

# IDC MarketScape: Worldwide Life Science Sales and Marketing IT Outsourcing Services 2022 Vendor Assessment

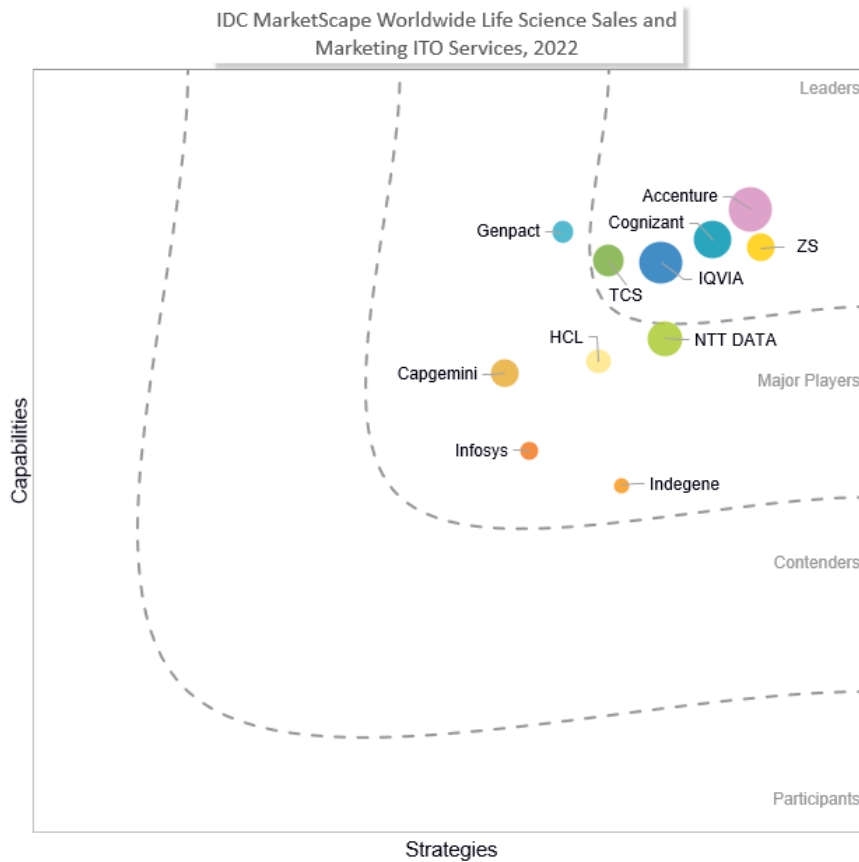
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THIS IDC MARKETSCAPE EXCERPT FEATURES IQVIA

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Life Science Sales and Marketing IT Outsourcing Services Vendor Assessment



Source: IDC, 2022

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Life Science Sales and Marketing IT Outsourcing Services 2022 Vendor Assessment (Doc # US41808017). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

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Digital transformation is occurring at a rapid pace in life science companies, including in the sales and marketing space. Internal and external sources of data are being collected in the cloud, and this information is being leveraged by sales and marketing groups to improve speed, efficiency, and effectiveness in reaching customers, including both healthcare providers (HCPs) and patients. Life science companies continue to invest in sales and marketing IT outsourcing (ITO) by the need to automate and optimize recurring commercial sales activities, consolidate disparate data sources, and optimize omni-channel sales and marketing operations.

In 2020 and 2021, the life science industry and the vendors that serve it have had to accelerate the pace of digital transformation to contend with the COVID-19 pandemic and associated changes in work. Healthcare providers have moved even faster toward digital channels to receive critical information on diseases and therapies to address the need for physical distancing and limits on personal calls by field sales professionals. Patients have increasingly engaged in telehealth visits, and many life science company employees have had to adopt to a work-from-home scenario. The life science industry has responded with enthusiasm to these new modes of work while accelerating efforts to develop therapies and vaccines in record time.

Although the industry has already been steadily moving toward IT outsourcing for several years, the pandemic and resulting changes in work appear to have accelerated ITO, especially on digital platforms. The vendors selected to participate in this study have demonstrated state-of-the-art solutions, which can be implemented and maintained by skilled workers virtually anywhere in the world, augmented by technologies such as cloud computing, AI, analytics, and mobile devices.

