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Professional
Society

2023 Medical Affairs Metrics Benchmark



Introduction

The Medical Affairs Professional Society (MAPS) is pleased to share our 2023 Medical Metrics Benchmarking Report. This Report is based on findings from 51 leading organizations representing the Pharmaceutical, Biotech, and Medical and Diagnostic Device sectors regarding capturing metrics and developing insights to influence the Medical and enterprise strategy.

Survey Design and Analysis: MAPS would like to thank Boston Consulting Group for moderating the Ambassador Alliance session during the MAPS 2023 Global Annual Meeting in Nashville, TN., and Tim Mikhelashvili, CEO & Co- Founder, Amedea Pharma, Inc. for developing and executing the survey.

Respondents: MAPS selected 51 representatives from 30 Pharma companies, 10 Biotech Companies, 9 Medical Devices companies and 2 Medical Diagnostics companies.

All responses were anonymous, meaning the self-reported industry type reflected in the baseline data overview may not align with the breakdown of the invitees.

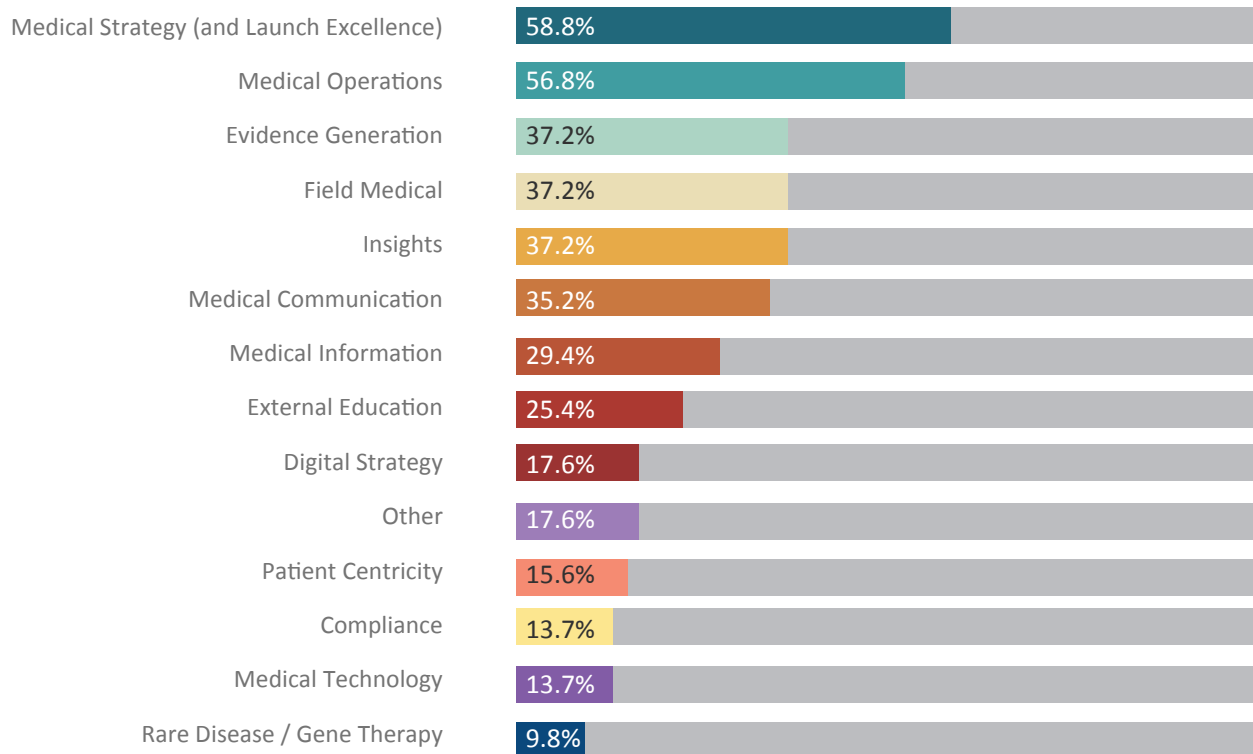
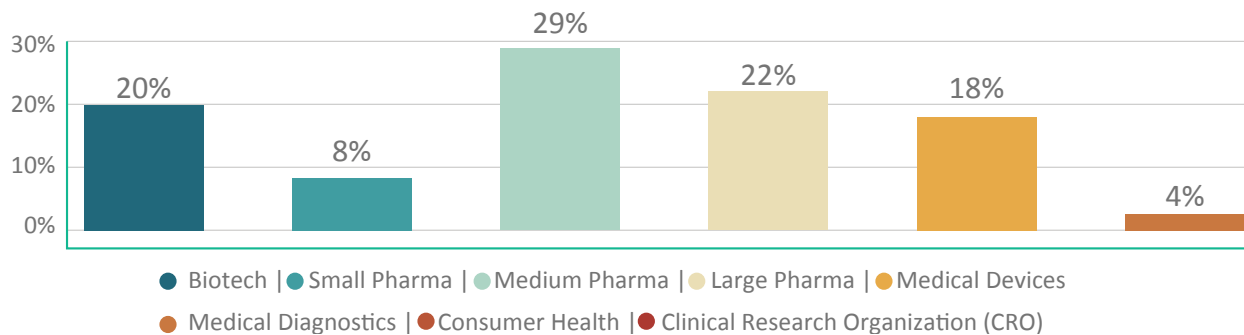
Companies that completed the survey:

- 3M
- Acadia Pharmaceuticals
- Amicus Therapeutics
- AstraZeneca

- Baxter
- Becton Dickinson
- BioMarin
- bioMérieux
- Boehringer Ingelheim
- Boston Scientific
- Connect Biopharma
- Daiichi Sankyo
- Eisai
- Elvium Life Sciences
- GSK
- Horizon Therapeutics
- Ipsen
- Jazz Pharmaceuticals
- Kite pharma
- Kyowa Kirin
- Longboard Pharmaceuticals
- Lundbeck
- Mallinckrodt
- Medtronic
- Merck
- Mundipharma
- Mylan Italia srl - a Viatrix Company
- Myovant
- Nighthawk Biosciences
- Nobelpharma America, LLC
- Novartis
- Organon
- Otsuka
- Pfizer
- Regeneron
- Takeda
- Teva
- UCB
- Viatrix

01. Baseline Data

Medium-Large pharma accounts for ~50% of represented Medical Affairs professionals sample, with biotech being the next most-represented, at ~20% of respondents. Consumer health and CRO cohorts were not represented within this survey.



