

DRAFT - WIP

# MedBank Use Case and Learnings

November 2022

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# MedBank Use Case overview

## MedBank Overview

- MedBank objective is to drive growth and new market share by delivering a differentiated customer experience in underserved non-acute market
- The focus was on three priority market segments; Ambulatory Surgical Centers, Behavioural Health, and Closed Door Pharmacies

## Description of Need

- MedBank team had limited knowledge on omnichannel lead generation and had only ever setup multichannel campaigns
- Teams were working in siloes and there was a lack of coordination between marketing and sales team for lead hand-off
- High volume of cold and/or under-nurtured leads were passed to the sales team

## Overview of Process

The MedBank team was tasked to drive the following outcomes:

- Increase lead quality by understanding customer personas, optimizing lead generation efforts and measuring end-to-end performance
- Operationalizing commercial choreography capability, with embedded agile ways of working, managing the end-to-end customer journey

Process taken to achieve outcomes:

- Ran several lead scoring and sales orchestration workshops between Marketing and Sales teams in the MMS organization
- Embedded agile ways of working within the OOT to deliver “test and learn” campaigns to drive optimal pathways to \$2mn in revenue

## Outcomes

- Aligned sales and marketing organizations in MMS
- Developed agile as a way of working for the BU
- Built global standards and how-to-guides for 5 workstreams
- Launched a “test and learn” ASC campaign

## Lessons Learned

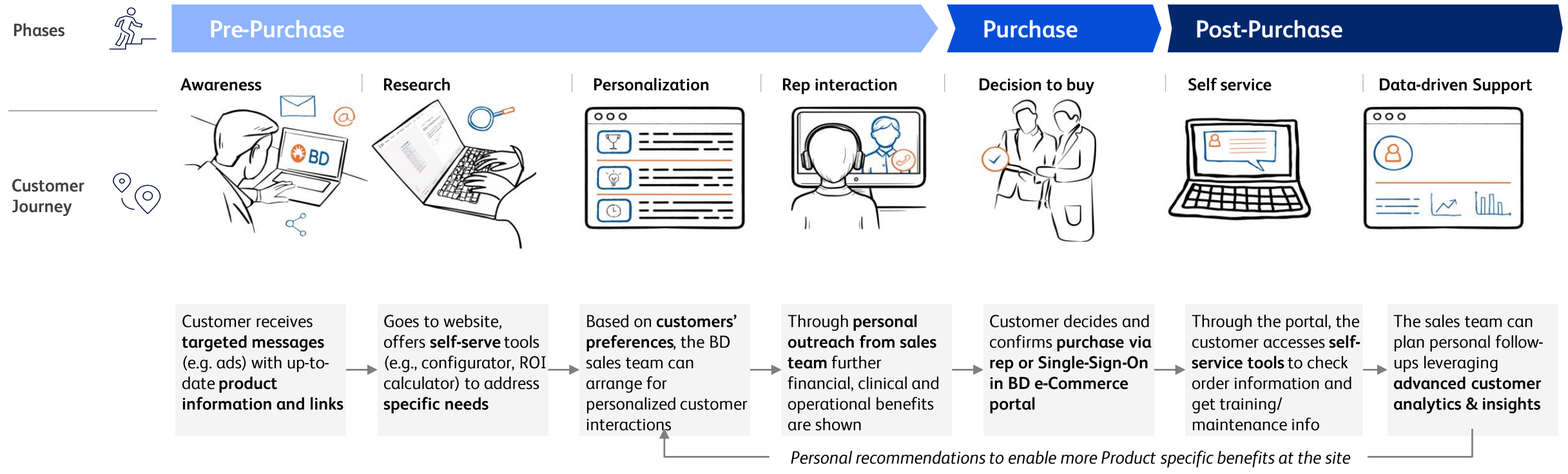
- The MLR process is a blocker for shorter term “test and learn” campaigns
- Agile should be integrated across MMS marketing to drive gains in efficiency
- True omnichannel campaigns require a more cohesive data infrastructure

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- 2 MedBank Use Case Set Up
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- 5 Key Learnings

# North star ambition for Medbank is to re-imagine a seamless customer journey powered by digital data and analytics



# In FY22 MedBank was selected as a priority enterprise commercial use case to receive focused CDA support in executing an omnichannel campaign



## Prioritized commercial use cases

<p><b>Life Sciences</b></p> <p><b>Veritor™ -At-Home</b></p> <p>Become a disruptive brand by delivering a differentiated, streamlined E2E patient experience in home care</p> <p>Dave Hickey</p>	<p><b>Life Sciences</b></p> <p><b>BDB Reagents</b></p> <p>Reduce lead time to support B2B direct e-commerce needs of reimagined bdbiosciences.com, building on E2E VSM</p> <p>Dave Hickey / Alexandre Conroy</p>	<p><b>Medical</b></p> <p><b>MedBank™</b></p> <p>Drive growth and new market share by delivering a differentiated customer experience in underserved non-acute market</p> <p>Alberto Mas</p>	<p><b>Interventional</b></p> <p><b>PureWick™</b></p> <p>Drive growth &amp; new market share by delivering a differentiated customer experience in underserved non-acute market</p> <p>Simon Campion</p>
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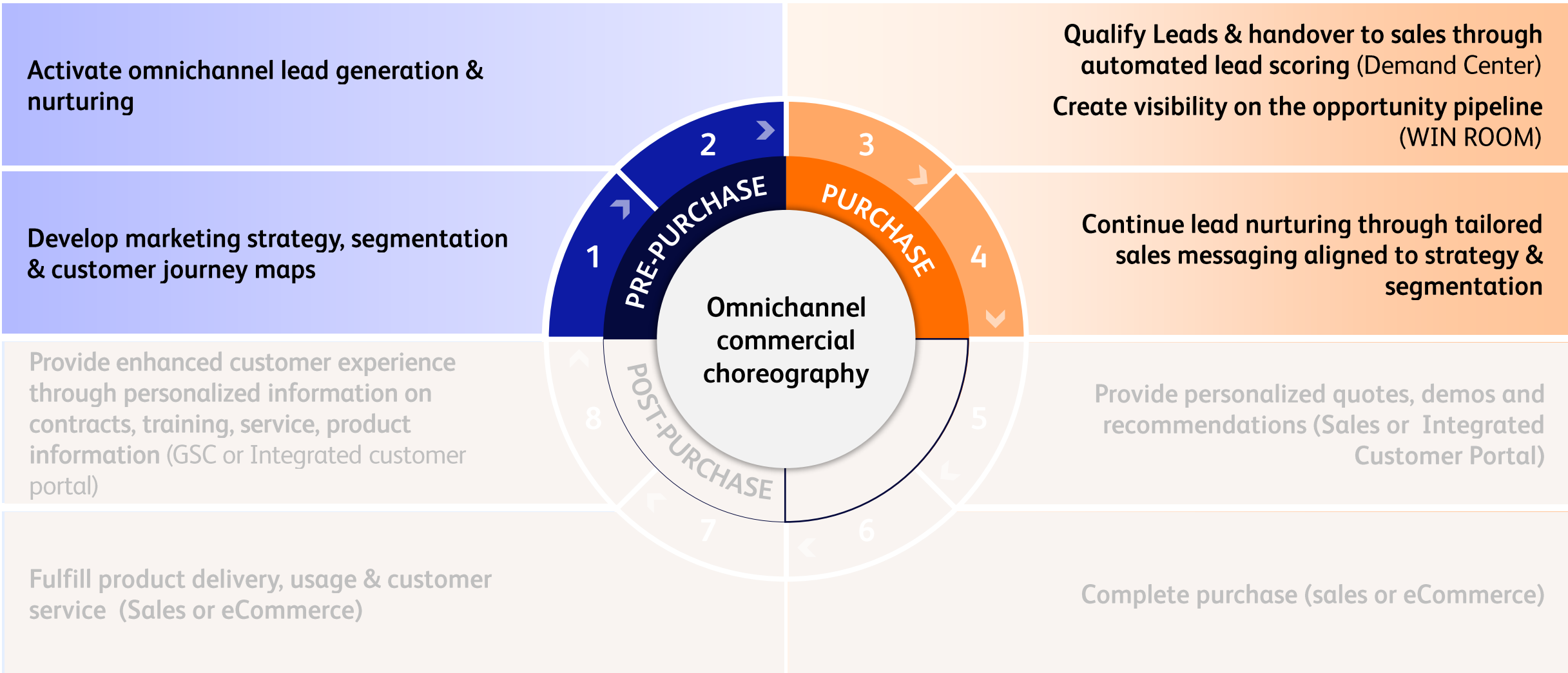
## DDA platforms

<p><b>3</b></p> <p> Omnichannel, customer experience</p>	<p><b>Commercial DDA platform (Project Monaco) BD.com</b></p>	<p></p> <p>Tony Ezell</p>
<p> Smart Factory, Smart Supply Chain</p>	<p>Smart Factory, Smart Supply Chain (Focused investments in "Make" &amp; "Deliver" (e.g., OEE improvement, predictive maintenance and quality, autonomous scheduling) to accelerate reduction of costs, improvement in quality, return on capital and service level while optimizing inventory)</p>	<p></p> <p>Alexandre Conroy</p>

## Backbone enablers

<p> Integrated technology, master data, insights and analytics engine</p>	<p>Master data and Business process excellence (Integrated mgmt. of main business processes and transactions, master data and IT systems at the enterprise level in support of the Product Digital Thread)</p>	<p></p> <p>Jerry Flasz</p>
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The ultimate objective of the use case was to enable successful omnichannel choreography to drive revenue generation through better customer insights and end to end lead management



# The MedBank team had gaps in experience and history with which to achieve the ambition and enable successful omnichannel commercial choreography

## MedBank Starting Point

**Activate omnichannel lead generation & nurturing**  
*Pre-Purchase*

- The team demonstrated limited knowledge on omnichannel lead generation and had only ever setup multichannel campaigns
- The previous campaign did not have any nurture elements built into the customer journey

**Develop marketing strategy, segmentation & customer journey maps**  
*Pre-Purchase*

- The marketing strategy was a role-based approach was taken to segment a purchased database
- Customer journeys were not mapped as part of the previous campaign

**Qualify Leads & handover to sales through automated lead scoring  
Create visibility on the opportunity pipeline**  
*Purchase*

- The lead scoring model was very weak for the first campaign
- The inside sales team received cold leads that were unaware they were in the funnel

**Continue lead nurturing through tailored sales messaging aligned to strategy & segmentation**  
*Purchase*

- There was no coordination between sales and marketing for lead handoff
- The digital marketers were sending over leads that were under-nurtured and under-qualified

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To prepare for campaign execution, we underwent a set up phase to ensure maximum impact and sustained capability uplift from the MedBank team

## Target outcomes of MedBank Use Case Set Up

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-  Omnichannel Orchestration team mobilized and ready for campaign execution
  - ✓ Critical team roles filled and onboarded
  - ✓ Core Team trained across key capabilities (e.g., Agile Marketing)
  - ✓ Cross-functional coordination between marketing and sales team

