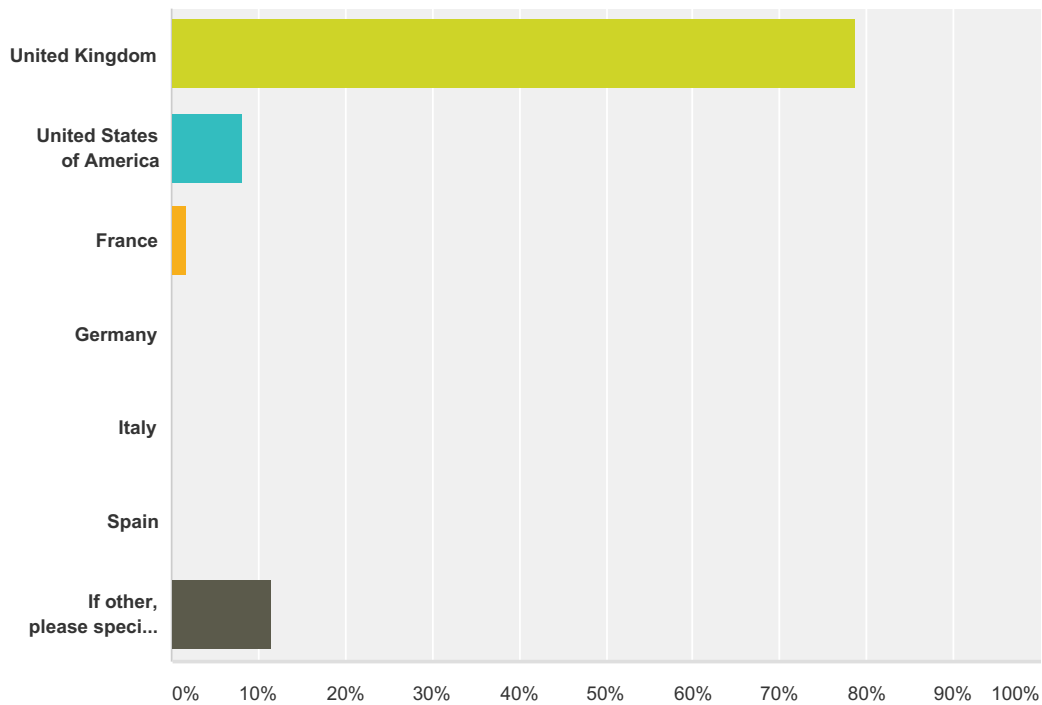


Q1 First a little about you - where are you based?

Answered: 61 Skipped: 0

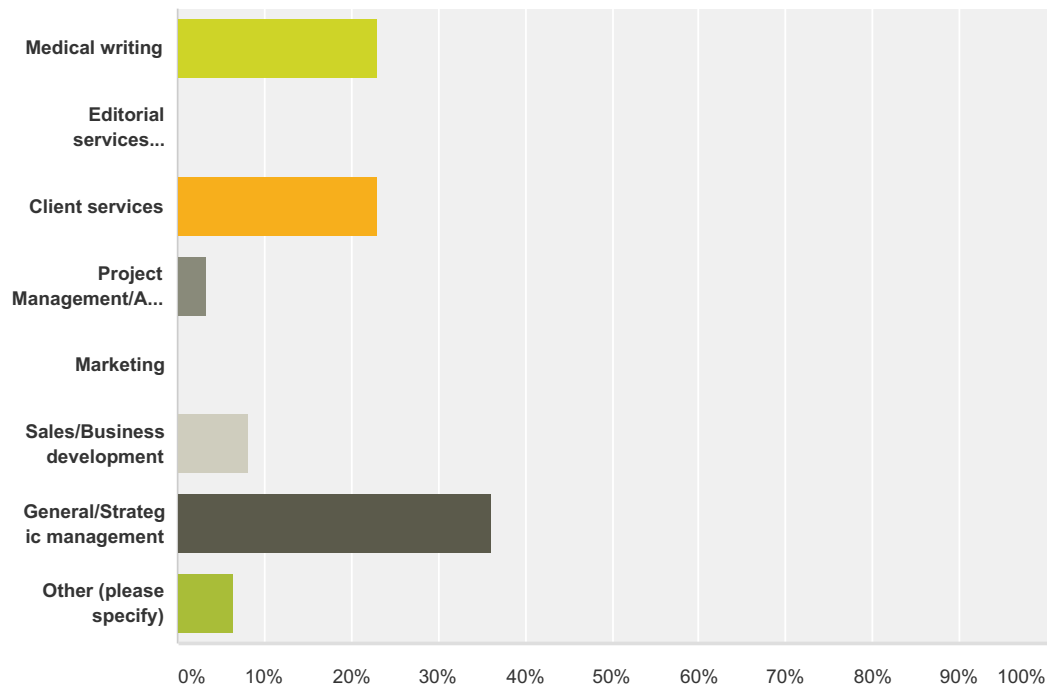


Answer Choices	Responses	
United Kingdom	78.69%	48
United States of America	8.20%	5
France	1.64%	1
Germany	0.00%	0
Italy	0.00%	0
Spain	0.00%	0
If other, please specific country where you are based	11.48%	7
Total		61

#	If other, please specific country where you are based	Date
1	Netherlands	11/24/2014 10:35 PM
2	Singapore	11/21/2014 6:53 AM
3	Australia	11/20/2014 9:18 PM
4	Netherlands	11/19/2014 10:56 AM
5	Work out of US but live in UK	11/17/2014 5:36 PM
6	New Zealand	11/17/2014 4:57 PM
7	Singapore	11/17/2014 10:04 AM

Q2 And a little more - what is your primary role within your agency?

