NEW BUSINESS PURSUIT

Process Launch

July 2024

digitas health

our charge

FOSTER A CULTURE OF IMAGINEISTS

(SCIENTISTS OF THE IMAGINATION)

TABLE OF CONTENTS

1. Key Learnings

2. Foundational Pitch Meetings

3. Foundation vs. Flex

(opportunities to tailor by client/brand team)

4. Pitch Team Roles

5. Executive Touch-points

6. ToolKit (In progress)

1.
KEY LEARNINGS

KEY LEARNINGS

Authentic Brand Story:

We must avoid presenting an overly optimistic narrative that doesn't align with the market realities. Clients seek practical solutions to their real-world challenges, not exaggerated promises.

Realistic Opening:

Our opening should match the tone and substance of our creative solutions. Overhyping can lead to disappointment if the subsequent content doesn't deliver on the initial excitement.

Integrated Omnichannel Strategy:

Every pitch starts with data. Rather than lengthy technical explanations, we should integrate our omnichannel capabilities seamlessly into the creative narrative. Providing concrete, relevant examples is far more effective.

Focused Pitch Content:

Prioritization is crucial. Address the most critical challenges identified by the client and dedicate most of our presentation to those areas. Secondary questions can be handled in follow-up communications.

Clear Decision Making Structure

Ensure our pitch team is well-structured with clearly defined roles:

- Executive Chair: Oversees the pitch process and resource allocation.
- Business Champion: Owns the narrative and content decisions.
- Growth Team: Manages pitch story and execution.
- Discipline Leads: Provide necessary content and support.

Debate within the team is healthy, but we must respect the decisions of the Business Champion and adhere to process set by the Growth team.

Proposed Pitch Structure:
To stand out, consider a refreshed pitch story structure

Creative Tease
Strategy Overview
Customer Insights
Creative Brief & Concepts
Omnichannel Integration Example
Strategic/ Creative Opportunity Recap & Business Ask
Agency Credentials

GOAL: TO CREATE A MORE INCLUSIVE PROCESS WHERE WE WIN OR LOSE TOGETHER

2.
FOUNDATIONAL PITCH MEETINGS

digitas health

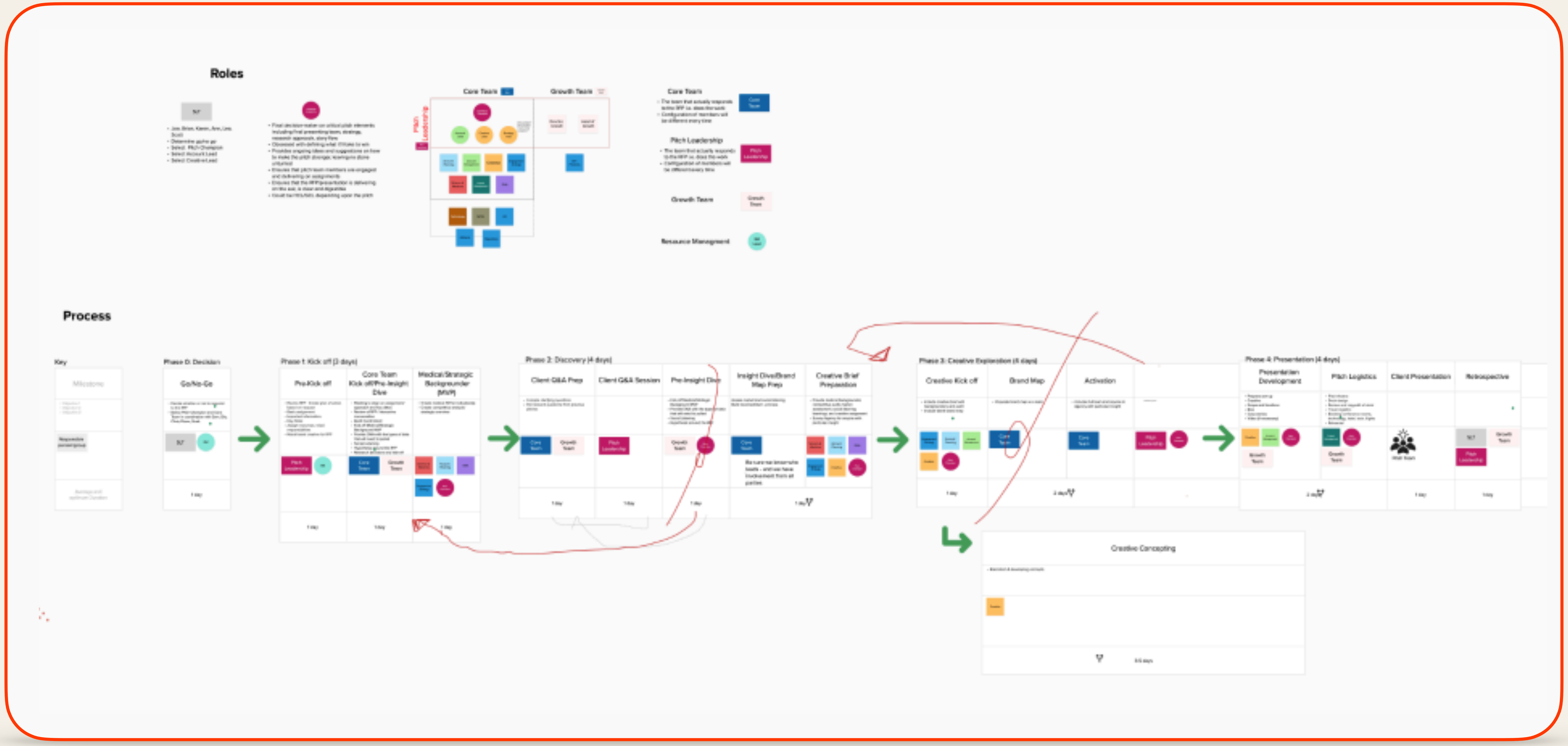
FROM YOUR INPUTS

30

People Surveyed:
Capability Leads, Relationship Leads, Frequent Pitchers

~50%

Response Rate



Phase 1

KICK OFF PROCESS

Phase 2

DISCOVERY & STRATEGIC ALIGNMENT

Phase 3

CONTENT DEVELOPMENT

↘ Creative Development

↘ OmniChannel Activation Development

Phase 4

DECK DEVELOPMENT

Phase 1

KICK OFF PROCESS

- Go/no-go decision
- Team alignment
- Pre-kick off
- Full team kick off
- Research initiated
- Medical & Market 101
- Client Q&A
- Land business strategy - what will it take to win?/Intelligent simplicity story - is this a framework?
- Opportunity reassessment

Phase 2

DISCOVERY & STRATEGIC ALIGNMENT

- Data brief developed
- Research conducted
- Reality Check
- Develop now/next and strategy on a page
- Creative brief development and finalization

Phase 3

CONTENT DEVELOPMENT

Creative Development

- Creative briefing
- Concept identification & refinement
- Consider video elements

Tactical Development

- Tactical brainstorm methodology
- Tactical brainstorm conducted
- Tactical briefing with creative teams
- Tactical slide development
- Consider video/gif elements

Phase 4

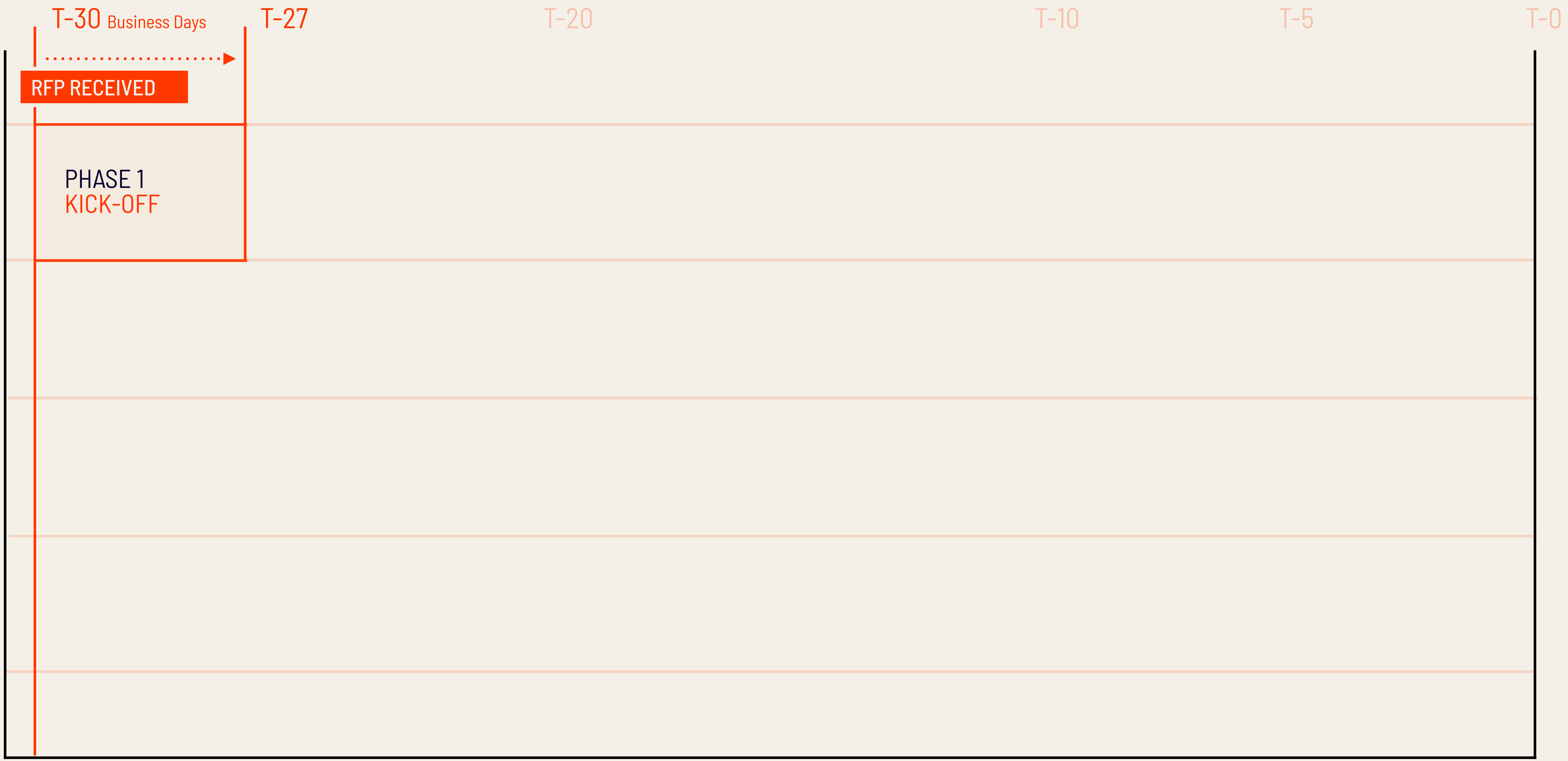
DECK DEVELOPMENT

- Story Flow and slide assignments
- Slide development, design and refinement
- Slide reviews and click throughs
- Pitch logistics
- Talk throughs and rehearsals
- Q&A prep

foundational pitch meetings

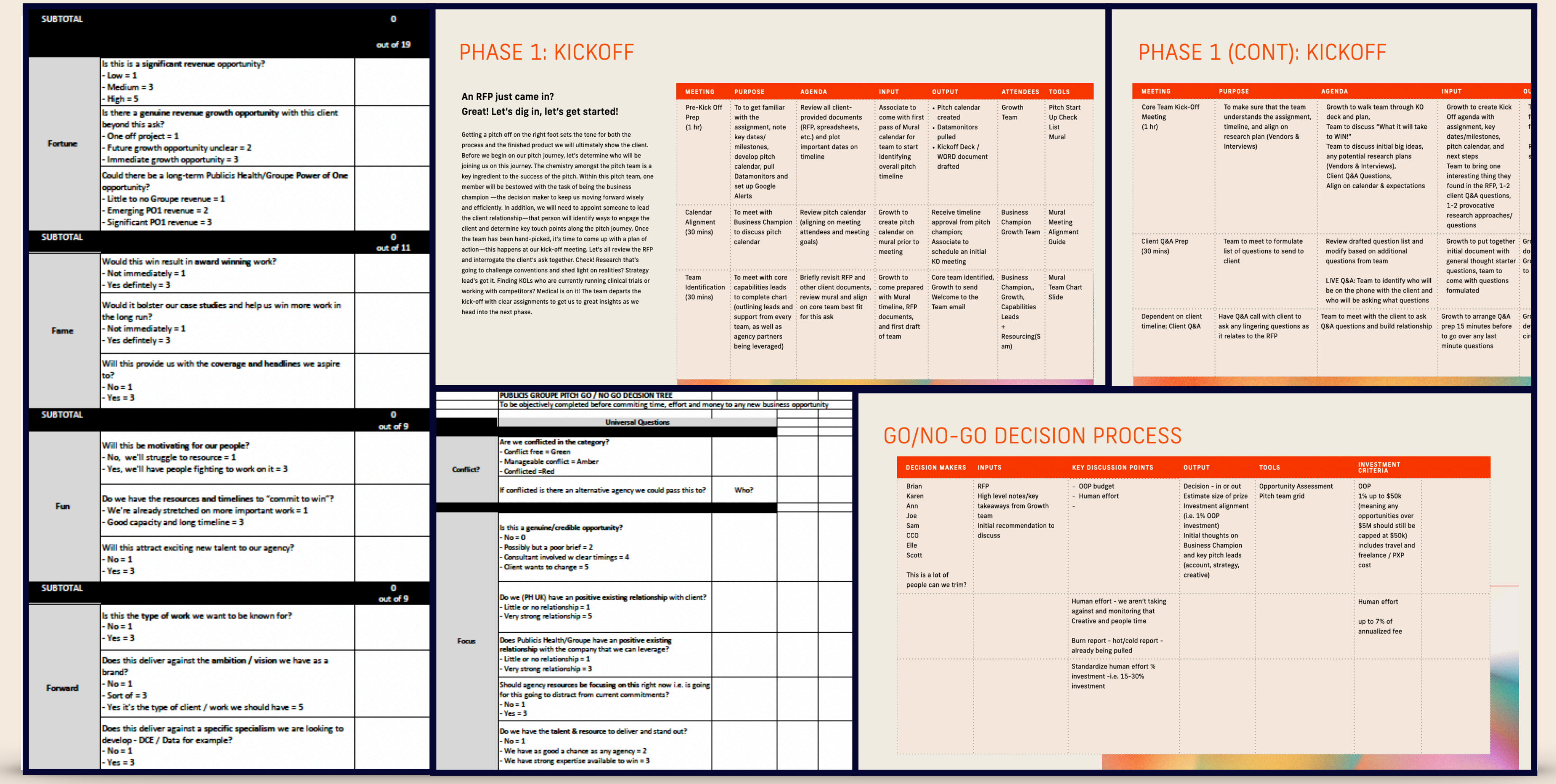
INTO ACTION: THE DH NEW BUSINESS PROCESS

OUR FOUNDATIONAL PROCESS

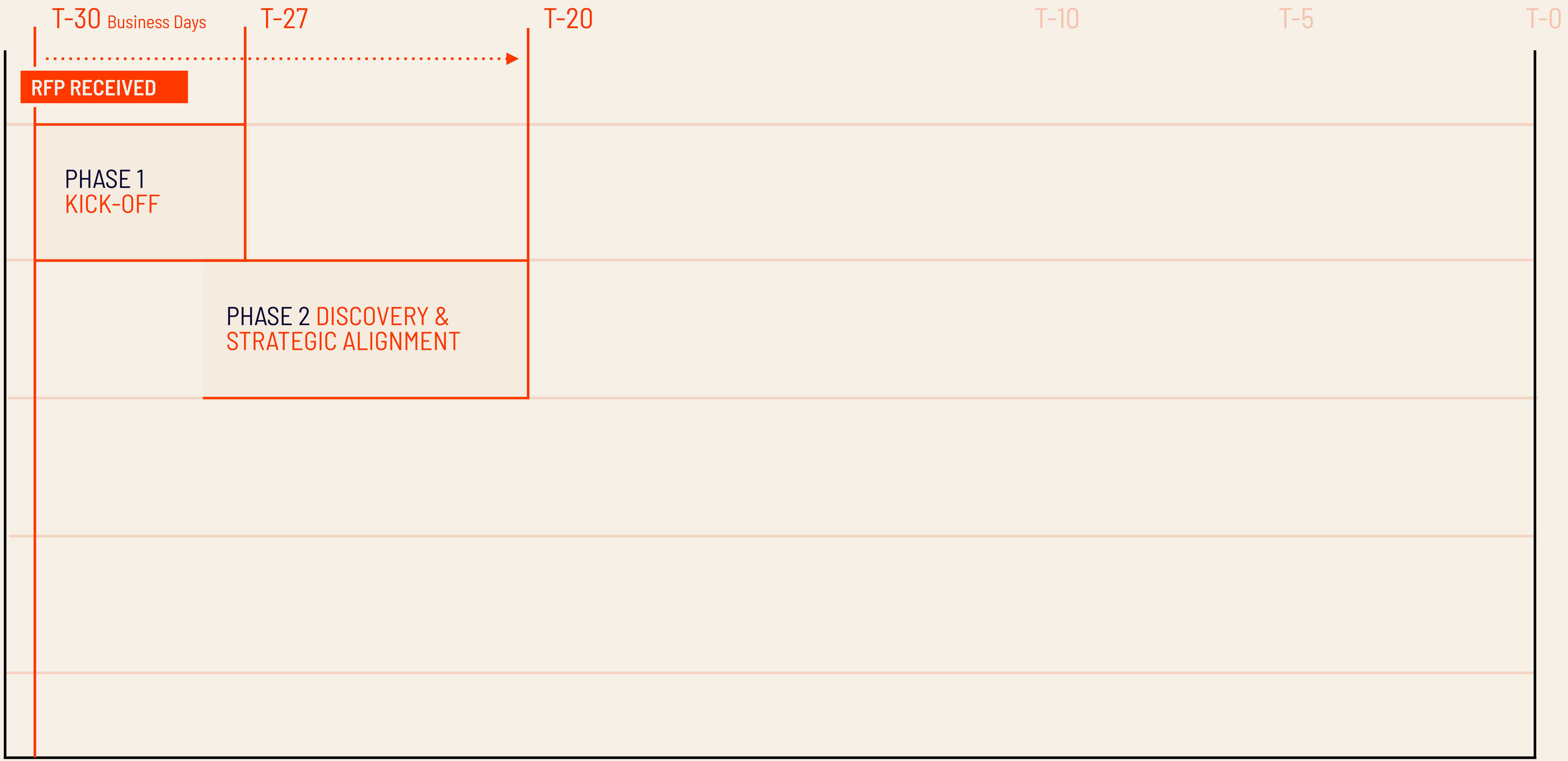


PHASE 1
KICK-OFF

- Go/no-go decision
- Team alignment
- Pre-kick off
- Full team kick off
- Research initiated
- Medical & Market 101
- Client Q&A
- Land business strategy - what will it take to win?/ Intelligent simplicity story - is this a framework?
- Opportunity reassessment