# The MedBank Omnichannel Orchestration team had a number of roles and responsibilities

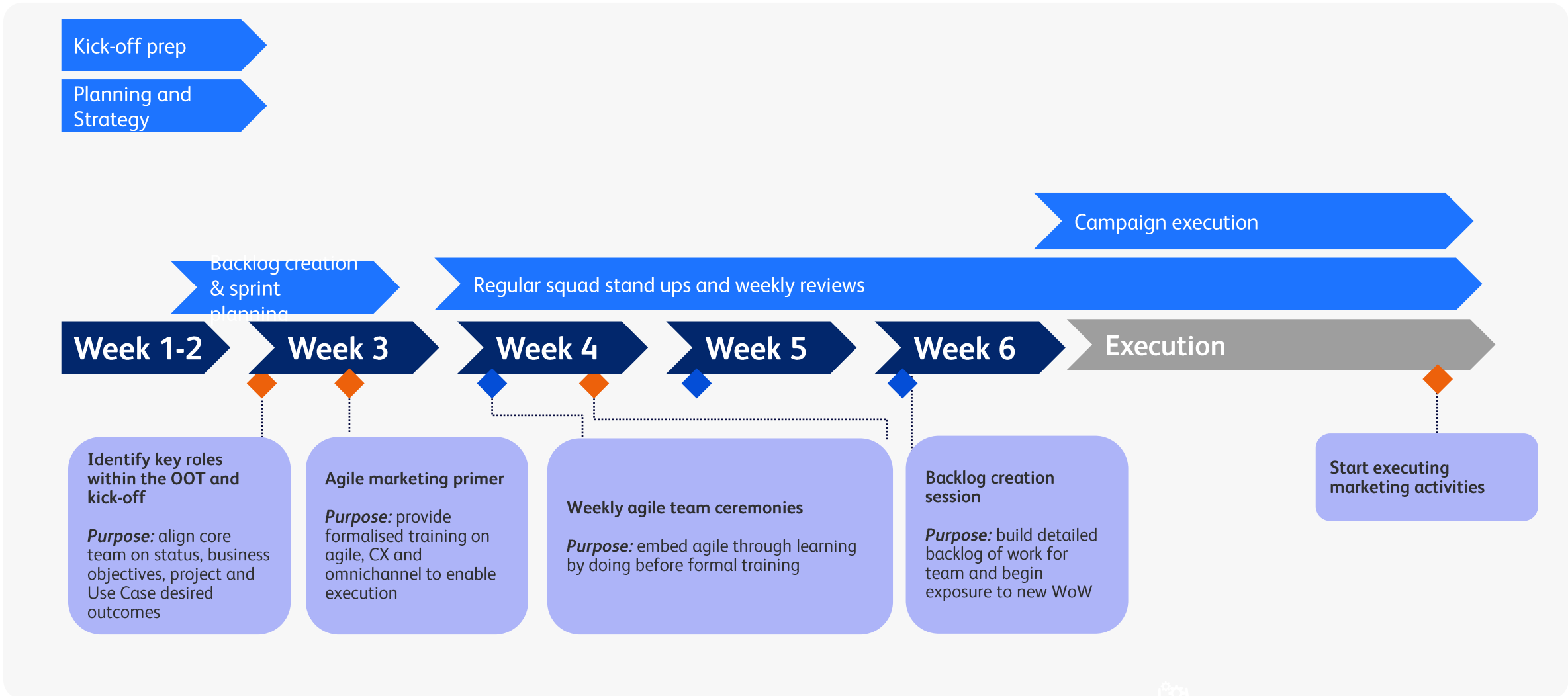


- Region BU resources
- Outsource, agencies
- Region BU shared resource
- CDA
- Sponsors









The set up phase contained several working sessions used to define the omnichannel orchestration team and mobilize for execution

Ongoing work

Key sessions



# The Core Team started running weekly sprints incorporating the various agile (SCRUM) ceremonies

Monday		Tuesday		Wednesday		Thursday		Friday		
	DSU		DSU		DSU		DSU		DSU	
	30 mins		30 mins		30 mins		30 mins		30 mins	
	Sprint Planning (2 hrs - Biweekly)							 	Demo (1 hr - Biweekly)  Retro (45 mins - Biweekly)	

**Sprint planning**

*Purpose:* Plan that lays out the work to be performed in the sprint with the whole scrum team.

**DSU**

*Purpose:* Discuss work done in the previous 24 hrs, work to be done in the next 24 hrs and impediments.

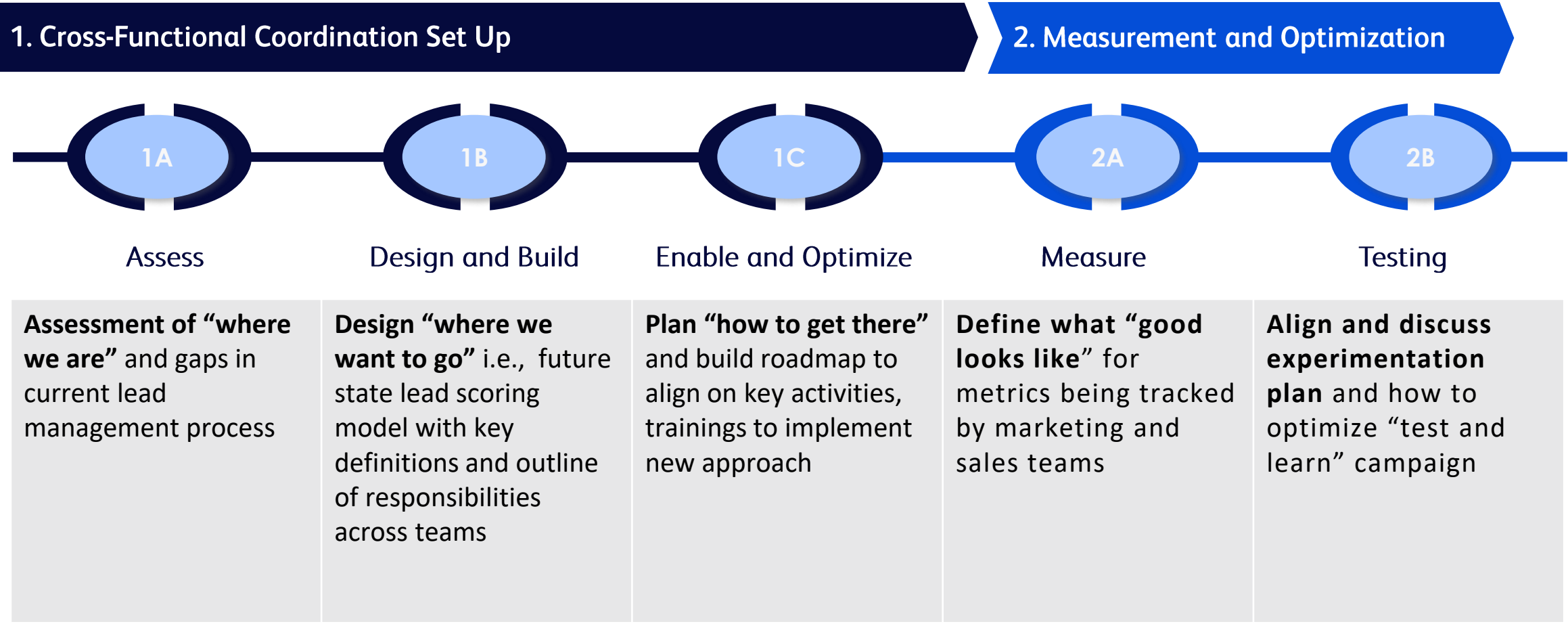
**Demo**

*Purpose:* Inspect the outcome of the sprint, determine future adaptations, present work to key stakeholders.

**Retrospective**

*Purpose:* Scrum team discusses what went well, what problems occurred and how they were solved in the sprint.

Cross-functional coordination between marketing and sales teams was orchestrated through a series of alignment sessions



# We aligned on clear roles and responsibilities between marketing, field sales, and inside sales functions to ensure smooth transition of lead management

## Roles and Responsibilities

	Campaign Plan	Target Group	Communicate	Capture	Nurture	Nurture & Qualify	Qualify & Sell	Measurement and Feedback
	<i>objectives, process, timing, resources, hand-over criteria, metrics, reporting,...</i>	<i>SFDC, 3rd Party, Manually selected by Sales, On-line, ...</i>	<i>Email Online Ads Social Events SEO/SEA</i>	<i>Email open/click Web site visits Landing Pages Events</i>	<i>Raise interest to the point at which 1:1 contact is needed / appropriate</i>	<i>Marketing Qualification Contact Customer and nurture to the point where a sales contact is appropriate</i>	<i>Sales Qualification Prospecting BDWoS</i>	<i>Content effectiveness</i>
Marketing	AR	AR	AR			AR	I	RACI
Field Sales	CI	ACI	I			I	AR	RACI
Inside sales	CI	ACI	I			AR	AR	RACI

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The strategy phase included market and customer research, journey mapping, and definition of marketing strategy

## Target outcomes of defining Strategy

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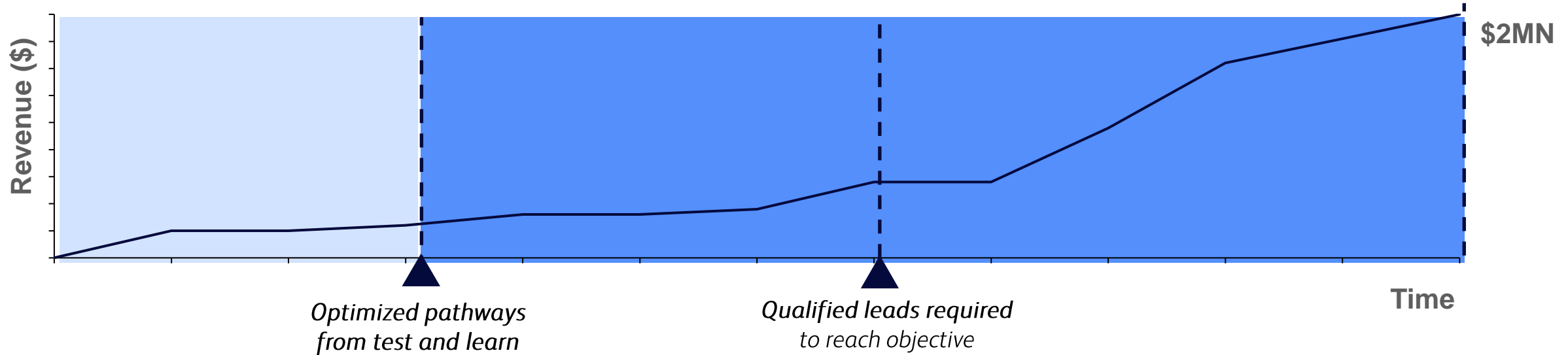
### Customer-Centric Strategy defined for omnichannel marketing campaign

- ✓ Understanding of BU Strategic ambition
- ✓ Research methods leveraged to understand market and customer
- ✓ Target market and customer defined based on data
- ✓ Mapping of key customer journey and key touchpoints
- ✓ Target messaging defined on persona needs and pain points



# Upcoming campaign test & learn efforts will help articulate *line of sight* to \$2MM in revenue

*Illustrative visual*



Test and learn is about finding 'optimal pathways' to scale in the campaign

*Initial budget (\$100k estimated) for test and learn is used to learn optimal pathways for campaign traction*

Outputs help prioritize the tactics to estimate line of sight

*Pathways are currently unknown, but outputs will help us determine additional investment required to scale towards \$2MM*

*Optimizing pathways refers to iteration on e.g., sites of care, personas, channels and content*

# Expansive research was conducted to discover and validate insights about the target market and customer

Total Sample Size	Quantitative Research	Qualitative Research			
	Survey and Segmentation (OSG Talon)	Secondary Ethnographic Research (Lextant)	Primary Ethnographic Research (Sales and Customer Interviews)		Business Experience
	N = 390	N = 10	N = 6	N = 6	N = 4

Key insights driven from each input

Challenges / Priorities	Top 5 by ASC organization		
	Corporate Chain (N=9)	SPH/Health System (N=39)	Independent (N=42)
Inventory Management	11%	13%	15%
Supply Cost Containment	7%	12%	12%
Medication Errors	9%	11%	11%
Infection Prevention	10%	10%	10%
Quality Scores	9%	10%	9%
Maximizing Patient Census/Caseload	11%	11%	11%
Attracting and Retaining Qualified Staff	11%	11%	11%
Drug Utilization	11%	11%	11%
Profitability	11%	11%	11%
Controlled Substance Management	11%	11%	11%

Top value drivers and pain point identified by market segment and role

- Role-based segmentation enhanced by Kearney
- Key pain points
- Value drivers
- Channel preferences

**MedBank Attitudes: ASC**

ASC users recognize MedBank's approach to further integration with their existing medication management systems, patient safety, and medication ordering systems. They are currently doing most of this work via manual transfer for an urgent change.

