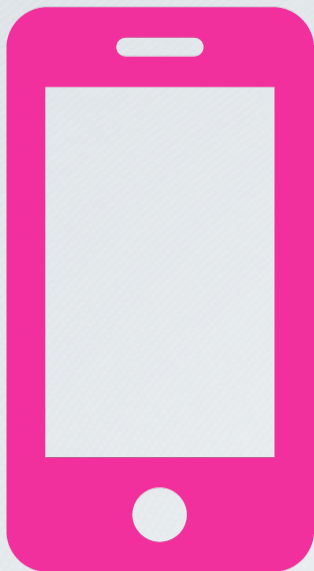


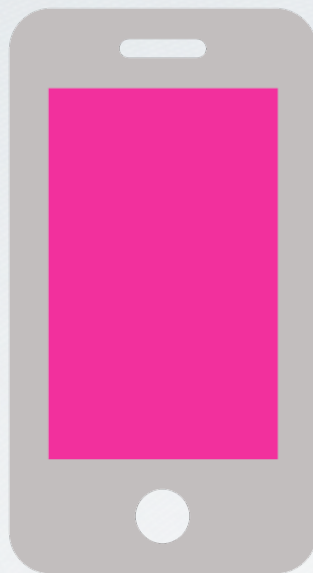
Use of Mobile / Voice to Enhance Customer Experience

What is it about "mobile" that enhances an experience?

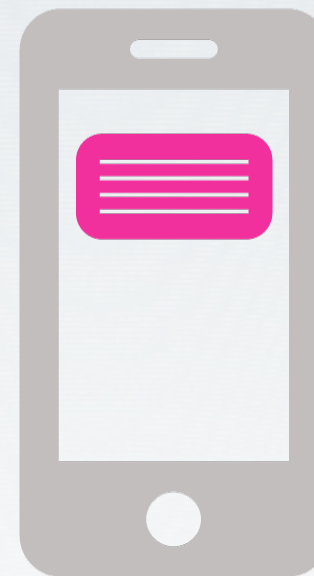
DEVICE PORTABILITY?



RESPONSIVE CONTENT?



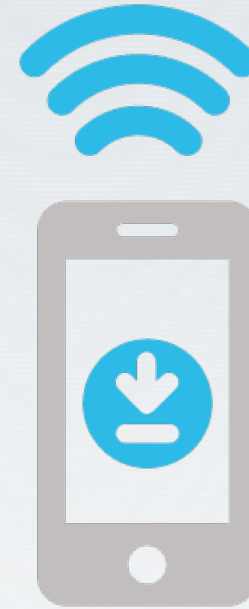
ACCESS TO COMMUNITY?





24/7 CONNECTIVITY

*Yes, and...
Constant Connectivity*



ON-DEMAND CONTENT

MOBILE USERS SPEND **MORE THAN 2X** THE AMOUNT
OF TIME ONLINE COMPARED TO DESKTOP USERS

The Implications of Constant Connectivity



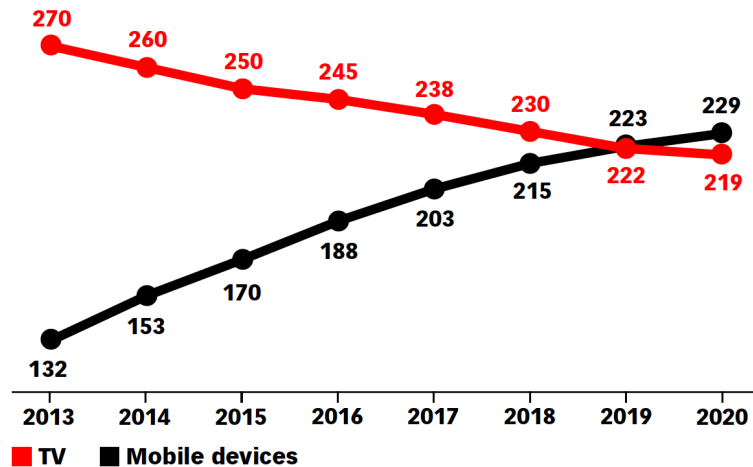
Your customer experience needs to be relevant, high context, and address in-the-moment needs.