Majority of surveyed group work across Medical strategy and Medical operations. Least-represented functions include Compliance, Medical Technology, and Rare disease/gene therapy (all <20% of respondents)



02. Executive Summary of Insights

This report summarizes results of the 2023 Medical Affairs Metrics Benchmark Survey, representing 51 completed responses. This survey was fielded to get the latest insights on Medical Affairs organizations' perspective on metrics, activities, and outcomes.

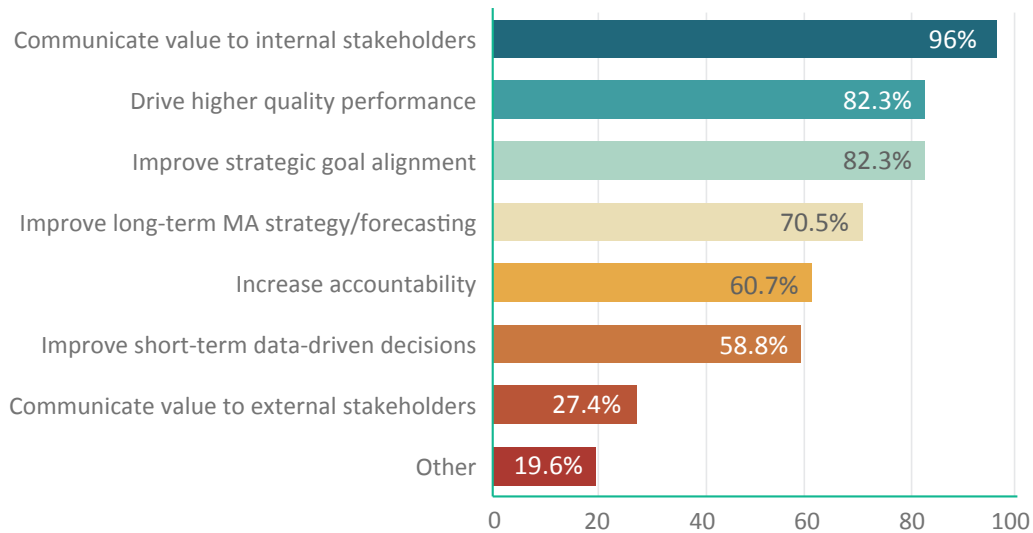
Key insights

- **Importance of capturing metrics:** Most respondents believe capturing metrics is important for internal purposes such as measuring and driving performance in Medical, communicating value internally and consequently impacting overall Medical strategy. In contrast, communicating value to external stakeholders is ranked lower (~27%), indicating a substantial gap. Exploring/investigating this gap may provide further insights on Medical's value proposition within and outside of the Medical organization and help Medical leaders identify ways to better communicate value to external stakeholders. Additionally, roughly only ~60% of respondents have strategies in place to ensure the validity and relevance of metrics for their respective activities and outcomes- suggesting a potential pain point.
- **Impact & activity metrics:** 60% track insights and outcomes and report them as metrics. Storage/tracking platform for metrics and how to leverage metrics varies by company. CRM, Sharepoint and Excel are top tools for tracking activity metrics. Individual activity metrics are shared with the individuals evaluated while Medical teams activity metrics are communicated with cross-functional management and internally within Medical Affairs.
- **Medical Affairs Dashboard:** MSL/KOL interactions, MSL insights and publications are three of the top outcomes tracked in Medical Affairs dashboard. Key to understand how to more effectively leverage these dashboards to impact the Medical strategy and build the value story.
- **Activities and outcomes:** Outcomes are communicated to cross functional management teams, Medical Affairs management team and with relevant Medical team members. Most teams aren't ranking outcomes but reporting them qualitatively. When ranked, outcomes are categorized by their impact on corporate strategic goals. While many do not differentiate between activities and outcomes, both are used to guide Medical strategy.

03. Metrics, Activities and Outcomes

Most respondents believe capturing metrics is important for communicating Medical's value story within the medical function, driving quality performance, and aligning strategic goals. Internal communication to Medical Affairs stakeholders represents the largest value-add of capturing metrics, as affirmed by ~96% of respondents. In comparison, external stakeholder communication to other functions and to HCPs, payers and provides, etc., is cited as significantly lower value-add from metrics capture, as indicated by ~20% respondent. This gap in prioritization of internal versus external communication highlights the need for Medical teams to better communicate their mandate beyond internal teams into cross functional business units and the healthcare ecosystem overall.

Metrics help communicate value, drive higher quality performance, and strategic alignment of goals

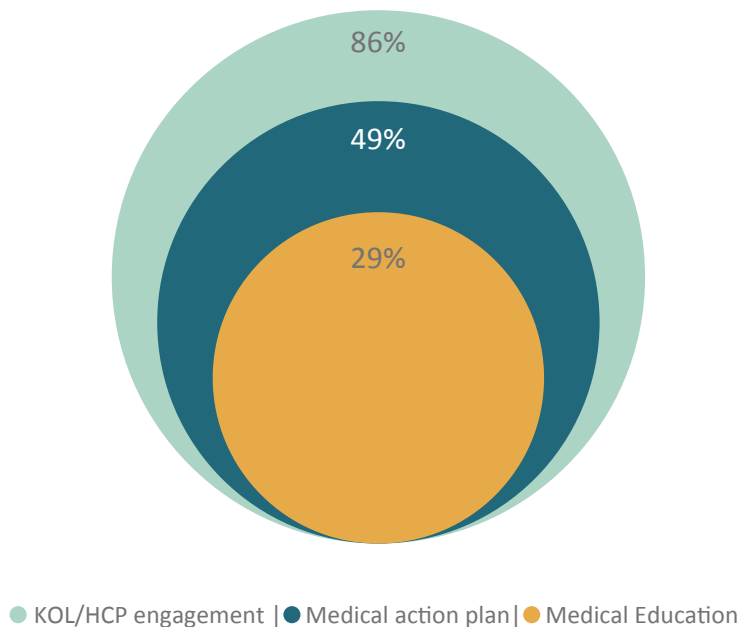


Q5: Why do you believe capturing Metrics is important to Medical Affairs?