Key insights about ASC attitudes and behaviours

- Pain points and journey
- Key attitudes by role
- Workflow performed in the relevant environments

**SECTION 3: The purchasing process**

Are you involved in equipment purchase processes at your workplace? How often?

How does a typical equipment purchase process look like at your workplace? Who initiates it and who decides?

How many of your team members are typically included in process of equipment evaluation?

How long does this process last from your experience?

**SECTION 4: Specific to ADC**

How have you been involved in a purchasing process of Automated Dispensing Cabinets systems?

What are the key characteristics taken under consideration during equipment evaluation? Is there anything different in case of ADC?

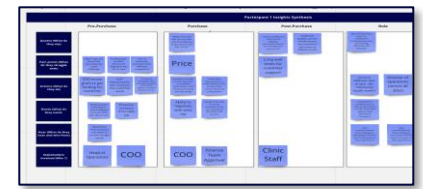
In your experience, was there anything that a manufacturer has done to significantly differentiate their offering in this product category? If not, in other equipment categories?

Do you remember which competitors did you consider during the evaluation process of ADC?

What are your experiences with the equipment in Dr? Did it meet the requirements / expectations?

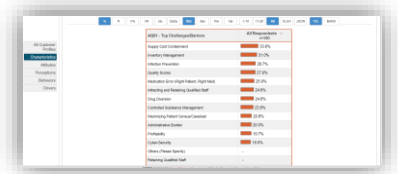
Existing pain points in sales process and product performance

- Sales process
- Key insights into the sales journey
- Differences in the approach by site of care



Behavioural insights clustered by market segment and role type

- The customer purchasing process and associated journey
- Context building to understand quantitative outputs






Previous segmentation and insights of ASC's

- The working teams experience with past campaigns
- Segmentation of ASCs

# The MedBank campaign opportunity was assessed across priority market segments, with an initial focus on growth within Ambulatory Surgical Centers

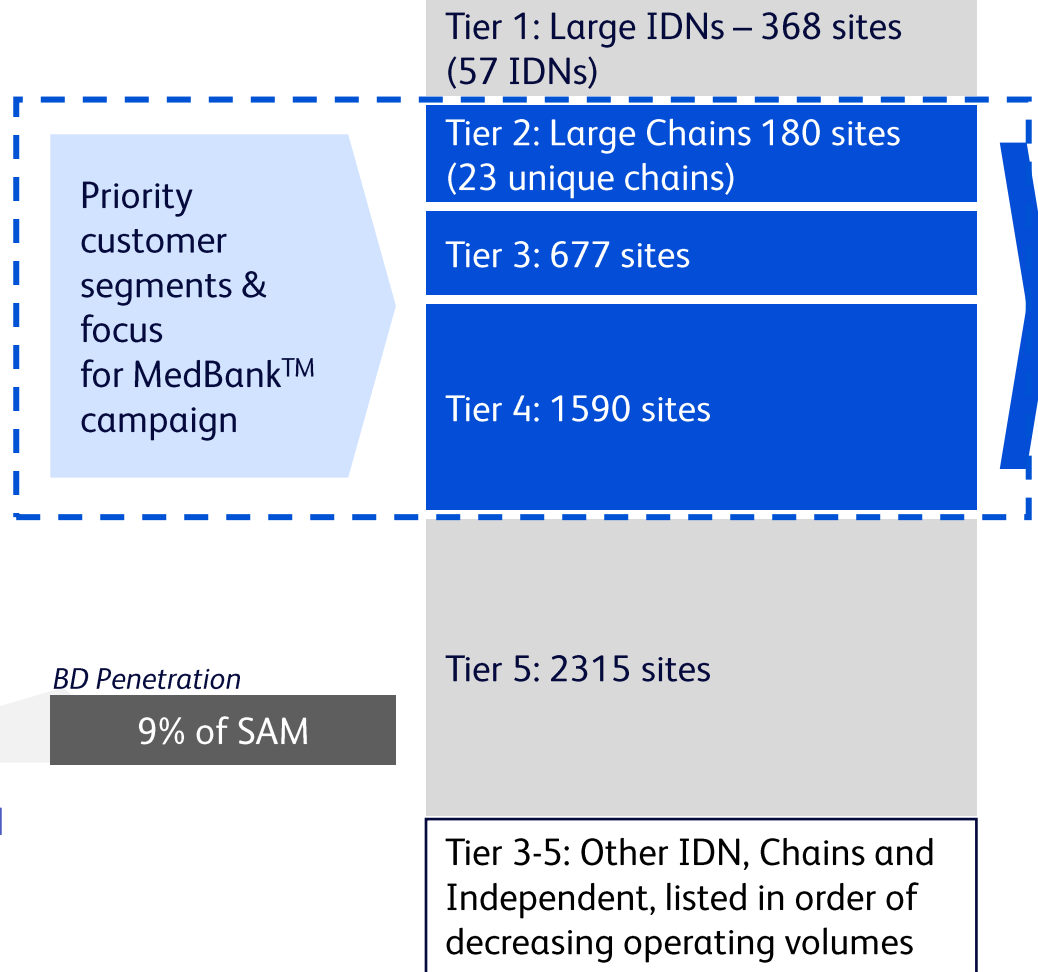
## Priority Markets

		SAM (\$)	BD Penetration (%) <sup>1</sup>
 <p><b>Ambulatory Surgical Centers</b></p> <ul style="list-style-type: none"> <li>Market where OOT has most experience, insight, and existing key messaging / content</li> <li>Fragmented market segment with Tier 1-5 customers based on procedure volume and facility size</li> </ul>		\$230M	9%
			<b>Initial focus</b>
 <p><b>Behavioral Health Centers</b></p> <ul style="list-style-type: none"> <li>Current lower adoption of ADCs within the market due to lower patient volumes</li> <li>Focus on right medication and compliance tracking for facility auditing</li> </ul>		\$1B+	3%
 <p><b>Closed-Door Pharmacies</b></p> <ul style="list-style-type: none"> <li>Higher-volume/bulk buying to supply primary customer e.g., long-term care facilities</li> <li>High price sensitivity, will select lowest cost supplier (competitor in this case) except in states with regulatory requirements that are favorable for MedBank</li> </ul>		\$495M	36%

**\$1.1B  
Total  
Addressable  
Opportunity<sup>2</sup>**

The ASC market was segmented by tiers with focus on Tier 2, 3, and 4 segments with the business objective of improve lead generation and sales acceleration

**ASCs Customer Segments**



**SAM Win Scenarios to \$2M in Leads**

Tier & Avg Deal Size	Scenario #1 <i>Even penetration</i>	Scenario #2 <i>Volume of operations</i>	Scenario #3 <i>Chain focused</i>
T2: \$50k	4%	3%	11%
T3: \$25k	3%	6%	4%
T4: \$25k	3%	2%	1%
Illustrative Sites Won	75	78	63

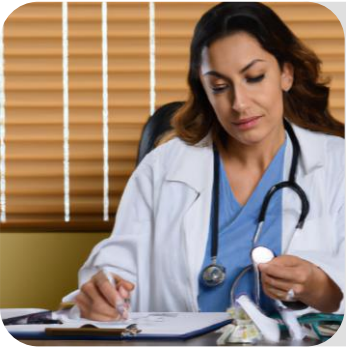


**Ambulatory Surgical Centers**

# Attitudinal segmentation was overlaid to understand behavioural attributes of the target market

	Efficient Storage (34%)	Easy, Accessible Secure Storage (31%)	Safe Storage (35%)
Main Settings	More Likely Behavioral health, Closed-Door Pharmacy (CDP)	More likely Ambulatory Surgery Center (ASC)	More likely Infusion center, Rehabilitation facility or Hospice
Affiliation	Overrepresentation of Corporate Chains	Overrepresentation of Independent Sites	Overrepresentation of IDNs
Top challenges	Supply cost containment Infection prevention Controlled substance management	Inventory management Infection prevention Controlled substance management	Supply cost containment Quality scores <b>Medication errors</b>
Likelihood to adopt each concept (adj.)	Concept 1 (Mini): <b>39%</b> Concept 2 (Tower): <b>35%</b> Concept 3 (MedFlex): <b>34%</b>	Highest impression of concept Concept 1(Mini): <b>34%</b> Concept 2 (Tower): <b>38%</b> Concept 3 (MedFlex): <b>40%</b>	Concept 1(Mini): <b>30%</b> Concept 2 (Tower): <b>41%</b> Concept 3 (MedFlex): <b>42%</b>
Willingness to pay	Average willingness to pay	More willing to pay for <b>Cabinet 1 or 2</b>	More willing to pay for <b>Cabinet 3</b>
Most likely to be used in (Only for ASC)	Medication room, Post-Op / PACU	Post Op/PACU, Pre-Op Holding	Medication Room, OR core area
Adoption impact if ADC cannot be placed in OR (Only for ASC)	OR Core Area: 67% less likely to adopt OR Suite (Back Table): 32%	OR Core Area: 60% less likely to adopt OR Suite (Back Table): 40%	OR Core Area: 61% less likely to adopt OR Suite (Back Table): 41%
Top Methods for communication	Visit by company representative, Internet search	Social media platforms, Internet search	Visit by company representative, Internet search
	<p><i>Wants a solution that offers automation and seamless reconciliation/report to reduce workflow burden</i></p>	<p><i>Wants safe, secure storage that is easy to use with accessible support</i></p>	<p><i>Wants a solution that focuses on safety measures and large storage options</i></p>

# The data led us to define four personas that drive our campaign strategy



**Isabel**  
*'the Intelligent Investor'*

Isabel is experienced Hand surgeon with a specialty in General Orthopedics. She an established partner, part-owner within an independent ASC, and is focused on providing quality care to her patients, while maintaining a strong reputation in the community, and growing profitably. She is a knowledgeable thought leader and well-respected surgeon. She is pragmatic and needs to be able to justify purchases based on ROI, clinical benefits.



**Otto**  
*'the Operation Optimizer'*

Otto is a Medical Director working within a high-traffic ASC clinic. He is focused on optimizing the operations of his ASC to ensure compliance and decrease diversion. He looks at purchasing to streamline the daily tasks required to run an ASC.



**Mike**  
*'the Medication Manager'*

Mike is a pharmacy director leading a team of junior pharmacists within an ASC. He is focused on enabling his team to provide the great services, ensuring medications are stored securely, meet quality expectations, and are available when needed. He evaluates purchases with a heavy focus on solutions that will benefit his teams' workflow.



**Clarissa**  
*'the Cultural Caregiver'*

Clarissa is an experienced APRN, recently joining an ASC as the Director of Nursing, leading a team of nurses. She cares about her team's morale and the culture she helps to enable. She likes to solve problems that impact their ability to be patient-facing and focus on patient care. She will step in, and advocate for new solutions if she believes they can help.

