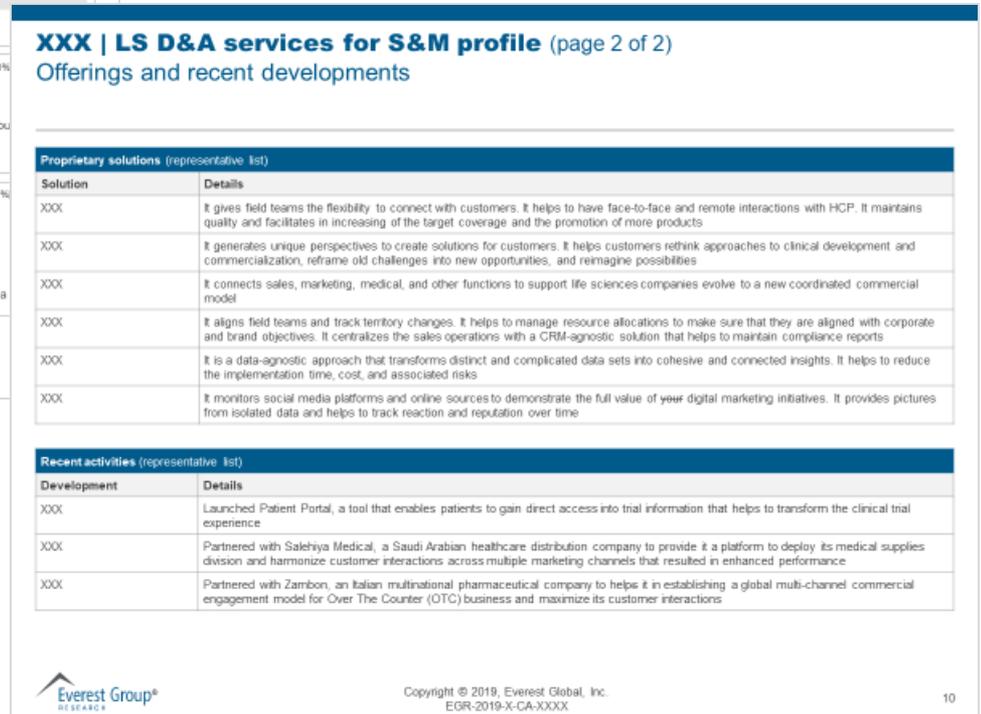
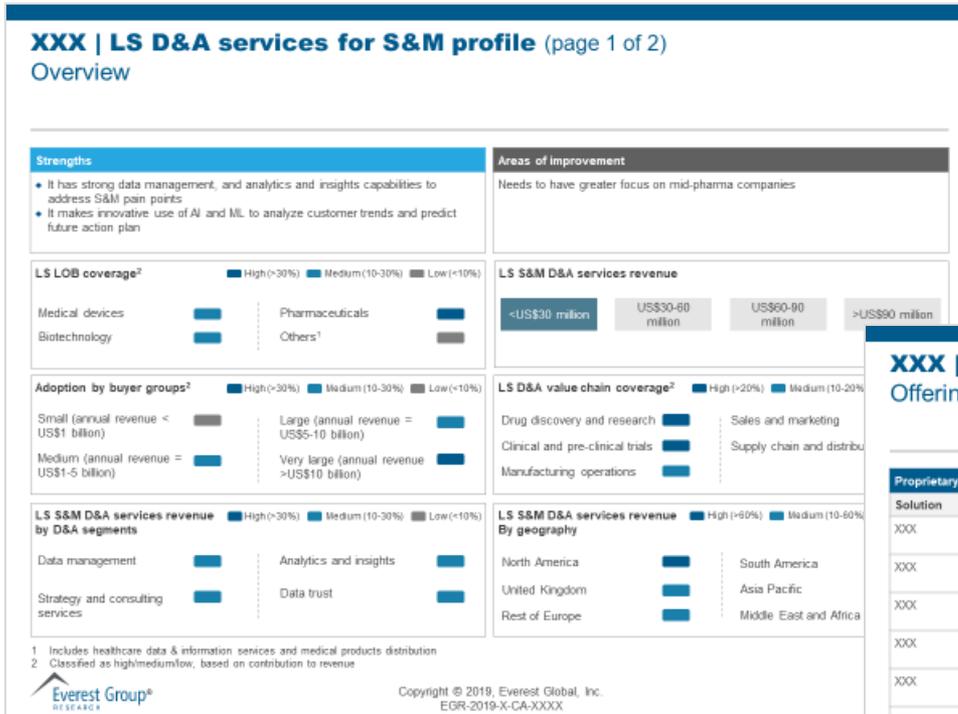
Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