Within metrics, engagement with KOL, creating Medical action plan and Medical education/training are the top three tracked activities. Medical action plan includes strategy, spend, completion of MLRs, and all relevant internally aligned goals. Publications, collaborative studies and scientific congresses are tracked by approximately 16% of the respondents. Medical communication is the least prioritized activity for most respondents. Tracking these activities provides a clear representation of Medical’s status quo priorities, however it would be interesting to explore how the lower tier activities can be utilized as to improve performance, value proposition, and strategic alignment.

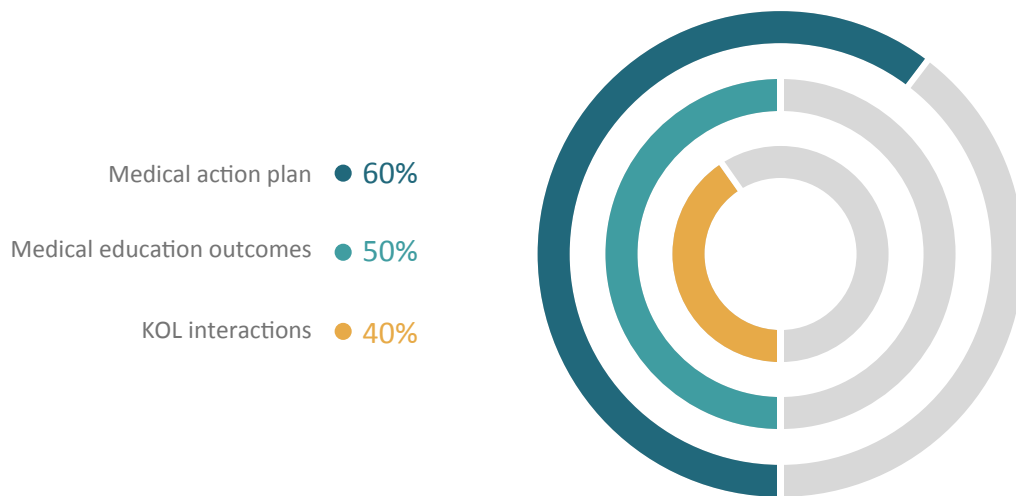
Roughly 86% of respondents prioritize KOL/HCP engagement in their metrics



Q6: *What are the top 3 Activities you track in your Metrics?*

In regards to outcomes as Metrics- about 25% of the respondents do not track outcomes at all. Among those who do, outcomes related to Medical action plan, Medical education, and KOL interactions are among the top three tracked outcomes. Outcomes considered for Medical education include attendance at webinars or in-person trainings, workshops, etc. Lastly, some key measurable outcomes from KOL interactions are number of first-time visits, follow-up visits and completed/resolved Medical information queries as indicated by 41% of the respondents. Some outcomes that are not as well represented by respondents are dissemination of Medical communication, guidance updates, launch success and proprietary offerings.

Medical action plan, education outcomes and KOL interactions are top 3 outcomes

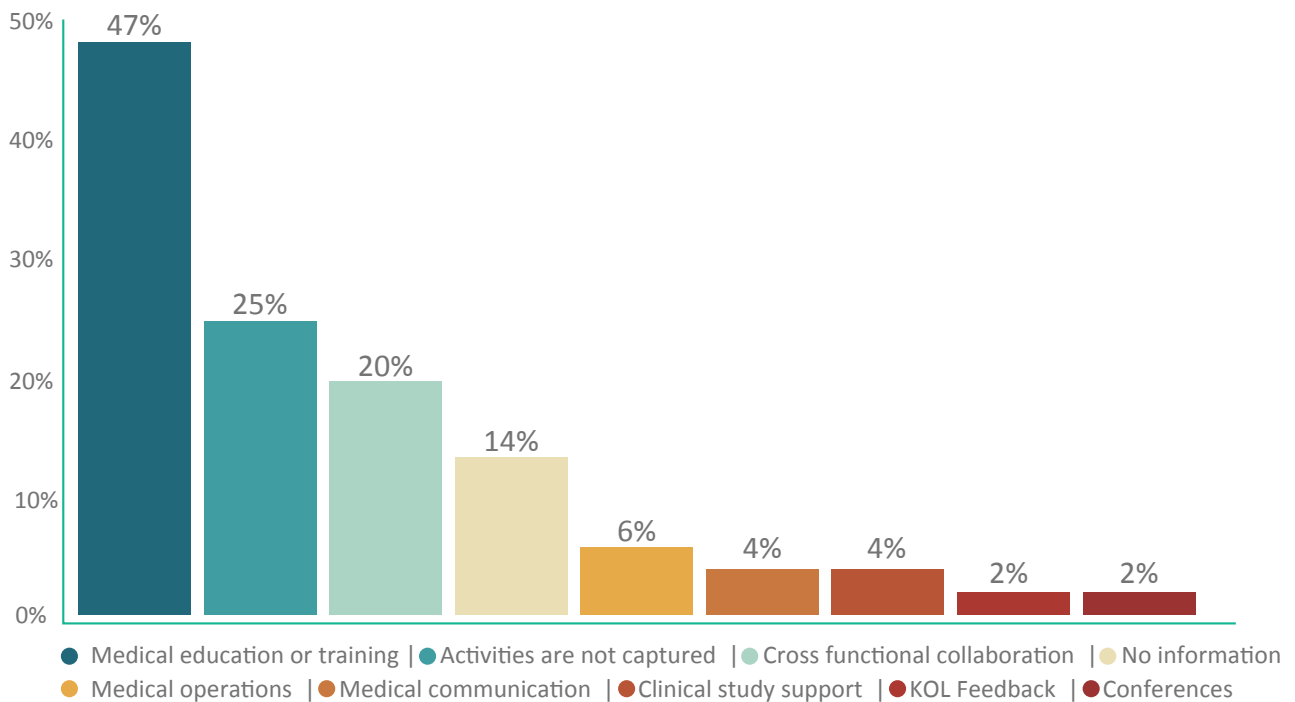


Q7: *What are the top 3 Outcomes you track in your Metrics? If applicable, please state whether each is a Team OR an Individual outcome.*



Looking into internally facing activities that are captured and monitored in alignment with Medical’s goals, there is variability across companies. Medical educational workshops (47%) and cross functional collaborations (20%) are the most captured internal activities. 25% of the respondents do not capture internal facing activities and 8% could not identify/specify the activities.