Senior Physician, N = 17	Medical Director, N = 19	Pharmacy Leadership, N = 38	Nursing Leadership, N = 32
<ul style="list-style-type: none"> <li>Offers secure storage options for expensive medications or supplies</li> <li>Easy to refill/reload medications and supplies</li> </ul>	<ul style="list-style-type: none"> <li>Reduces potential drug diversion</li> <li>Identifies potential drug/drug interactions</li> </ul>	<ul style="list-style-type: none"> <li>Offers secure storage options for expensive medications or supplies</li> <li>Easy to refill/reload medications and supplies</li> </ul>	<ul style="list-style-type: none"> <li>Reduces the burden on nurses of logging medication administration allowing them to spend more time on patient care</li> <li>Identifies potential drug/drug interactions</li> </ul>

Legend: OSG Segment Value Drivers    Efficient Storage    Easy, Accessible Secure Storage    Safe Storage

# Persona-based journeys were mapped to initial hypothesis and campaign opportunity areas

## PERSONA-BASED JOURNEYS

Journey Stage	Pre-Purchase	Awareness	Research	Personalization
	1 - ASC Nurse Manager 2 - ASC Nurse	1 - Problem recognition and awareness of "what good looks like with" medication management  2 - Nurses have to manage lots of paperwork to track medications  2 - Negative consequences of nurses failing to keep paper records, like DEA checks requiring nurses to "pee in a cup," which are "bad for morale."	1 - Concerns over costs of a MedBank system, and ability to make the case (concerns fade over time as user learns more about the system)  2 - (POSITIVE) Many nurses were already familiar with Pyxis systems from hospital settings. They considered MedBank to be "like Pyxis", but less expensive and designed for smaller sites.  2 - Wishes there was more MedBank integration with EMRs, inventory management, billing, and other systems	1 - Help making the case internally for the purchase of MedBank device to ASC leadership (e.g., CEO, CFO)

**Clarissa (Director of Nursing)**  
*e.g., pain points & needs*

<i>Awareness</i>	<b>I'm not confident we have an issue with medication management, but I believe we might</b>
<i>Research</i>	<b>I'm concerned that a medication management solution is going to cost too much for us, it's not really an option</b>
<i>Research &gt; Personalization</i>	<b>I believe we need an ADC, but I need help making the case to my leadership</b>

## HYPOTHESIS AND OPPORTUNITY IDEATION

*Initial hypothesis were developed around each pre-purchase pain point for key personas with expected measures, as a high-level exercise to guide the development of the campaign test & learn plan*

**Clarissa (Director of Nursing)**  
*e.g., hypotheses and measures*

Dimension	Hypothesis	Measure
<b>Awareness:</b> Drive awareness on the challenges of medication management and "what good looks like"	- Targeted customer list based on persona insights, and "look-alike" customers - Attracting "net new" customers with persona-based messaging - Leveraging highest-use channels by persona	Number of New Leads
<b>Research:</b> Lessening cost concerns by building understanding on the value of a Medbank solution over-time, sequential interactions	- Tailored acquisition strategies, focused on using secondary channels & content to amplify prior messaging	Number of Marketing Qualified Leads
<b>Personalization to Rep Interaction:</b> Personalized content shared by rep to support ASC Nurse in making the case for a MedBank solution	- Alignment on qualified lead scoring, means pass-along on qualified lead to sales rep with insights, accelerates sales conversion	Number of Sales Qualified Leads

# Persona-based MedBank Campaign Journeys were made to align messaging & channel to lead-scoring expectations



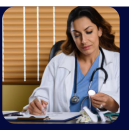



**Clarissa, the Cultural Caregiver**  
 Clarissa is an experienced APRN, recently joining an ASC as the Director of Nursing, leading a team of nurses.

**“I want my medication logging to be easy so my Nurses can spend more time on patient care.”**

	Visit 1	Visit 2	Visit 3
Needs & Expectations	<ul style="list-style-type: none"> <li>I need to save my clinical team time</li> <li>I want a tailored solution that focuses my team's efforts on patient care</li> <li>I expect that there are better ways to manage medication</li> </ul>	<ul style="list-style-type: none"> <li>I don't know what good looks like in Medication Management</li> <li>I expect to understand how BD differs from competitors</li> </ul>	<ul style="list-style-type: none"> <li>I need to understand how an ADC would improve my ASC dispensing procedure</li> <li>I need to justify the purchase of the ADC to my team and organization</li> <li>I expect to align stakeholders by highlighting clinical care and business cases</li> </ul>
Emotions	<p>😊</p> <p>🙄</p> <p>😞</p>		
Channels Used	<ul style="list-style-type: none"> <li>Demandbase</li> <li>Email</li> </ul>	<ul style="list-style-type: none"> <li>Email</li> <li>Marketo Landing Page</li> </ul>	<ul style="list-style-type: none"> <li>Email</li> <li>Web</li> </ul>
Lead Scoring	<ul style="list-style-type: none"> <li>Visit Page + 5</li> <li>Download Content + 15</li> <li>Give Opt-in +20</li> </ul>	<ul style="list-style-type: none"> <li>Marketo Email Open +2</li> <li>Marketo Email Click +7</li> <li>Webpage Multiple Page visit + 4</li> </ul>	<ul style="list-style-type: none"> <li>Watch video +5</li> <li>Marketo Email Open +2</li> <li>Marketo Email Click +7</li> <li>Webpage Visit +2</li> </ul> <p><b>Total = 69 (Behavioral)</b></p>



# OOT used collective output of research and expertise to define target messaging that would serve as input for content creation and delivery

Persona	Key Messaging	Channels	Example Content
 <p>Isabel 'the Intelligent Investor'</p>	<ul style="list-style-type: none"> <li>• <b>Business rationale:</b> Data-backed insights e.g., improved efficiency, ROI, of adopting solution</li> <li>• <b>Efficiency optimization:</b> Improved efficiencies of team and staff after onboarding to solution</li> <li>• <b>Decrease in diversion</b> and theft opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Paid Search (Google/Bing)</li> <li>• Search engine optimization</li> <li>• LinkedIn Ads</li> <li>• 3<sup>rd</sup> party industry (ex. ASCA)</li> <li>• Programmatic (Demandbase)</li> <li>• Email (1:1)</li> </ul>	<ul style="list-style-type: none"> <li>• "Why Change" eBook</li> <li>• "How can ASCs [...] management" eBook</li> <li>• Infographic</li> </ul>
 <p>Otto 'the Operation Optimizer'</p>	<ul style="list-style-type: none"> <li>• <b>Safety and security:</b> Improvement to safety and security of medication management process</li> <li>• <b>Efficiency optimization:</b> Improved efficiencies of team and staff after onboarding to solution</li> </ul>	<ul style="list-style-type: none"> <li>• Paid Search (Google/Bing)</li> <li>• Search engine optimization</li> <li>• LinkedIn Ads</li> <li>• 3<sup>rd</sup> party industry (ex. ASCA)</li> <li>• Programmatic (Demandbase)</li> <li>• Email (1:1)</li> </ul>	<ul style="list-style-type: none"> <li>• "Why Change" eBook</li> <li>• "How can ASCs [...] management" eBook</li> <li>• Infographic</li> </ul>
 <p>Mike 'the Medication Manager'</p>	<ul style="list-style-type: none"> <li>• <b>Reliability and ease of adoption:</b> Seamless installation and timely onboarding and training for teams</li> <li>• <b>Process improvement:</b> Improvement to day-to day medication management from a safety and security perspective</li> </ul>	<ul style="list-style-type: none"> <li>• Paid Search (Google/Bing)</li> <li>• LinkedIn Ads</li> <li>• Search engine optimization</li> <li>• 3<sup>rd</sup> party industry (ex. ASCA)</li> <li>• Programmatic (Demandbase)</li> </ul>	<ul style="list-style-type: none"> <li>• "How can ASCs [...] management" eBook</li> <li>• Infographic</li> <li>• Solution Brief</li> <li>• Checklist</li> </ul>
 <p>Clarissa 'the Cultural Caregiver'</p>	<ul style="list-style-type: none"> <li>• <b>Access to customer support:</b> Ability to get support 24/7 through preferred channels</li> <li>• <b>Ongoing solution maintenance :</b> Ease of solution maintenance with low impact on patient care and facetime</li> </ul>	<ul style="list-style-type: none"> <li>• Paid Search (Google/Bing)</li> <li>• LinkedIn Ads</li> <li>• 3<sup>rd</sup> party industry (ex. ASCA)</li> <li>• Video (YouTube)</li> <li>• MedBank Customer Portal</li> </ul>	<ul style="list-style-type: none"> <li>• "How can ASCs [...] management" eBook</li> <li>• Infographic</li> <li>• Solution Brief</li> <li>• Checklist</li> </ul>

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The execution phases included funnel analysis, test and learn experimentation, and campaign optimization

## Target outcomes of defining execution

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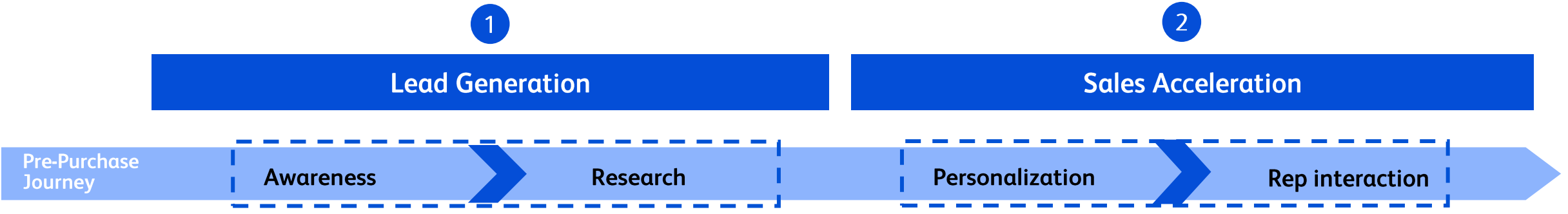


Executing test and learn campaign to iteratively refine strategy and reach campaign objectives

- ✓ Campaign plan and business case defined with line of sight to MMS strategic objectives
- ✓ Content assets developed for ASC campaign
- ✓ Performance tool defined and developed to track campaign progress
- ✓ Test and learn approach leveraged to execute campaign in sprints
- ✓ Campaign optimized based on key results

# Campaign Plan

The MedBank campaign was focused on lead generation and sales acceleration, targeting awareness and conversion down the funnel




**Success Drivers**



<b>DDA Commercial Platform</b>	<i>Seamless customer journey from campaign to BD.com</i>	<i>Sales process complimented by BD.com elements (e.g. product catalogue)</i>
<b>Technology and Data</b>	<i>360-degree customer reporting &amp; analytics tool for Sales &amp; Marketing</i>	<i>Data feedback loop established between sales to marketing for campaign attribution</i>
<b>Digital Roles and Skills</b>	<i>Agile marketing roles and ways of working (e.g., Scrum Master) in place</i>	<i>Sales integrated in campaign agile ceremonies for feedback and iteration</i>
<b>Digital Campaigns</b>	<i>Persona-led messaging, content, and channel selection</i>	<i>Orchestrated account targeting with common intelligence (e.g. persona, journeys)</i>

# We started by defining campaign goals tied to MMS business objectives and outlining potential strategies to achieve them