The PEAK Matrix report has service provider profiles for all 16 players featured in the evaluation



Research calendar – Life Sciences IT Services

■ Published ■ Planned □ Current release

Flagship Life Sciences IT Services reports

Release date

Life Sciences Report Card 2017 – Enterprise Initiatives and Service Provider Performance	March 2018
Life Sciences Annual Report 2018: Pharma’s DevOps Factor for Digital Transformation	March 2018
Life Sciences Digital in North America – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018	June 2018
Life Sciences Digital in Europe – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018.....	August 2018
Life Sciences Report Card 2018 – Enterprise Initiatives and Service Provider Performance	March 2019
Life Sciences Clinical Trials Products PEAK Matrix™ Assessment 2019: Integrated Platforms Rise to the Challenge	May 2019
Life Sciences Digital PEAK Matrix™ 2019 for Services.....	September 2019
Life Sciences Data and Analytics Services for Sales and Marketing Services PEAK Matrix™ Assessment with Service Provider Landscape 2020	December 2019

Thematic Life Sciences IT Services reports

Regulatory Stress: Life Sciences Market Under the GDPR Regime	March 2018
Closing the Gap – The Future of IT Skills in the United States	April 2018
Atos Acquires Syntel: Can Atos Win in the North American Battleground?	July 2018
The Dissatisfaction Conundrum: What are Clients not Telling Service Providers?	January 2019
Assuring Trust in a Converging Life Sciences Ecosystem: The Emerging Role of Quality Assurance	February 2019
The Future of Clinical Trials	August 2019
Unveiling the Impact of AI Initiatives in Life Sciences.....	December 2019

Note: For a list of all of our published Life Sciences ITS reports, please refer to our [website page](#)

Additional Life Sciences ITS research references

The following documents are recommended for additional insights into the topic covered in this report. The recommended documents either provide additional details or complementary content that may be of interest

- 1. Life Sciences Digital Services – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019** ([EGR-2019-46-R-3324](#));
September 2019. Enterprises have made digital adoption the bedrock of their growth strategy in recent years, to optimize processes, reduce costs, and deliver better customer experience, all in the pursuit of higher revenue growth. The life sciences industry is no exception. Digital technologies can make internal workflows more efficient, reduce drug development timelines, offer supply chain transparency and efficiency, and even combat counterfeits. To support enterprises in their digital journeys, service providers are ramping up capabilities through life sciences specific partnerships and acquisitions. This, in turn, is driving the need for on demand research and market intelligence and an understanding of the supply trends in life sciences digital services. Everest Group's life sciences ITS research program addresses this market need by analyzing outsourcing trends and service provider capabilities in life sciences digital services.
- 2. Life Sciences Clinical Trials Products PEAK Matrix™ Assessment 2019: Integrated Platforms Rise to the Challenge** ([EGR-2019-46-R-3178](#));
May 2019. Digital technologies have the potential to streamline and accelerate each stage of the clinical trials process – from matching eligible patients to studies, to data collection and monitoring adherence. However, the overall life sciences industry has been slow to digitize clinical trials, with even the most technologically advanced enterprises only piloting technologies in different areas of clinical development. As the industry continues to struggle with its fundamental challenge of achieving faster time-to-market, organizations need to act immediately to devise a robust strategy to harness the full potential of digital technologies in clinical development. In response, clinical trials product vendors have been making significant efforts around ramping up their proprietary solutions portfolio, with many now focusing on taking an end-to-end single vendor platform for clinical trials to the market. What remains to be seen is whether these investments and innovative offerings can now translate into positive business outcomes for enterprises.

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About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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