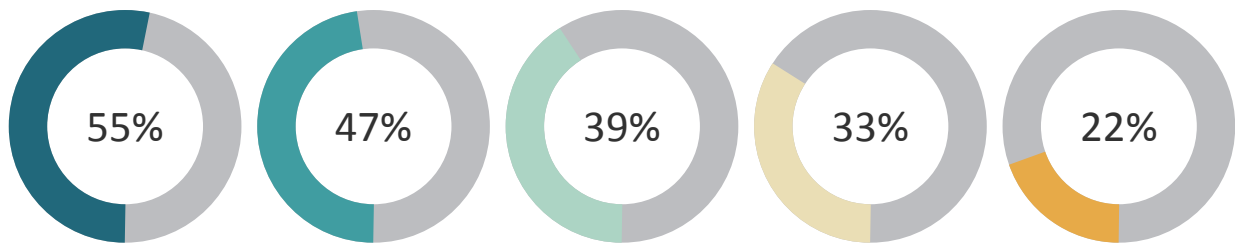
25% do not track any internal activities; Medical educational activities are most captured for those who do track



Q8: Do you capture internally facing activities such as learning and development, cross-functional collaboration or training in your Metrics aligned to strategy and goals? If so, which ones?

Numerous activities that are discussed as part of this analysis are tracked and stored in distinct platforms as metrics across Medical teams. CRM, SharePoint and Excel spreadsheets are top tools for tracking activity metrics with CRM being the most popular” with “CRM are the most popular tool for tracking activity metrics.

More than half the respondents utilize CRMs for capturing activities



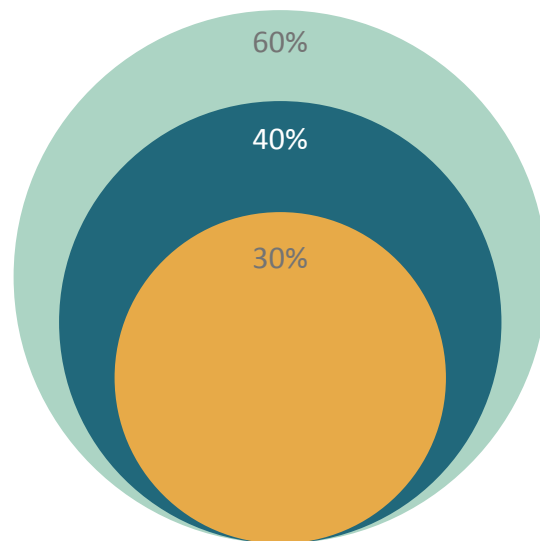
- CRM | ● Sharepoint or other internal shared space | ● Excel spreadsheet | ● Other (please specify)
- Third party platform (specify)

Q11: Where do you capture your function's activity Metrics?



Within Medical Affairs organizations, quality of KOL interactions and achievements of Medical action plan are both ranked as top metric or outcome, highlighting some ambiguity on outcomes versus activity metrics. 60% agree KOL interactions is a top metric to track value of Medical, followed by impact of Medical Insights (40%) and success of Medical Action Plan (30%). Launch, HEOR submissions and strategic partnerships are low in ranking for metrics that show Medical’s value. As we consider improving Medical’s visibility throughout a product lifecycle, greater involvement with launch activities and evidence generation via HEOR dossiers may be of great value.

KOL interactions, impact of Medical Insights and success of Medical action plan are top metrics demonstrating Medical value

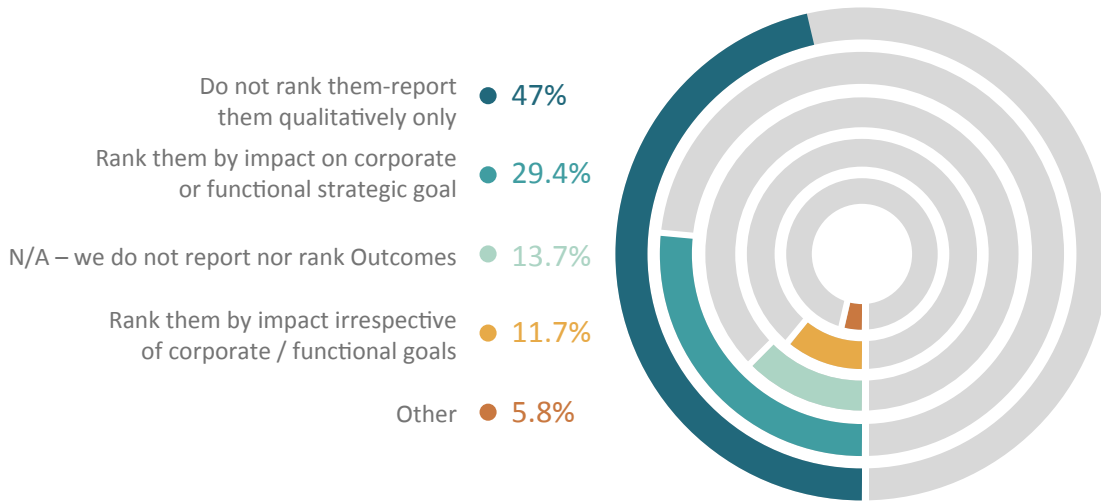


● Quality of KOL interactions | ● Impact of medical insights | ● Medical action plan accomplishment

Q12: What are your top 3 Metrics that demonstrate the value Medical delivers to the organization?

Among rating or ranking of outcomes, qualitative reporting is the most common practice across the industry as indicated by 47% of the respondents. In contrast, about 30% respondents quantitatively rank by impact on corporate or functional strategic goals. About 20% either do not rank/rate or didn't identify methods to do so. This finding helps us better understand that outcomes can be measured both qualitatively and quantitatively to capture a holistic picture of Medical's accomplishments and progress.

~47% report outcomes qualitatively and ~30% rank them by impact on strategic goals.



Q16: How do you rate or rank Outcomes?