Answered: 61 Skipped: 0

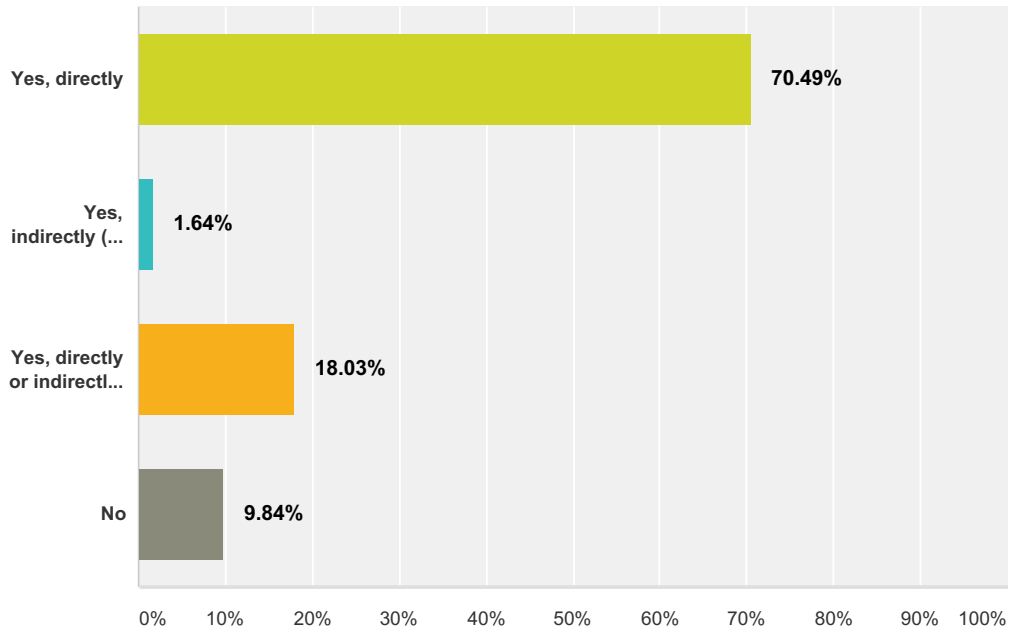


Answer Choices	Responses
Medical writing	22.95% 14
Editorial services (copy/production editing, proof-reading)	0.00% 0
Client services	22.95% 14
Project Management/Admin	3.28% 2
Marketing	0.00% 0
Sales/Business development	8.20% 5
General/Strategic management	36.07% 22
Other (please specify)	6.56% 4
Total	61

#	Other (please specify)	Date
1	I am a freelance Project Manager for Ad Boards, Investigator Meeting, Satellites, Meet the Expert Events	12/1/2014 11:43 AM
2	WOrk for pharma contracting these services	11/17/2014 5:36 PM
3	Commercial Finance	11/17/2014 5:25 PM
4	Principal / Owner	11/17/2014 3:52 PM

Q3 In your current role are you ever involved in pitching to pharma?

Answered: 61 Skipped: 0

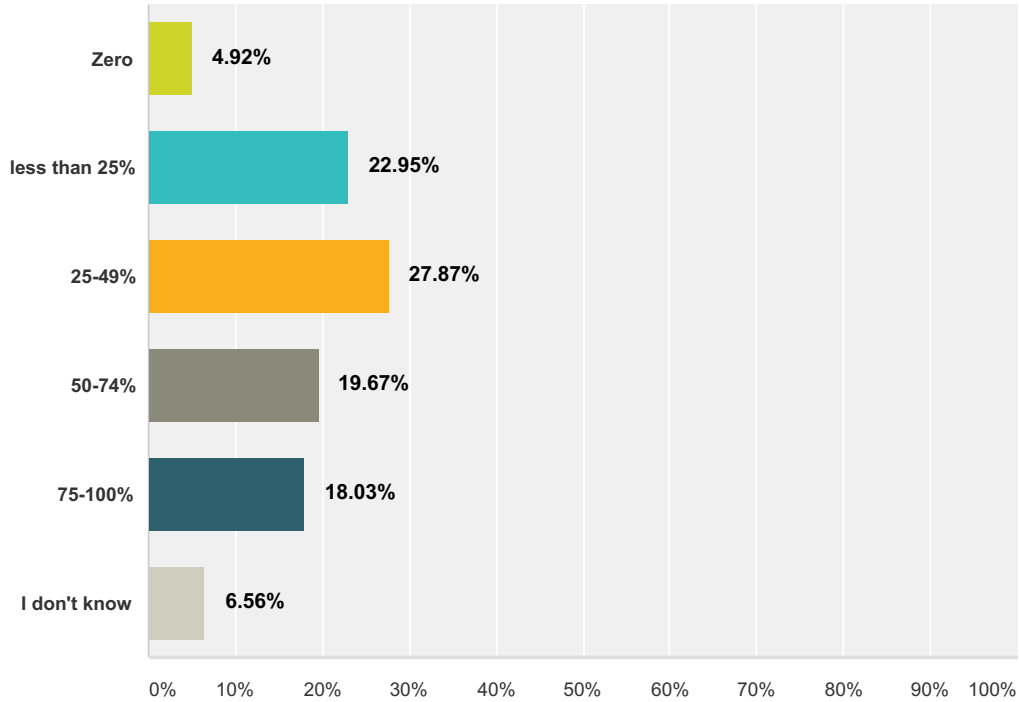


Answer Choices	Responses
Yes, directly	70.49% 43
Yes, indirectly (eg providing background research)	1.64% 1
Yes, directly or indirectly depending on circumstances	18.03% 11
No	9.84% 6
Total	61

#	Please add additional insights here	Date
1	Pitches draw in whoever is needed on the team.	11/18/2014 4:21 PM
2	N.B. we try to avoid the competitive pitch process whenever possible as it generally puts us up against the bigger agencies who throw large amounts of resource at the pitch	11/18/2014 3:53 PM
3	I'm a receiver of the pitches.	11/17/2014 5:36 PM
4	Writing proposals but not actual pitch meetings as yet	11/17/2014 10:17 AM

Q4 In 2014 how much new business has your agency won with pharma clients WITHOUT going through any sort of a pitch process?

Answered: 61 Skipped: 0



Answer Choices	Responses
Zero	4.92% 3
less than 25%	22.95% 14
25-49%	27.87% 17
50-74%	19.67% 12
75-100%	18.03% 11
I don't know	6.56% 4
Total	61

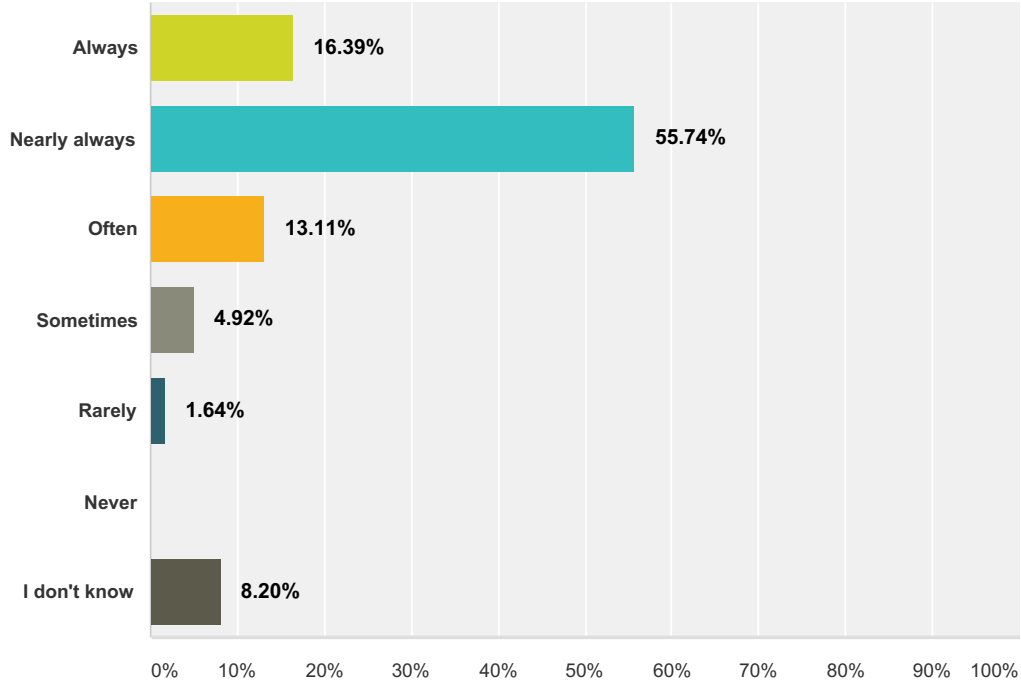
#	Please add additional insights here	Date
1	This is my direct experience. After securing business with a new company or team within a company through the pitch process, other work develops organically from it without having to deliver further official pitches.	11/21/2014 6:53 AM
2	Nearly always in Europe, occassionally in the US. Most of our work is commissioned out of the US, and there is less procurement activity here.	11/18/2014 10:25 PM
3	Generally business has come through good recommendations from our clients and word of mouth.	11/18/2014 2:28 PM
4	All new business has to go through procurement.	11/17/2014 5:36 PM
5	Virtually doubled our business without pitching	11/17/2014 4:57 PM