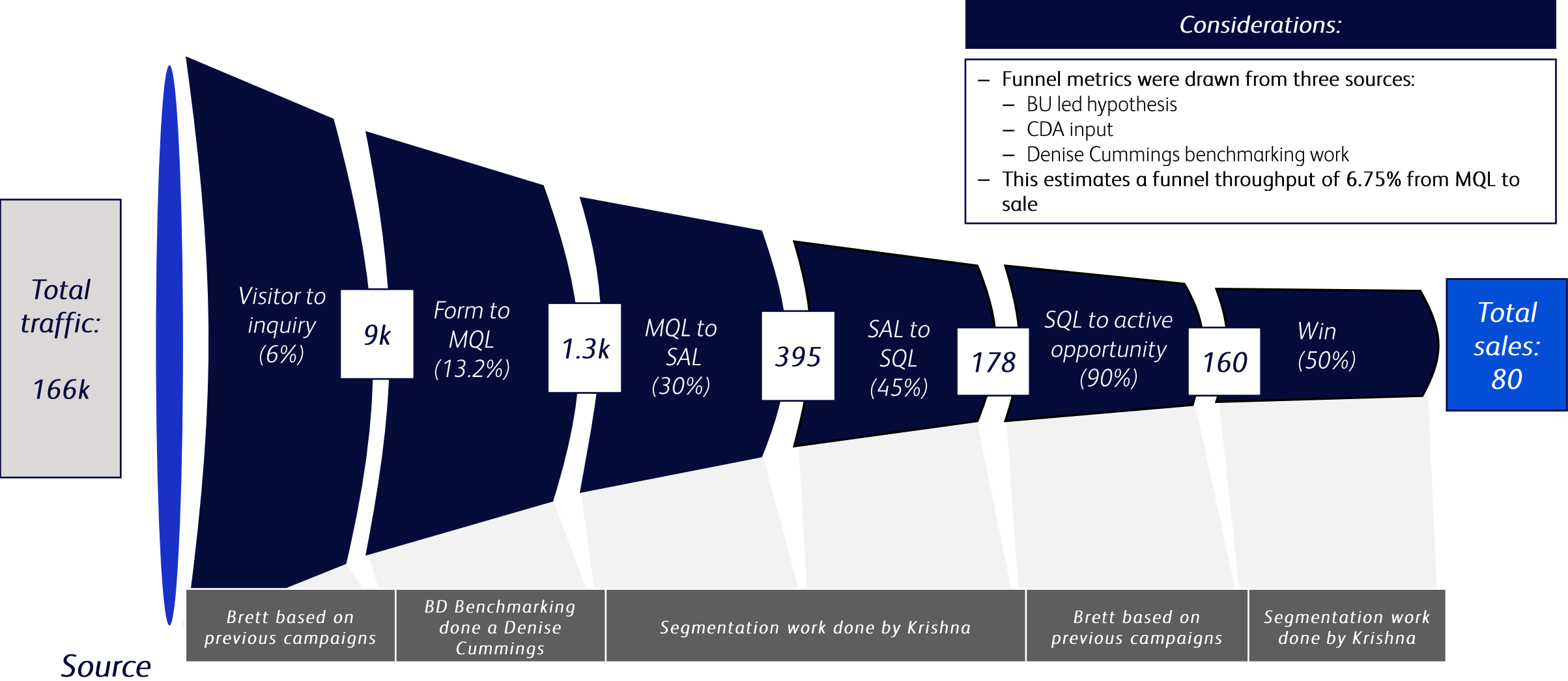
## What did we do?

**Goal(s):** Accelerate MedBank new customer acquisition by increasing the quality and quantity of digital driven marketing qualified leads in the sales funnel vs. FY22.

**FY23 Objective:** Deliver marketing qualified leads (MQLs) equivalent to \$2M in MedBank incremental revenue 

Strategy 	Tactic 
Setup an Omnichannel choreography capability to jumpstart lead capture experimentation across channels	<ul style="list-style-type: none"> <li>– Focus on three market segments: ASC, Behavioral Health, CDP/LTC</li> <li>– Develop customer-back campaign strategy (persona, messaging, creative, etc.) to jumpstart go-to-market</li> <li>– Run campaign experimentation sprints across a curated set of channels to optimize lead capture</li> </ul>

Using the campaign tool, we estimated number of leads required to reach campaign goal based on historic data and inputs from the BU



**Considerations:**

- Funnel metrics were drawn from three sources:
  - BU led hypothesis
  - CDA input
  - Denise Cummings benchmarking work
- This estimates a funnel throughput of 6.75% from MQL to sale

# Campaign Set Up



# For the campaign, we developed assets based on key messaging defined for target personas (1/2)

## 1 Email – Otto



**Subject Line:**  
Bringing medication management up to industry standards.

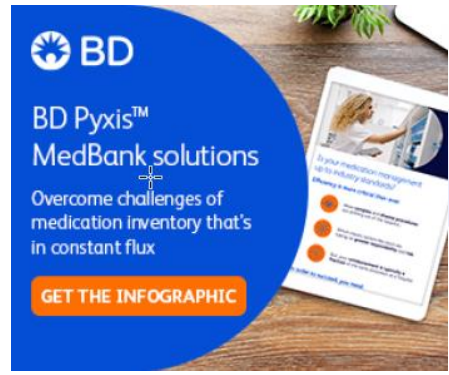
**Subject Line ALT:**  
Controlled substance abuse can happen in your ASC. Here's how to help lower that risk.

## 2 Demandbase ad - Otto

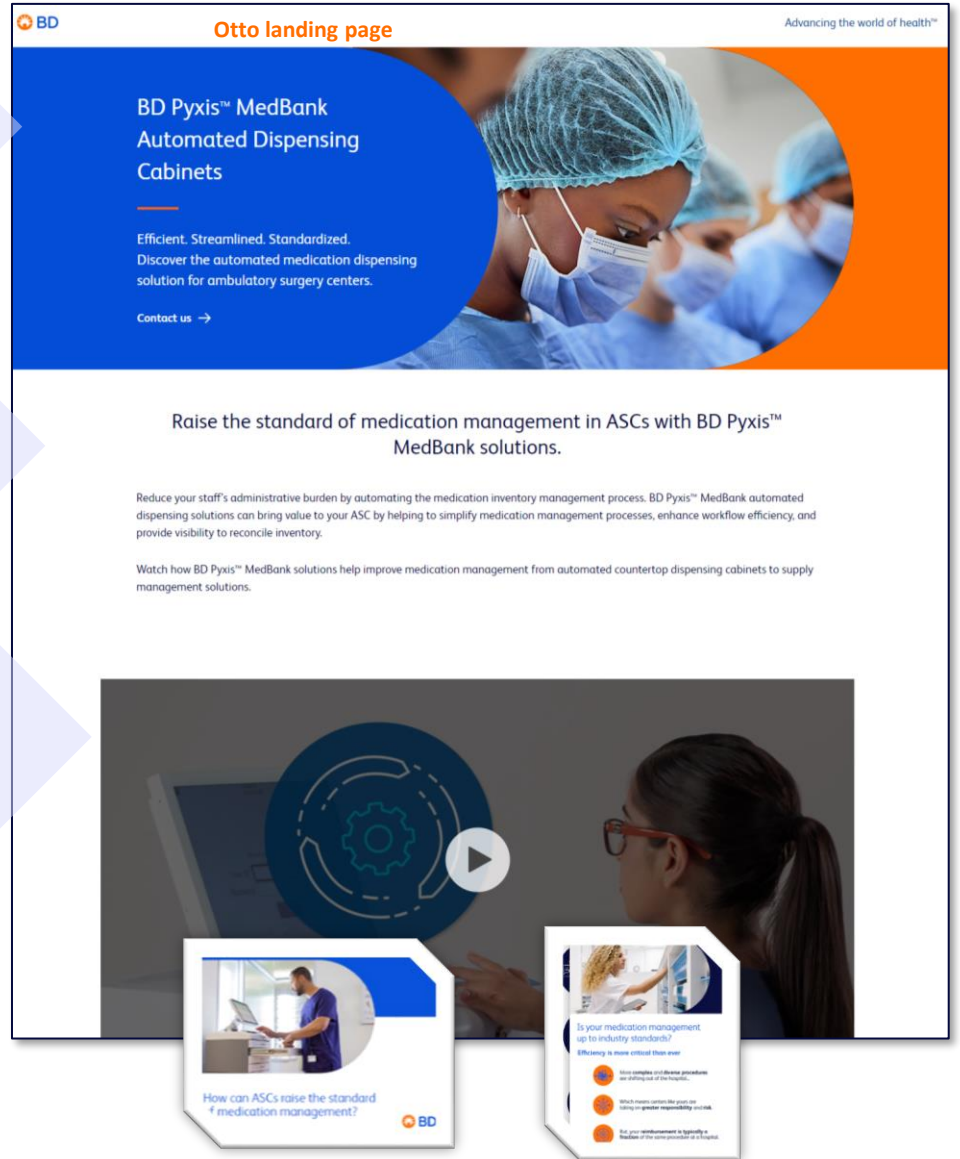


**Experiment #2 - Targeting**  
We believe that we can will achieve a higher CTR on Tiers 4 and 5 ASCs than Tier 2 ASCs. Reference this with Otto as our persona. We will split targeting list on DB by Tier size (large vs. small).  
Test: 20 days  
- **Desired outcome:** We'll know which ad message resonates better Otto in a larger ASC vs. smaller ASC.

## 3 Outpatient Surg ad - Otto

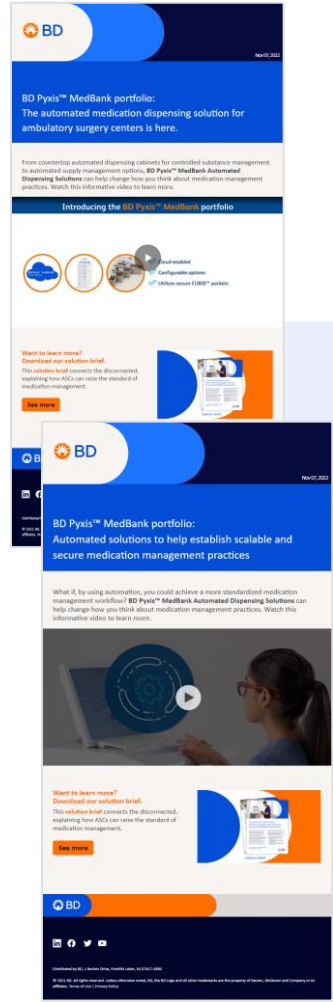


## 3 Becker's ASC ad - Otto



# For the campaign, we developed assets based on key messaging defined for target personas (2/2)

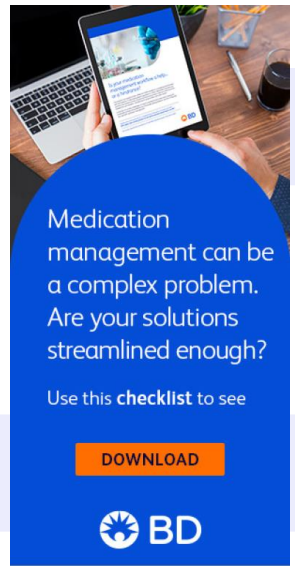
## 1 Email – Med Mike



## 2 Demandbase ads – Med Mike

### Test & Learn experiment #2 - Targeting

- **Hypothesis:** We believe that we can will achieve a higher CTR on Tiers 4 and 5 ASCs than Tier 2 ASCs. We'll cross-reference this with Med Mike as our persona.
- **Our test:** We will split targeting list on DB by Tier size (large vs. small).
- **Length of test:** 20 days
- **Desired outcome:** We'll know which ad message resonates better Med Mike in a larger ASC vs. smaller ASC.