OUR FOUNDATIONAL PROCESS



PHASE 2
DISCOVERY & STRATEGIC ALIGNMENT

- Data brief developed
- Research conducted
- Reality Check
- Develop now/next and strategy on a page
- Creative brief development & finalization

PHASE 2: DISCOVERY & STRATEGIC ALIGNMENT

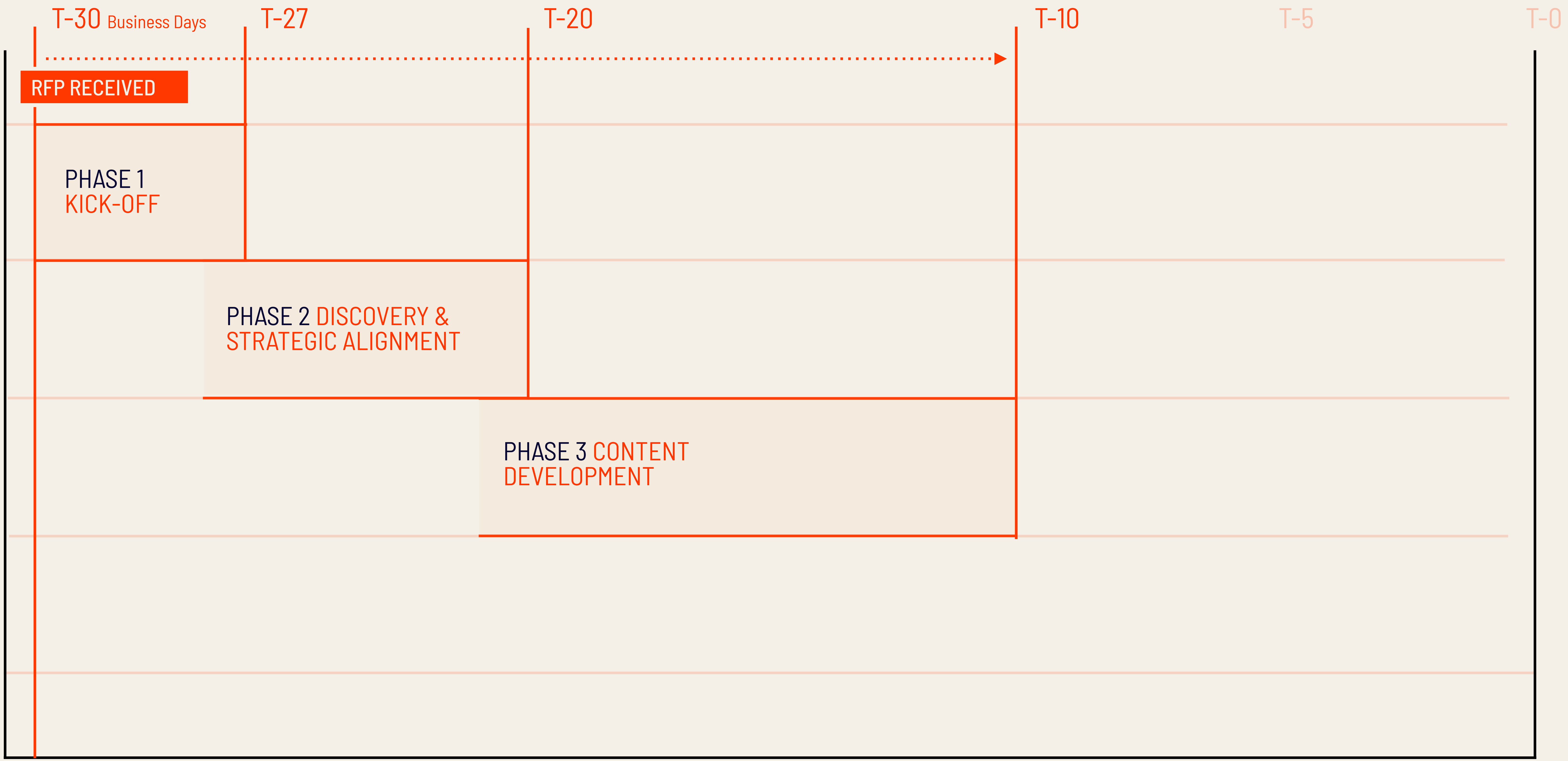
It's time to dig deep into the disease state, customer and product—

Let's do our homework and let's uncover some provocative realities. In this phase it's all about conducting and crystalizing our research. The heavy lifting in this stage is done by our strategy, medical and copy leads. Our objective? Ensure we are finding the deeper insights and "a-ha's" that will give us the best creative evolutions and make the clients go "hmm...Digitas Health doesn't just take the easy way out".

As we continue on in this phase, keep in mind, we are still finding opportunities to engage the client and stay top of mind—did we uncover something interesting in research we can share? Is there something that came up during our Q&A that we can follow up on? Let's keep the dialog open throughout the process, and build a relationship.

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Medical 101 (1 Hour)	Deep dive into the product, and its competitors	Medical to present findings	Medical to create Med101 deck prior to meeting and share within TEAMS channel	Growth to circulate deck and recording to team Team to send any additional questions to Medical for clarity	Full Team	Key Questions to answer in Medical 101 deck
Focus Group/ Interviews (1 Hour)	To speak directly to our customers (KOLs, HCPs, Patients, Caregivers) to get a better understanding of their challenges	Lead strategists OR medical to conduct interview or focus group	Discussion guide developed by strategy (community and patient) and medical (KOL) circulated to the team for feedback	Key learnings to be shared with team following right after meeting; Insights to be shared at Reality Check Meeting	Strategy, Medical, Account, Creative Leads, Engagement Lead, Growth	Discussion Guide Projective Exercises (if applicable)
Reality Check Meeting (2 Hours)	To take a deep dive into the market, competitive, socially, etc.	Team assigned questions to respond and build off of based off the Client, Human, Cultural, Category, Conversation, Brand and Clinical leading to an overarching reality for each	Pitch leads to develop slides based on assignments leading up to meeting (these will be provided in the welcome to the team email or following KO)	Growth to circulate Reality Check deck to team Initial strategic direction (leading to a strategy and brief)	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, DNA, Growth	Template of Reality Check deck
Strategy Alignment (30 mins)	To discuss the strategy for pitch to make sure team is aligned	Team to finalize strategy	Planning to develop initial strategy for team to react to	Team alignment on strategy to proceed to creative briefing	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Lead, DNA, Growth	Strategic Brief Strategy Deck (containing insights leading up to overarching strategy)

OUR FOUNDATIONAL PROCESS



digitas health

PHASE 3
CONTENT DEVELOPMENT

Creative Development

- Creative Briefing
- Concept identification & refinement
- Consider video elements

Tactical Development

- Tactical brainstorm methodology
- Tactical brainstorm conducted
- Tactical briefing with creative teams
- Tactical slide development
- Consider video/gif elements
- Creative Development
- Tactical Development

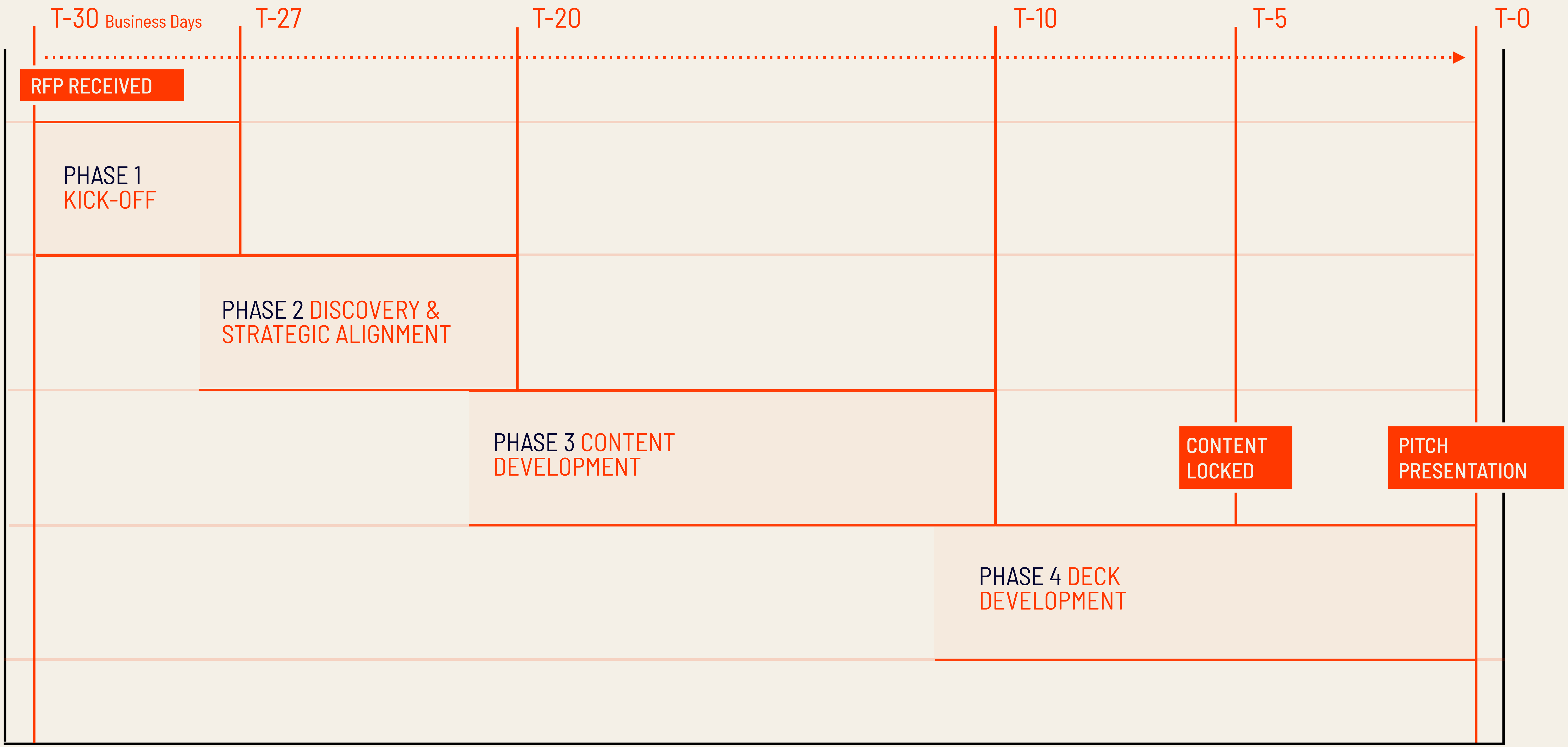
PHASE 3: CONTENT DEVELOPMENT

Now that we have dug deep, spoken to our client and customers, and aligned and committed to a strategy, it's time to distill our strategy into a main idea that will get us to great creative.

This stage is driven by our creative leads. In our pursuit of powerful creative, it's important that the creative brief is the catalyst for that output. To ensure our creative brief is at it's best we pull our Executive Chair and Business Champion together to sign off on the brief. Following the briefing, several creative reviews will take place. Once the team is feeling energized by the creative and the ideas become further fleshed out, a Creative Sign Off meeting will occur with the Executive Chair, Business Champion, and Creative Lead to ensure that we are hitting on key areas of focus for the brand—Is the creative on strategy? Has medical reviewed the copy for accuracy? Are we highlighting the new launch and brand benefits? Great. Good. Let's make some boards!

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Creative Brief Development (30 mins)	To react to the brief that Strategy has drafted	Finalize creative brief in preparation for creative briefing	Strategy and creative to develop creative brief and have document completed for team to react to	Strategy to make tweaks to brief based off of team discussion	Business Champion, Creative Lead, Strategy Lead, Medical Lead, Growth	Creative brief template
Creative Brief Sign Off (30 mins)	To receive approval on creative brief from Executive Chair and Business Champion	Review creative brief to ensure we will get the best creative output possible (Ensuring aligns with the brand vision/strategy)	Creative brief developed by team	Receive specific direction to modify the brief and approval to proceed to creative briefing	Executive Chair, Business Champion, Strategy Lead, Creative Leads, Growth	Creative brief
Creative Briefing (1 Hour)	To brief creatives on assignment so they can begin concepting	Medical to provide brief download, strategy to share insights leading to creative brief	Brief creative teams and provide timing / expectations	Creative team to begin concepting, Growth to share deck and recording with team following the meeting, Growth to schedule reviews	Creative team, Creative leads, Strategy Lead, Medical lead, Analytics lead, Business Champion, Growth, Core pitch team (Optional)	Creative Brief Medical Backgrounder Creative Ideation Template
Creative Reviews (1 Hour)	To check in with creative to review concepts for pitch	Review creative concepts, give feedback/direction, make decisions on which concepts will move forward	Extended Creative team to work on concepts, send updates to larger team	Creative Leads to check in with Extended Creative team to ensure concepts are on the right track	Creative Team, Creative Leads, Strategy Lead, Medical lead, Analytics Lead, Business Champion, Resourcing (Sam and Joey), Growth	
Exec Creative Check-ins (30 mins)	To meet between the creative reviews prior to creative sign off	Review creative concepts, give feedback/direction	Creative leads to gather creative ideas into deck to review	To provide direction from leadership to ensure alignment on creative	Brian, Karen, Ben, Noel, Elle, Creative Leads, Strategy Lead, Growth	WIP Creative Concepts, Strategic Brief
Creative Sign Off	To do a final review of creative before teams move into finalizing and creating	Review concepts for medical and brand benefits, ensure copy is finalized	Creative Concepts	Approval on creative concepts from core team	Creative Leads, Strategy Lead, Medical Lead, Business Champion, Growth, Core team	QC Checklist from pitch captain based on assignment

OUR FOUNDATIONAL PROCESS



PHASE 4
DECK DEVELOPMENT

- Story Flow and slide assignments
- Slide development, design and refinement
- Slide reviews and click throughs
- Pitch logistics
- Talk throughs and rehearsals
- Q&A prep

PHASE 4: PRESENTATION DEVELOPMENT

The culmination of all pitch efforts comes to life in our presentation—

The theme, the theater and the story come to life here. In staying true to who we are at Digitas Health, our story flow session focuses on getting to the hearts and minds of our customers—What makes them tick? Why did they get into their specialty in the first place? How does treating this condition make them feel? How will our brand make them feel? By bringing that emotion to life, the pitch theater and theme come naturally. In this phase of the process, each team member is a champion of their section and has a large part of bringing the presentation to life.

Once we nail down our story, the slides are brought to life visually by the team in partnership with our presentation specialists. It's almost time for the show!

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Story Flow (30 mins)	To finalize story flow for pitch deck and identify topics to hit for each section	Growth to lead story flow session with the team	Team to ensure they have read all research to be prepared for discussion	Growth to assign team slides to create based off of story flow	Executive Chair, Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, Growth	Story Flow Workshop Guide
Pitch Deliverables (30 mins)	To align on what pitch deliverables/theater we are	Team to brainstorm and align on pitch delivererables	Growth to bring pitch deliverables check list, Team	Alignment on pitch deliverables and ... nts for owners	Business Champion, Creative Leads, Growth + DH Presents (PJ/Sara), maybe Engagement Strat leads	Pitch deliverables checklist and examples

PHASE 4 (CONT.): PRESENTATION DEVELOPMENT

We have hit the 48-hour mark. Pencils down!

On the day of the pitch, whether it is hosted at our agency or the client's location, we will make sure that the pitch team has a logistics of the pitch will run smoothly—starting from the point the clients arrive through to the presentation itself!

MEETING	PURPOSE	AGENDA	INPUT	OUTPU
Talk Through	To walk through the deck and hear our story out loud from start to finish	This is an "informal rehearsal." Teams should be prepared to talk through each slide and make any final changes to builds/design for their sections	Presentation deck with all changes and design incorporated since last meeting	Final c tweaks presen incorp
Rehearsal	To present as if the clients were in the room	Team to rehearse. No changes are made at this point	Final presentation deck owned by Growth	Feedba presen section
Q&A Rehearsal	To prepare for client questions that may be asked during the pitch	Share Q&A Rules with the team. Practice sample Q&A questions	Growth lead and pitch team to draft a list of questions during the rehearsal to be asked during the Q&A prep session	Q&A qu roughly have a take w

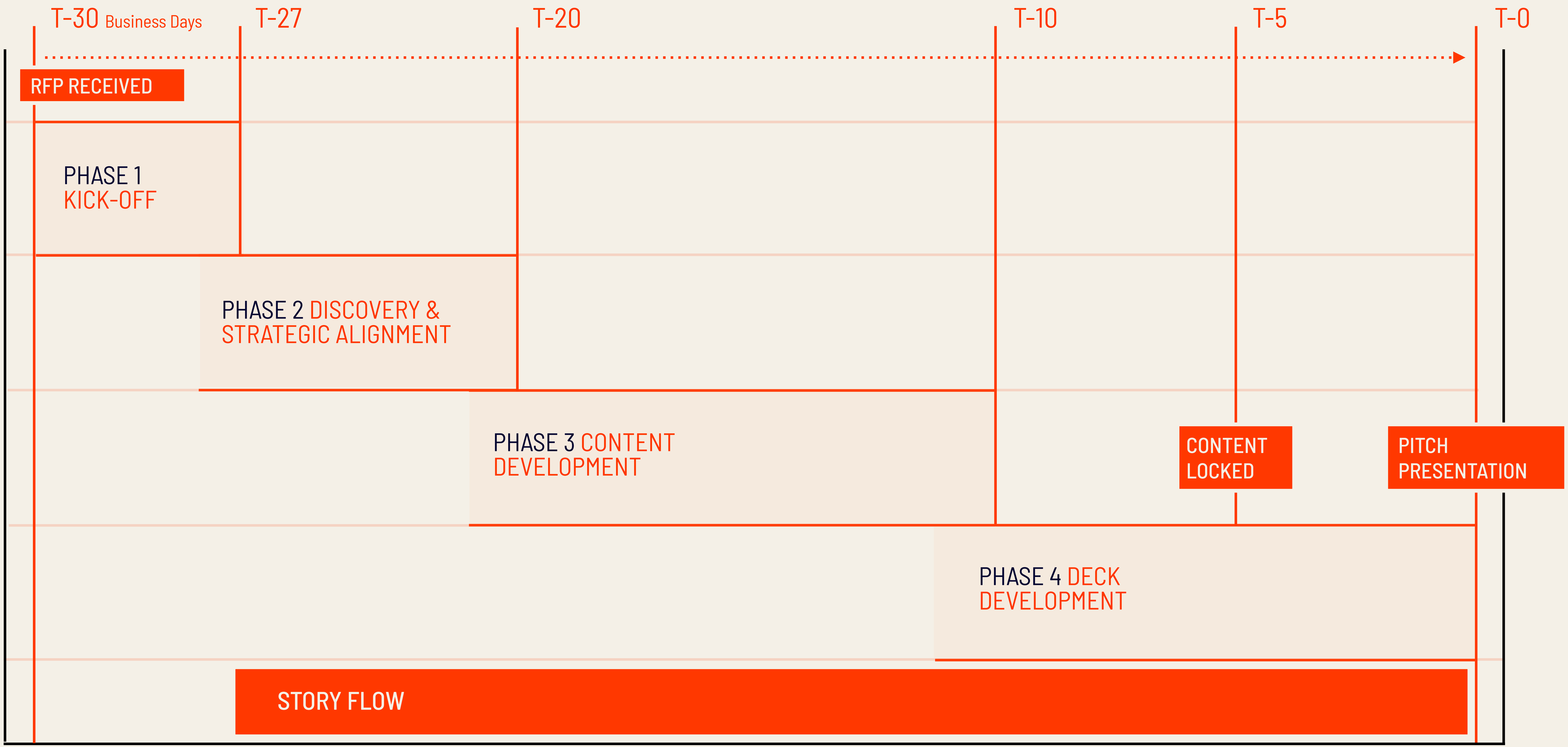
PHASE 4 (CONT.): PRESENTATION DEVELOPMENT

After the pitch, we can't let the energy and enthusiasm drop.