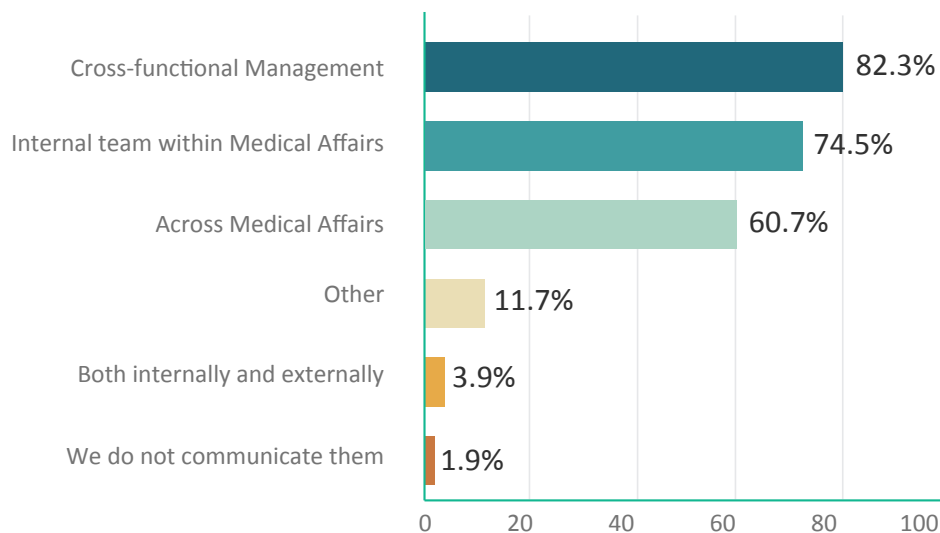


04. Communicating metrics and outcomes:

Communicating value of Medical is often the core theme of discussions among Medical teams and leaders. In this section of the analysis we look closer at how the metrics and outcomes we have discussed in the prior sections is communicated within and beyond the Medical organization.

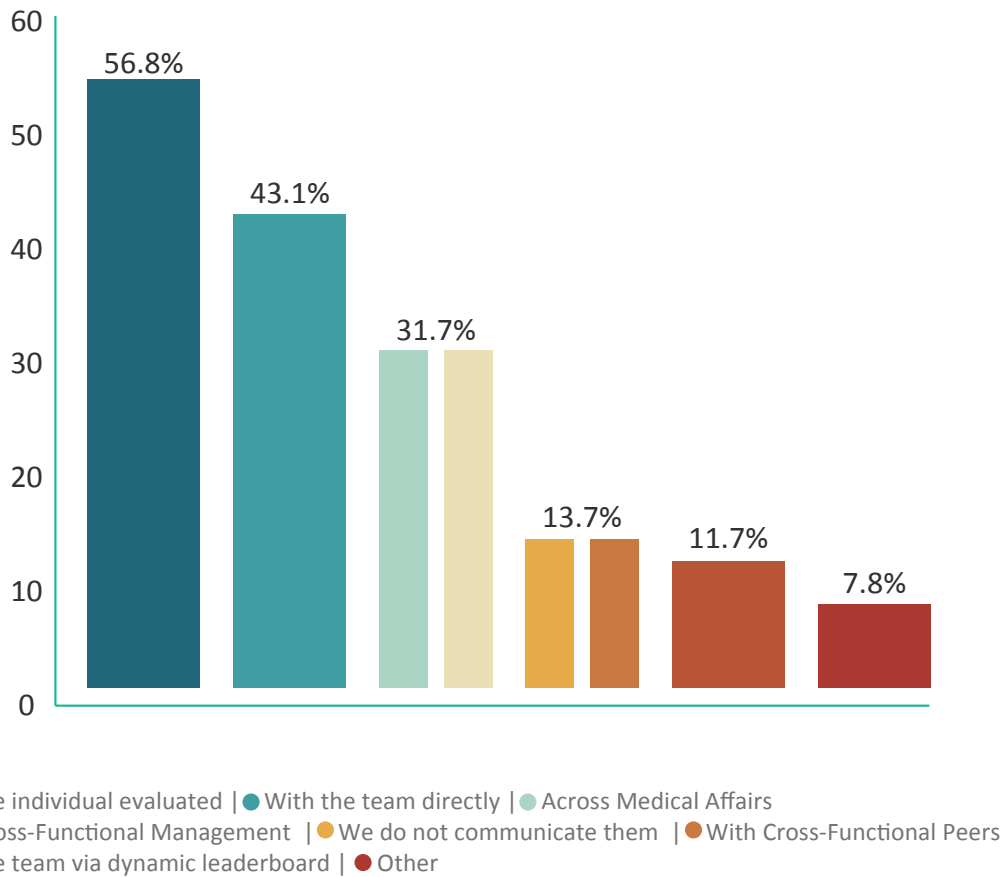
Team activity metrics are communicated with both cross functional **management teams** and within Medical Affairs internal management teams. Sharing these metrics cross functionally can improve visibility of Medical and demonstrate value to the broader organization.

Team activity metrics are communicated across all management teams and within Medical Affairs



Q13: With whom do you communicate your Team's Activity Metrics?

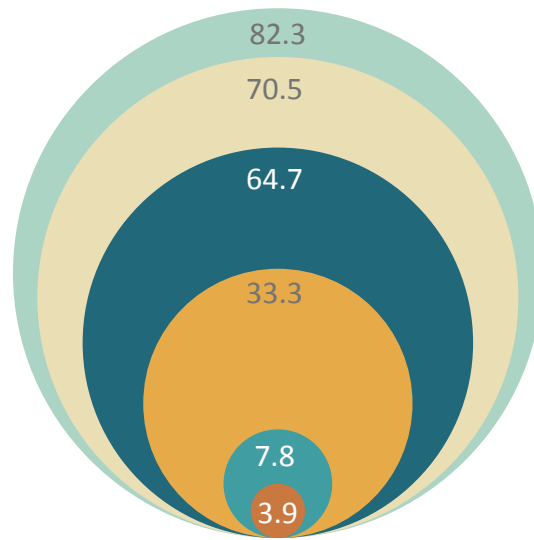
On the other hand, individual activity metrics are mostly shared directly with evaluated individuals as expected. Teams often have insight on individual activity metrics as well, which can drive incentive structures for improved performance.



Q14: With whom do you communicate Individual Activity Metrics?



Medical's outcomes and activities are widely shared even among non-Medical management teams to help demonstrate value of Medical across the organization. 33% of the respondents share outcomes across function as well.