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6	We typically work with smaller firms that may not have a formal PITCH process.	11/17/2014 3:52 PM
7	I assume the question refers to % of agency's total business with pharma, not % of the agency's total overall business. We have won business with pharma based on proposal only, but no pitch.	11/17/2014 10:17 AM

Q5 In your experience, how often is a procurement department now involved directly in a pitch process with pharma?

Answered: 61 Skipped: 0



Answer Choices	Responses	
Always	16.39%	10
Nearly always	55.74%	34
Often	13.11%	8
Sometimes	4.92%	3
Rarely	1.64%	1
Never	0.00%	0
I don't know	8.20%	5
Total		61

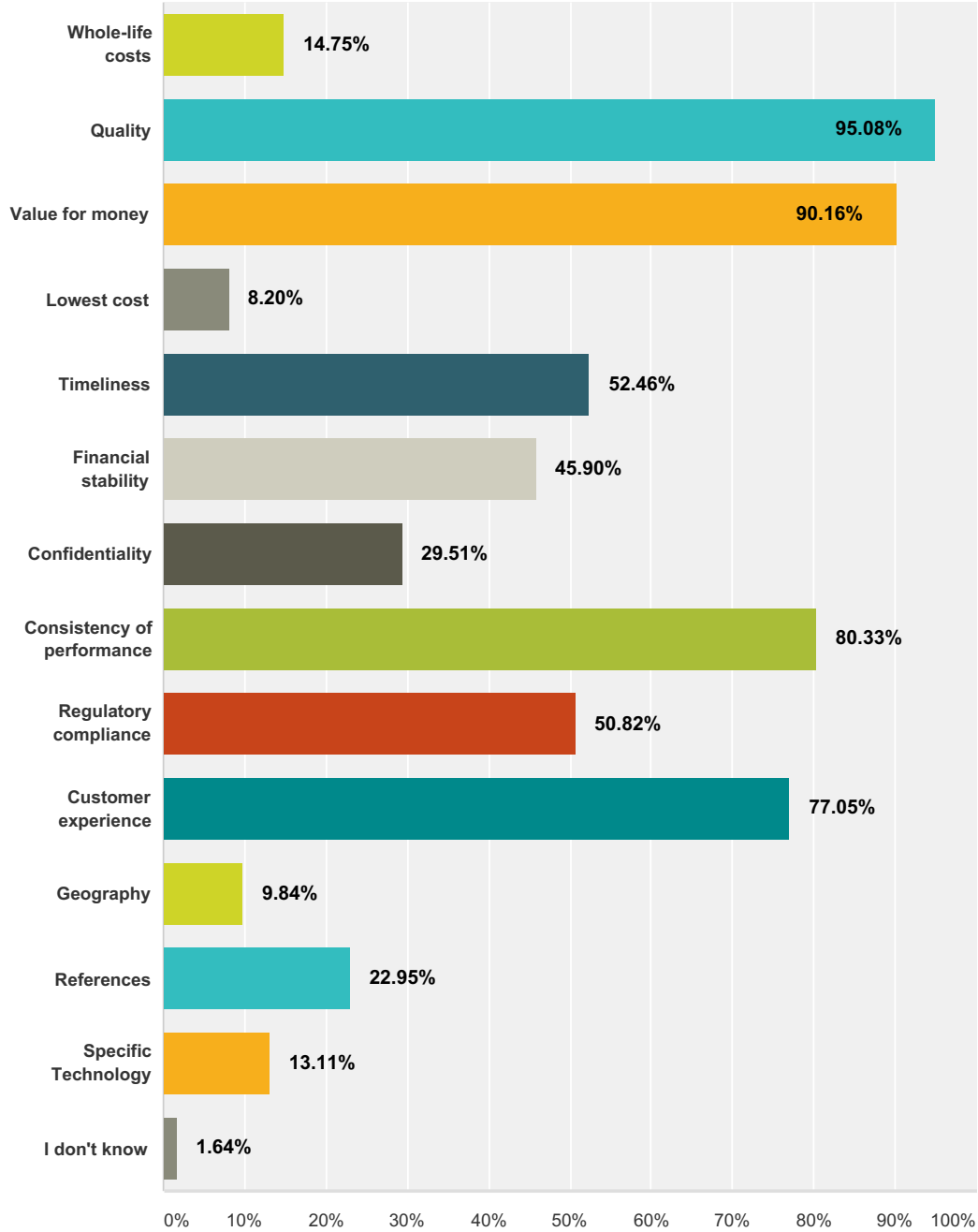
#	Please add additional insights here	Date
1	Nearly always in Europe, occassionally in the US	11/18/2014 10:25 PM
2	It is our policy to actively engage procurement at an early stage in order to understand their processes & procedures. If that relationship and their understanding of our business is strong, procurement will sometimes take a step back while we negotiate with clients.	11/18/2014 3:53 PM
3	In some instances the procurement team are the gate keepers and do not allow the agencies to engage with the end customers. I am convinced pharma would get better responses all round that more closely match the clients specifications if we were allowed to speak with them and really understand and probe their needs.	11/18/2014 3:01 PM

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4	And its often a less than positive experience. Still get poor briefs, no budget information, little or no feedback, and pitches for pieces of business that is frankly too small and wastes everybody's time. Most are driven and rewarded by one thing - money!	11/18/2014 2:47 PM
5	100%	11/17/2014 5:36 PM
6	Depends on the company and its size	11/11/2014 2:28 PM

Q6 What criteria do you think procurement specialists should be considering when contracting services (tick all that apply)?