Ensuring relevant and accessible content creates a positive customer experience that drives sustained engagement, building **trust**, **loyalty**, and **advocacy**.

How and when are HCPs using mobile devices?

More and more people are moving to mobile.

Average Time Spent per Day with TV and Mobile Devices by US Adults, 2013-2020
minutes



Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking on a mobile device while watching TV is counted as 1 hour for TV and 1 hour for mobile device
Source: eMarketer, April 2018

238500

www.eMarketer.com

US adults will spend an average of **3 hours, 35 minutes** per day on mobile devices in 2018, an **annual increase of more than 11 minutes**.

BY 2019

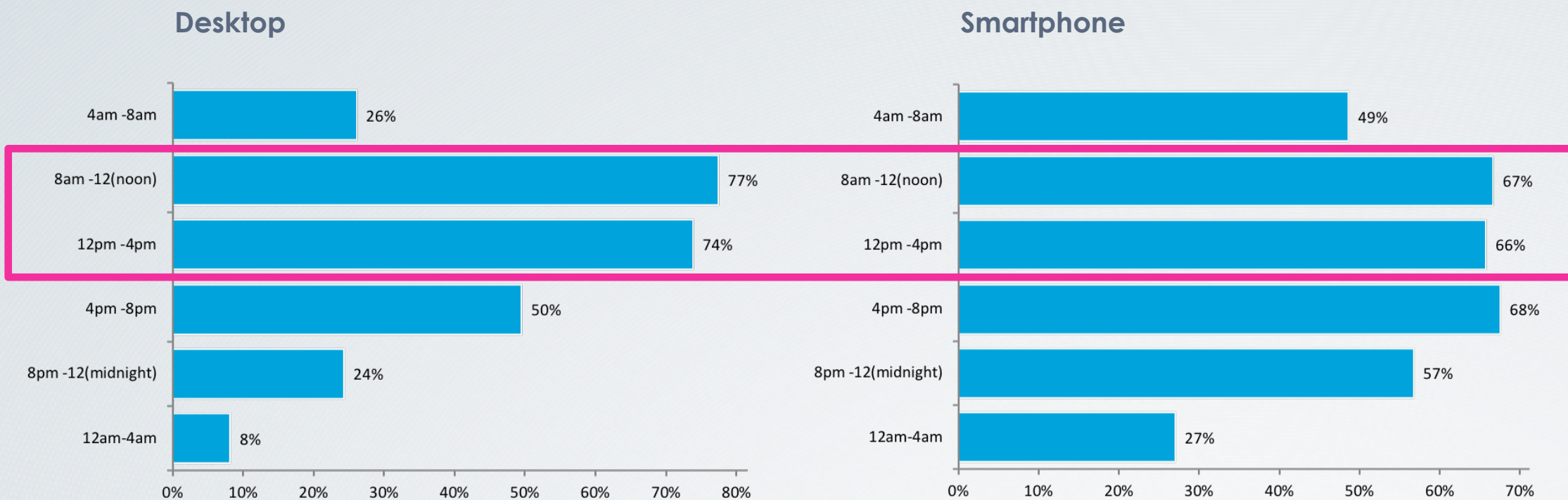
MOBILE WILL SURPASS TV

Attracting the most minutes in the US.

Nearly all of this additional time spent on mobile devices will come from smartphones, which will account for two-thirds of mobile minutes this year.

How and when are HCPs using mobile devices?