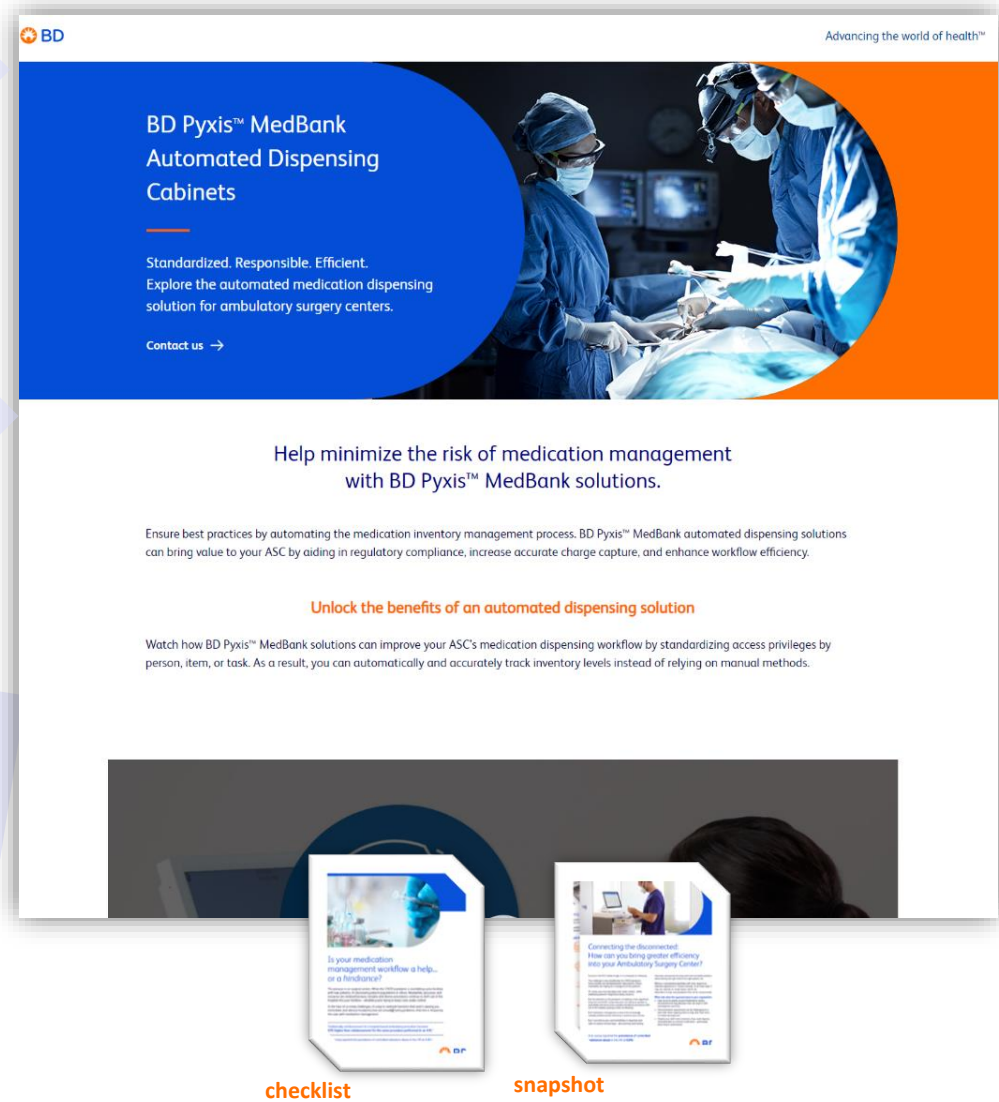
### Test & Learn experiment #1 – Email Body Copy

- **Hypothesis:** Using the videos, we can identify what types of video content and key messaging resonates most with Medication Mike.
- **Our test:** We'll test (2) emails w/ videos to see which resonates.
- **Length of test:** 2-3 days
- **Desired outcome:** We'll know which MedBank video is most engaging for Med Mike.

## 3 Becker's ASC ad – Med Mike



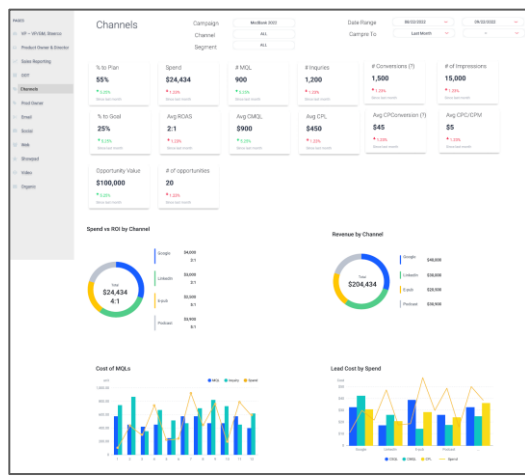
## Med Mike landing page



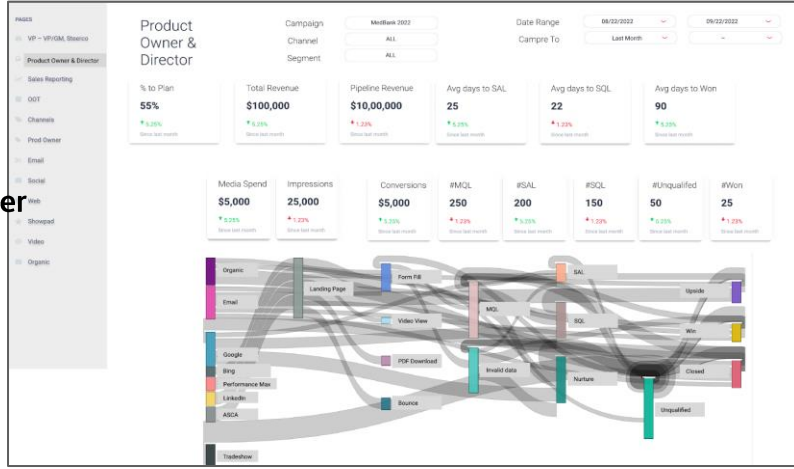
# For reporting and analytics, we developed dashboards to enable automation and tracking of success metrics

## Different views of Campaign dashboard built for MedBank

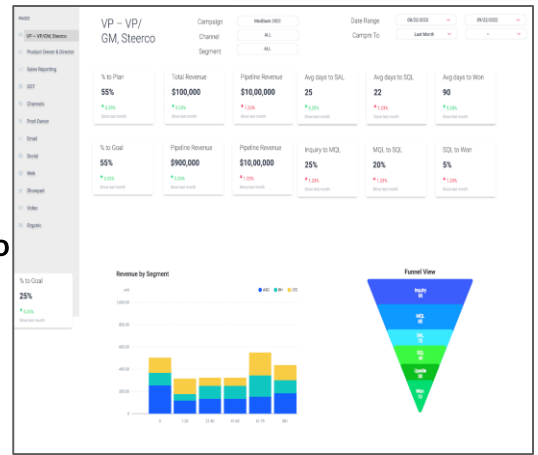
Channels



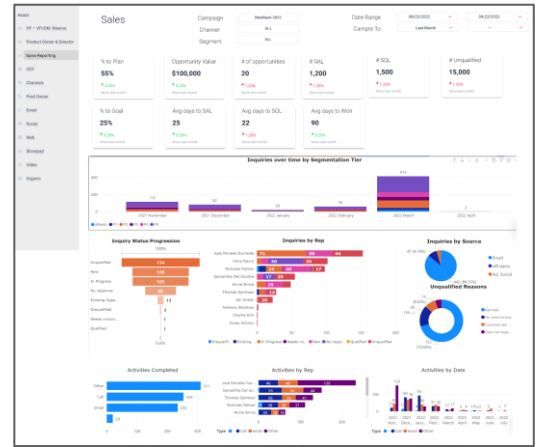
Product Owner & Director



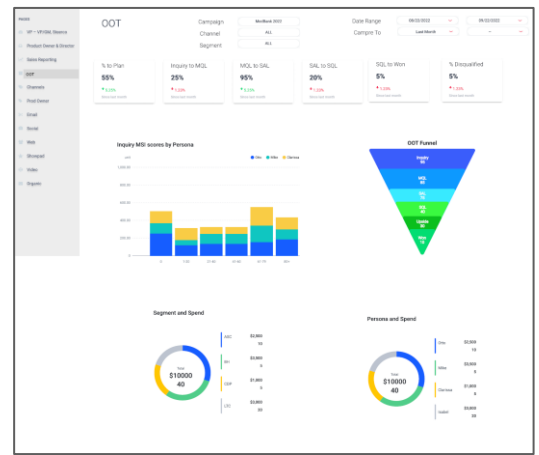
VP, GM, SteerCo



Sales



OOT



# Campaign Optimization

# An iterative approach is fundamental to “test and learn” customer preferences and messaging

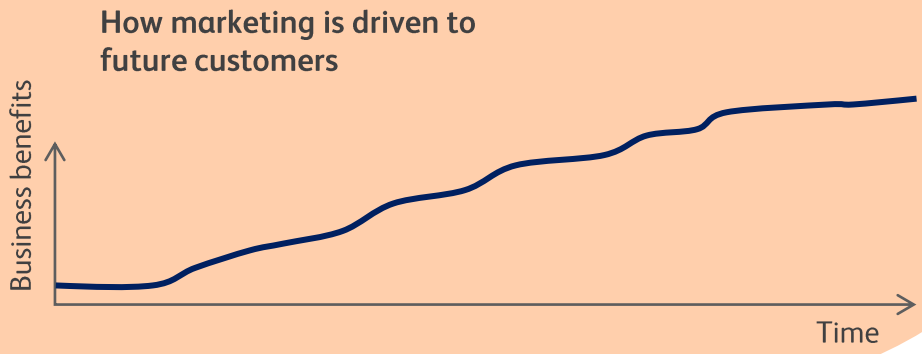
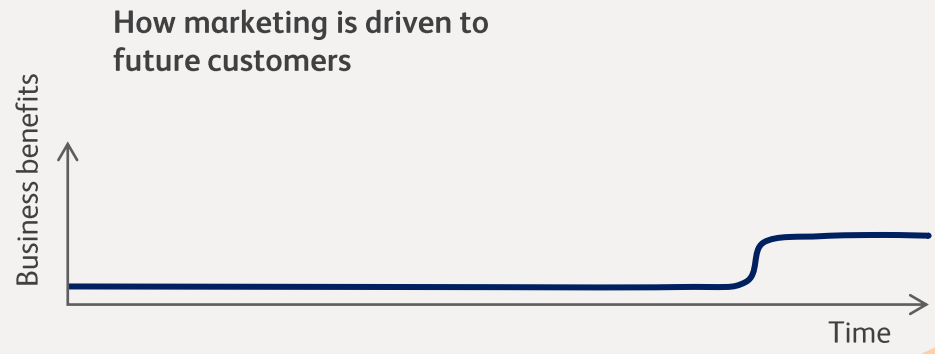
## Traditional Marketing Model

Design the campaign as a “big bang”