Answered: 61 Skipped: 0



Answer Choices	Responses	
Whole-life costs	14.75%	9
Quality	95.08%	58
Value for money	90.16%	55

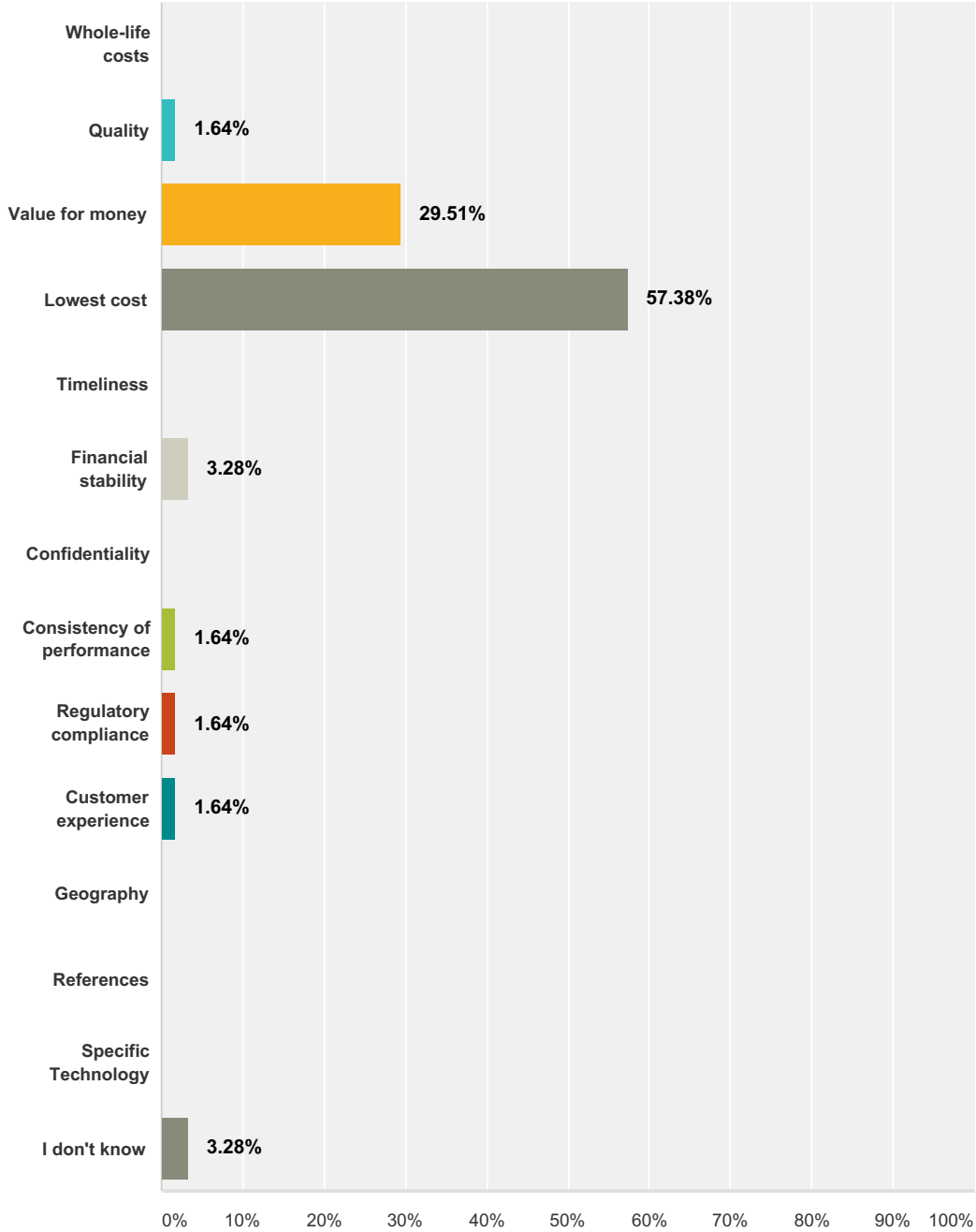
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Lowest cost	8.20%	5
Timeliness	52.46%	32
Financial stability	45.90%	28
Confidentiality	29.51%	18
Consistency of performance	80.33%	49
Regulatory compliance	50.82%	31
Customer experience	77.05%	47
Geography	9.84%	6
References	22.95%	14
Specific Technology	13.11%	8
I don't know	1.64%	1
Total Respondents: 61		

#	Other (please specify)	Date
1	Value for money does not equal lowest cost!	11/19/2014 6:44 AM
2	Depends on the job	11/17/2014 10:17 AM
3	Right 'fit' with the Pharma team	11/11/2014 5:53 PM

Q7 In practice, what do you think is the top criteria for pharma procurement specialists when making contracting decisions?

Answered: 61 Skipped: 0



Answer Choices	Responses
Whole-life costs	0.00% 0
Quality	1.64% 1
Value for money	29.51% 18

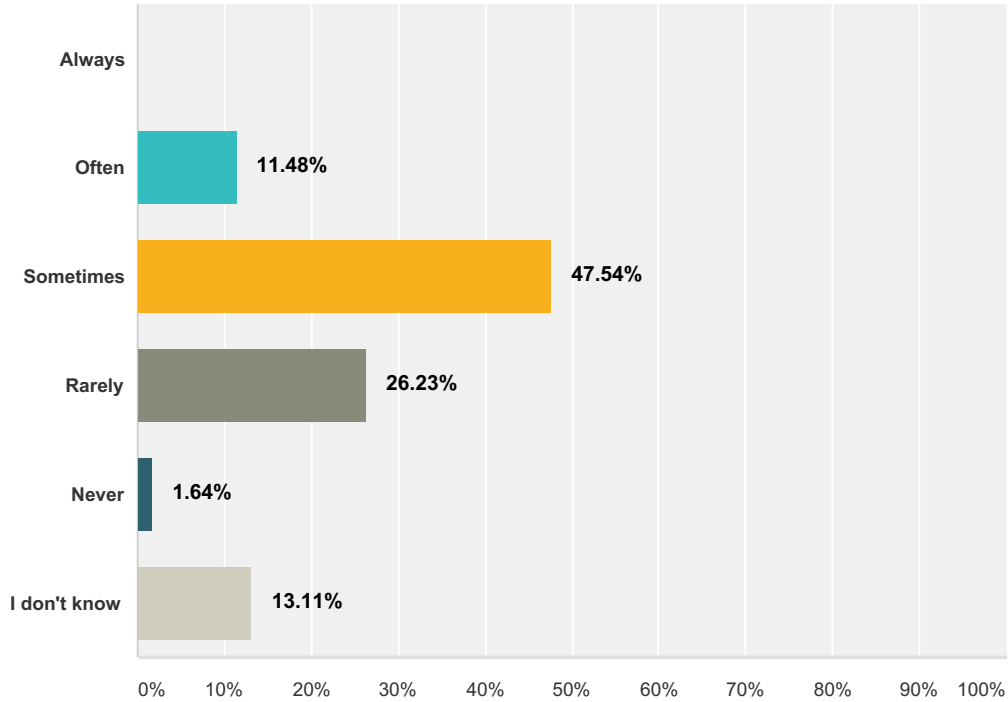
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Lowest cost	57.38%	35
Timeliness	0.00%	0
Financial stability	3.28%	2
Confidentiality	0.00%	0
Consistency of performance	1.64%	1
Regulatory compliance	1.64%	1
Customer experience	1.64%	1
Geography	0.00%	0
References	0.00%	0
Specific Technology	0.00%	0
I don't know	3.28%	2
Total		61