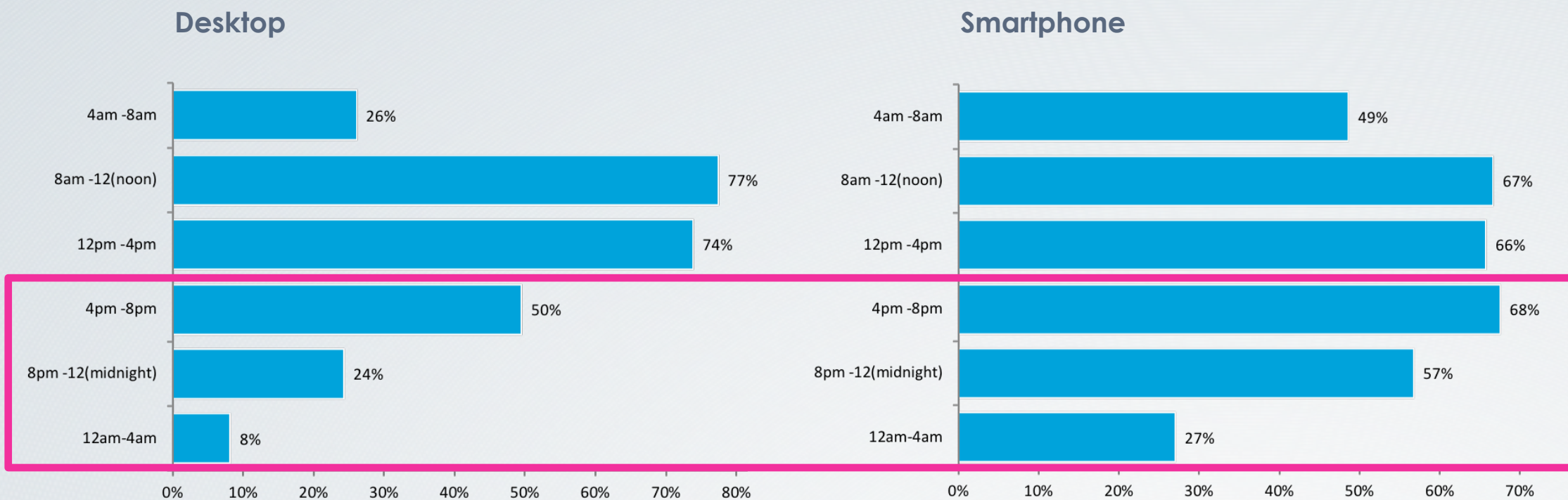
Time of Use for Professional Purposes



HCPs use both desktop and smartphones to access the internet during the day;
Devices coexist and serve parallel purposes.

How and when are HCPs using mobile devices?

