

Life Sciences Sales and Marketing Operations – Provider Compendium 2023

June 2023: Complimentary Abstract / Table of Contents



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Life Sciences Business Process

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- ▶ Process Mining
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
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Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

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Introduction

With the growing cost of drug and device manufacturing, impact of regulatory development such as the Inflation Reduction Act 2023 and impending patent cliffs, among other factors, robust sales and marketing operations is a must for any life sciences enterprise. Additionally, the increasing involvement of end-consumers/patients in their healthcare decisions and evolving Healthcare Practitioner (HCP) needs, is mandating life sciences enterprises to look for digital tools and technologies to realize incremental value from the market and ensure continual engagement in an increasingly competitive market.

To effectively cater to the evolving enterprise needs, service providers have been revamping their scope of sales and marketing operations offerings. Investments vary from point analytics solutions such as HCP segmentation to large-scale multi-tower platform solutions covering marketing, promotion, and sales along with investments in evolving technologies such as metaverse for sales rep training.

In this research, we present an assessment and detailed profiles of 17 service providers featured on life sciences sales and marketing operations PEAK Matrix®. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, and domain investments. The assessment is based on Everest Group’s annual RFI process for calendar year 2022, interactions with leading life sciences providers, client reference checks, and an ongoing analysis of the life sciences BPS market.

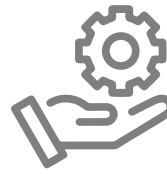
This report includes the profiles of the following 17 leading life sciences providers featured on the [Life Sciences Sales and Marketing Operations – Services PEAK Matrix® Assessment 2023](#):

- **Leaders:** Axtria, Cognizant, Indegene, IQVIA, and ZS
- **Major Contenders:** Accenture, Conduent, Eversana, Genpact, ICON, Syneos Health, TCS, Tech Mahindra, and WNS
- **Aspirants:** Conexus Solutions, Lash Group, and Marlabs

Scope of this report



Geography
Global



Providers
Accenture, Axtria, Cognizant, Conduent, Conexus Solutions, Eversana, Genpact, ICON, Indegene, IQVIA, Lash Group, Marlabs, Syneos Health, TCS, Tech Mahindra, WNS, and ZS



Services
Life sciences sales and marketing operations

Summary of key messages

Everest Group’s Life Sciences Sales and Marketing Operations – Provider Compendium 2023 provides accurate, comprehensive, and fact-based snapshots of 17 life sciences sales and marketing services providers. The compendium will enable providers to benchmark their capabilities against their competitors, while buyers of life sciences sales and marketing services will be able to assess the providers based on their desired set of capabilities.

Key report findings and observations:

Life Sciences Sales and Marketing Operations – Services PEAK Matrix® characteristics

Everest Group positions 17 life sciences sales and marketing operations service providers on the Everest Group Life Sciences Sales and Marketing Operations PEAK Matrix® as:

- Leaders: Axtria, Cognizant, Indegene, IQVIA, and ZS
- Major Contenders: Accenture, Conduent, Eversana, Genpact, ICON, Syneos Health, TCS, Tech Mahindra, and WNS
- Aspirants: Conexus Solutions, Lash Group, and Marlabs

Profiles of service providers

- The report provides an overview of each provider and outlines any recent developments/investments made by them
- It offers insights on provider client portfolios, including their key delivery locations and proprietary tools/solutions
- It highlights providers’ key strengths and limitations

The Life Sciences Sales and Marketing Operations – Provider Compendium has 17 provider profiles

Life Sciences Sales and Marketing Operations – Provider Compendium 2023

Provider 1 profile (page 1 of 5) Overview

Company overview

Provider 1 designs and develops advanced digital solutions that led digital innovation with human experience, composable digital partners and innovators. The company provides strategy and prototyping, and agile engineering.

Headquarters:

Key leaders

- Leader 1, Chairman and CEO
- Leader 2, Chief Operating Officer
- Leader 3, Chief Commercial Officer
- Leader 4, Chief Financial Officer
- Leader 5, Chief Marketing Officer

Recent developments (including acquisitions, partnerships, etc.)