To help life science companies evaluate the vendors in this space, in this IDC MarketScape, we evaluate the capabilities of several prominent providers of ITO services in life science sales and marketing, including those that transform sales and marketing operating models by providing and operating state-of-the-art outsourcing processes. When evaluating these vendors, the key criteria companies should consider (all of which are discussed in this study) include:

- Breadth of experience and offerings in life science sales and marketing ITO efforts and the number of customers the vendor has served
- Geographic footprint and global delivery capabilities, level of priority, and focus by the vendor on the life science sales and marketing sector, including the pace of sector investment by the vendor
- Life science industry expertise, corporate financial stability, and the size and experience of global life science delivery teams
- Thorough vetting of customer references to evaluate vendor capabilities in project management, IT technical skills, account management, and overall value delivery to clients

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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IDC frequently has unique visibility into vendor selection processes within life science companies through clients and contacts in the industry. For a vendor to be considered for inclusion in this study, the vendor's ITO services must have been significantly evaluated for purchase within recent contracts with which IDC is familiar. Further research and due diligence were then conducted to narrow the list of vendors to only those that fulfilled the following qualifying criteria:

- Significant marketplace presence in life science sales and marketing ITO services, including such work at large (>\$1 billion annual revenue) biopharmaceutical firms for at least the past five years
- Delivery of technology solutions to the life science industry, including cloud strategy, mobile solutions, social data, and analytics/AI
- Global life science customer base and delivery network
- A documented vertical life science industry practice
- Demonstrated success in one or more ITO categories in life science sales and marketing, including but not limited to:
  - Sales force automation (SFA)
  - Customer relationship management (CRM)
  - Analytics
  - Business intelligence
  - eDetailing
  - Sales and marketing infrastructure outsourcing
  - Predictive modeling
  - eLearning and training solutions
  - Customer (HCP/HCO) master data management (MDM)
  - Incentive and compensation management
  - Social media analytics
  - Key opinion leader (KOL) management
  - Call center operations/staffing
  - Enterprise mobility technology
  - Sales and marketing application or data integration
  - Digital asset management
  - System validation
  - Aggregate spend compliance
  - Speaker and event management
  - Closed-loop marketing (CLM)
  - Multichannel marketing optimization
  - Patient services
  - Regulatory compliance
  - Forecasting
  - Customer segmentation and targeting

## ADVICE FOR TECHNOLOGY BUYERS

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Outsourcing of IT processes, particularly repetitive processes that are not considered core to the mission of delivering value to patients and other stakeholders, makes sense for life science companies with limited IT and development capabilities. These limited internal resources can be deployed strategically to areas requiring scientific or commercial innovation, which may add more value. Multiple outsourcing vendors with substantial IT and life science expertise have developed business models that can reduce costs for pharmaceutical, biotech, and medical device manufacturers by hosting these processes and infrastructure while delivering superior service compared with internal models.

Life science companies are increasingly looking for vendors that can combine deep industry expertise with global delivery capabilities. Successful vendors in this space must demonstrate:

- Deep, proven industry-specific expertise, with a strong book of references
- Proven understanding of industry regulations and compliance standards
- Willingness to provide dedicated resources onsite on an ongoing basis across sequential digital projects to maintain acquired best practices

Buyers should:

- Determine whether vendor teams are organized vertically (life science). This will ensure that vendor leadership is aligned with industry-specific needs and that future development will be aligned with life science industry needs.
- Consider each vendor's breadth of service offerings, especially in the sales and marketing space; pricing flexibility; and willingness to share risk for project outcomes.
- Be sure that functional and technical requirements are signed off by all stakeholders within your organization by involving them early in the specification process.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### IQVIA

IQVIA is positioned in the Leaders category in this IDC MarketScape for worldwide life science sales and marketing IT outsourcing services in 2022.

For the life science industry, IQVIA offers ITO solutions and hosted services for sales force automation, CRM, data management, marketing analytics, business intelligence, MDM, predictive modeling, incentive compensation management, social media analytics, key opinion leaders , call center, enterprise mobility, digital asset management, aggregate spend compliance, system validation, and others.