#	Other / Please add additional insights here	Date
1	That is their main responsibility after all. If the relationship within the client company between procurement and the budget holders that they serve is good, then the half-dozen criteria highlighted in Q.6 are generally adjudged by a collaborative process.	11/18/2014 3:53 PM
2	Internal client recommendation is vital.	11/17/2014 5:36 PM
3	Hard to tell. I used to think it was all lowest cost, as they were part of the team that was keeping money expenditure top of mind. But now I believe that they work hard to develop a strong relationship with their partnering companies, and so the security of the relationship is more important.	11/17/2014 4:57 PM
4	Value for money is the ultimate factor influencing decision making. However, procurement seem to moving away from looking at this as the lowest cost and integrating other factors, including quality but also whether relationships can work and the long-term picture	11/17/2014 9:32 AM
5	Every agency I've pitched with has always been the most expensive that the Pharma Co is talking to! Procurement care about costs, not value for money and lack an understanding of the client/agency relationship.	11/11/2014 2:19 PM

Q8 In your experience, when asked to provide framework costings do pharma procurement teams provide realistic specifications?

Answered: 61 Skipped: 0



Answer Choices	Responses
Always	0.00% 0
Often	11.48% 7
Sometimes	47.54% 29
Rarely	26.23% 16
Never	1.64% 1
I don't know	13.11% 8
Total	61

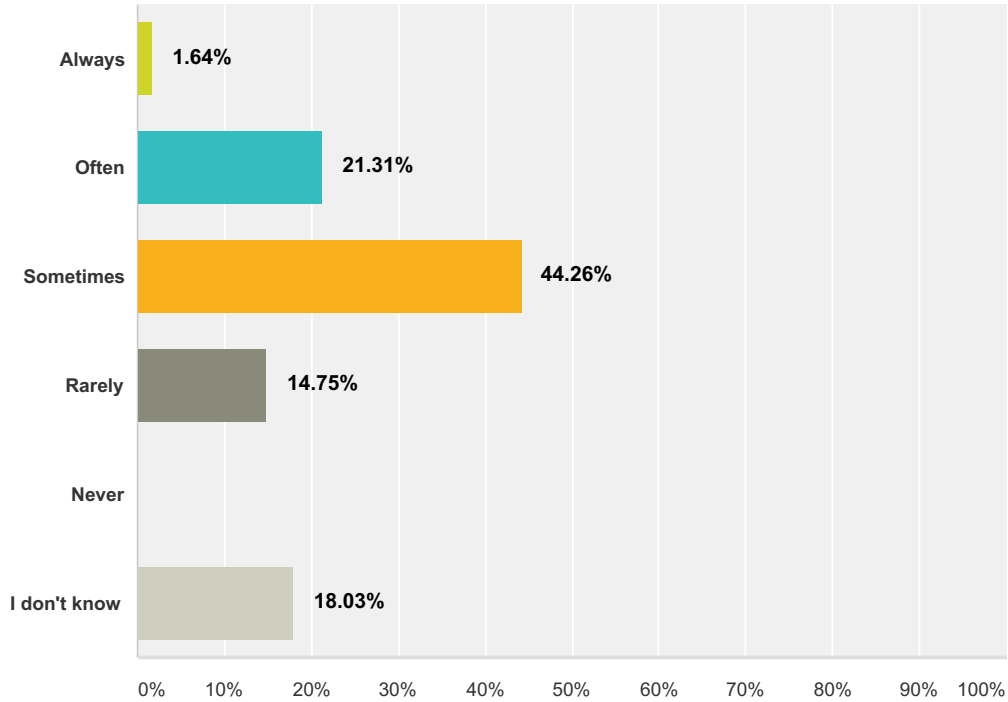
#	Please add additional insights here	Date
1	I know this is a common complaint, but we have nearly always been provided with very clear specs for a pitch which, in my experience, have been compiled to reflect the fixed budget available. Changes come once a piece of business is won and the budget holder then tries to squeeze more out of us for the same money.	11/18/2014 3:53 PM
2	We try	11/17/2014 5:36 PM
3	Things are often left out, and over simplified or overly complex in areas they don't need to be.	11/17/2014 4:57 PM
4	Specifications are OK for typical projects and will usually reflect how a company claims to work. However, the reality of how companies work is usually different and means that specifications are often inaccurate	11/17/2014 9:32 AM

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5	The difficulty is that there often isn't enough detail so it's not possible to compare like with like, however some agencies chop bits out and win the work, then spring a nasty surprise on their clients for those bits that weren't included.	11/11/2014 2:35 PM
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Q9 In your experience, when pharma procurement teams provide specifications for framework costings, are they in alignment with known client SOPs?

Answered: 61 Skipped: 0

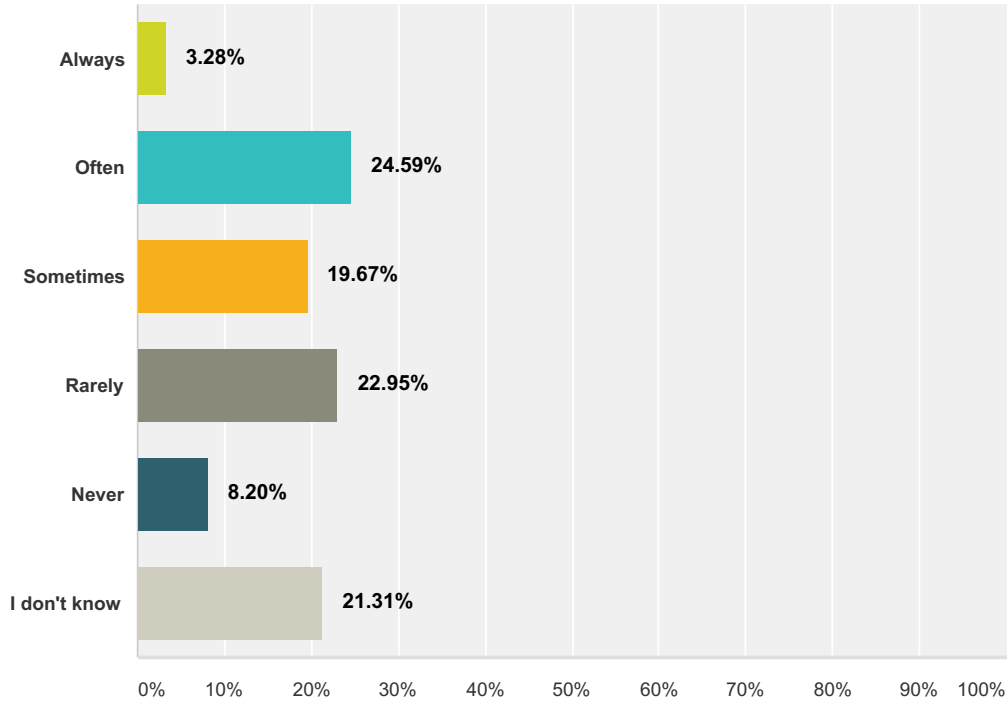


Answer Choices	Responses
Always	1.64% 1
Often	21.31% 13
Sometimes	44.26% 27
Rarely	14.75% 9
Never	0.00% 0
I don't know	18.03% 11
Total Respondents: 61	

#	Please add additional insights here	Date
1	We have never had an occasion when SOPs cannot be upheld. In our experience, procurement teams generally have a very good handle on their company SOPs.	11/18/2014 3:53 PM
2	The disconnect is between SOPs and their application by client teams	11/17/2014 9:32 AM

Q10 How often in 2014 has your agency been asked to provide data to pharma procurement teams that you considered to be inappropriate to disclose?