- Set up an automation CoE to make sales and marketing operations more efficient
- Set up a sales and marketing excellence CoE
- Invested in building solutions and partnerships for patient outreach

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Life Sciences Sales and Marketing Operations – Provider Compendium 2023

Provider 1 profile (page 2 of 5) Delivery locations



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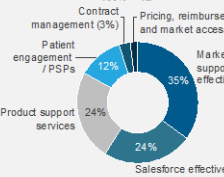
Life Sciences Sales and Marketing Operations – Provider Compendium 2023

Provider 1 profile (page 3 of 5) Capabilities and key clients

Revenue split by value chain segments

Revenue in US\$ million

100% = 12



Key life sciences sales and marketing operations engagements

Client name	Sub-processes served
A US-based medical device company	Ma
A leading US-based and worldwide distributor of medical and dental supplies including vaccines and pharmaceuticals	Ma
A Europe-based global pharma organization	Ma

1 Buyer size is defined as mega (>US\$20 billion), very large (US\$10-

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Life Sciences Sales and Marketing Operations – Provider Compendium 2023

Provider 1 profile (page 4 of 5) Technology solutions/tools

Solution/ Tool name

Sub-processes served

Solution 1	Marketing support and effectiveness, reimbursement, and market access effectiveness, contract management, patient engagement / PSPs, and Product support services
Solution 2	Marketing support and effectiveness, contract management, patient engagement and Product support services
Solution 3	Marketing support and effectiveness, contract management, patient engagement and Product support services
Solution 4	Patient engagement / PSPs
Solution 5	Patient engagement / PSPs
Solution 6	Marketing support and effectiveness
Solution 7	Marketing support and effectiveness
Solution 1	Marketing support and effectiveness

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Life Sciences Sales and Marketing Operations – Provider Compendium 2023

Provider 1 profile (page 5 of 5) Everest Group assessment – Aspirant

Measure of capability: Low High

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

Strengths

- Provider 1 has robust proprietary solutions such as mAdvisor, which leverage predictive analytics to translate data into meaningful insights, order tracking system, physician query management, and NLP-based chatbots for patient connect
- Provider 1 has a decent breadth of portfolio offerings ranging from marketing support and patient services to medical information support
- Provider 1 has continued to build its talent pool, which comprises domain specialists with advanced degrees in life sciences, to transition from a horizontal technology partner to a verticalized solution provider
- Provider 1 has observed steady and robust growth in the life sciences commercial space, coupled with high client retention, indicative of how its offerings are finding traction with clients

Limitations

- While Provider 1 is experiencing good traction in the commercial space on the back of its strong digital play, given the existing scale, traction in large end-to-end operations deals may be limited
- Enterprises looking for onshore support (especially for strategy-oriented processes such as patient support programs and HEOR) might be hesitant to partner with Provider 1 as it has an offshore-centric delivery model
- Its current focus on leveraging thought leadership, case studies, and marketing initiatives to build brand recall is limited vis-à-vis peers

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Research calendar

Life Sciences Business Processes

Published
 Planned
 Current release

Reports title	Release date
Pharmacovigilance and Complaint Management Operations – Services PEAK Matrix® Assessment 2021	March 2021
Pharmacovigilance and Complaint Management Operations Service Provider Profile Compendium 2021	April 2021
Life Sciences Operations – Services PEAK Matrix® Assessment 2021	June 2021
Life Sciences Operations – Service Provider Compendium 2021	September 2021
Life Sciences Operations – State of the Market 2021	September 2021
MedTech – The Next Colossal Wave in Life Sciences Outsourcing	April 2022
Life Sciences Operations – PEAK Matrix® Assessment 2022	June 2022
Life Sciences Operations – Provider Compendium 2022	September 2022
What’s in a label? The Evolving Landscape of Labeling and Artwork in the Life Sciences Industry	February 2023
Navigating the Shift in the Pharma-CRO Engagement Model: Evolving Pharma Needs Signaling Change	February 2023
Life Sciences Sales and Marketing Operations – Services PEAK Matrix® Assessment 2023	March 2023
Life Sciences Sales & Marketing Operations – Provider Compendium 2023	June 2023
Life Sciences Sales & Marketing – State of the Market 2023	Q2 2023
Life Sciences Operations PEAK Matrix® Assessment 2023	Q3 2023
Evolution of Clinical Trial Operations	Q3 2023

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