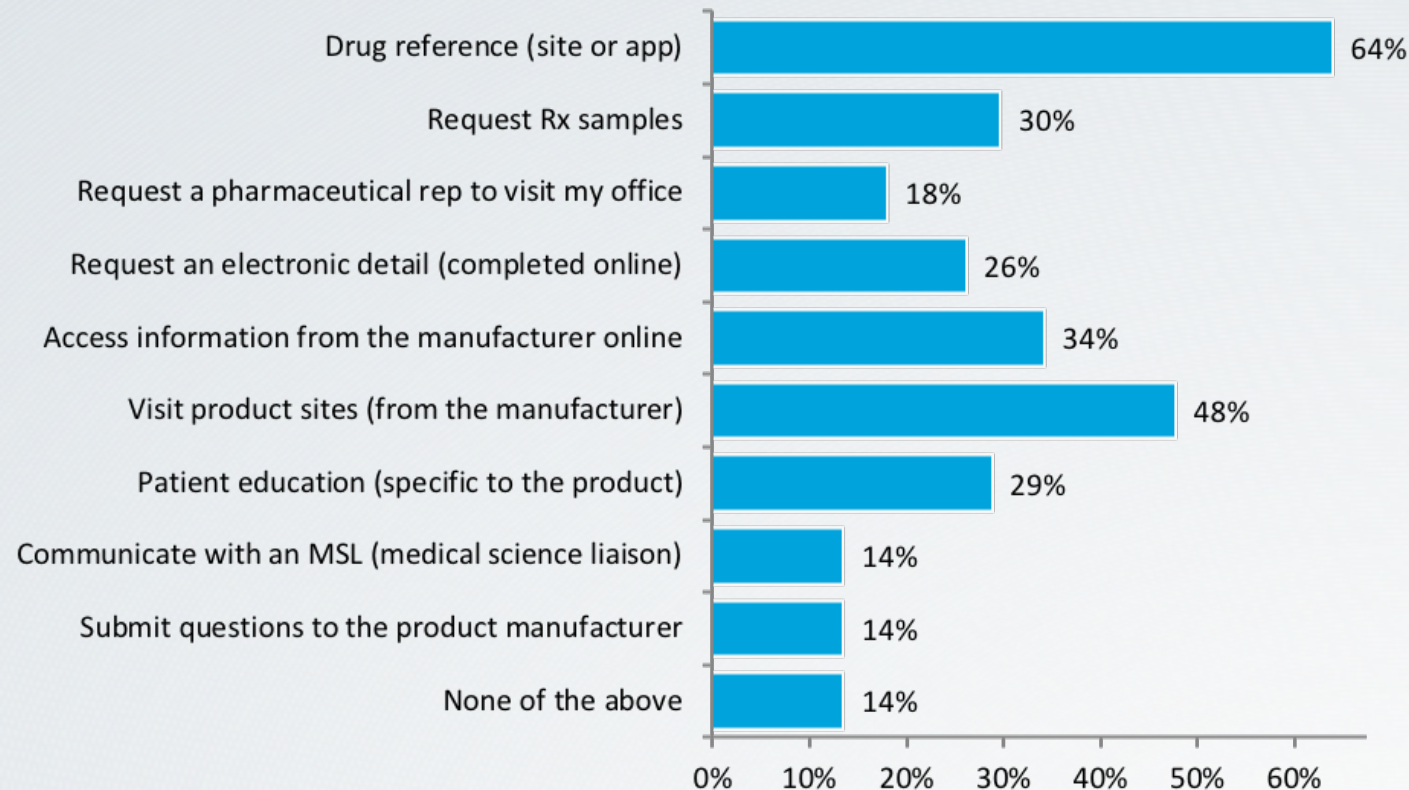
Time of Use for Professional Purposes



Smartphone usage remains high “after hours” due to constant connectivity.

What are they using smartphones for?

Which of the following **pharmaceutical related activities** do you regularly complete or do on your smartphone?

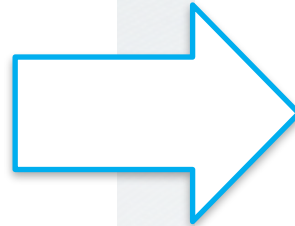


Greatest need: Clinical information in the moment of care

Evolving Expectations around Smartphone Functionality

What is the most important activity you conduct on your phone for professional purposes today? What activity makes your phone essential to you today?

- Email (most cited)
- Answering “on call” messages
- EMR access
- CME / education
- Texting colleagues
- Online search



If you could develop an app, resource, or content for your smartphone (for professional purposes) **what is your dream app, resource or content?** What would add significant value to your smartphone (for professional purposes)?

- Better e-prescribing tools
- Radiology viewers
- Better voice recognition for EMR
- A better version of UpToDate
- Access to drug prices (real time)

HCPs are looking for increased flexibility in clinical workflow.

Practical Application

HCPs have more responsibilities than ever before —
making diagnoses, providing treatment, ordering tests, and updating documentation.

**81% OF PHYSICIANS
SAY THEY WERE
OVER-EXTENDED OR
AT FULL CAPACITY**

Time-constrained HCPs have less time to find and digest
the vast amounts of information available to them.