Answered: 61 Skipped: 0



Answer Choices	Responses
Always	3.28% 2
Often	24.59% 15
Sometimes	19.67% 12
Rarely	22.95% 14
Never	8.20% 5
I don't know	21.31% 13
Total	61

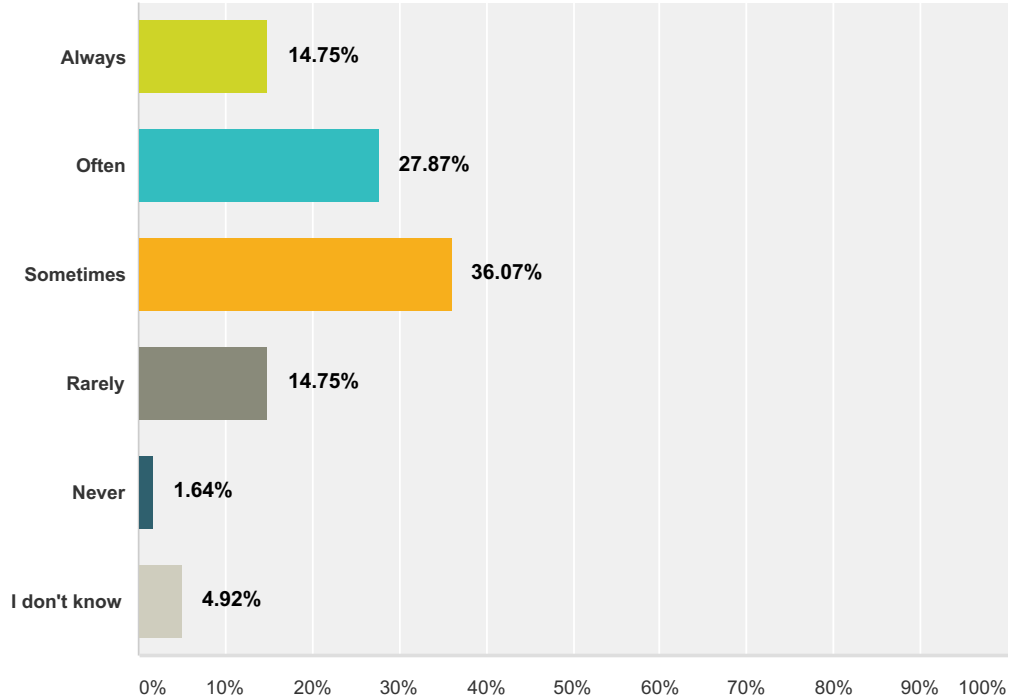
#	Please explain what sort of data you have been asked for that you think is inappropriate	Date
1	Financial information that is not available on Companies House.	11/19/2014 9:31 AM
2	Specific projects we have delivered in the same therapy area, including ROI/impact.	11/19/2014 6:44 AM

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3	But in the past have been asked to provide almost every piece of financial data about my limited company - would have taken hours, was not relevant (geared obviously to multi-million pound companies not sole trader levels), and was GROSSLY invasive in nature. Included things like annual turnover, balance sheet for last 2 years etc. etc. which is ABSOLUTELY none of their business. I did not do it as I was too busy and too affronted by the amount of irrelevant and intrusive information demanded. So, an excellent relationship that had more than thrived for several years preceding this came to an end. Their loss. Really. They had got vastly superior quality work from me for years (they told me so on numerous occasions) and all of a sudden all that knowledge was lost because of all this procurement bureaucracy and nosiness and bean counter mentality. And, as the client had told me I knew more about their drug than they did after years of working on it, that was a significant and totally unnecessary loss to them.	11/18/2014 5:38 PM
4	In this era of honesty and transparency, I don't believe there is any area of our business activity that should be hidden. Sometimes the confidentiality of the detail becomes paramount, but procurement generally understand that as they wouldn't wish for their confidential issues to be disclosed (it can sometimes be a test of the agency's discretion).	11/18/2014 3:53 PM
5	But you have the right to not answer!	11/17/2014 5:36 PM
6	Data around other clients Data around personal employee details	11/17/2014 5:25 PM
7	How much work we have with other companies, as in their budgets and our expenditure with them.	11/17/2014 4:57 PM
8	When I worked at a different agency, we were once asked to provide more information on how our hourly rates were put together, including how much profit we include.	11/17/2014 9:58 AM
9	details of costs relating to another client	11/17/2014 9:23 AM
10	Examples of work done for other pharma companies, references from other pharma companies	11/11/2014 5:53 PM
11	Confidential information about previous clients that the prospective client would be horrified to have shared about them	11/11/2014 2:35 PM

Q11 In your experience, how often do you get feedback following a pitch process with pharma, whatever the result?

Answered: 61 Skipped: 0



Answer Choices	Responses
Always	14.75% 9
Often	27.87% 17
Sometimes	36.07% 22
Rarely	14.75% 9
Never	1.64% 1
I don't know	4.92% 3
Total	61