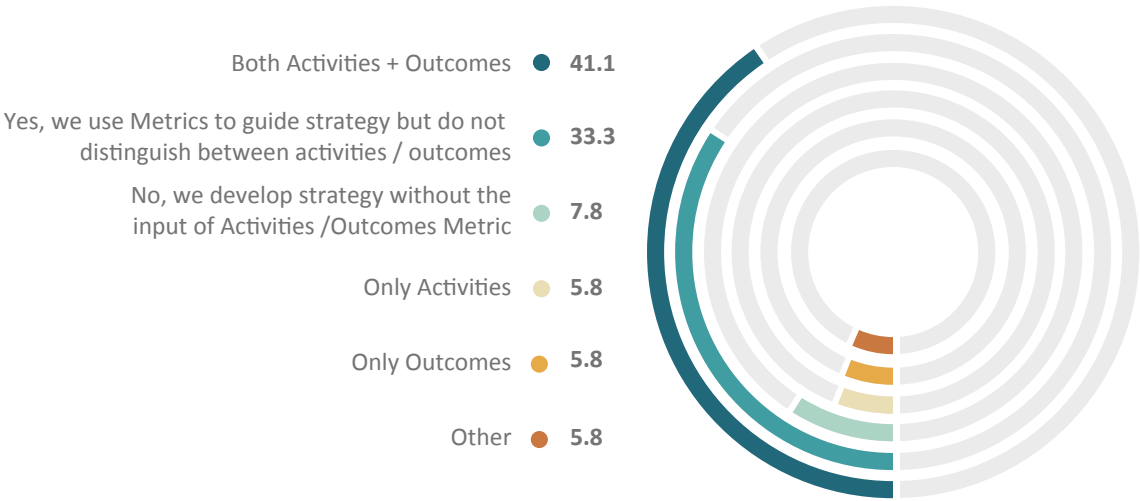
- Cross-functional Management | ● Internal team within Medical Affairs
- Across Medical Affairs | ● Other | ● Both internally and externally
- We do not communicate them

Q15: With whom do you communicate the Outcomes of your function's activities?

05. Medical Strategies:

Activities and outcomes are insightful when guiding Medical strategy. ~75% of respondents agree that activities or outcomes guide strategy, but only ~40% of respondents employ both in a distinct manner, reflecting prior finding on lack of distinction between activities and outcomes. This signals an opportunity for more nuanced data-driven strategies and appropriate categorization of such metrics.

Activities and Outcomes both guide medical strategy for ~75% of respondents

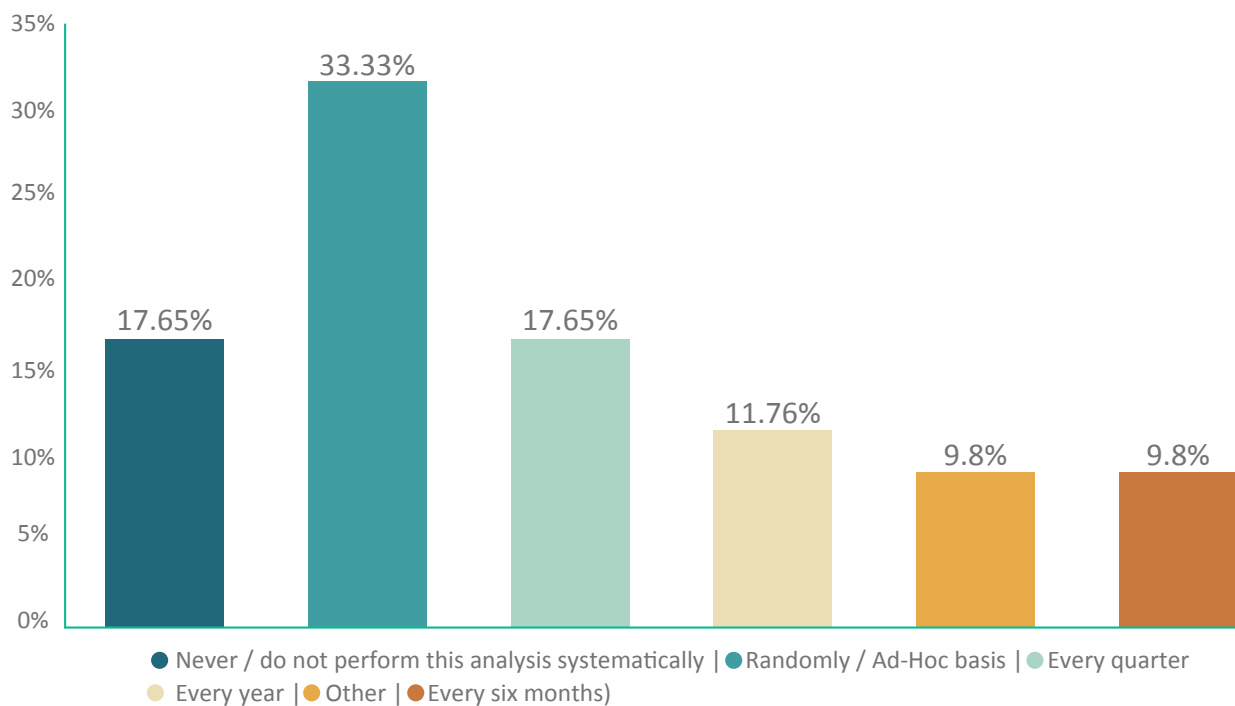


Q17: Do you utilize Activities and/or Outcomes Metrics to guide your Medical Strategy?



Roughly only ~40% of respondents analyze the relationship between activities and outcomes systematically, suggesting a substantial majority that does not analyze such synergies or even when tracked, it is not systematic. Streamlining such analyses can bring tremendous value for Medical’s growth within the organization, drive performance and identify opportunities for improvement.