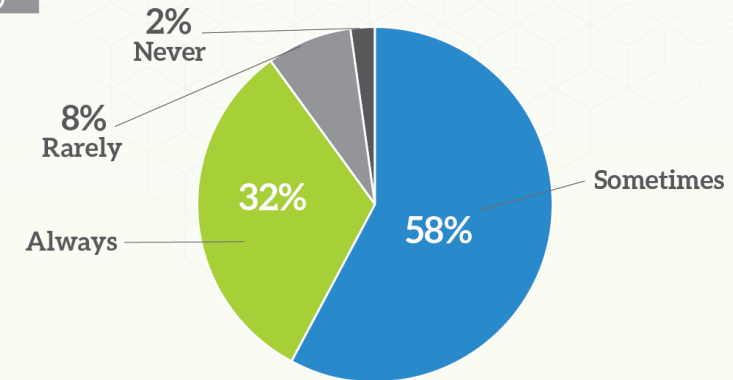
PHYSICIAN ONLINE INTERACTIONS WITH PROFESSIONAL CONTENT

Physicians were asked:

“Do you read professional content when you’re not at work?”



90% of physicians said they do indeed read professional content on a regular basis when they’re not working.



Broadening out: What are they using smartphones for?

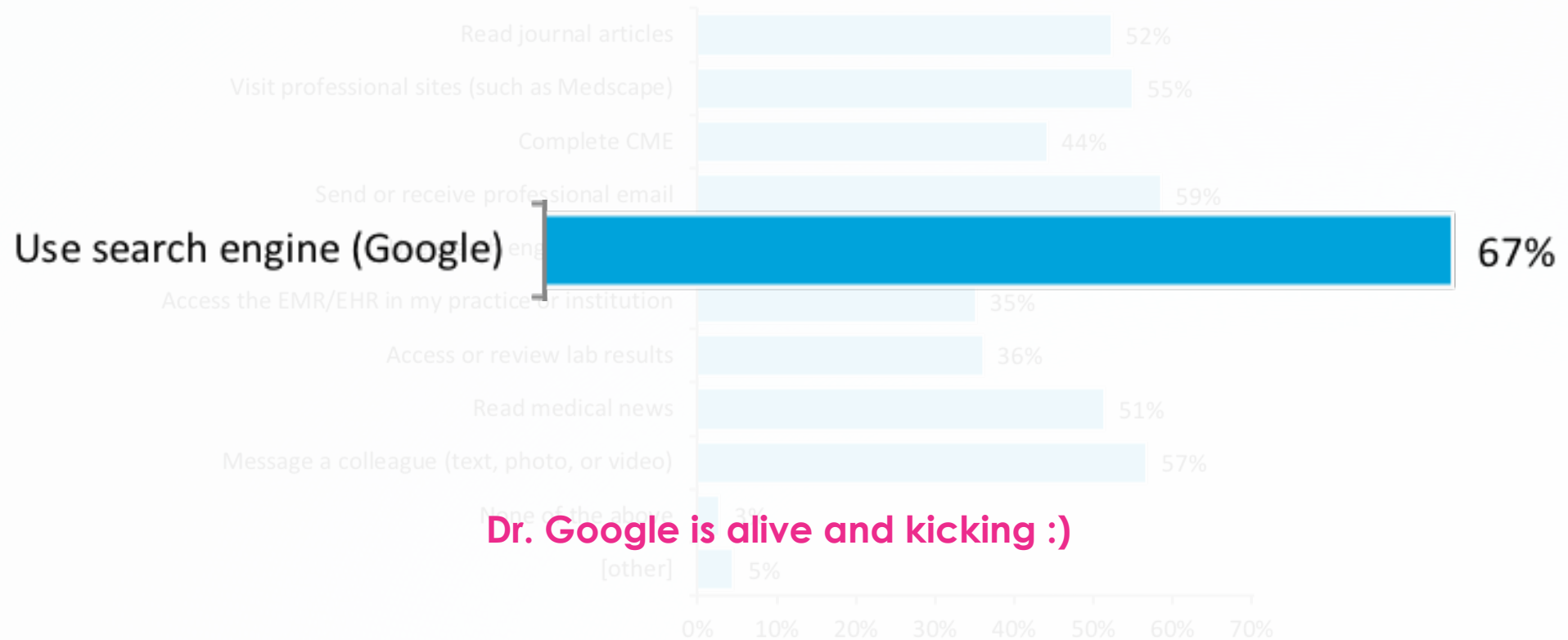
Which of the following **professional activities** do you regularly complete or do on your smartphone?