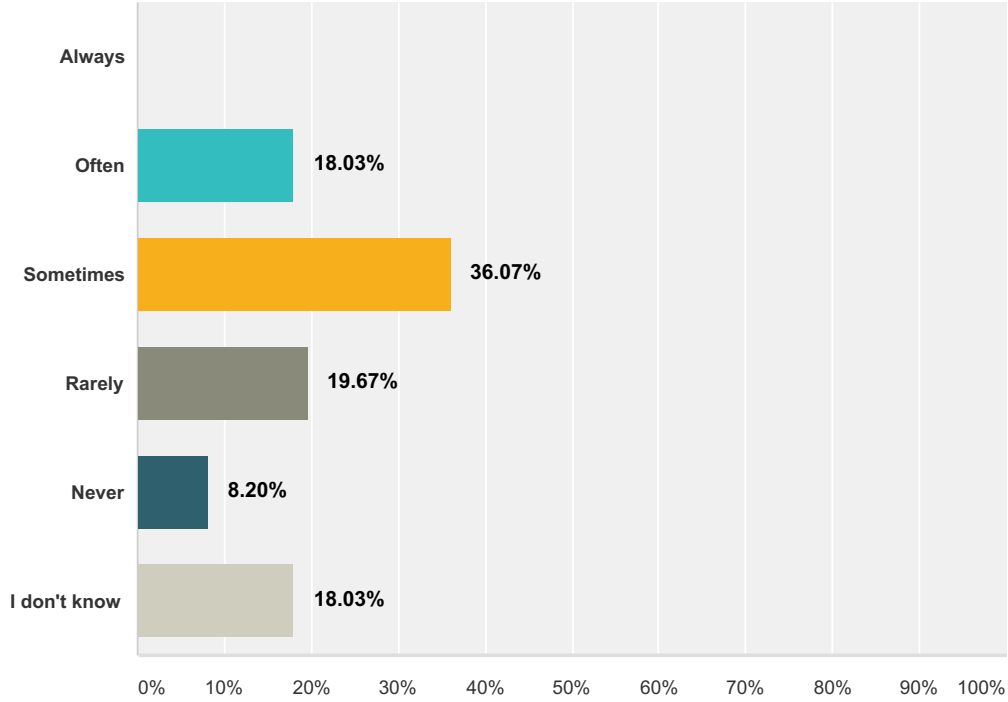
#	Please provide some insights here	Date
1	But often very superficial, and not very enlightening	11/24/2014 10:35 PM
2	Cost is cited as the primary reason for company choice.	11/21/2014 6:53 AM
3	Usually unhelpful in any practical sense, sometimes leaving a suspicion of a hidden agenda...	11/18/2014 3:54 PM
4	This is definitely one aspect that could be improved. Providing feedback should be routine. Admittedly if we win, we don't ask the question. However if we lose, we will ask the question and responses are often evasive which give a suspicion of a decision already made pre-pitch.	11/18/2014 3:53 PM
5	We always ask!	11/18/2014 3:40 PM
6	lots of effort and expense is put into developing proposals and pitches. In order to get better outputs	11/18/2014 3:01 PM

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7	But its not very good!	11/18/2014 2:47 PM
8	although it is never deemed to be of real value or particularly truthful	11/17/2014 5:25 PM
9	You often have to demand it in more detail though.	11/17/2014 4:57 PM
10	Need to ask for it, and them only sometimes is the feedback forthcoming.	11/17/2014 10:04 AM
11	We normally request this as a matter of course and make sure that we get it	11/17/2014 9:23 AM
12	Only when chased usually	11/11/2014 10:48 PM
13	A number of companies don't give more than a couple of lines of feedback, and it is usually very generic - very disappointing given the time. effort and expense of the pitching process	11/11/2014 5:53 PM
14	We always follow up to find out why we weren't successful. After asking us to pitch and then sitting through a pitch meeting it's not a lot to ask for feedback in return. Having been client side myself I know it's not always easy to give feedback, but quite frankly - grow a pair - and let people know why you didn't choose them, it's a courtesy at least to respond.	11/11/2014 2:35 PM

Q12 In your experience, does pharma procurement generally provide regular feedback to an incumbent agency through a structured process? (eg. supplier review meetings)?

Answered: 61 Skipped: 0



Answer Choices	Responses
Always	0.00% 0
Often	18.03% 11
Sometimes	36.07% 22
Rarely	19.67% 12
Never	8.20% 5
I don't know	18.03% 11
Total	61

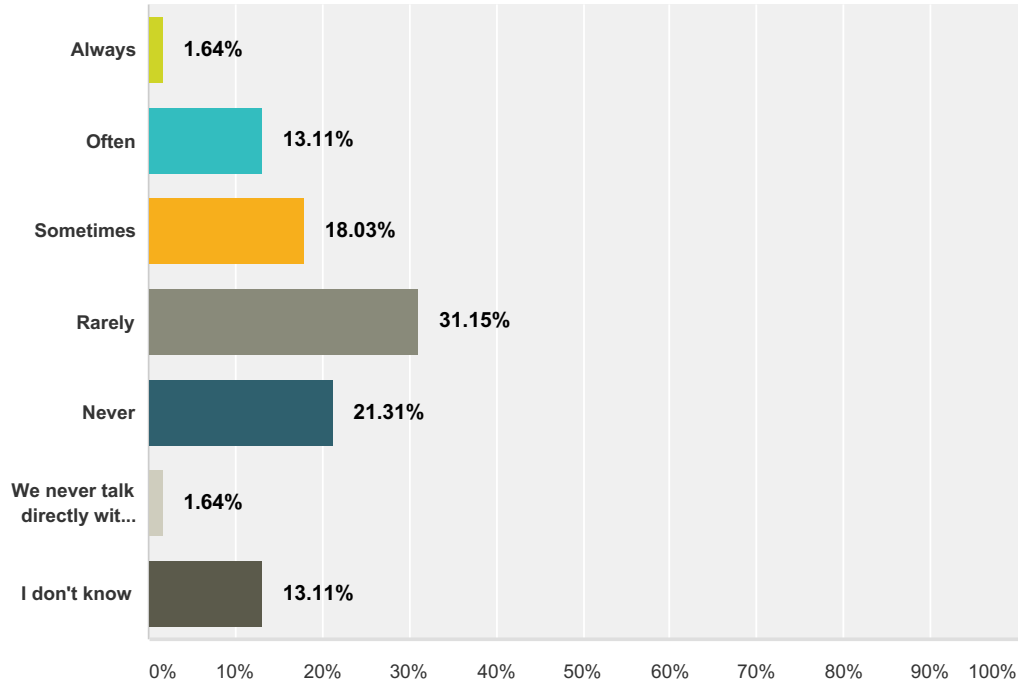
#	Please add additional insights here	Date
1	we have regular feedback from clients but I've never had any from a procurement department specifically. they are normally not involved in working with an agency except for during the pitching process, renewal of contracts, negotiations on rates and if an agency is under-performing.	11/19/2014 9:31 AM
2	Some via a very structured system.	11/19/2014 6:44 AM
3	Very beneficial when this happens for both apties	11/18/2014 3:01 PM
4	Particular large pharma companies have these meetings, however they are always one sided with little room for discussion	11/17/2014 5:25 PM

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5	yes, with our biggest client. Its very regular and is called a governance meeting. In some cases we have had a monthly review until they are happy that we know what we are doing.	11/17/2014 4:57 PM
6	I have been asked to provide feedback over a year showing budget versus actual cost for each deliverable but that is quite rare.	11/17/2014 9:58 AM
7	Our major clients always do - smaller ones not so much. It varies from a very regulated company wide survey with results grading you against other agencies of your type to a bi-annual chat to pick up on any areas of concern	11/17/2014 9:23 AM
8	Annual healthchecks	11/11/2014 10:48 PM
9	Becoming less frequent now, which is a shame as how can an agency address any issues if the client tells them they're delighted with their performance but complains to Procurement?	11/11/2014 2:35 PM

Q13 In your experience, is your agency ever asked by pharma procurement teams to provide feedback on the experience of working with their company?