After the follow ups are sent, it's time to reflect on the recent pitch process and experience as a team. Now is the time to hold your internal review meetings to discuss how the pitch went. Using our debrief tools we will reflect on the experience and the output—win or lose. These learnings from each pitch will be pulled through into our Growth process to inform future opportunities.

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Follow Ups Sent to Client	To show that we haven't stopped thinking about the clients since the pitch ended and ensure we fully answer all questions asked in the Q&A	Team to share idea for pre-planned follow up and develop any new ideas during meeting	Insight from the pitch meeting to guide follow ups	Follow ups sent to client in a timely manner	Pitch team as needed, Growth	Follow Up Ideas List
Internal Debrief	To reflect on the pitch process and presentation as a whole - win or lose	Team to review what worked well and what could have gone better during the process	Growth to share template for team to fill out in advance of the meeting to share their feedback	Learnings to incorporate into the Growth process moving forward	Executive Chair, Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, Growth Brian, Karen, Elle	Debrief template

OUR FOUNDATIONAL PROCESS



GO/NO-GO DECISION PROCESS

DECISION MAKERS	INPUTS	KEY DISCUSSION POINTS	OUTPUT	TOOLS	INVESTMENT CRITERIA
Brian Karen Ann Joe Sam CCO Elle Scott This is a lot of people can we trim?	RFP High level notes/key takeaways from Growth team Initial recommendation to discuss	- OOP budget - Human effort -	Decision - in or out Estimate size of prize Investment alignment (i.e. 1% OOP investment) Initial thoughts on Business Champion and key pitch leads (account, strategy, creative)	Opportunity Assessment Pitch team grid	OOP 1% up to $50k (meaning any opportunities over $5M should still be capped at $50k) includes travel and freelance / PXP cost
		Human effort - we aren't taking against and monitoring that Creative and people time Burn report - hot/cold report - already being pulled			Human effort up to 7% of annualized fee
		Standardize human effort % investment -i.e. 15-30% investment			

PHASE 1: KICKOFF

An RFP just came in?
Great! Let's dig in, let's get started!

Getting a pitch off on the right foot sets the tone for both the process and the finished product we will ultimately show the client. Before we begin on our pitch journey, let's determine who will be joining us on this journey. The chemistry amongst the pitch team is a key ingredient to the success of the pitch. Within this pitch team, one member will be bestowed with the task of being the business champion —the decision maker to keep us moving forward wisely and efficiently. In addition, we will need to appoint someone to lead the client relationship—that person will identify ways to engage the client and determine key touch points along the pitch journey. Once the team has been hand-picked, it's time to come up with a plan of action—this happens at our kick-off meeting. Let's all review the RFP and interrogate the client's ask together. Check! Research that's going to challenge conventions and shed light on realities? Strategy lead's got it. Finding KOLs who are currently running clinical trials or working with competitors? Medical is on it! The team departs the kick-off with clear assignments to get us to great insights as we head into the next phase.

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Pre-Kick Off Prep (1 hr)	To to get familiar with the assignment, note key dates/ milestones, develop pitch calendar, pull Datamonitors and set up Google Alerts	Review all client-provided documents (RFP, spreadsheets, etc.) and plot important dates on timeline	Associate to come with first pass of Mural calendar for team to start identifying overall pitch timeline	• Pitch calendar created • Datamonitors pulled • Kickoff Deck / WORD document drafted	Growth Team	Pitch Start Up Check List Mural
Calendar Alignment (30 mins)	To meet with Business Champion to discuss pitch calendar	Review pitch calendar (aligning on meeting attendees and meeting goals)	Growth to create pitch calendar on mural prior to meeting	Receive timeline approval from pitch champion; Associate to schedule an initial KO meeting	Business Champion Growth Team	Mural Meeting Alignment Guide
Team Identification (30 mins)	To meet with core capabilities leads to complete chart (outlining leads and support from every team, as well as agency partners being leveraged)	Briefly revisit RFP and other client documents, review mural and align on core team best fit for this ask	Growth to come prepared with Mural timeline, RFP documents, and first draft of team	Core team identified, Growth to send Welcome to the Team email	Business Champion,, Growth, Capabilities Leads + Resourcing(Sam)	Mural Team Chart Slide

PHASE 1 [CONT.]: KICKOFF

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Core Team Kick-Off Meeting (1 hr)	To make sure that the team understands the assignment, timeline, and align on research plan (Vendors & Interviews)	Growth to walk team through KO deck and plan, Team to discuss "What it will take to WIN!" Team to discuss initial big ideas, any potential research plans (Vendors & Interviews), Client Q&A Questions, Align on calendar & expectations	Growth to create Kick Off agenda with assignment, key dates/milestones, pitch calendar, and next steps Team to bring one interesting thing they found in the RFP, 1-2 client Q&A questions, 1-2 provocative research approaches/questions	Team align on plan moving forward and provide any feedback on overall approach Research plan request to be started	Full Team (all team members identified by capabilities leads)	Kick Off Agenda & Document Research Brief
Client Q&A Prep (30 mins)	Team to meet to formulate list of questions to send to client	Review drafted question list and modify based on additional questions from team LIVE Q&A: Team to identify who will be on the phone with the client and who will be asking what questions	Growth to put together initial document with general thought starter questions, team to come with questions formulated	Growth team send finalized Q&A document to editorial and team Growth to send to lead to submit to client (or submit within portal)	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Lead, DNA, Project Management, Growth	Client Q&A Question Bank
Dependent on client timeline; Client Q&A	Have Q&A call with client to ask any lingering questions as it relates to the RFP	Team to meet with the client to ask Q&A questions and build relationship	Growth to arrange Q&A prep 15 minutes before to go over any last minute questions	Growth to transcribe / capture detailed notes of Q&A call and circulate responses to core team	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Lead, DNA, Growth	Recording device Provide final questions to team and ensure owners are clear

PHASE 2: DISCOVERY & STRATEGIC ALIGNMENT

It's time to dig deep into the disease state, customer and product—

Let's do our homework and let's uncover some provocative realities. In this phase it's all about conducting and crystalizing our research. The heavy lifting in this stage is done by our strategy, medical and copy leads. Our objective? Ensure we are finding the deeper insights and "a-ha's" that will give us the best creative evolutions and make the clients go "hmm...Digitas Health doesn't just take the easy way out".

As we continue on in this phase, keep in mind, we are still finding opportunities to engage the client and stay top of mind—did we uncover something interesting in research we can share? Is there something that came up during our Q&A that we can follow up on? Let's keep the dialog open throughout the process, and build a relationship.

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Medical 101 (1 Hour)	Deep dive into the product, and its competitors	Medical to present findings	Medical to create Med101 deck prior to meeting and share within TEAMS channel	Growth to circulate deck and recording to team Team to send any additional questions to Medical for clarity	Full Team	Key Questions to answer in Medical 101 deck
Focus Group/ Interviews (1 Hour)	To speak directly to our customers (KOLs, HCPs, Patients, Caregivers) to get a better understanding of their challenges	Lead strategists OR medical to conduct interview or focus group	Discussion guide developed by strategy (community and patient) and medical (KOL) circulated to the team for feedback	Key learnings to be shared with team following right after meeting; Insights to be shared at Reality Check Meeting	Strategy, Medical, Account, Creative Leads, Engagement Lead, Growth	Discussion Guide Projective Exercises (if applicable)
Reality Check Meeting (2 Hours)	To take a deep dive into the market, competitive, socially, etc.	Team assigned questions to respond and build off of based off the Client, Human, Cultural, Category, Conversation, Brand and Clinical leading to an overarching reality for each	Pitch leads to develop slides based on assignments leading up to meeting (these will be provided in the welcome to the team email or following KO)	Growth to circulate Reality Check deck to team Initial strategic direction (leading to a strategy and brief)	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, DNA, Growth	Template of Reality Check deck
Strategy Alignment (30 mins)	To discuss the strategy for pitch to make sure team is aligned	Team to finalize strategy	Planning to develop initial strategy for team to react to	Team alignment on strategy to proceed to creative briefing	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Lead, DNA, Growth	Strategic Brief Strategy Deck (containing insights leading up to overarching strategy)

PHASE 3: CONTENT DEVELOPMENT

Now that we have dug deep, spoken to our client and customers, and aligned and committed to a strategy, it's time to distill our strategy into a main idea that will get us to great creative.

This stage is driven by our creative leads. In our pursuit of powerful creative, it's important that the creative brief is the catalyst for that output. To ensure our creative brief is at it's best we pull our Executive Chair and Business Champion together to sign off on the brief. Following the briefing, several creative reviews will take place. Once the team is feeling energized by the creative and the ideas become further fleshed out, a Creative Sign Off meeting will occur with the Executive Chair, Business Champion, and Creative Lead to ensure that we are hitting on key areas of focus for the brand—Is the creative on strategy? Has medical reviewed the copy for accuracy? Are we highlighting the new launch and brand benefits? Great. Good. Let's make some boards!

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Creative Brief Development (30 mins)	To react to the brief that Strategy has drafted	Finalize creative brief in preparation for creative briefing	Strategy and creative to develop creative brief and have document completed for team to react to	Strategy to make tweaks to brief based off of team discussion	Business Champion, Creative Lead, Strategy Lead, Medical Lead, Growth	Creative brief template
Creative Brief Sign Off (30 mins)	To receive approval on creative brief from Executive Chair and Business Champion	Review creative brief to ensure we will get the best creative output possible (Ensuring aligns with the brand vision/ strategy)	Creative brief developed by team	Receive specific direction to modify the brief and approval to proceed to creative briefing	Executive Chair, Business Champion, Strategy Lead, Creative Leads, Growth	Creative brief
Creative Briefing (1 Hour)	To brief creatives on assignment so they can begin concepting	Medical to provide brief download, strategy to share insights leading to creative brief	Brief creative teams and provide timing / expectations	Creative team to begin concepting, Growth to share deck and recording with team following the meeting, Growth to schedule reviews	Creative team, Creative leads, Strategy Lead, Medical lead, Analytics lead, Business Champion, Growth, Core pitch team (Optional)	Creative Brief Medical Backgrounder Creative Ideation Template
Creative Reviews (1 Hour)	To check in with creative to review concepts for pitch	Review creative concepts, give feedback/ direction, make decisions on which concepts will move forward	Extended Creative team to work on concepts, send updates to larger team	Creative Leads to check in with Extended Creative team to ensure concepts are on the right track	Creative Team, Creative Leads, Strategy Lead, Medical lead, Analytics Lead, Business Champion, Resourcing (Sam and Joey), Growth	
Exec Creative Check-ins (30 mins)	To meet between the creative reviews prior to creative sign off	Review creative concepts, give feedback/ direction	Creative leads to gather creative ideas into deck to review	To provide direction from leadership to ensure alignment on creative	Brian, Karen, Ben, Noel, Elle, Creative Leads, Strategy Lead, Growth	WIP Creative Concepts, Strategic Brief
Creative Sign Off	To do a final review of creative before teams move into finalizing and creating boards/other print assets	Review concepts for medical and brand benefits, ensure copy is finalized	Creative Concepts	Approval on creative concepts from core team	Creative Leads, Strategy Lead, Medical Lead, Business Champion, Growth, Core team	QC Checklist from pitch captain based on assignment

PHASE 3 (CONT.): CONTENT DEVELOPMENT

While the creative concepts likely sparked some big ideas, it's important to think about our programs holistically and based on our customer preferences—

In comes the Engagement Strategy team to drive this phase of pitch development. In this stage of the journey, we will think through the programs to launch our brand or disease state campaign into the market for maximum engagement for our customers. Partnering with the strategy and account leads, the Engagement Strategy team will guide the pitch team and extended creative teams through a tactical brainstorm based on the behavior change we need to make happen. Once the ideas are generated, our creative teams will help bring them to life.

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Tactical Brainstorm (1-2 Hours)	To use the behavior changes and strategic imperatives we have aligned on to generate tactical ideas	Engagement Strategy to facilitate brainstorm and provide direction on which tactical ideas we will bring to life for the pitch	Engagement Strategy to bring in behavior shift, strategic imperatives and initial tactical ideas to inspire thinking	Engagement Strategy and creative to meet to align on tactics for development, generate tactical brief, and assign creative teams to develop	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, Creative teams, Growth	Behavior shifts/ strategic imperatives
Tactic Briefing (1 Hour)	To assign and brief creative teams on tactics	Review tactic brief and assign creative owners	Engagement Strategy and creative leads to provide tactical brief to teams (creative team pairings decided by creative lead)	Creative teams to generate tactics as assigned	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, Creative teams, Growth	Tactic Brief
Tactic Review (30 mins)	To ensure the tactics are strategically relevant and sound	Review WIP tactics based on strategic imperatives/ behavior shifts	Creative teams to bring WIP Tactics	Creative teams to incorporate team feedback	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, Creative teams, Growth	Behavior shifts/ strategic imperatives
Content Strategy Review	To align on content pillars and key messages	Review draft content strategy plan Engagement Strategy lead has created and provide any additional insight for gaps	Draft content strategy plan developed by Engagement Strategy	Feedback for Engagement Strategy to finalize content strategy section for deck	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, Growth	Content Strategy Template

PHASE 4: DECK DEVELOPMENT

The culmination of all pitch efforts comes to life in our presentation—

The theme, the theater and the story come to life here. In staying true to who we are at Digitas Health, our story flow session focuses on getting to the hearts and minds of our customers—What makes them tick? Why did they get into their specialty in the first place? How does treating this condition make them feel? How will our brand make them feel? By bringing that emotion to life, the pitch theater and theme come naturally. In this phase of the process, each team member is a champion of their section and has a large part of bringing the presentation to life.

Once we nail down our story, the slides are brought to life visually by the team in partnership with our presentation specialists. It's almost time for the show!

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Story Flow (30 mins)	To finalize story flow for pitch deck and identify topics to hit for each section	Growth to lead story flow session with the team	Team to ensure they have read all research to be prepared for discussion	Growth to assign team slides to create based off of story flow	Executive Chair, Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, Growth	Story Flow Workshop Guide
Pitch Deliverables (30 mins)	To align on what pitch deliverables/ theater we are creating	Team to brainstorm and align on pitch delivererables	Growth to bring pitch deliverables check list, Team to come prepared with ideas	Alignment on pitch deliverables and assignments for owners	Business Champion, Creative Leads, Growth + DH Presents (PJ/Sara), maybe Engagement Strat leads	Pitch deliverables checklist and examples
Slide Reviews/Click Through (1 hr)	To review pitch deck to ensure that we are answering all client requirements	Review pitch deck and make changes to story	Team to send Growth new slides prior to reviews Team to upload slides into shared slide deck	Growth to work with Designer to design slides Team to make discussed changes	Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, Growth Core team + DH Presents	Pitch deck

PHASE 4 (CONT.): PRESENTATION DEVELOPMENT

We have hit the 48-hour mark. Pencils down!

On the day of the pitch, whether it is hosted at our agency or the client's location, we will make sure that the pitch team has all necessary materials at hand and are ready to set up. That way the logistics of the pitch will run smoothly—starting from the point the clients arrive through to the presentation itself!

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Talk Through	To walk through the deck and hear our story out loud from start to finish	This is an "informal rehearsal." Teams should be prepared to talk through each slide and make any final changes to builds/ design for their sections	Presentation deck with all changes and design incorporated since last meeting	Final changes and tweaks from presentation team to incorporate	Executive Chair, Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, PS, Growth Core team + DH Presents	Pitch Deck Presentation Checklist/ RFP
Rehearsal	To present as if the clients were in the room	Team to rehearse. No changes are made at this point	Final presentation deck owned by Growth	Feedback for individual presenters on their section	Executive Chair, Business Champion, Account, Pitch Team Presenting, Growth, DH Presents	Pitch Deck
Q&A Rehearsal	To prepare for client questions that may be asked during the pitch	Share Q&A Rules with the team. Practice sample Q&A questions	Growth lead and pitch team to draft a list of questions during the rehearsal to be asked during the Q&A prep session	Q&A questions assigned roughly by topic – we have a plan for who will take which questions	Team presenting, Growth, DH Presents	Pitch Deck/ Sample Question list

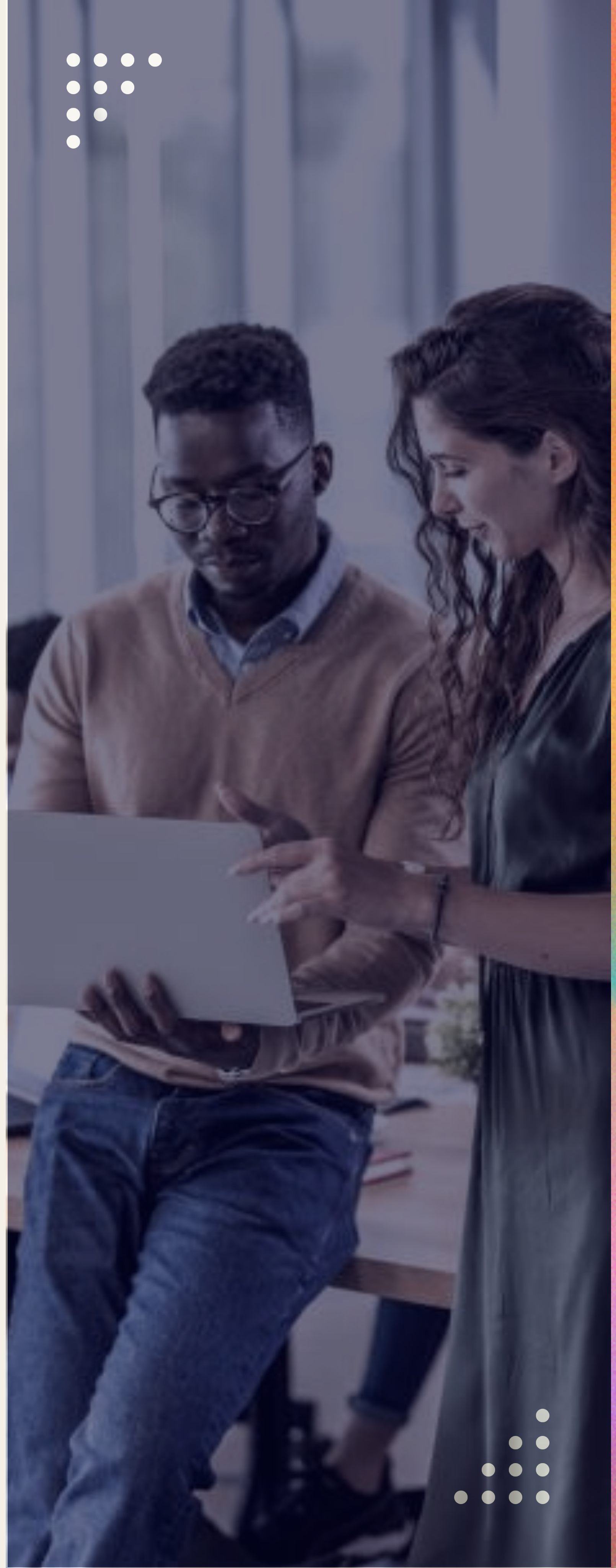
PHASE 4 (CONT.): PRESENTATION DEVELOPMENT

After the pitch, we can't let the energy and enthusiasm drop.