Learning: News, Journals, CME, etc. | Connection: Text + Email

What are they using smartphones for?

Which of the following professional activities do you regularly complete or do on your smartphone?



Dr. Google is alive and kicking :)

Search is still the gateway to your content!



Optimizing your experience is critical!

61%

do not return to a website if they have trouble accessing it on a mobile device

40%

will visit a competitor instead

Research shows that a user's flow is interrupted if a page takes more than **1 second** to load.

57%

say they won't recommend a business with a poor mobile site



HCPs are consumers too. Don't just build it — Build it right.

Mobile 2.0?

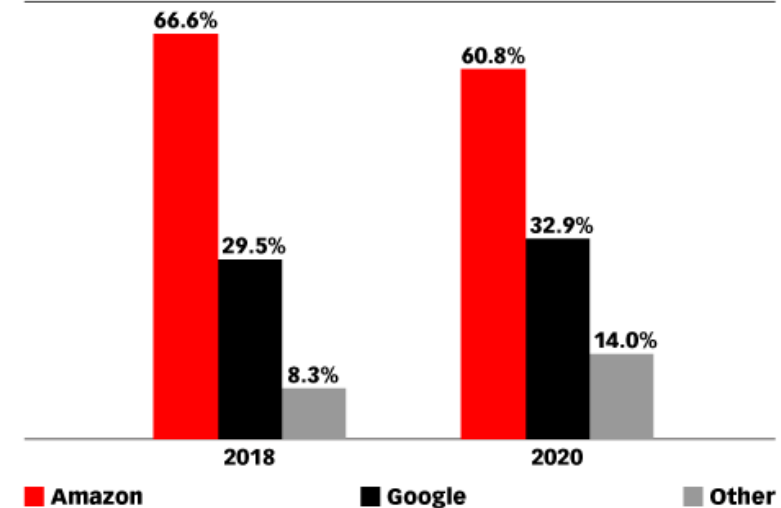
COMPETING DEVICES, SUCH AS SMART SPEAKERS, SMART CARS AND WEARABLES, ARE LIKELY TO CUT INTO “SCREEN TIME.”

“ Two thirds of smart speaker owners use their smartphones less...”¹

While there is a lot of potential for the application of voice, it's still early days:

- Voice recognition needs improvement
- Emerging vSEO
- No scaled vSEM

US Smart Speaker Users, by Brand, 2018 & 2020
% of smart speaker users



Note: individuals of any age who use a smart speaker at least once per month; smart speaker users are not mutually exclusive; there is overlap between groups

Source: eMarketer, April 2018

237157

www.eMarketer.com

Use Cases: Improving Treatment

Therapeutic Areas

- Visually Impaired
- Neurological conditions
- **Patient Empowerment**

**VOICE IS A NATURAL EVOLUTION OF THE
PATIENT EMPOWERMENT MOVEMENT,
ALLOWING PATIENTS TO TAKE MORE
CONTROL OF THEIR WELL BEING.**

“Many older patients are able to use voice commands to do things they may otherwise be unable to do because of lack of computer skills, arthritis, poor eyesight or other conditions.”

Use Cases: Improving the EHR Workflow

Healthcare

- Intake efficiencies
- Physician note transcriptions
- Procedural documentation

“VOICE RECOGNITION WILL FACILITATE THE CREATION OF MORE ACCURATE, COMPREHENSIVE AND COST-EFFECTIVE ELECTRONIC HEALTH RECORDS.”

Machine learning and AI layering

“Voice recognition can be used to build more secure data access systems as part of a biometric single sign-on platform.”¹

Know Your Audience

WHAT, WHEN, WHERE, AND HOW MATTER, MORE THAN EVER



Content must be relevant and offer real value to the physician. It needs to promote meaningful clinical activity that helps them and their patients in high context moments.

The information physicians need has not changed –
it's the format, timing, and delivery of that information that has changed.