Answered: 61 Skipped: 0



Answer Choices	Responses
Always	1.64% 1
Often	13.11% 8
Sometimes	18.03% 11
Rarely	31.15% 19
Never	21.31% 13
We never talk directly with procurement	1.64% 1
I don't know	13.11% 8
Total	61

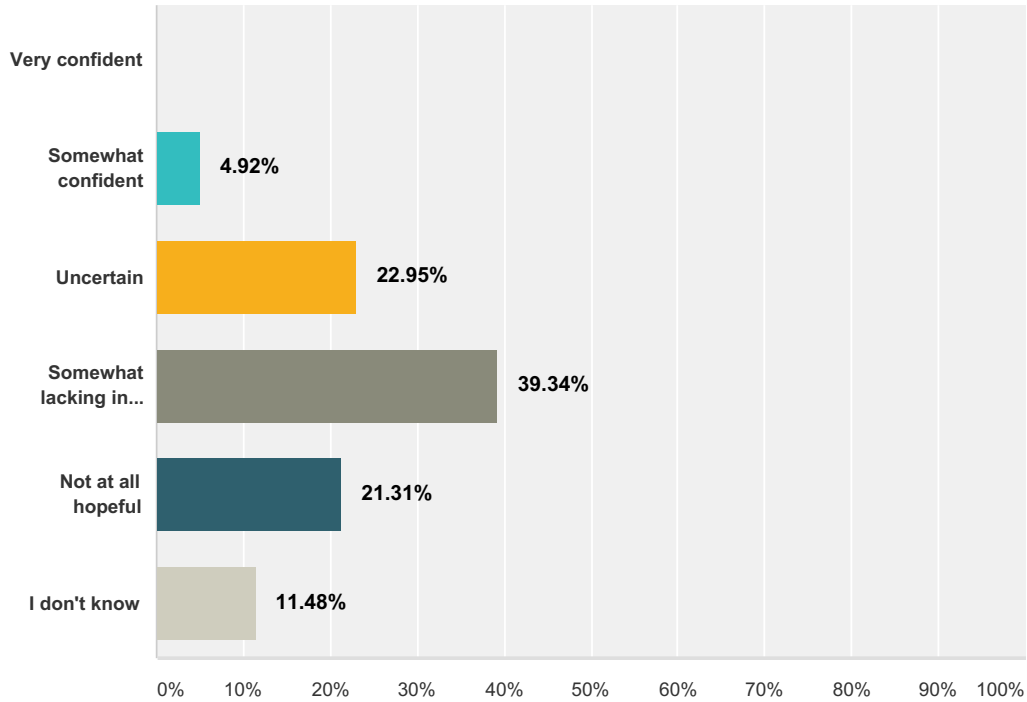
#	Please add additional insights here	Date
1	In my experience I am only aware of one pharma company who has twice yearly review meetings to discuss the performance of both agency and client	11/27/2014 5:22 PM
2	Not in my experience.	11/21/2014 6:53 AM
3	Some companies are great at this, others less so!	11/19/2014 6:44 AM
4	Other than letting of steam, not sure if there are often any real world consequences...	11/18/2014 3:54 PM
5	Procurement should work both ways and true sourcing professional build this into their agency relationship strategies.	11/18/2014 3:53 PM

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6	Occasionally, however the assumption & culture are such that the agency does not want to offend and would use this as an opportunity to praise the client & say positive things	11/17/2014 5:25 PM
7	Only one client in recent times. But it was more for feedback of their project team, not their procurement team.	11/17/2014 10:04 AM
8	In update meetings I am always asked for feedback	11/17/2014 9:23 AM
9	We have done this for Roche and Janssen	11/11/2014 10:48 PM
10	Not sure this is ever fed back to the client team	11/11/2014 2:35 PM

Q14 With the advent of US Sunshine and Open Payments reporting and the forthcoming EFPIA transparency requirements how confident are you that pharma procurement teams will fully accept the increased costs of administration for the agencies?

Answered: 61 Skipped: 0



Answer Choices	Responses
Very confident	0.00% 0
Somewhat confident	4.92% 3
Uncertain	22.95% 14
Somewhat lacking in confidence	39.34% 24
Not at all hopeful	21.31% 13
I don't know	11.48% 7
Total	61

#	Please add additional insights here	Date
1	Current experience is proving that company Brand teams support increases, but procurement do not.	11/19/2014 8:53 AM
2	Most clients want us to follow further additional procedures at no cost to them.	11/19/2014 6:44 AM
3	We haven't been asked to do anything additional - they appear to be doing it all in-house.	11/17/2014 4:57 PM

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4	From current experience - many companies are seeking to bring some payments back in house so that they can track them -	11/17/2014 9:23 AM
5	There is a distinct lack of understanding of the extra work this entails, and no, it's not a business costs we should be absorbing	11/11/2014 2:35 PM

Q15 Please add any additional relevant thoughts or insights you have, if you have them. This question is optional.

Answered: 8 Skipped: 53

#	Responses	Date
1	If a procurement team is engaged then they can be a massive asset and help an agency to provide the best services for a client and really help them to become an extended part of the team, however, in my experience (both from pharma side and agency) most procurement teams are obstructive to getting work done and are only interested in cost-cutting. Very few procurement teams get involved with agencies, preferring to get them on board and then leaving their medical/marketing teams to get on with their projects until there is a problem or rates/contracts need to be discussed.	11/19/2014 9:31 AM
2	I feel Pharma needs to review the pitch process as often this is a lengthy, costly process for all involved and not always the best way to measure either existing or new agencies. The client team always want the delivery team to attend the pitch which is a sensible request, however, in my experience some of these individuals and particularly medical writers are not in their comfort zone pitching or presenting to clients in this way, therefore, the client doesn't always see the best of them.	11/18/2014 2:28 PM
3	I'd appreciate insights into e auctions as well. Does this ever work well for the agency?	11/17/2014 8:03 PM
4	As former agency I value dialogue during the pitch process. Many things can be sorted with a short phone call.	11/17/2014 5:36 PM
5	Numerous changes have occurred in the industry which have increased costs on the provider side of the business. Procurement staff often do not fully understand / take these points into consideration.	11/17/2014 3:52 PM
6	In my opinion there is a focus on lowest cost and whilst getting work done for the lowest cost is important, there does need to be a balance between value for money and consistent quality of work.	11/17/2014 9:58 AM
7	Procurement is often seen as the enemy - it isn't - they can be a great ally. They add a level of scrutiny to budgets which in many cases is appropriate and in my experience, if you can justify your budget they will let it go - they just do not like wooly statements "client liaison" - they like to have some details of what that might be.	11/17/2014 9:23 AM
8	We are sometimes penalised for being transparent in our budgets by being told we are too expensive when being compared to another agency who have been given a different specification by a different client team. Comparing like with like is not always done and is where many Procurement teams fall down in their decisions	11/11/2014 2:35 PM