~33% of respondents analyze activities and outcomes on an ad-hoc basis and ~40% analyze systematically



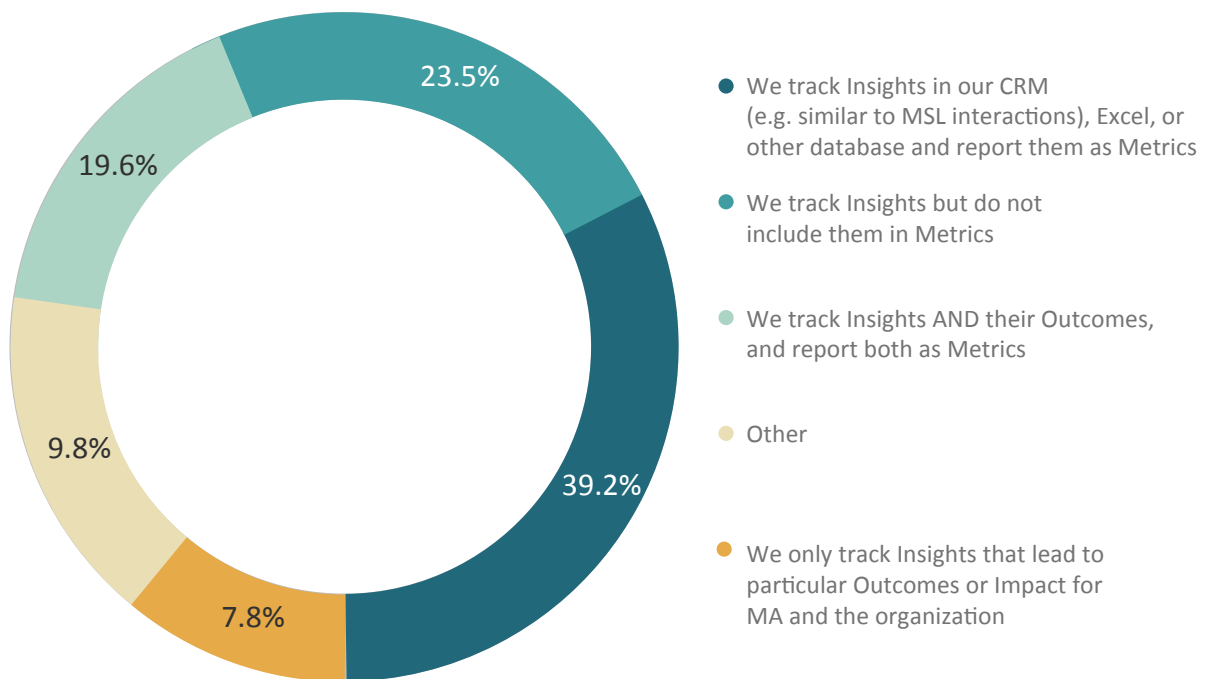
Q18: How often do you analyze the relationship between Activities and Outcomes to establish future Strategy and Goals?

Additional analyses on metrics validity and relevance (graphs not included in this report) show that only a few teams are tracking activities and metrics to influence their Medical strategy. A sizable 70% do not have methodology in place to analyze the relationship between activities and outcomes, hence unable to capture the impact value of Medical. This further corroborate the finding in our analysis that showing that 50% of respondents don’t believe or are unaware of their function’s contribution to the overall Medical strategy and action plan. Among the small percentage those who do think activities influence strategy, 39% believe insights and 20% believe cross functional activities shape strategy.

06. Medical Insights

Medical insights are leveraged at various capacities by Medical teams. ~60% of respondents reported tracking insights in CRMs and reporting them as metrics, while ~25% track insights but do not include them as metrics. Some respondents take insights further, and report the associated outcomes as metrics. Our analysis identifies a discrepancy among Medical organizations on whether insights can be included in metrics or not.

Medical insights are diversely utilized as reflected by the survey results



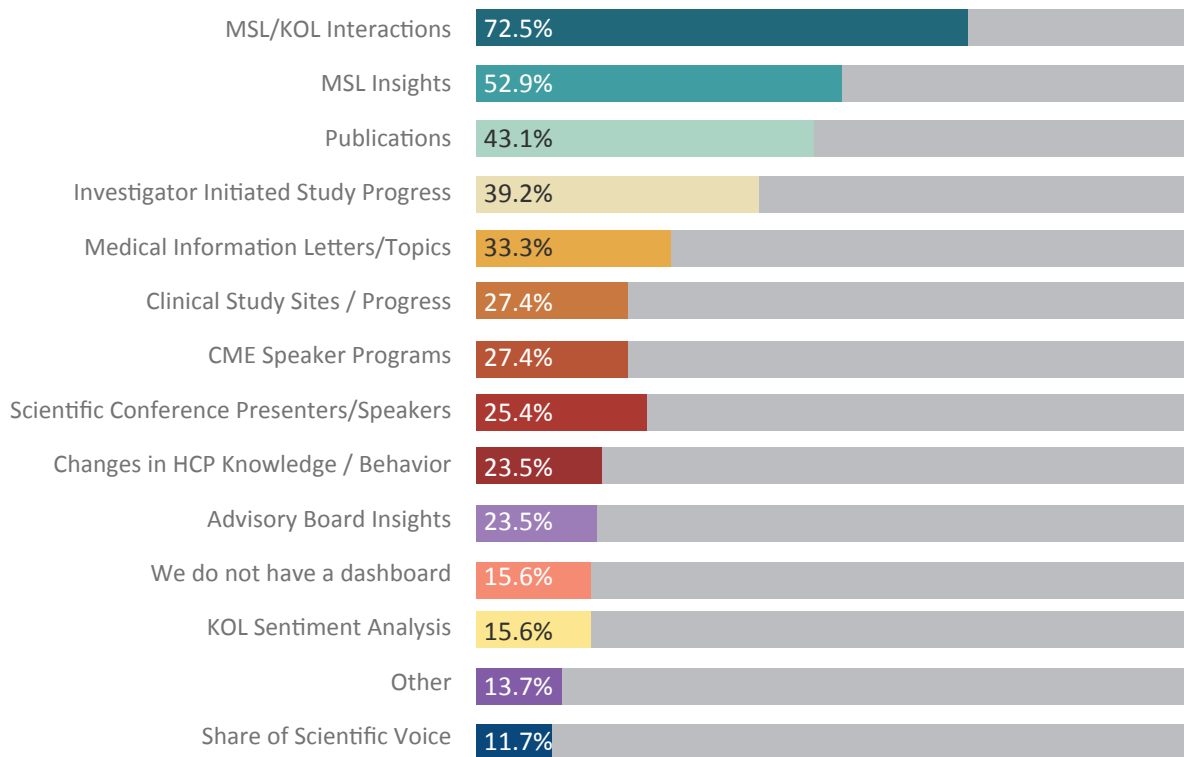
Q9: Do you include Medical Insights in your Metrics?