IQVIA was established in 2016 with the merger of IMS Health (founded in 1954) and Quintiles, a contract research and services organization founded in 1982. IDC estimates that IQVIA derives about 70% of its revenue from the life science industry, with about 30% of this revenue coming from the sales and marketing areas. In 2017, IQVIA acquired HighPoint Solutions, a service provider and systems integrator specializing in life science sales and marketing engagements. Further:

- **Life science employees:** Approximately 25,000 IQVIA employees, including 1,100+ at HighPoint
- **Total life science customers (current, 2022):** 275+
- **Life science sales and marketing ITO demonstrated categories:** >50
- **Global support:** 125 offices, all major regions
- **Industry focus:** Highly concentrated in life science sales and marketing

### Strengths

IQVIA has broad offerings in life science IT outsourcing and has a major presence in life science sales and marketing through OneKey provider reference solutions, prescription data solutions, Orchestrated Customer Engagement (OCE), a CRM and multichannel engagement platform for the life science industry, and several other life science data and consulting practices, in addition to HighPoint. IQVIA recently introduced its Human Data Science Cloud, which offers cloud-based harmonization and globalization of internal and external life science sales and marketing data. IQVIA is well positioned to leverage its data and analytics capabilities with a growing suite of software platforms and services.

### Challenges

Although IQVIA has a major presence in data and software for the industry, it should consider growing its consulting and service provider/integrator workforce. IQVIA may leverage its data and software platform strength into higher growth in the life science integration project business.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and

interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

For the purposes of this study, ITO in life science sales and marketing includes all staffed or hosted services including, but not limited to:

- Sales force automation (SFA)
- Customer relationship management (CRM)
- Analytics
- Business intelligence
- eDetailing
- Sales and marketing infrastructure outsourcing
- Predictive modeling
- eLearning and training solutions
- Customer (HCP/HCO) master data management (MDM)
- Incentive and compensation management
- Social media analytics
- Key opinion leader (KOL) management
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- Closed-loop marketing (CLM)
- Multichannel marketing optimization
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  - Customer segmentation and targeting

## LEARN MORE

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### Related Research

- *IDC FutureScape: Worldwide Health Industry 2022 Predictions* (IDC #US47231021, October 2021)
- *IDC MarketScape: Worldwide Life Science Sales and Marketing BPO Services 2021 Vendor Assessment* (IDC #US41433617, August 2021)

- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2021: Life Sciences* (IDC #US47235121, August 2021)
- *The Future of Intelligence for Life Sciences: Transcending Boundaries* (IDC #US47730821, June 2021)
- *U.S. Life Science Top 10 Market Trends for 2021* (IDC #US46583321, February 2021)
- *IDC MarketScape: Worldwide Life Science Sales and Marketing Digital Transformation Services 2020 Vendor Assessment* (IDC #US42724918, December 2020)

## Synopsis

This IDC study provides an assessment of 11 vendors offering IT outsourcing solutions for sales and marketing processes in the life science industry. Digital transformation is occurring at a rapid pace in life science companies, including in the sales and marketing space. Data from internal and external sources is being collected in the cloud, and this information is being leveraged by sales and marketing groups to improve speed, efficiency, and effectiveness in reaching customers, including both healthcare providers and patients. Tools such as AI, advanced analytics, and orchestration of multiple tasks and roles utilizing data from multiple sources are accelerating change in 2022 and beyond and helping expand the scope of business processes suitable for outsourcing to qualified vendors.

Mike Townsend, research director for Life Science Commercial Strategies at IDC Health Insights, says, "Life science companies are embracing digital transformation efforts within sales and marketing, which can connect stakeholders such as sales representatives, marketing and medical affairs executives, doctors, patients, and payers using a wide variety of digital technologies, including AI, cloud computing, mobile technology, and social media and analytics, and leveraging a host of internal and external data sources. Highly experienced vendors are offering increasingly sophisticated ITO models for processes leveraging these technologies while allowing these companies to focus on their core competencies. Life science companies will continue to see improved outcomes, growth, and productivity as they free their organizations to focus on core innovation and business cases, using these offerings to improve outcomes for doctors and patients alike."

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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