After the follow ups are sent, it's time to reflect on the recent pitch process and experience as a team. Now is the time to hold your internal review meetings to discuss how the pitch went. Using our debrief tools we will reflect on the experience and the output—win or lose. These learnings from each pitch will be pulled through into our Growth process to inform future opportunities.

MEETING	PURPOSE	AGENDA	INPUT	OUTPUT	ATTENDEES	TOOLS
Follow Ups Sent to Client	To show that we haven't stopped thinking about the clients since the pitch ended and ensure we fully answer all questions asked in the Q&A	Team to share idea for pre-planned follow up and develop any new ideas during meeting	Insight from the pitch meeting to guide follow ups	Follow ups sent to client in a timely manner	Pitch team as needed, Growth	Follow Up Ideas List
Internal Debrief	To reflect on the pitch process and presentation as a whole - win or lose	Team to review what worked well and what could have gone better during the process	Growth to share template for team to fill out in advance of the meeting to share their feedback	Learnings to incorporate into the Growth process moving forward	Executive Chair, Business Champion, Account, Strategy, Medical, Creative Leads, Engagement Strategy Lead, Growth Brian, Karen, Elle	Debrief template

BEYOND THE PITCH



digitas health

THE 3-PHASE PROCESS

The process for effectively on-boarding a new client can be broken into three stages. These three areas can be staged simultaneously to ensure efficient and fast transition.

Phase 1

Process On-boarding

Introduction of agency stakeholders to their client counterparts and subsequent training on all relevant processes

Phase 2

Asset Transition

Collection, transition, and QC of all assets (if applicable)

Phase 3

Financial On-boarding & Initiation

Best practices, and download on client financial processes

ONBOARDING OVERVIEW

Agency gets call that business has been awarded

Business development sends email to alert pitch team

BD Director & Account lead meet to develop contact list and develop calendar

Associate sets meetings with stakeholders

Non-billable job opened

Estimate created

60 Day Plan

New team members integrated into process as they join

Associate captures and sends all notes/next steps assignments to teams

Account lead sets agenda for client/agency kick off and moderates meeting

Key Meetings

- Agency On-boarding
- Finance
- Medical
- Marketing Brand Plan Presentation
- Formal Review and Submission Process
- Compliance Training

3.

FOUNDATION VS. FLEX

FOUNDATION VS FLEX

When you know one client, you know one client. Partnering with the business champion/HCL/GCL for opportunities where we have existing brand or client experience, we will meet prior to kick off to align on client or agency team specific ways of working to ensure we maximize or internal knowledge to create the most tailored pitch process and output possible. Some opportunities to flex and tailor to specific clients or agency teams may include, but are not limited to:

Meet with business lead/HCL/GCL prior to kick off to align on ways of working. Key discussion points:

Are there any clients tools/templates/structure we should be leveraging for this pitch process - i.e. creation brief template, tactical planning framework, status meeting/document structure (internal), presentation template

How do we want to engage the clients throughout the process, since we are already meeting with them on current business? What types of pre, during and post engagement are possible?

Do we have their brand book?

Ensure alignment in key process steps, align on key attendees for each meeting

Where do we want to pull in current team members vs. net new team members with outside perspective

What is the learning curve for folks coming in new?

How does the pitch start up process need to differ given institutional knowledge?

Based on what we know about these clients, how do we tailor our story accordingly?

What is it going to take to win?

What do they need to see from us?

Is there anything we need to index higher on to overcome current perceptions?

Surprise and delight the clients since we have a sense of how they think

Is the taste and tone aligned with what we know about the clients?

What level of fidelity/finish do these clients expect?

Put your client hat on

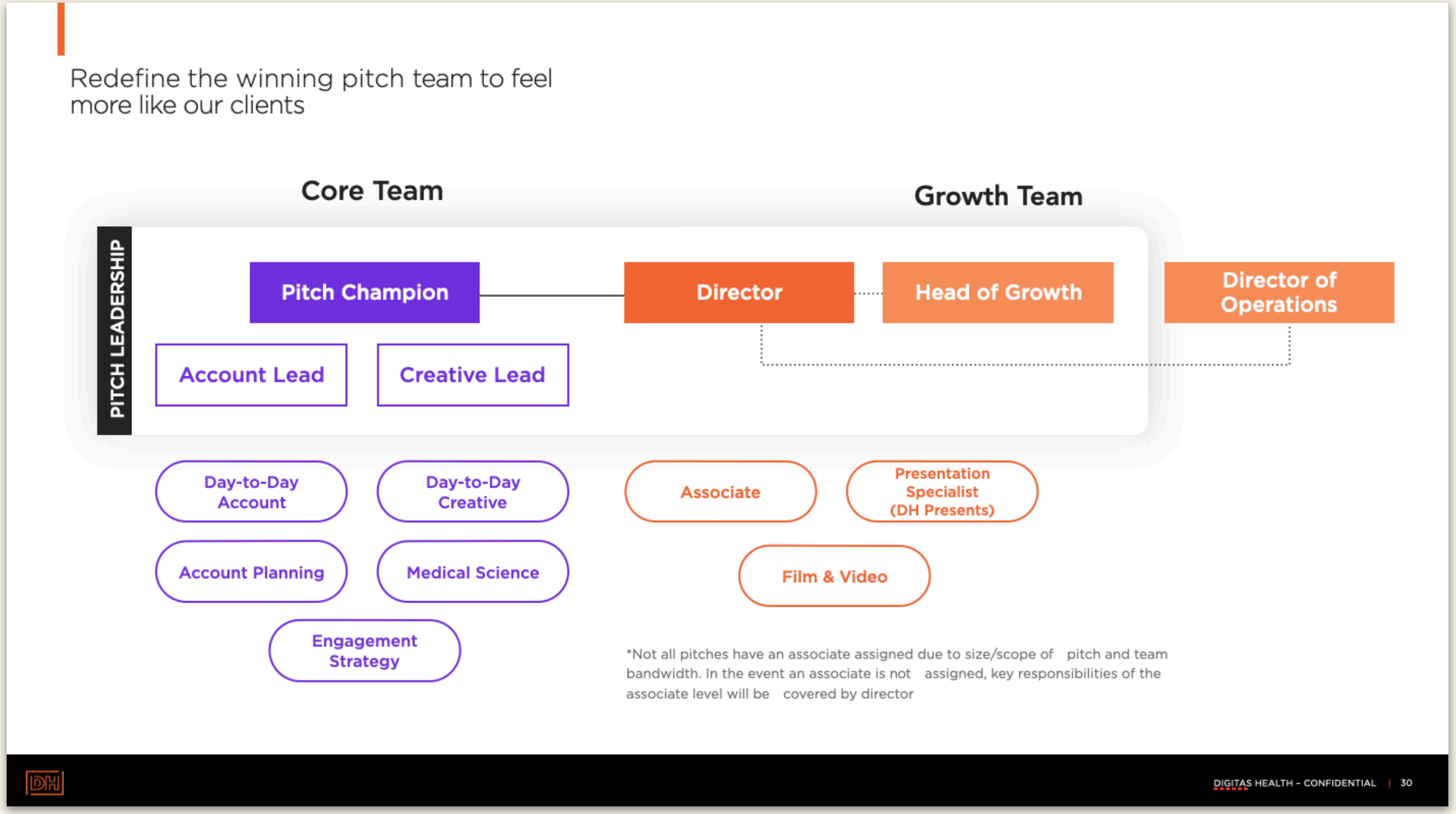
Prep the team with key client language/lexicon - what do they call their MLR process? Are there inside phrases, teams or cultural nuances to hit on (i.e. GSK "Ambition", Merck PRT, etc.)

Give the team the latest and greatest client updates to ensure our talk track is seamless

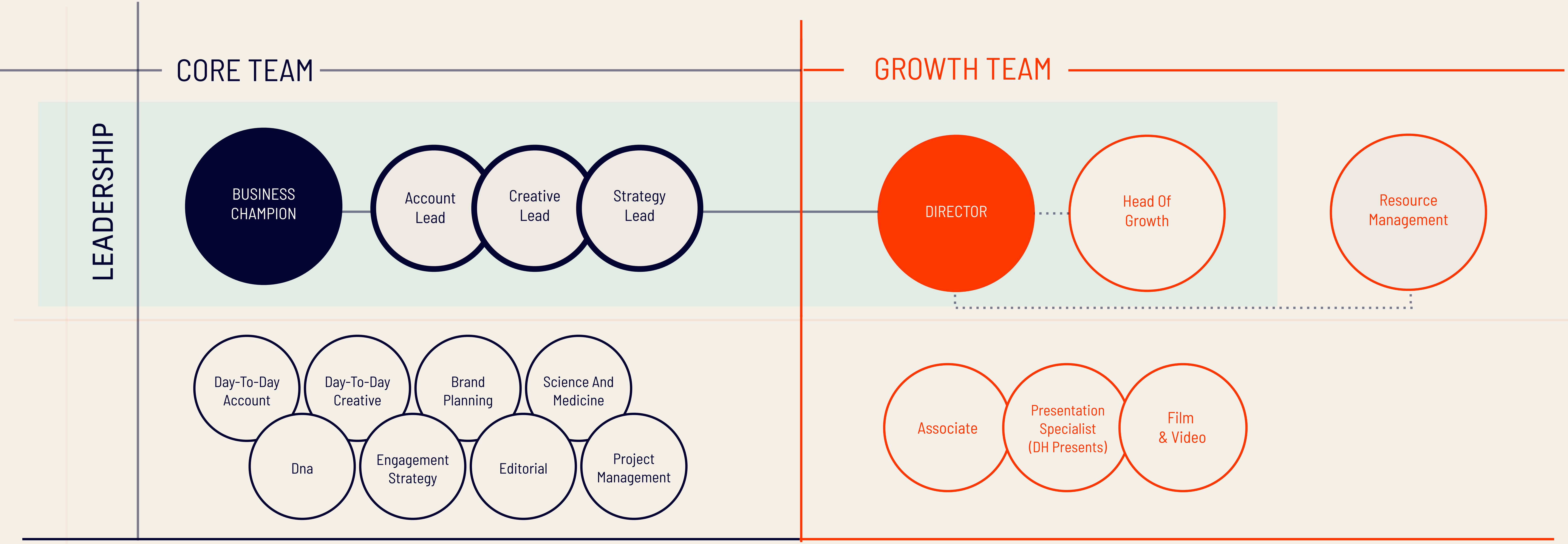
4.
PITCH TEAM ROLES

HOW IT STARTED

GROWTH BUSINESS PLAN Q4 2023

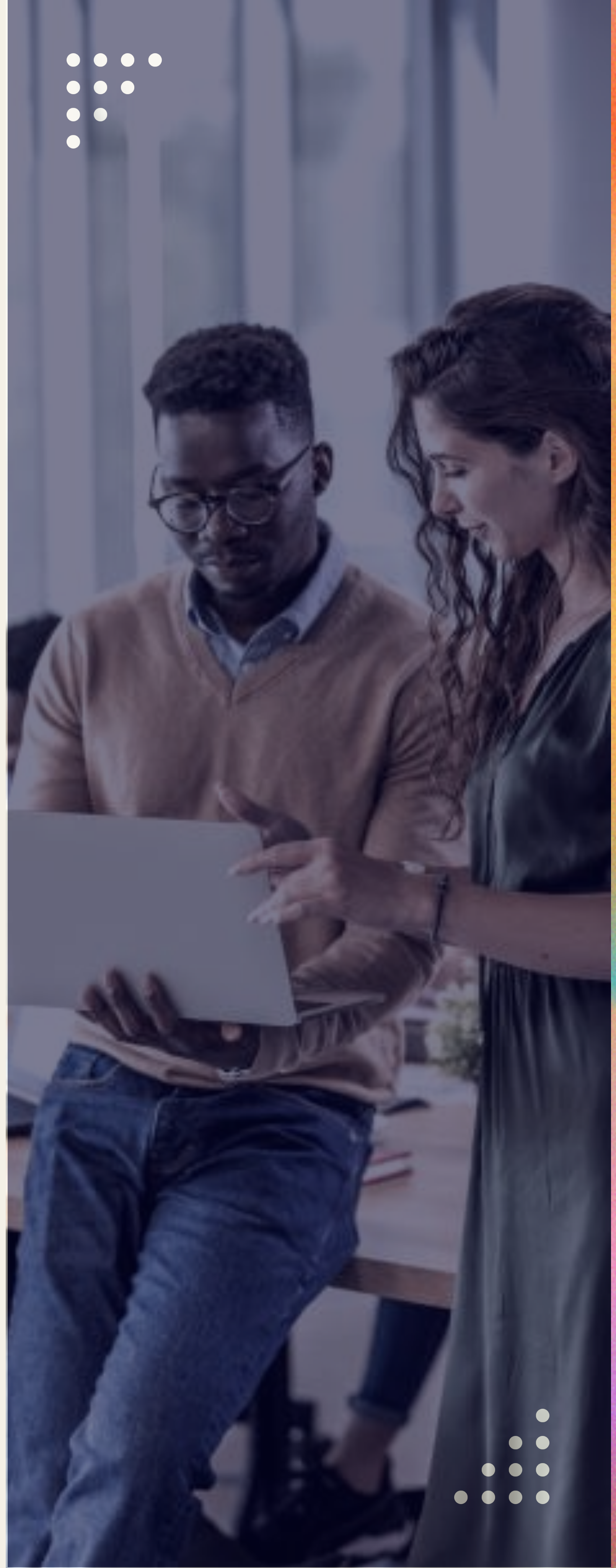


HOW ITS GOING: TODAY



*Not all pitches have an associate assigned due to size/scope of pitch and team bandwidth. In the event an associate is not assigned, key responsibilities of the associate level will be covered by director pitch team job descriptions

CORE PITCH TEAM

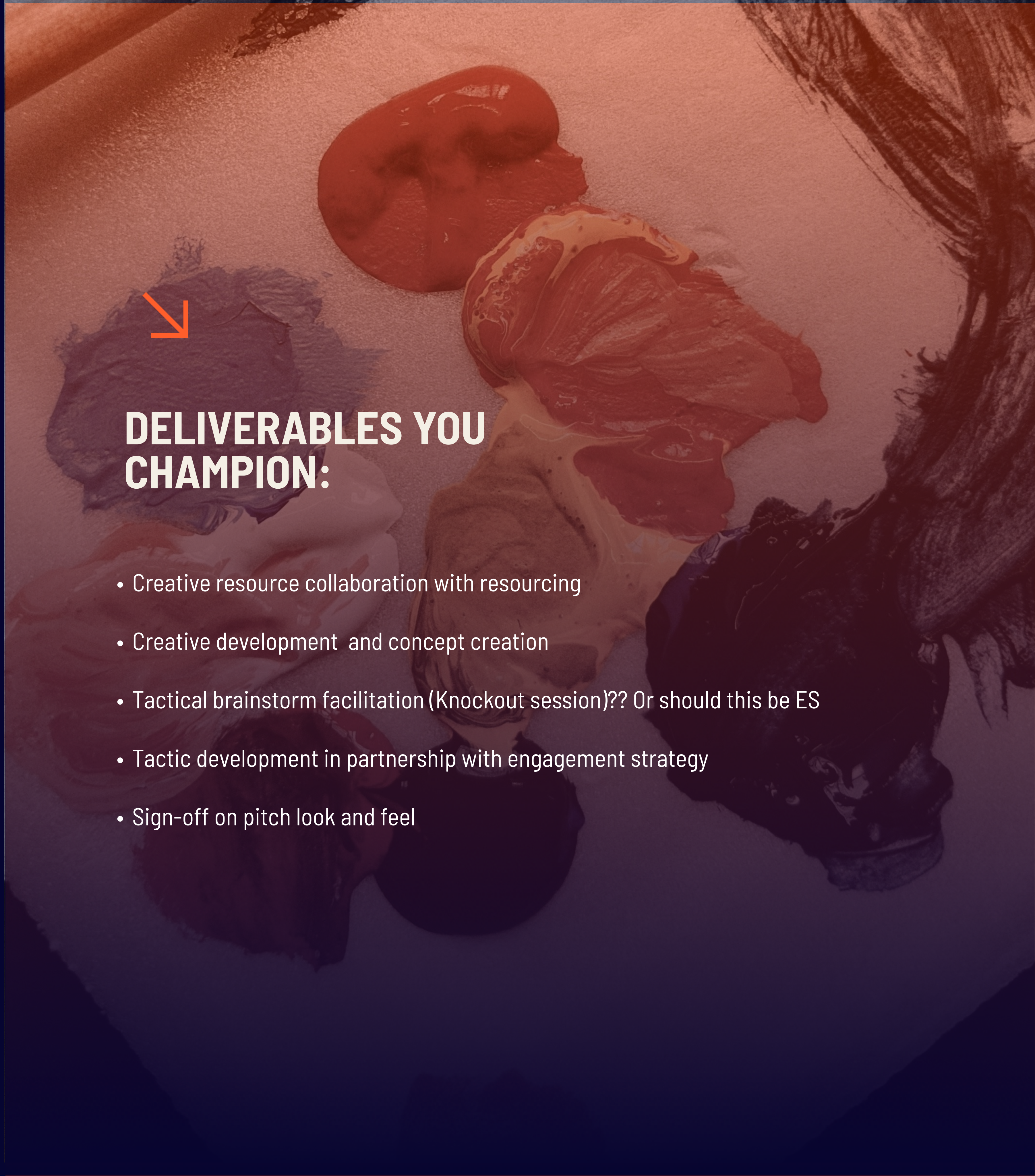


digitas health

CHAMPION OF ALL THINGS CREATIVE

CREATIVE LEAD

- Co-owns the pitch experience and brings ideas of how to bring the pitch to life creatively (through creative opening, room dressing, videos, pitch theme, leave behinds, send aheads)
- Sets overall creative "look and feel" for all pitch deliverables
- Works with presentation specialist to help solve design challenges with slides/ collateral
- Oversees all creative development and has final say on what is included in the pitch - pushing teams to ensure that creative is on strategy and exceptional. Pushes on innovation and that tactics go above and beyond "what's expected"
- Owns development and finalization of written submission content