07. Medical Affairs dashboards:

CRMs and similar dashboards are utilized to track activities such as KOL interactions, actionable inside, publications, progress of investigator-initiated studies and medical communication. Broad opportunity exists to increase activity coverage across Medical affairs workstreams, given that only MSL/KOL interactions and MSL insights are tracked among majority of respondents. Higher-quality insight generation can be achievable through automation of advanced data techniques (e.g., automated ingestion and sentiment analysis of KOL feedback), currently infrequently represented.

MA dashboards most frequently track interactions and insights from MSLs and KOLs.



Q10: What types of Activities or Outcomes do you track in your MA Dashboard?

Discussion and insights from the Ambassador Alliance session at MAPS (Nashville, March 26th, 2023):

Post-benchmarking, 31 Biopharma and MedTech companies came together at the Ambassador Alliance session to debate, interpret, and dialogue key topics for Medical and these benchmark findings around metrics and insights*. Here are key takeaways from the discussion.

Current gaps and areas of opportunities in Medical metrics:

This benchmark highlighted Medical strengths in collecting and tracking activity data but showed the clear need to better identify, capture and communicate enterprise impact metrics to both the broader enterprise as well as across the healthcare ecosystem. There is a long-standing value narrative gap due to heterogeneity and breadth of Medical Affairs departments

- Medical is good at capturing and quantifying both qualitative and quantitative metrics but lacks the strong ability to develop insights that can help shape the enterprise strategy. Activity metrics can drive decisions on resourcing and scope of work, while impact & outcome metrics are key to demonstrate value to patients and healthcare stakeholders (HCPs, Payers & Providers, etc.) as well as impact on enterprise strategy.
- Medical teams often lack ability to build and communicate the value narrative with the data and metrics collected. The value and impact of metrics is often not maximized as the metrics are not translated into meaningful evidence and insights.
- Medical needs to increase focus on most impactful and valuable metrics, with more automated processes to consistently influence the Medical and enterprise strategy.
- Communicating value to external stakeholders, both outside of the Medical function and the enterprise, is lacking. Less than 30% of the benchmark respondents consistently communicate value outside of Medical.

Evolution of Medical to improve how we create and use metrics

Medical teams do valuable work in Biopharma and MedTech, however they need to optimize the way they measure impact and outcomes in addition to activity metrics to be able to play a more strategic role in the drug development life-cycle. Key capabilities that need to be enhanced include:

- Driving consistency of key impact metrics across the industry that elevates overall understanding of Medical



- Advancing analytical capabilities (e.g., data scientists and technical skills, analytical tools, digital etc.)
- Increasing drug development and regulatory science acumen within Medical to collect and communicate R&D impact metrics

Key insights:

- **Standardization needed in tracking insights:** consistent methodology is required to demonstrate how activity can be turned into actionable insights and to develop solutions to challenges the enterprise faces. This can include digitization of dashboards, grouping large number of data and insights into defined categories, streamlining medical information, etc.
- **Advance analytical capabilities:** Lack of operational bandwidth or infrastructure in Medical leads to inability to measure Medical metrics or the numerous KPIs to translate them into valuable insights for the other key functions (i.e., R&D, Commercial, etc.)
- **Increasing business and drug development acumen in Medical:** Sophisticated business acumen is required to be able to identify what we should be measuring and communicating to convey the value of Medical. In times of closer scrutiny by regulatory authorities, Medical needs to strategically translate scientific exchanges into value stories and demonstrate the direct contribution of medicines to improve patients' lives. It is especially important to create Medical value narrative in the absence of clear ROI metrics. These value stories can also be circulated in the form of white papers that can capture the attention of HCPs and Payers.
- **Patient centricity:** Medical mandate is to be the voice of patients, improve lives and help providers get accurate scientific information for the best possible treatment of their patients; hence it is critical for Medical to anchor the value narrative with the patient's needs. Alongside communicating the business goals, achievements and company financials, there is a clear need to demonstrate how Medical has impacted the lives of the patients treated.

**For the purpose of this report: We define Insight as an accurate and deep understanding of a disease, the patient and the practice of medicine that is connected to seeing a business, drug development or patient solution that facilitates reaching a goal.*

Special thanks to the Ambassadors and Guests who participated in the MAPS 2023 Global Annual Meeting discussion

AbbVie	Andrew Holden, Director & Lead Medical Brand & Learning Excellence
Amgen	Joanna Gonsalves, Global Field Medical Excellence Lead
Astellas	Fran Paradiso-Hardy, Vice President, Medical Communications
Baxter	Mandy Corrigan, Senior Manager, Medical Strategy, Worldwide Medical
Becton Dickinson	Constance Johnston, Senior Director Program Management - Medical Affairs
Bristol Myers Squibb	Ghaz Shimoun, Executive Director, WW Field Medical Excellence
Daiichi Sankyo	Thang Trieu, Head, Program Management & Operational Excellence
Eisai	Bagrat Lalayan, Executive Director, Global Medical Lead
Eli Lilly	Karen King, Associate Director, Global Medical Affairs Launch Strategy
Gilead Sciences	Jen Prokes, Executive Director, Medical Affairs Operations
Horizon	Greg Kozar, Senior Director, Medical Affairs Operations
Janssen	Jaime Blais, Head of Medical and Healthcare Excellence
Jazz Pharmaceuticals	Avni Patel, Senior Director, Medical Affairs
Kyowa Kirin	Deb Braccia, Global Medical Affairs Excellence Head
Longboard Pharmaceuticals	Dewey McLin, Vice President, Medical Affairs
Lundbeck	Christine Castro, Director, Medical Affairs Excellence
Mallinckrodt	Brant Jarrett, Executive Director, Head of Field Medical Affairs
Merck	Eric Toron, Executive Director & Lead, Medical Operations
Myovant	Scott Flanders, Executive Director, Medical Affairs (Prostate Cancer)
Nobelpharma America, LLC	Eric Beresford, Vice President, Head of Medical Affairs
Novartis Oncology	Robert Kersting, Global Head, Scientific Alliances
Organon	Nick Massas, Director, Medical Excellence and Capabilities, Medical Affairs & Outcomes Research
Otsuka	Walter Lawhorn, Regional Medical Lead
Pfizer	Sagar Shah, Global Head Field Excellence
SAGE Therapeutics	Aamir Shamim Choudry, Executive Medical Director
Sunovion	Lizbeth Delgado, Executive Director, Field Medical
Teva	Karen Jursca, Director, Operational Excellence