## Agile Marketing Model

Constant iteration on experiments and strategy



To achieve this efficiency a new method of working was setup for the OOT

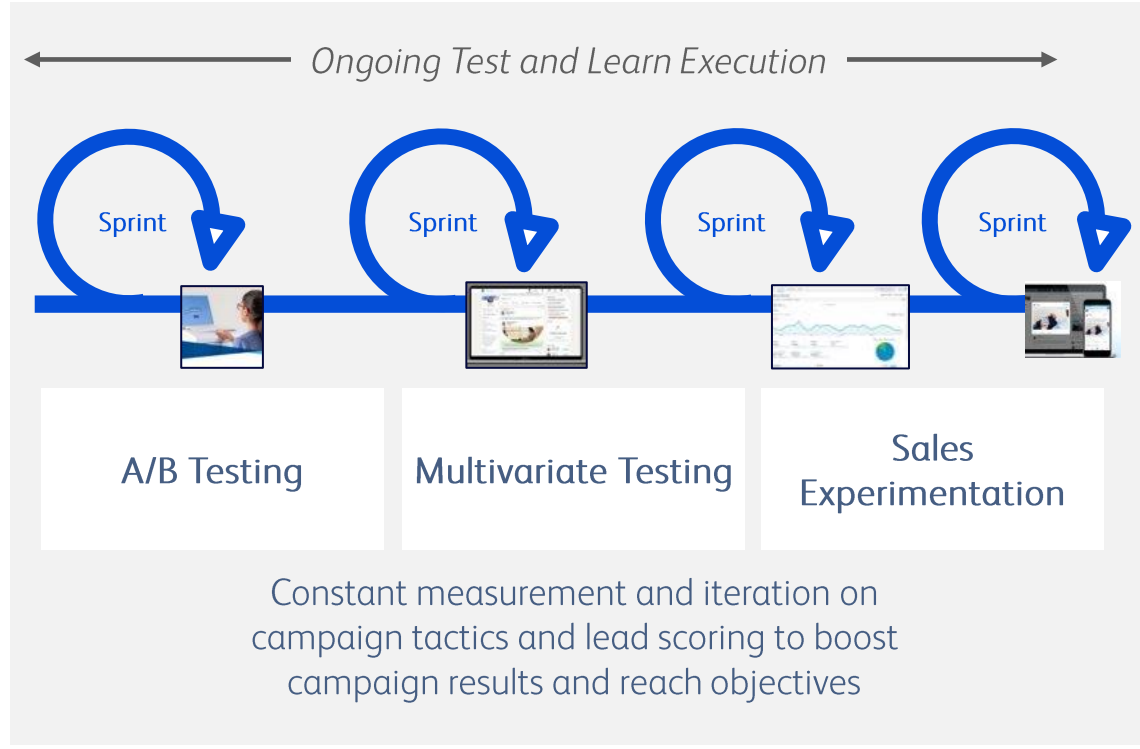
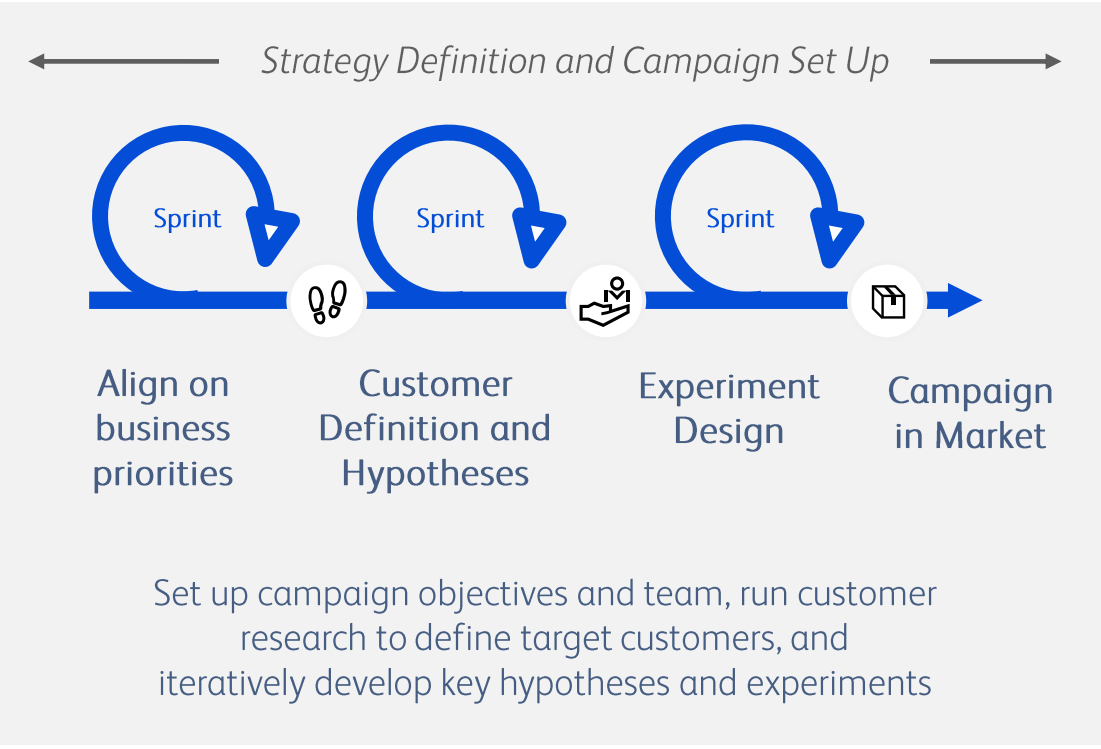
Illustrative



Build Sprints

Run Sprints

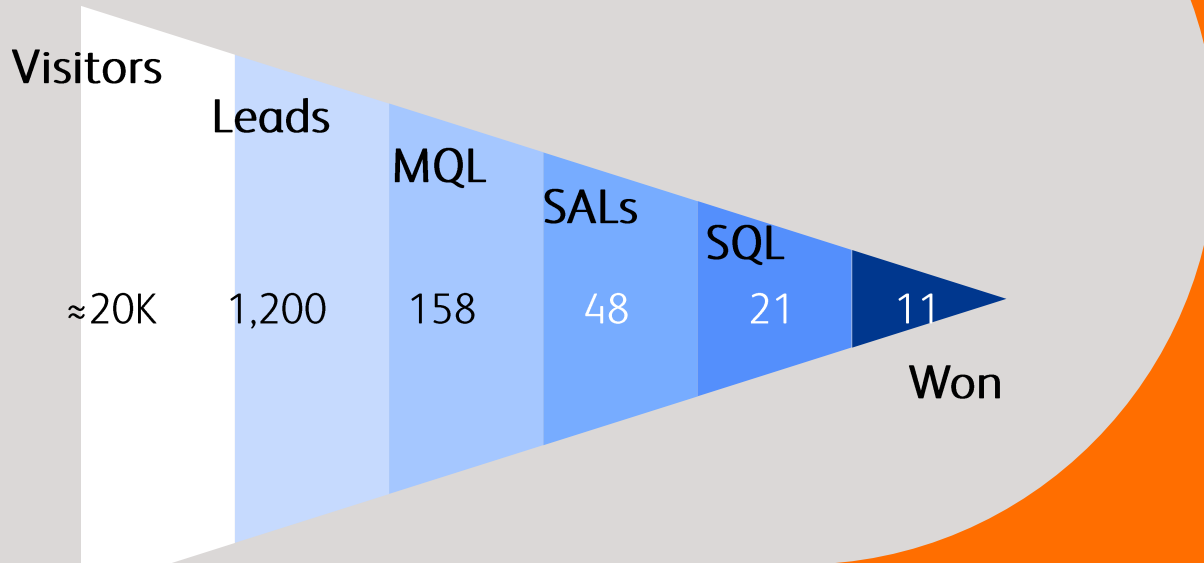
Agile Sprints<sup>1</sup> Approach



The “test and learn” strategy is designed to drive improvement throughout the funnel by driving increased conversion in both lead generation and sales acceleration

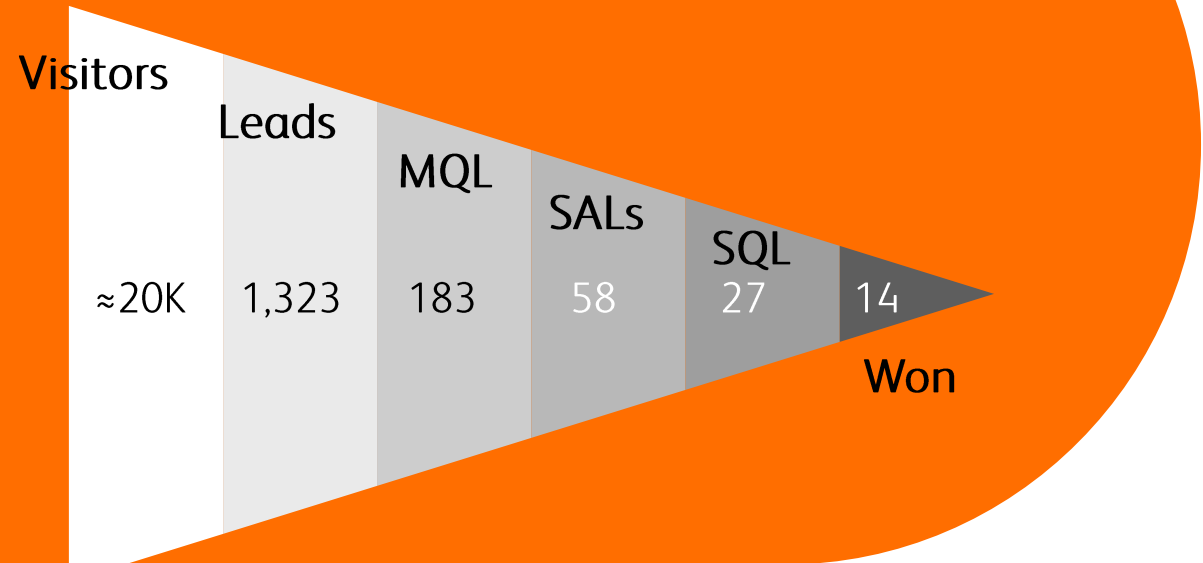
### Current State

Baseline metrics based on MedBank use case



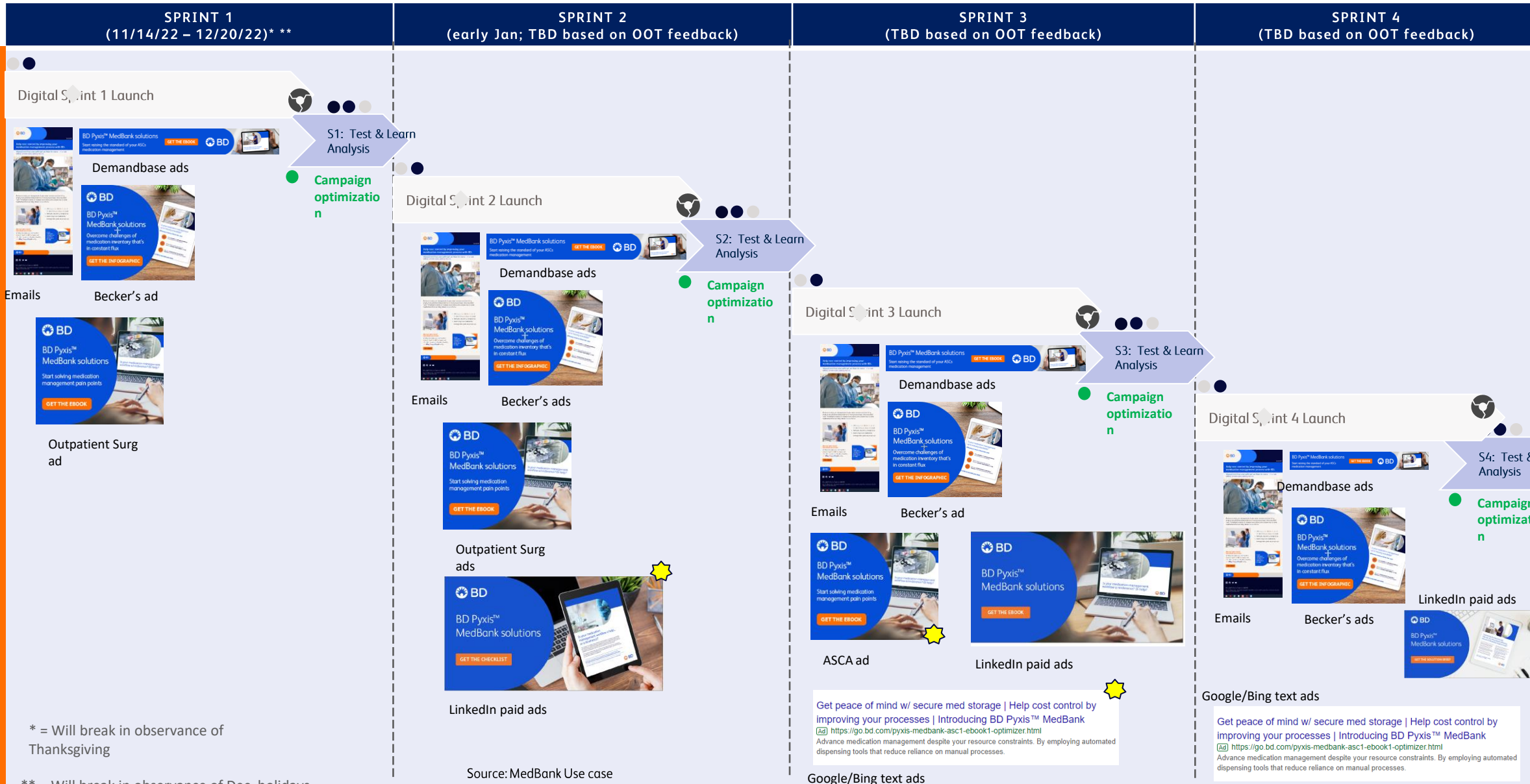
### New state

A 5% improvement in the funnel at each stage leads to 34% more sales



# ASC MedBank Sprint Timeline

3-4 wk. sprints



ASC Campaign Launch

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Omnichannel orchestration setup