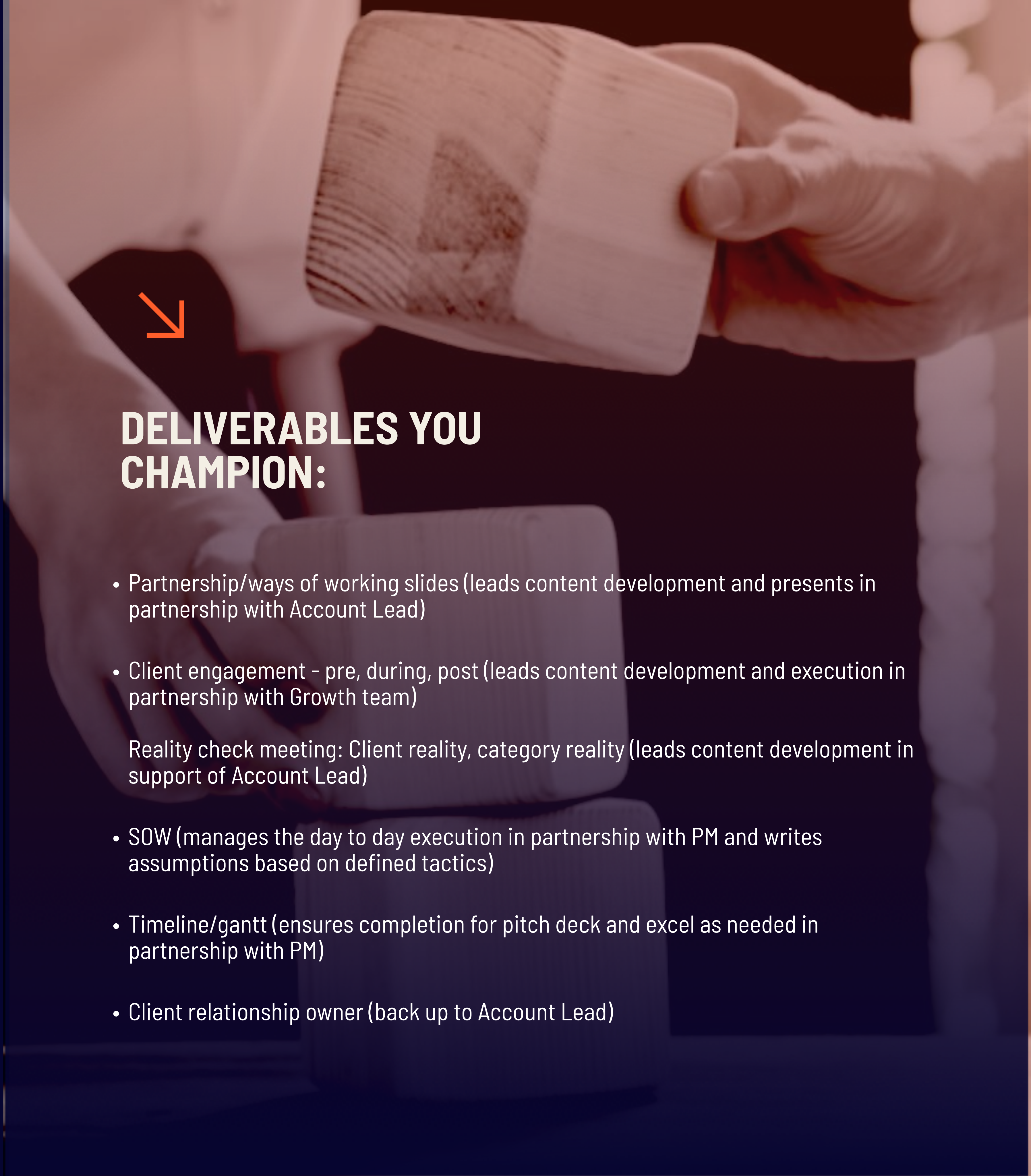
DELIVERABLES YOU CHAMPION:

- Creative resource collaboration with resourcing
- Creative development and concept creation
- Tactical brainstorm facilitation (Knockout session)?? Or should this be ES
- Tactic development in partnership with engagement strategy
- Sign-off on pitch look and feel

TEAM BUILDER

DAY-TO-DAY ACCOUNT

- Owns development of any ways of working, client partnership, collaboration, global, case studies, etc. for written submission and pitch needs
- Supports the account lead with day-to-day management of timeline, SOW, and ways of working slide development
- Partners closely with resourcing and PM on pitch staffing plan (i.e. client facing excel) and org chart (slide format)
- Responsible for developing assumptions for all SOW activity, especially pitch specific tactics, with support of engagement strategy and PM partners
- Key chemistry builder with clients in the pitch, instilling confidence in a clear game plan to achieve the clients business goals and objectives through attention to detail
- Focused on account content development for each key step in the pitch process



DELIVERABLES YOU CHAMPION:

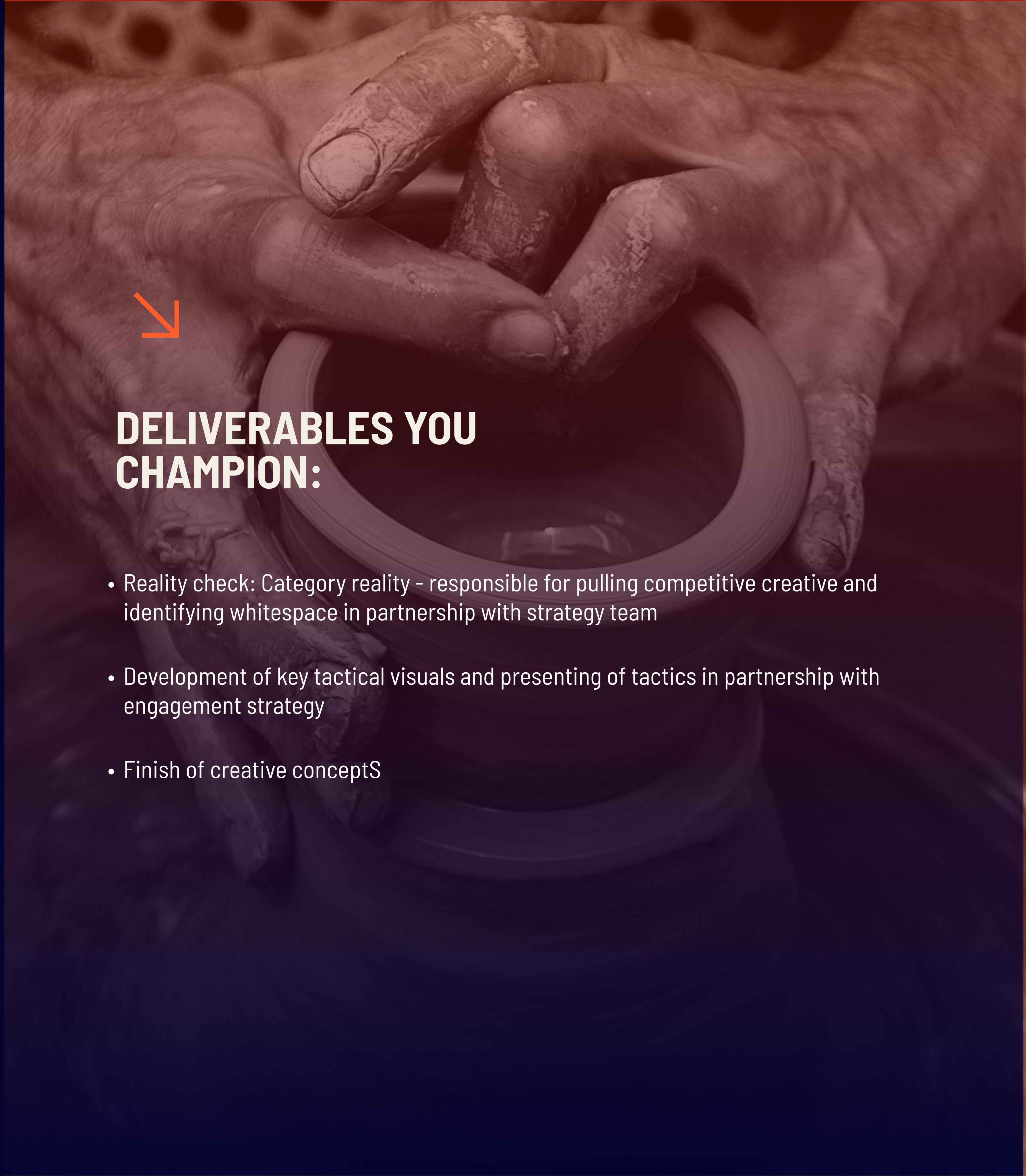
- Partnership/ways of working slides (leads content development and presents in partnership with Account Lead)
- Client engagement - pre, during, post (leads content development and execution in partnership with Growth team)

  Reality check meeting: Client reality, category reality (leads content development in support of Account Lead)
- SOW (manages the day to day execution in partnership with PM and writes assumptions based on defined tactics)
- Timeline/gantt (ensures completion for pitch deck and excel as needed in partnership with PM)
- Client relationship owner (back up to Account Lead)

BRINGS IT ALL TO LIFE

DAY-TO-DAY CREATIVE DUO

- Pushes individual teams to deliver beyond static visuals, where can we bring in movement to make recommendations come off the page
- Partners closely with engagement strategy on tactical brainstorm approach, brainstorming session, aligning on outputs and ultimately brief teams and develop slides for presentation
- Works arm in arm with film and video team in developing any and all pitch video assets from pitch engagement to creative reels to anthemic videos and beyond
- Owns development of any creative process/approach, creative reel/showcase, or case studies, etc. for written submission and pitch needs



DELIVERABLES YOU CHAMPION:

- Reality check: Category reality - responsible for pulling competitive creative and identifying whitespace in partnership with strategy team
- Development of key tactical visuals and presenting of tactics in partnership with engagement strategy
- Finish of creative conceptS

HOW WE DIFFERENTIATE

BRAND STRATEGY

- Leads execution of primary research plan in partnership with pitch strategy lead
- Key content driver and synthesizer, takes the first draft of strategy on a page and creative brief to review with core strategy leads
- Develops human and brand reality content for reality check meeting
- Leads presenting in creative briefing
- Gets deep into the brand and category to develop and present the lead up to the creative platform in the pitch presentation
- Owns development of any strategic process, approach to creative, case studies, etc. for written submission and pitch needs

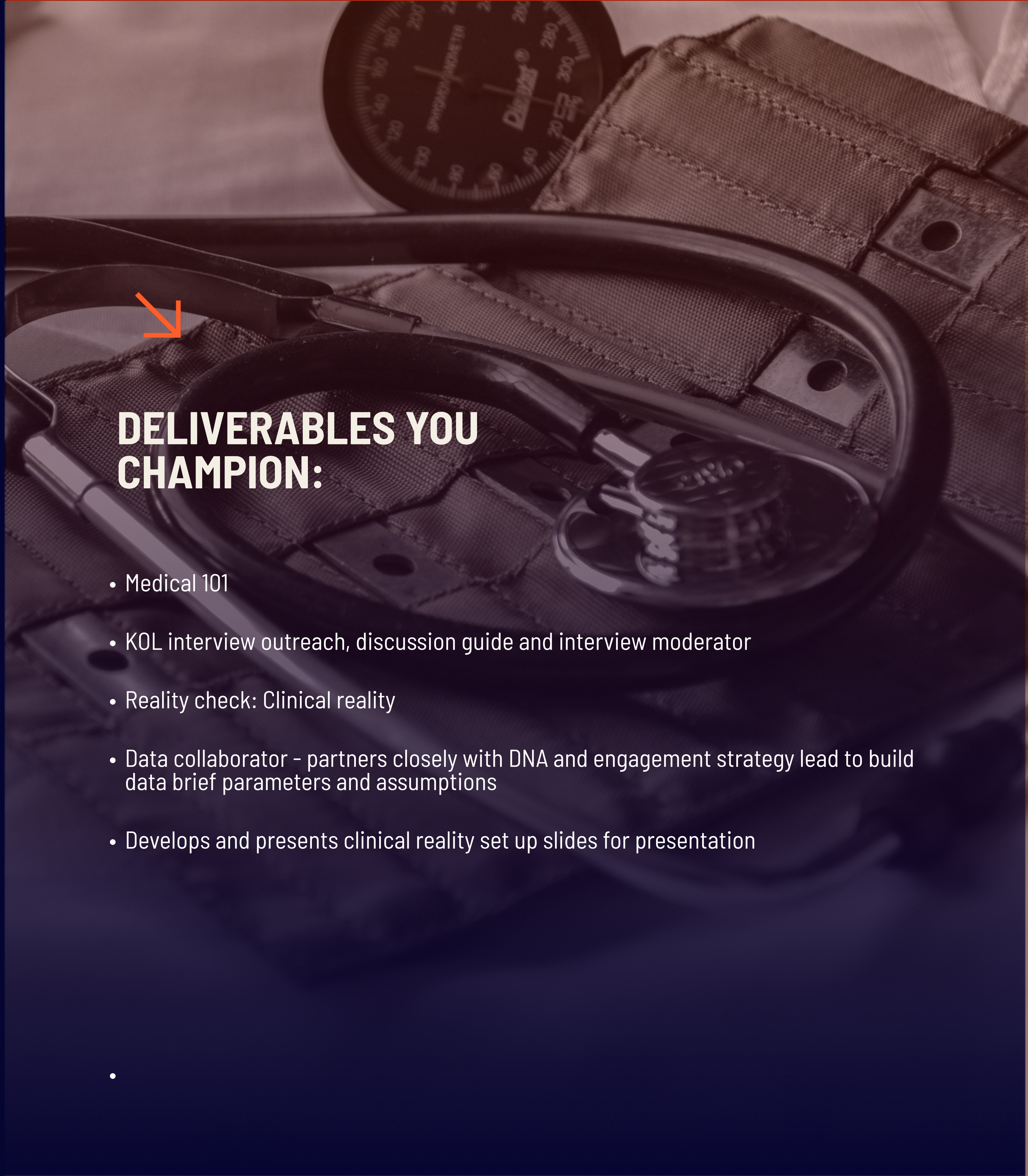
DELIVERABLES YOU CHAMPION:

- Reality check: Human reality, Brand reality
- Research plan: methodology, screener, discussion guide, moderator, debrief email sent or published on teams within 24 hours of interview
- Develops strategy on a page - Now/Next, BrandFit, Jobs to be done
- Creative brief development and lead briefing of creative teams

THE TEAM DOCTOR

SCIENCE & MEDICINE

- Goes deep into the disease state, the class, the competitive set, the treatment paradigm, brand secret sauce, client pipeline, clinical trials and beyond - the science guru
- Knows the key thought leaders in the space, reaches out to speak with and engage KOLs throughout the pitch process, manages KOL relationships on behalf of the agency
- Owns the clinical reality, what differentiation can only this brand own
- Works closely with other strategy leads to ensure clarity on data pulls and other aspects of research throughout the pitch process



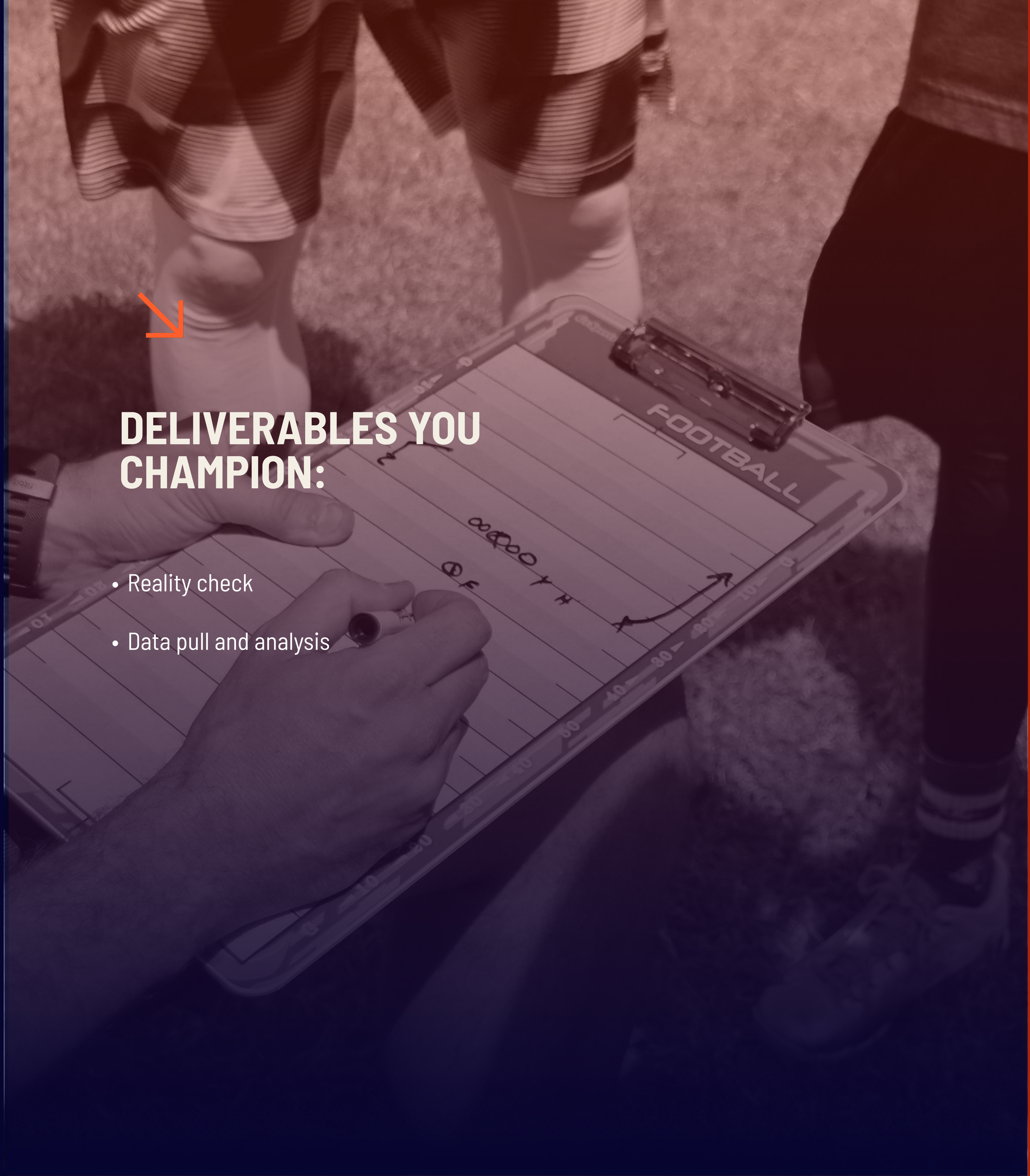
DELIVERABLES YOU CHAMPION:

- Medical 101
- KOL interview outreach, discussion guide and interview moderator
- Reality check: Clinical reality
- Data collaborator - partners closely with DNA and engagement strategy lead to build data brief parameters and assumptions
- Develops and presents clinical reality set up slides for presentation

CLIENT CONFIDENCE OFFICER

PROJECT MANAGEMENT

- Supports the account lead with day-to-day management of timeline, SOW, and ways of working slide development
- Ensures for every new business opportunity we are are sharing a buttoned up internal process, timeline and approach to staffing and pricing with our clients - giving them the confidence we will handle their business with the utmost rigor and care
- Ensures for every new business opportunity we are are sharing a buttoned up internal process, timeline and approach to staffing and pricing with our clients - giving them the confidence we will handle their business with the utmost rigor and care
- Partners closely with resourcing and PM on pitch staffing plan (i.e. client facing excel) and org chart (slide format)
- Responsible for developing assumptions for all SOW activity, especially pitch specific tactics, with support of engagement strategy and PM partners



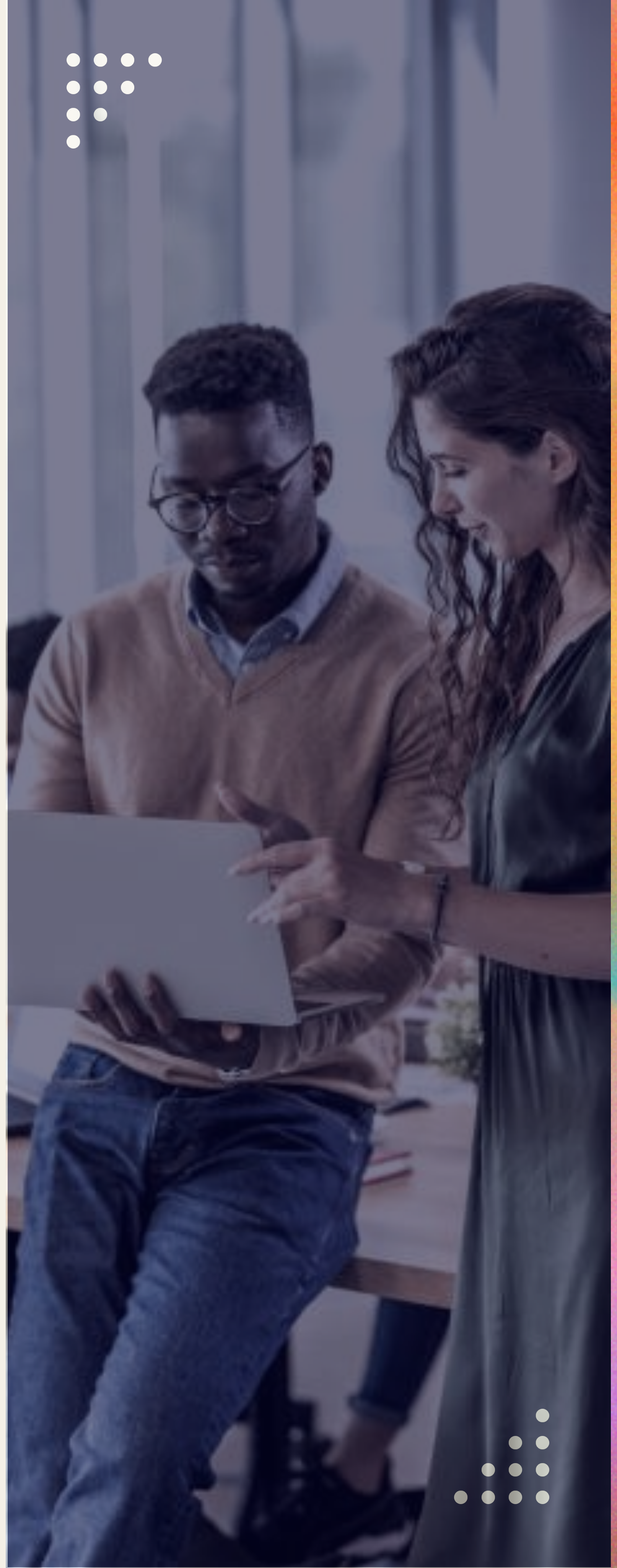
DELIVERABLES YOU CHAMPION:

- Reality check
- Data pull and analysis

pitch team job descriptions

GROWTH TEAM

digitas health



PITCH QUARTERBACK

SVP, GROWTH

- Partners closely with the pitch champion on all aspects of the pitch including the pitch strategy (defining what it will take to win), the pitch team and the plan
- Sets the pitch process and schedule. Pivots when necessary to re-evaluate next steps and what is required to continue making progress with the team
- Provides a POV on research, pitch "experience", story flow, strategy, creative and recommends external partners to engage
- Serves as liaison to external partners (i.e. OHG Technology Center of Excellence and other OHG/Omnicom partners)
- Brings new and innovative ideas to the table on how to differentiate the agency and pitch from the competition
- Prepares in advance of meetings with pitch champion to provide direction/assignments to teams and defines objectives/goals for meetings. Facilitates meetings and asks probing questions to get the most out of teams
- Rallies team to deliver strongest pitch possible and voices concerns to team/pitch champion along the way on important aspects of the pitch including: the strategy, creative, presenting team, client relationship development, digestibility of pitch, overall pitch experience
- Rehearses teams and provides feedback. Can step in and present as needed

digitas health

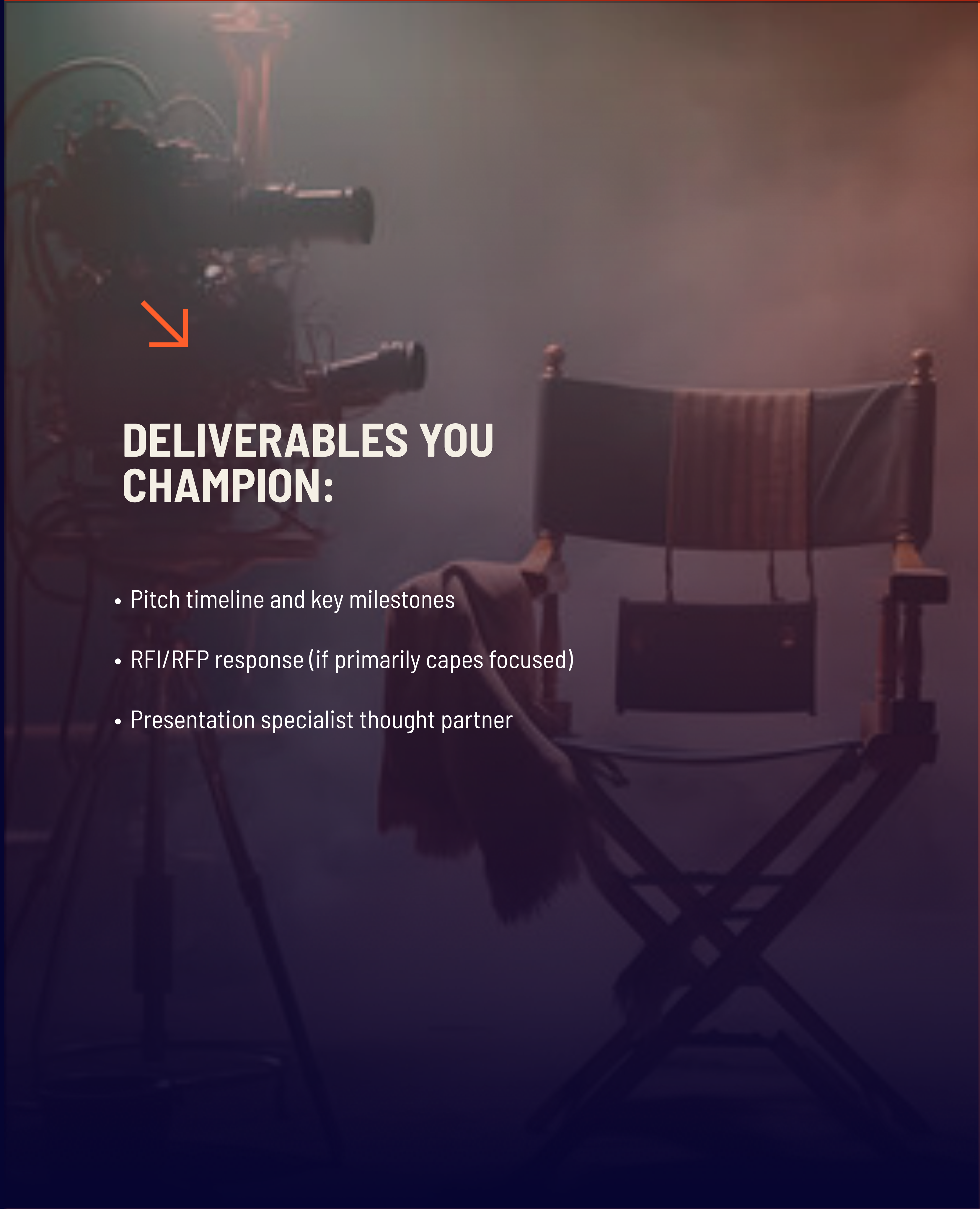
DELIVERABLES YOU CHAMPION:

- Pitch leadership relationship lead
- Story Flow
- Client relationship lead (when procurement lead)
- Pitch engagement plan development

MASTER ORCHESTRATOR

DIRECTOR, GROWTH

- Manages associate and oversees all aspects of the process, including, content development, logistics and team communication
- Owns the deck or RFP submission and works with individual team members to collect content and collate into a single document
- When available, can act as an additional set of hands to pitch teams - sitting in on market research, helping prepare competitive
- Able to handle multiple additional pitch deliverables including videos, leave behinds, microsite and boards, survey deployment, etc. Works as a project manager - ensuring teams provide content when needed and clearly outlines deadlines
- Ensures all resources are lined up for pitch needs including presentation specialists, editorial, film & video, production, etc. Works with outside vendors as needed for any additional pitch needs (equipment rental, etc.)
- Works closely with the presentation specialist to ensure content is designed according to what the team envisions and that all changes are incorporated. For RFP submissions, associates will also collect past RFP responses and provide to teams to tailor for active opportunity



DELIVERABLES YOU CHAMPION:

- Pitch timeline and key milestones
- RFI/RFP response (if primarily capes focused)
- Presentation specialist thought partner

5.
EXECUTIVE TOUCH POINTS

EXECUTIVE TOUCH-POINTS

Where outside perspective powers us up

Go/no Go
- ELT

Kick Off
- Karen
- Elle

Creative Brief Finalization
- CCO TBD - Ben/Noel
- Elle

Story-Flow Working Session
- Elle
- Joe

Story-Flow Review
- Brian
- Karen
- Elle
- Joe

Creative Review
- Brian
- Karen
- Elle
- CCO TBD - Ben/Noel
- Joe

Slide Review #2
- Elle
- Joe

Rehearsals
- Brian
- Karen
- Elle
- Joe

Pricing Finalization
- Ann

6.
TOOLKIT

digitas health

Toolkit

KICK
OFF

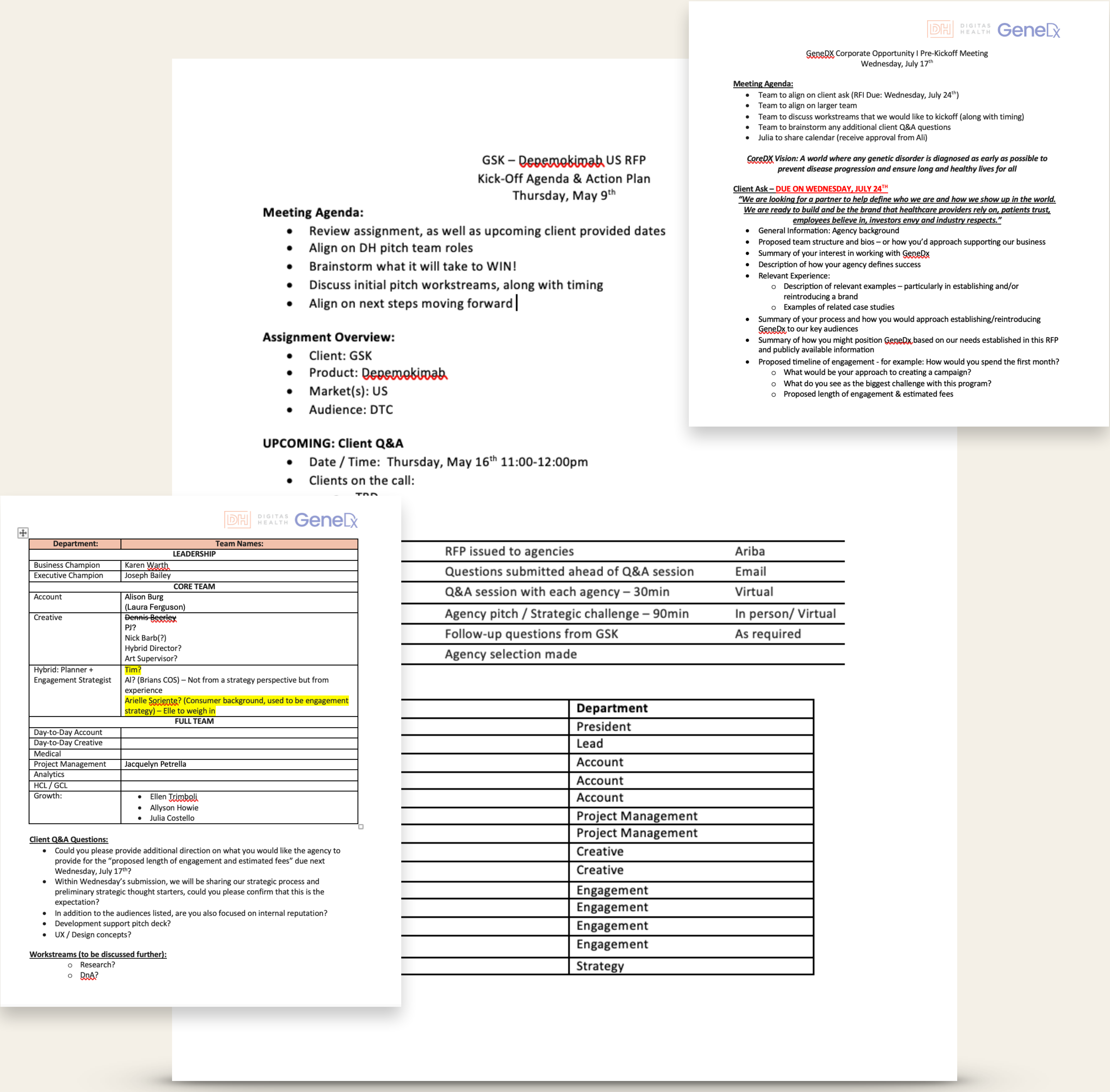
digitas health

TEAM GRID

DEPARTMENT	TEAM NAMES	DEPARTMENT	TEAM NAMES
PITCH LEADERSHIP			
Business Champion		Executive Champion	
CORE TEAM			
Account		Creative	
Strategy			
FULL TEAM			
Day-to-day Account		Day-to-day Creative	
Medical		Brand Strategy	
Engagement Strategy		Project Management	
Analytics		Global Partner	
Other network/out-of-network partners (i.e. MSL, Payer Sciences, Cien+)		HCL/GCL	

KICK OFF
MEETING AGENDA

- Review assignment, as well as upcoming client provided dates
- Align on DH pitch team roles
- Brainstorm what it will take to WIN!
- Discuss initial pitch workstreams, along with timing
- Review reality check assignments
- Align on next steps, and calendar, moving forward



GSK – Depemokimab US RFP
Kick-Off Agenda & Action Plan
Thursday, May 9th

Meeting Agenda:
- Review assignment, as well as upcoming client provided dates
- Align on DH pitch team roles
- Brainstorm what it will take to WIN!
- Discuss initial pitch workstreams, along with timing
- Align on next steps moving forward

Assignment Overview:
- Client: GSK
- Product: Depemokimab
- Market(s): US
- Audience: DTC

UPCOMING: Client Q&A
- Date / Time: Thursday, May 16th 11:00-12:00pm
- Clients on the call:

RFP issued to agencies	Ariba
Questions submitted ahead of Q&A session	Email
Q&A session with each agency – 30min	Virtual
Agency pitch / Strategic challenge – 90min	In person/ Virtual
Follow-up questions from GSK	As required
Agency selection made	

Department
President
Lead
Account
Account
Account
Project Management
Project Management
Creative
Creative
Engagement
Engagement
Engagement
Engagement
Strategy

DIGITAS HEALTH GeneDx

GeneDX Corporate Opportunity I Pre-Kickoff Meeting
Wednesday, July 17th

Meeting Agenda:
- Team to align on client ask (RFI Due: Wednesday, July 24th)
- Team to align on larger team
- Team to discuss workstreams that we would like to kickoff (along with timing)
- Team to brainstorm any additional client Q&A questions
- Julia to share calendar (receive approval from Ali)

CoreDX Vision: A world where any genetic disorder is diagnosed as early as possible to prevent disease progression and ensure long and healthy lives for all

Client Ask – DUE ON WEDNESDAY, JULY 24TH

"We are looking for a partner to help define who we are and how we show up in the world. We are ready to build and be the brand that healthcare providers rely on, patients trust, employees believe in, investors envy and industry respects."

- General Information: Agency background
- Proposed team structure and bios – or how you'd approach supporting our business
- Summary of your interest in working with GeneDx
- Description of how your agency defines success
- Relevant Experience:
  - Description of relevant examples – particularly in establishing and/or reintroducing a brand
  - Examples of related case studies
- Summary of your process and how you would approach establishing/reintroducing GeneDx to our key audiences
- Summary of how you might position GeneDx based on our needs established in this RFP and publicly available information
- Proposed timeline of engagement - for example: How would you spend the first month?
  - What would be your approach to creating a campaign?
  - What do you see as the biggest challenge with this program?
  - Proposed length of engagement & estimated fees

DIGITAS HEALTH GeneDx

Department:	Team Names:
LEADERSHIP	
Business Champion	Karen Warth
Executive Champion	Joseph Bailey
CORE TEAM	
Account	Alison Burg (Laura Ferguson)
Creative	~~Dennis Beerley~~ PJ? Nick Barb(?) Hybrid Director? Art Supervisor?
Hybrid: Planner + Engagement Strategist	Tim? Al? (Brians COS) – Not from a strategy perspective but from experience Arielle Soriente? (Consumer background, used to be engagement strategy) – Elle to weigh in
FULL TEAM	
Day-to-Day Account	
Day-to-Day Creative	
Medical	
Project Management	Jacquelyn Petrella
Analytics	
HCL / GCL	
Growth:	• Ellen Trimboli • Allyson Howie • Julia Costello

Client Q&A Questions:
- Could you please provide additional direction on what you would like the agency to provide for the "proposed length of engagement and estimated fees" due next Wednesday, July 17th?
- Within Wednesday's submission, we will be sharing our strategic process and preliminary strategic thought starters, could you please confirm that this is the expectation?
- In addition to the audiences listed, are you also focused on internal reputation?
- Development support pitch deck?
- UX / Design concepts?

Workstreams (to be discussed further):
- Research?
- DnA?

digitas health

REALITY CHECK ASSIGNMENTS

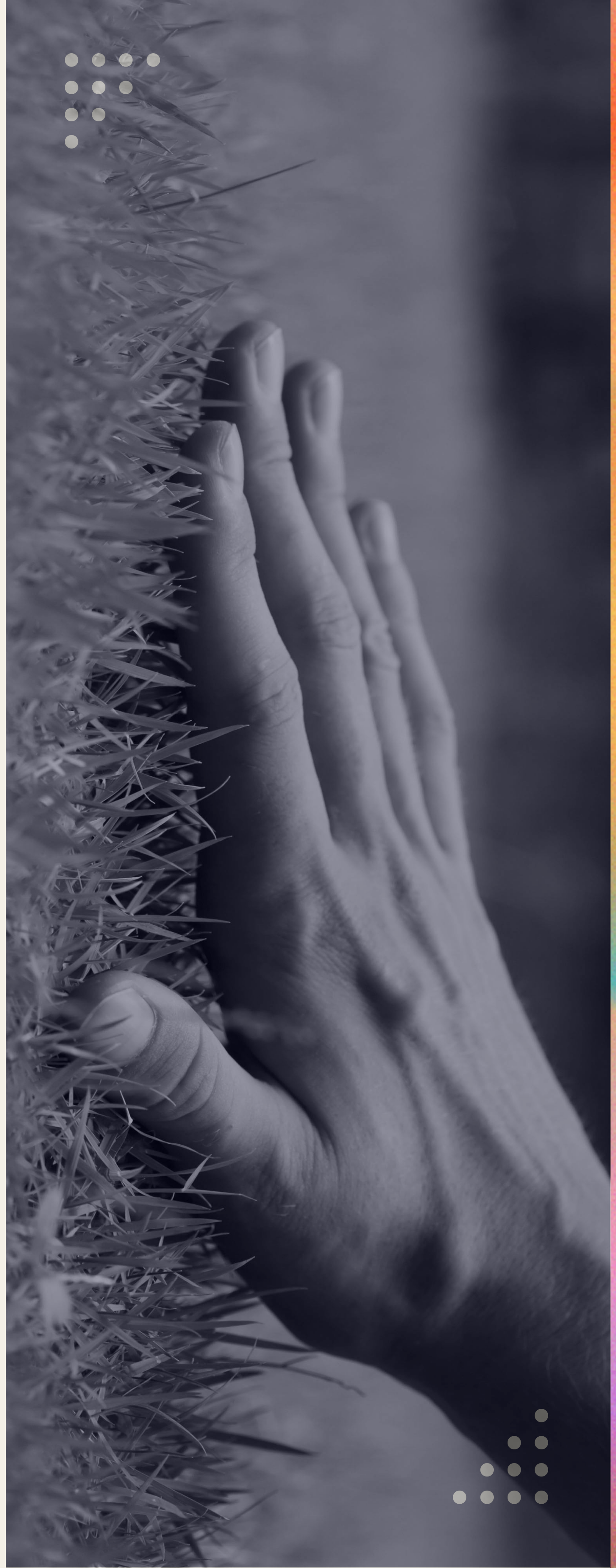
SECTION	OWNER	TIME
Client Reality	Account	10 minutes
Human Reality (HCP or Patient/Consumer)	Brand Strategy	30 minutes
Category Reality	Account and Creative	15 minutes
Media Reality	Engagement Strategy	30 minutes
Business Reality	Brand Strategy	20 minutes
Clinical Reality	Science and Medicine	10 minutes
Cultural Reality	TBD	5 minutes

For details on the definition of each reality and an outline of the reality check meeting inputs and synthesis, please see the following slides!

Toolkit

REALITY CHECK

digitas health



BRANDFIT V.3.0: THE REALITIES DEFINED

CLIENT REALITY
ACCOUNT
What will it take to win them over?

HUMAN REALITY
PLANNING
Beyond or because of their disease, how does our target see themselves and the world around them?

CLINICAL REALITY
MEDICAL
What is the clinical benefit of the product the HCP and patient?

BUSINESS REALITY
ACCOUNT
What is the unique value proposition of the brand in terms of emotional and clinical outcomes?

MEDIA REALITY
ENGAGEMENT
Where are people (patients and supporters) talking about the category and the brands within it? What is the treatment conversation the office? What do people encounter when they share experiences and needs in social media?

CATEGORY REALITY
ACCOUNT/PLANNING
Where are competitors positioned? What are the market forces and dynamics defining the category?

CULTURAL REALITY
TBD
How have larger cultural forces influenced the way our target sees themselves in context of media and culture at large?

NOW →

The current state –
a customer insight that reveals a growth opportunity and serve as the foundational pitch insights

ASSIGNMENTS FOR INSIGHTDIVE 1- TO BE COMPLETED & PRESENTED

RESOURCES		WHAT WE NEED TO KNOW	WHAT WE NEED TO CHANGE

• 3rd Party Data Sources
• Client-Provided Materials
	ACCOUNT/BUSINESS STRATEGY	**BUSINESS**
		• What is the market size? (broken down by region if global)
		  • Current
		  • Future (and what's driving that shift?)
		• Are there compliance/adherence issues?
		• What future trends will impact this category?
		• Where can we win?
		  • Competitive grid (efficacy, safety, tolerability, MOA, dosage, administration, price, relationships, etc.)
		  • SWOT
		• What are the unmet needs?
		• What will be our source of business?
		  • Diagnosis Rates
		  • Treatment Rates
		  • Line of Therapy
		  • Product Usage (competitive market share, breakdown of branded/generics, off-label/ indicated)
			Where do we need to win to be successful?

• Ad Pharm • Competitive Websites • Advocacy Websites	CREATIVE/ DIGITAL/MSA	**BRAND & COMPETITION** • What do we think is truly unique and special about our product? • What is the scientific story that surrounds our product? • What specific benefits do competitive treatments provide and how do they communicate them? • What is the common language of this category? Is it clear? • What category conventions exist?	What is the category convention we have to break?
• 1:1 Interviews • Social Listening • Survey	PLANNING/ MSA	**CUSTOMER** • Who is the primary audience? What do they care about? What attracts them? What repels them? • What is today's understanding of the science behind the disease at issue and of current treatments being used? • What is the patient experience and what do they struggle with most? • What is the goal of today's treatment for both doctor and patient? • More specifically, how do HCPs currently define treatment success and what is standing in their way? • Who are our loyalists? Why are they believers? • What are current perceptions of our product? • What lessons can be learned from spirometry?	What is the one entrenched behavior/ perception we have to break?

CLIENT REALITY

Connected Realities
Clinical
HCP

Writer:
All Teams

Supporting Data:
Claims Data
Competitive Analysis
Data Monitor
Financial Earnings
Syndicated Research

Objective:
To understand the Organizational complexity, commercial landscape and economic drivers

Key Questions to explore:

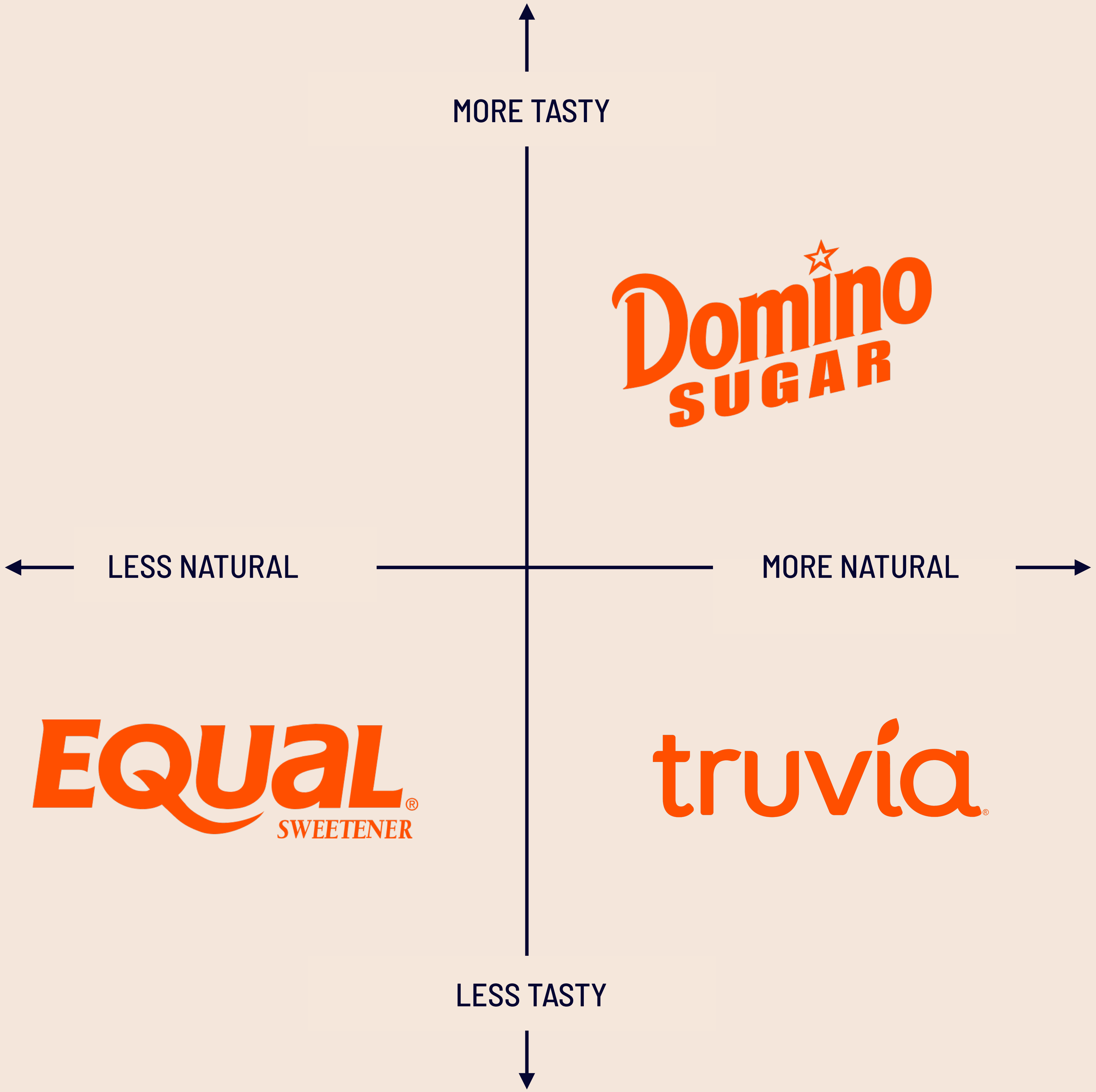
- Nascent or mature market?
- Launch of brand? Launch of indication to existing brand?
- Therapeutic experience of organization?
- What is the reputation of organization, brand within the TA?
- Competitive set & Market ownership?
- How engaged, prepared, established is the sales force?
- Relationship with HCP influencers?
- Relationship with governance bodies?

CATEGORY REALITY

Connected Realities
Clinical
HCP

Writer:
Planning
Medical

Supporting Data:
Claims Data
Competitive Analysis
Data Monitor
Financial Earnings
1st Party Data



CLINICAL REALITY

Connected Realities
Clinical
HCP

Writer:
Medical

Supporting Data:
Label
Clinical Trial Data
HCP Qual
Patient Qual
Syndicated Research
BioMed Tracker

digitas health

Objective:

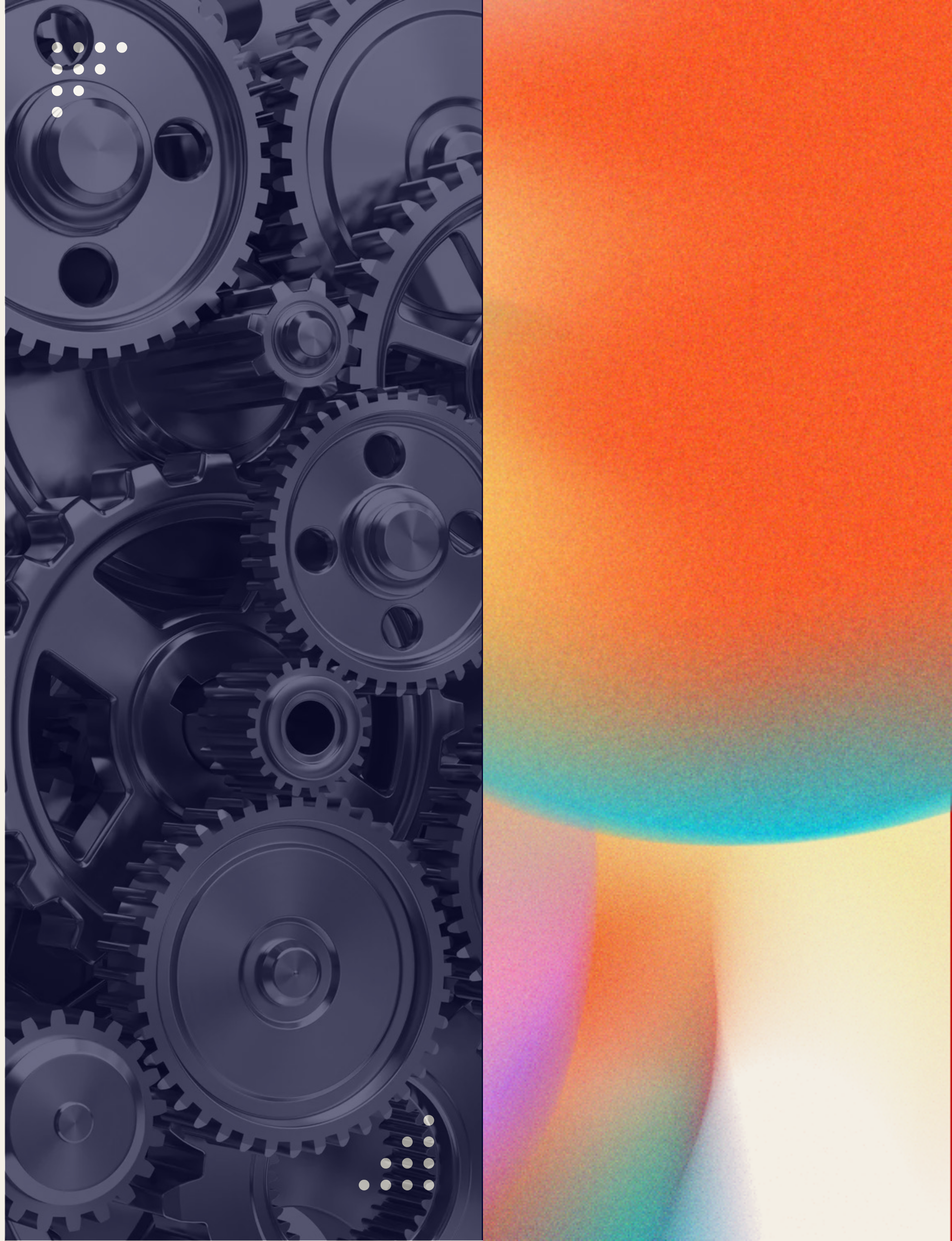
To understand the the scientific foundation, treatment approach, HCP view and therapeutic dynamics

Key Questions to explore:

- What is the clinical benefit?
- Why this molecule?
- Novel or Commoditized?
- MOA/MOD?
- Any public perception issues around treatment?
- How has the treatment story
- Who are the experts in this therapeutic area?
- What are the global, country guidelines?
  How does the therapy fit into the spectrum of treatment?
- What are the major conferences?
- What are the major publications?
- How do the medical colleges relate to the therapy or therapeutic area?
- How will the treatment landscape look post launch?

Toolkit

STRATEGIC FRAMEWORKS



digitas health

NOW + START + NEXT

NOW

The current state –
a customer insight that reveals
a growth opportunity

START

The Objective, CSF and
Tactics that make the
Next Possible

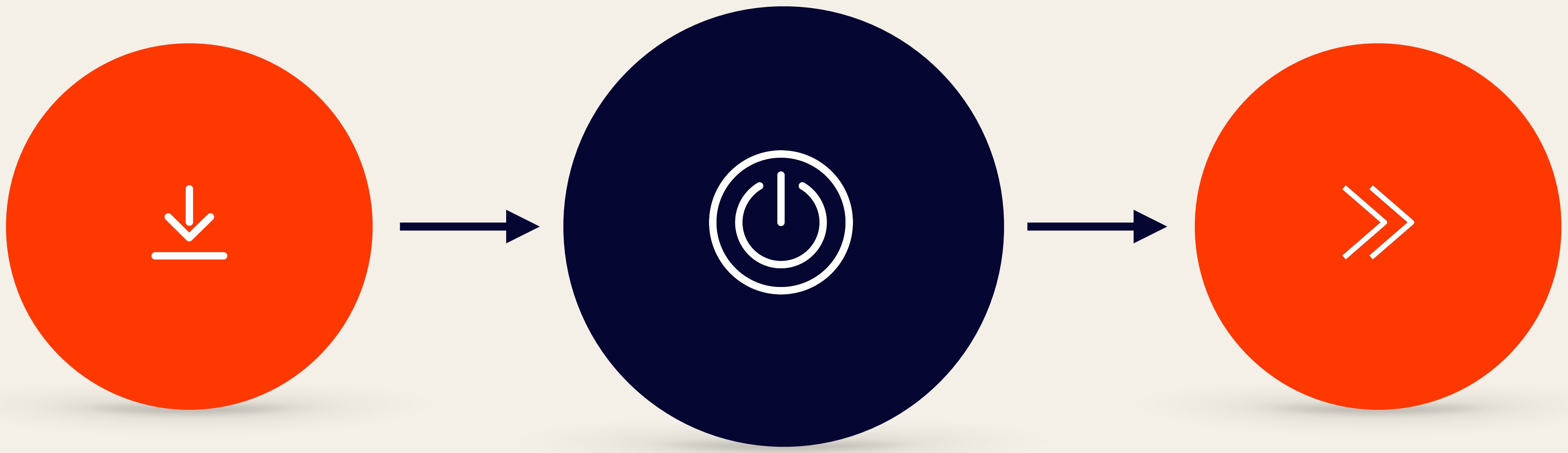
NEXT

The desired state –
a compelling vision
of success

CREATIVE BRIEF

DATE:		PROJECT:	
CLIENT:		JOB NUMBER:	

NOW **START** **NEXT**



The current state – a customer insight that reveals a growth opportunity

The Objective, CSF and Tactics that make the Next Possible

The desired state – a compelling vision of success

digitas health

Who do we need to reach to create the desired change?