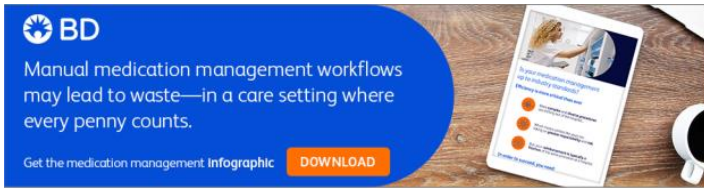
The “test and learn” methodology employed focused on pulling levers within the campaign to drive iterative improvement and increase conversion

### New MedBank Campaign

Focus on independent ASCs	Med. Decile
Persona (research) driven targeting <sup>1</sup>	Persona based
Detailed sprint-based experimentation	Multiple
Iterative budget allocation for testing	Agile

### Sample experimentation on Demandbase

Persona based messaging A



Persona based messaging B



### Outcomes inform further experimentation

- Targeted Creative
- Refined Content Delivery
- Enhanced Segmentation
- Precise Channels

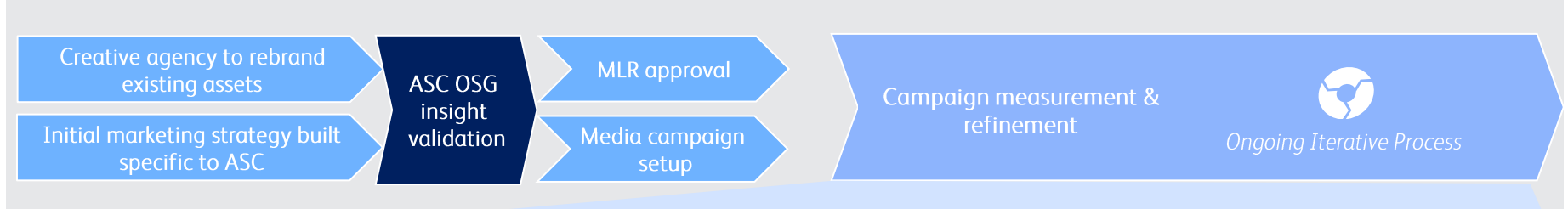
# Drawing on best practices, research and collective team expertise, the OOT defined experiments for the ASC1 campaign.

Hypothesis	Description Strategy	Personas				Testing Budget \$ or %	Source
		Isabel	Otto	Mike	Clarissa		
We believe that the messaging surrounding increased process efficiency and secure store will resonate with Isabel the intelligent investor	We will test two messages: 1.Easy to refill/reload medications and supplies 2. Offers secure storage options for expensive medications or supplies	Senior Physician				8% of 12,500 = \$1,000	OSG Research N = 15 Local = 15
We believe that the messaging surrounding reduced drug diversion and drug interaction will resonate with Otto the Operation Optimizer	We will test two messages: 1.Reduces potential drug diversion 2.Identifies potential drug/drug interactions		Medical Director			8% of 12,500 = \$1,000	OSG Research N = 15 Local = 15
We believe that the messaging surrounding increased secure storage and medication management will resonate well with Mike the Medication Manager	We will test two messages: 1.Offers secure storage options for expensive medications or supplies 2.Easy to refill/reload medications and supplies			Pharmacy Director		8% of 12,500 = \$1,000	OSG Research N = 28 Local = 28
We believe that the messaging surrounding drug interactions increased process efficiency with resonate well with Clarissa the Clinical Practitioner	We will test two messages: 1.Identifies potential drug/drug interactions 2.Reduces the burden on nurses of logging medication administration allowing them to spend more time on patient care				Nurse Director	8% of 12,500 = \$1,000	OSG Research N = 16 Local = 16

Sprint 1 Example

# Based on outputs from the campaign, experiments were refined across sprints

Weeks	8/29 – 9/2	9/5 – 9/9	9/12 – 9/16	9/19 – 9/23	9/26 – 9/30	10/3 – 10/7	10/10- 10/14	10/17 – 10/21	10/24 – 10/28	10/31 – 11/4	11/7 – 11/11	11/14 – 11/18	<i>Illustrative</i>
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## Test and Learn Example

Approach

<ul style="list-style-type: none"> <li>– Define testing budget to test individual levers of a campaign               <ul style="list-style-type: none"> <li>– Channel</li> <li>– Content</li> <li>– Creative</li> </ul> </li> <li>– Determine what success looks like for a campaign               <ul style="list-style-type: none"> <li>– Focus on a measurable statistic that would define campaign success relative to the funnel                   <ul style="list-style-type: none"> <li>– i.e. CPC difference of 10% between version 1 and version 2 after two weeks</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>– Focus on a single experiment variable to test different versions               <ul style="list-style-type: none"> <li>– i.e. Channel: LinkedIn vs SEM</li> <li>– i.e. Content: eBook vs checklist</li> <li>– i.e. Creative: Image 1 vs Image 2</li> </ul> </li> <li>– Select testing methodology and optimization variable               <ul style="list-style-type: none"> <li>– i.e. testing method: A/B Testing</li> <li>– i.e. optimization variable: CPC</li> </ul> </li> <li>– Run a two-week test stopping once the optimization variable differential has been realized with sufficient sample size</li> </ul>	<ul style="list-style-type: none"> <li>– If testing fails to reach required statistical threshold the test is paused</li> <li>– If testing is successful and statistical significance is reached, the next iteration is planned               <ul style="list-style-type: none"> <li>– Optimize against winner in the subsequent two weeks</li> </ul> </li> <li>– Establish the new metric as a benchmark with which to test subsequent campaigns against</li> <li>– Setup new test and learn experiments for the following sprints</li> </ul>
Experiments are designed to incrementally alter a chosen metric	Optimizing for top of funnel metrics to drive insight	Using the results to refine further design experiments

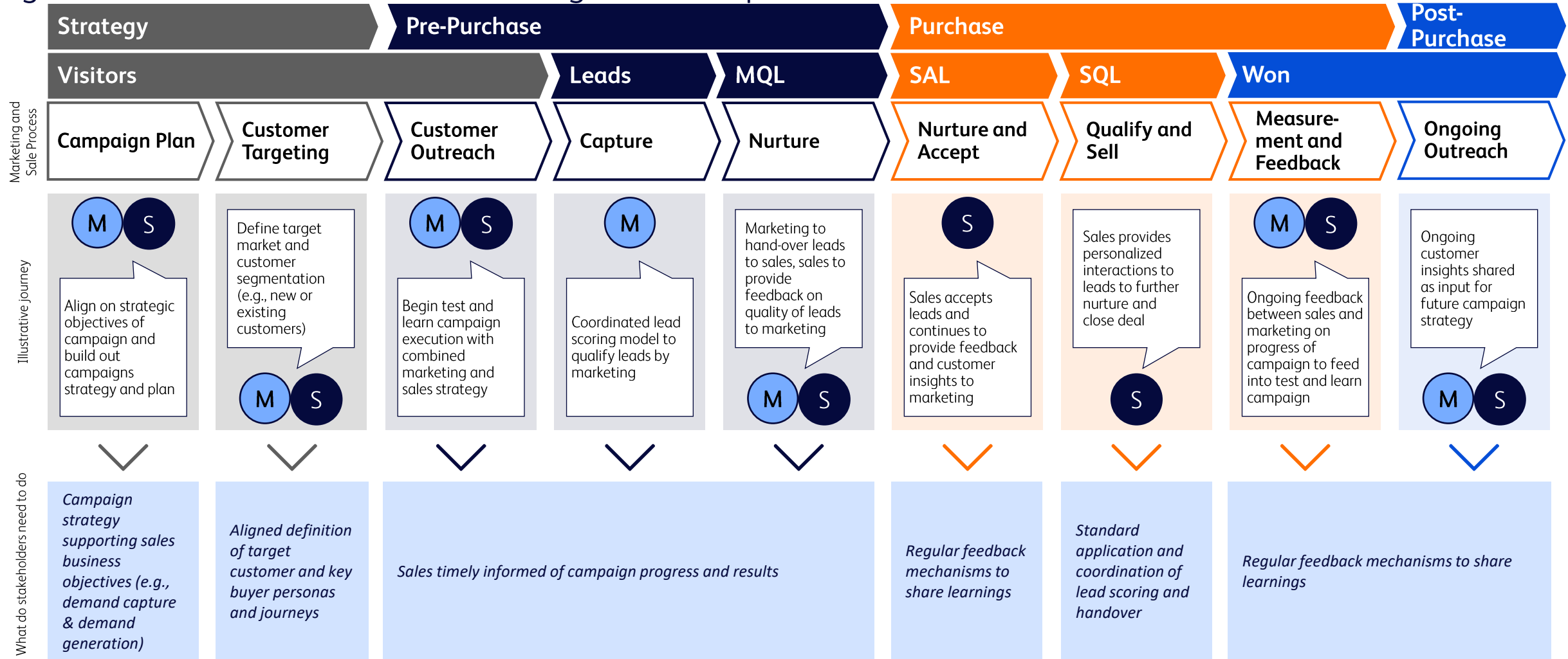
Placeholder for outcomes of first sprint

# Contents



- 1 Context
- 2 MedBank Use Case Set Up
- 3 Strategy
- 4 Execution
- 5 Key Learnings

# Successful omnichannel commercial choreography depends on a few key “get rights” across the combined marketing and sales process



# Key ingredients to making commercial choreography work

We started with the customer – their needs and behaviors

- › Attitudinal research (OSG), to identify the value drivers
- › Personas, to make it actionable

Anchored on the value we can bring

Improved the E2E omnichannel experience

Brought a cross-functional team

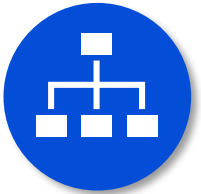
We weren't afraid to adjust, we were eager to learn; we became agile

# Key Learnings from MedBank Use Case



## **Dedicated Scrum Master Role is imperative to scaling agile and executing multiple campaigns**

- Building a sustainable OOT requires hiring a dedicated Scrum Master resource
- Scaled Agile requires a dedicated scrum master role, and use of this methodology ensures teams are more efficient when operating multiple campaigns



## **Heavy reliance on external agencies can impact sprint progress and output**

- Engage agencies early and develop a targeted brief with clear roles, objectives, outcomes and timelines to size scope of work accurately
- Product Owner and Digital Marketer should be responsible for assessing quality of outputs against campaign plan and ensuring timely delivery
- Include representative from agency in Daily Stand Ups to track progress of outcomes



## **OOT to be aware of MLR process, and significant internal delay on core campaign assets**

- Scrum Master and Product Owner need to be aware of asset revision schedule to accurately estimate campaign launch date
- -It is imperative to allow enough time for assets to be redone 2-3 times when planning for campaign launch





# Key Learnings from MedBank Use Case



## **Reimagined to-be experience is a key input to strategic planning of potential solutions, and capabilities**

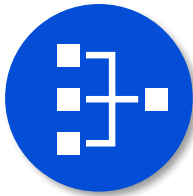
Using one view of the to-be customer experience for lead management, campaign planning, service development will ensure an integrated experience as you roll out solutions



## **Start marketing and sales planning with the customer, not the product at the centre**

- To be-experience will help lay out what campaigns, services, content are needed to move potential customers across the journey
- Defined Omnichannel touchpoints will be an input market, sales and customer service activities and campaigns down the funnel

# Key Learnings from MedBank Use Case



## **Evolve from a siloed lead management process to combined marketing and sales funnel across the customer journey**

Strategic of CX solutions (e.g., campaigns, services) should go beyond lead generation – sales acceleration, customer loyalty are taken into account across the end to end experience



## **Ensure Omnichannel orchestration team is working with key stakeholders to align customer-centric strategy**

Engage with sales to align on persona targeting, key messaging and tactics for campaigns across the customer lifecycle