Why will they believe us?

How will we know we have succeeded?

What is the personality or tone of the communication?

BRANDFIT

6 **BrandFit Idea**
The foundation for strategic and creative development

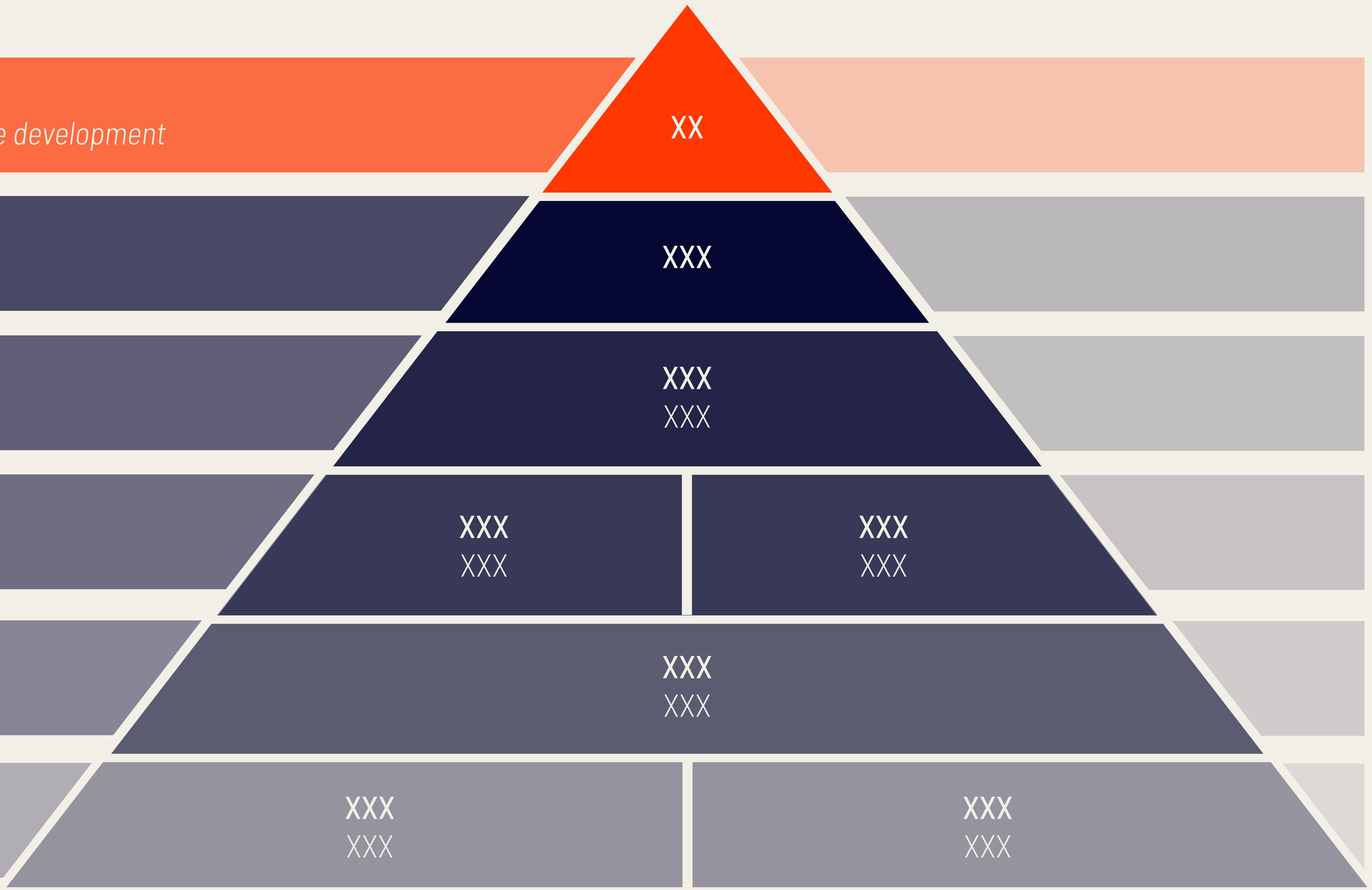
5 What is the voice of our brand?

4 What is the tension/brand fit story

3 The single-minded benefit
and reasons to believe

2 What is the Key Insight

1 Who is the audience?
What is/are their issues?



BRANDFIT

DIANN
HAMILTON

NOW

THE CURRENT
STATE

START

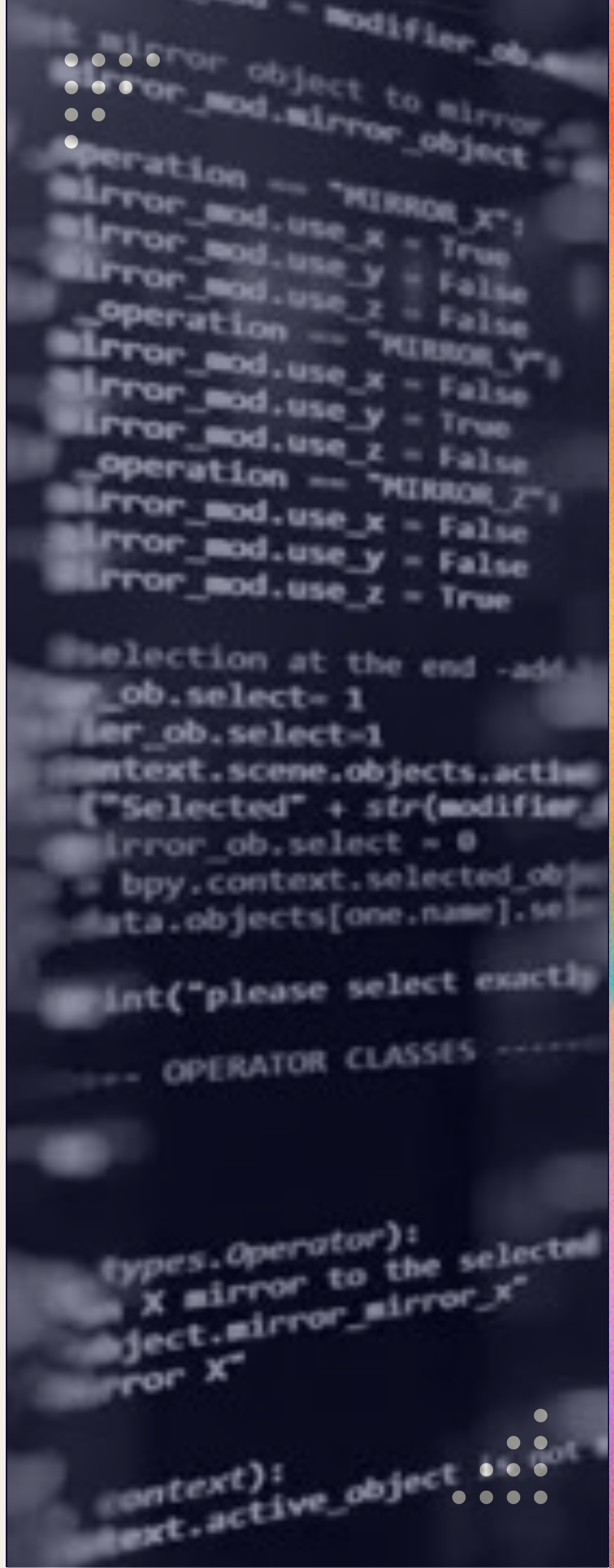
PLATFORM
IDEA

NEXT

THE DESIRED
STATE

Toolkit

DATA PROCESS



digitas health

DATA BRIEF

Client:
Gilead

Account:
LEN Pitch

Data:
Ben and Alex

Strategy:
Char and Tom

digitas health

Project Overview

Gilead – the leader in HIV Prevention – is preparing for the 2026 launch of LEN for PrEP. This new injectable form dosed by an HCP twice per year (every 6 months) is poised to transform the HIV Prevention landscape and has the potential to shift consumer perceptions around who may benefit from PrEP.

- Create multiple attention grabbing/groundbreaking campaigns for the LEN for PrEP launch with the goal to impact and resonate across numerous consumer audience groups.
  Audience insights development, including campaigns to reach multi-cultural communities (Black & Latino MSM) and cis-gender women
- Example of customer engagement plan – _product initiation and adherence to ensure continued engagement in a long-acting care routine
- Recommended marketing mix including any non-traditional, media tactics to reach our multicultural audiences.
-
- The tactics should go beyond just leveraging the standard technologies, media plans and traditional patient testimonials (real stories). Gilead would like to see new and different ideas that go beyond the pharma industry. Use of technologies, such as artificial intelligence (AI) in campaign development, mixed reality/virtual and augmented reality (VR/AR) would be a great add to see.
- A proposed launch plan outlining objectives, understanding of the target audience, potential positioning and key messaging, and initial campaign ideas/approach. Longer-term engagement strategy for campaign launch and adherence as well as key performance measures for success would be helpful to understand.

Market Challenge

- Define the business challenge [TM1]
- With this launch, the PrEP category is expanding from a daily pill and bi-monthly injectable to 2x annual injection.
-
- We want to shift consumer mindset around PrEP and PWBPs to help normalize PrEP as part of a routine preventative healthcare (ie. Reframe PrEP as a key tool in overall health and wellness akin to other preventative measures such as HPV vaccination).

Data Strategy Purpose

Statement that helps define the level of impact and/or role data strategy will play within the marketing strategy
Be able to find, understand and activate the various PWBPs.

- Expected outcomes and how they will be used in our marketing strategy:
- Define the characteristics of current and past PrEP users
- Create a predictive model for potential PrEP users
- Be able to differentiate between the profiles and activations for the various PWBP groups

Realities

- Brand Reality: LEN for PrEP is transformational
- Category Reality: PrEP category is stable with incremental growth
- Clinical reality: LEN may be "superior" in efficacy and convenience* (likely will not be able to explicitly state superiority -due to Apretude not being included in trial- but ideas should seek to imply it)
- Consumer reality: LEN for PrEP can make my life better

Condition Overview

Key characteristics of the condition, treatment, procedures, caregivers

- These are not patients, they are proactively taking medication to avoid transmission of HIV from their partners
- Typical treatments are either pills or injections at intervals

Diagnosis Codes

Identify diagnosis and treatment codes that will support clinical segmentation

- Probably not diagnosis codes, but we can use treatment codes for:
- Desgovy, Generic PrEP/Truvada and Apretude
- ·We would like to size the segments of all current treaters all past treaters and each treatment specifically
- Once we have that we'll port those audiences into TSP

Patient Definition

Who are we talking to? All PWBPs (people who would benefit from PrEP) including:

- MSMs (men who have sex with men) – all races,
- Cisgender women (focus on Black).
- Transgender
- Hypothesis that LEN for PrEP early adopters will be current APRETUDE and DESCOVY users primarily – white, middle-upper class, gay males living in major cities.
- Basic segmentation:
- Patient Journey:

Audience Hypothesis/Know Do

Identify high level questions and thoughts that would ignite thinking for our work.

- Given that these are diagnosed audiences, can we use our data and their lifestyle attributes to predict and then target potential PrEP users and/or switchers

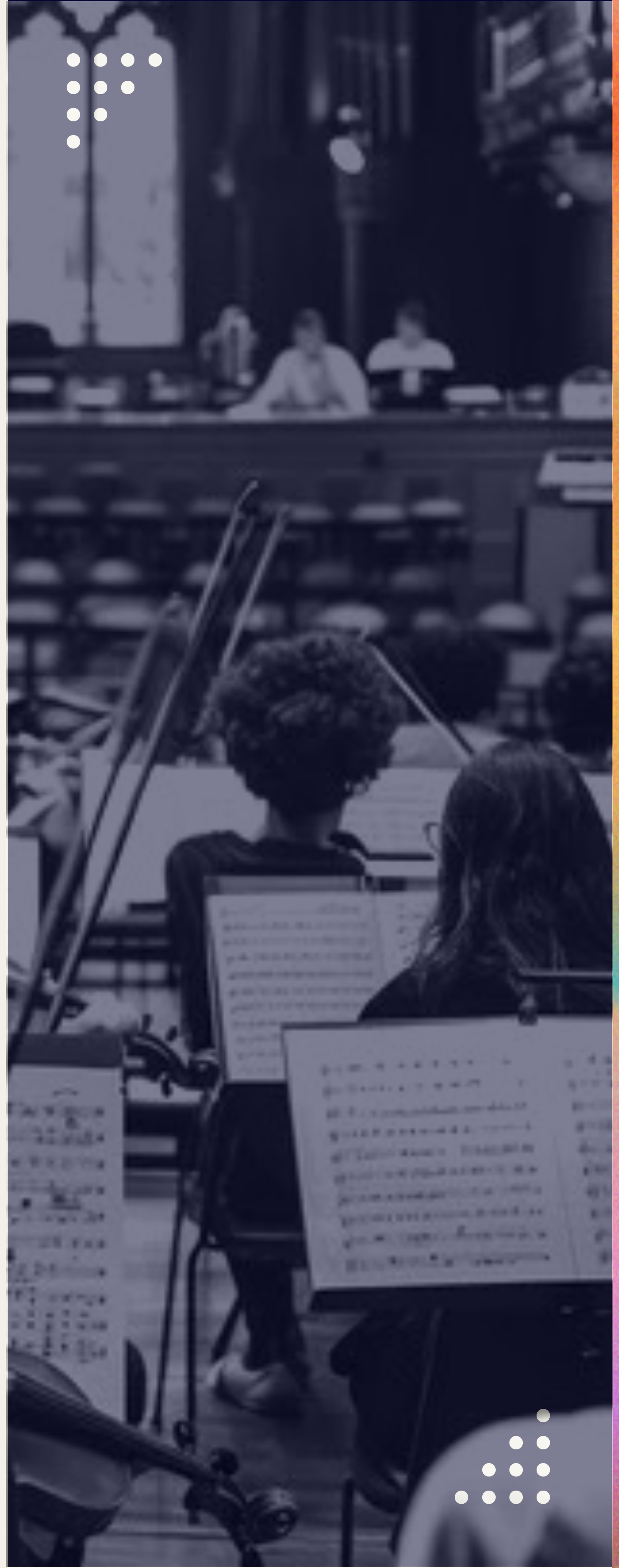
[TM1]Would move this to the top under project overview

HEALTH STYLES PROCESS

DATA BRIEF	FIRST PULL	SECOND PULL	LIFESTYLE POOL	SYNTHESIS	STORY
Broad understanding of condition, treatment, procedures, stakeholders (patients, HCPs)	Pull all diagnosed patients in the database against all clinical variables	Re-pull the data by your newly clustered profiles	Port profiles into Epsilon TSP to add lifestyle and channel preferences	Gather all your inputs to the story research, realities, insights	Visualize the data and profiles
Why we're doing this specifically for insights, for targeting, for niche populations etc.	Size the populations	Identify variable differences between them that can help to inform their clinical profile	Use the Niches 5.0 clusters to get a general idea as to how these profiles differ	Based on the clinical and lifestyle and other insights create **Engagement Profiles**	Define your activation radar
Diagnosis Codes, treatment codes	Either manually or with the help of AI determine how best to cluster their profiles	Build clinical profiles	Consider merging profiles if they are super similar from a lifestyle or activation perspective	Hone in on channel differences for activation	Build your experience map
Where it fits into the broader story, expected story hypotheses, the actual output needed	Define number of clusters - aiming for distinctly different populations		Dig into the data, looking for interesting comparisons	Hone in on lifestyle differences for creative iteration	

Toolkit

REHEARSALS



digitas health

REHEARSAL BEST PRACTICES

Only you know what you didn't say If a figure skater drops their triple axel in the Olympics they don't stop the routine, just keep skating!

VIRTUAL PITCH BEST PRACTICES

- Find a quiet room to pitch
- Make sure the lighting in your pitch room allows for you to be seen instead of making you look like a silhouette
- Dress for a live pitch
- Try to practice using the video conference platform prior to the pitch to ensure the camera and microphone are working properly, especially if this is a new platform
- If possible, log into the pitch 10 minutes prior to start time to ensure everything is working and you're all set up
- Cameras on and SMILE! 😊

VIRTUAL PITCH BEST PRACTICES

- Eliminate distractions - turn off email, messages, and other notifications
- Mute when not presenting
- Pause when transitioning - DO NOT say “Next slide”
- Reference other parts of the pitch when making a point
- Use text chain to communicate and cheer on your team members
- Use the text chat mindfully: don’t send too many texts (especially if its a smaller group) as it can take away from the presentation

SAMPLE CLIENT Q&A REHEARSAL QUESTIONS

SMALL COMPANY

- As you know, we are a smaller company going up against some pretty still competition. How do you think we'll be able to compete with the Pfizer's of the world, in both relationships with the community and financially? Where can we win?
- Great plan and ideas - but, it's a lot to do for a small company. How would you suggest we prioritize efforts? What are the must haves versus nice to haves?

CREATIVE

- The work is powerful, but can be seen as negative in that it highlights the problem. That can work for or against brands, what advantages do you see of taking this approach? What are some of the risks?
- Based on the two evolutions you recommended, which do you believe should be our next step?

OUR RECOMMENDATION

- You didn't show a full CRM program, based on what you know about our program and your experience with in an analogous category why did you not choose to highlight this in your tactics?
- Have you had much success with branded social programs for this demographic? Based on our research they prefer not to engage directly with brands: Would you recommend an unbranded social approach based on this information.

TACTICS

- If you could pick one tactical recommendation you showed today to implement which would you choose and why?
- We do need to create a movement but realize that this type of mass media effort could be expensive. How would you suggest targeting?

ONBOARDING

- Our PRC can be challenging because each brand has its own team. How do you recommend us on-boarding you?

TEAM

- We loved the chemistry we felt today, would this be our team?
- Will this team be fully dedicated to our business?
- We absolutely loved it. When can you start?