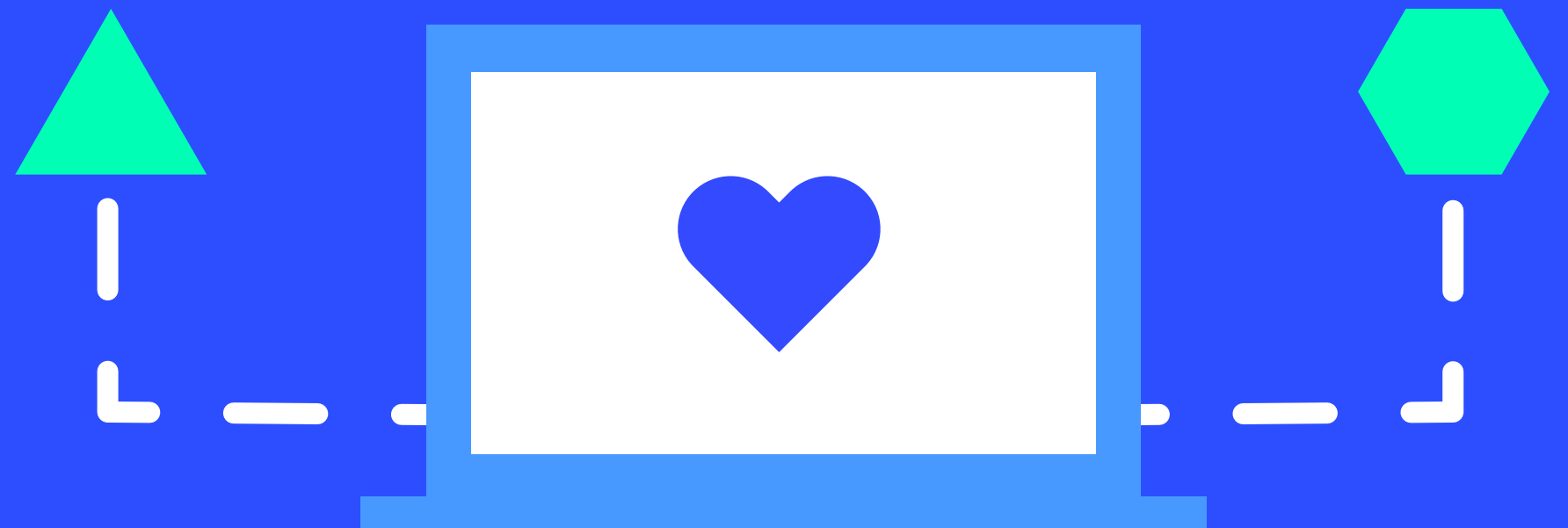


PROPHET

# Transforming Healthcare

The State of Digital Marketing  
and Selling in Life Sciences

Jeff Gourdj  
Paul Schrimpf  
Christine Arbesman  
Claire Bennett



# Executive Summary

Even before the onset of the COVID-19 pandemic, the lines between marketing and sales were blurring at most healthcare and life sciences organizations. The remote working environment accelerated the integration of digital marketing and digital sales, both in terms of strategic alignment and tactical collaboration.

This was a matter of necessity, given that in-person meetings between physicians, hospital administrators and salespeople dropped considerably in the wake of the pandemic. Specifically, face-to-face interactions dropped by 69% in the US, 59% across Europe and 56% in Japan, according to sentiment surveys of healthcare professionals (HCPs) conducted by Sermo in 2020. Further, most HCPs expect to have fewer representative meetings after the crisis.

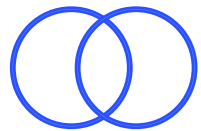
Altimeter's 2020 [State of Digital Marketing](#) and [State of Digital Selling](#) reports identified and quantified salient trends and key practices being used by companies to achieve excellence in both functions. This report analyzes the results for the healthcare and life sciences sectors, with additional insights provided by follow-up interviews conducted with marketing and sales leaders from diverse organizations.

Our research consistently showed the important role cross-functional teamwork plays in digital marketing and selling success. Doing business digitally benefits organizations that use technology to achieve efficiency and scale; but it also lays bare organizational silos and sub-par processes that can degrade the customer experience and complicate handoffs between marketing, sales, and customer

service. And it certainly underscores the unique challenges in healthcare and life sciences marketing and sales.

Marketing and sales leaders recognize how "getting more digital" will help personalize interactions and experiences, boost engagement and enhance their ability to meet customer needs. They also understand the need to collaborate more frequently and systemically on all things digital. Thus, there is every reason to believe the steady improvement of marketing and sales collaboration during the last few years will increase in the near term.

# Key Findings



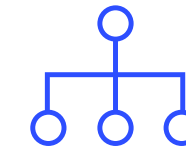
## Marketing and Sales Teams Have Overlapping Priorities

Where once sales and marketing had distinct priorities and clearly defined roles, they overlap to a much greater degree today. There is more consensus and mutual support for both high-level objectives (e.g., revenue growth, customer engagement and satisfaction) and tactical collaboration (e.g., developing and sharing content on the latest medical research and mapping customer journeys). Where gaps and non-alignment exist, sales and marketing leaders are clearly aware of them and motivated to take action.



## Digital Forced a Boost in Collaboration

Marketing and selling have always been “team sports” but life sciences organizations have unique challenges in expanding digital capabilities given the prevalence of in-person sales (e.g., at hospitals and in doctors’ offices) and the high regulatory bar. In the last year, with nearly every customer touchpoint going virtual, sales and marketing teams were forced to work together more closely. Collaboration is increasing with other business functions, too, including sales, product development and IT.



## Teams Back From Shared Goals

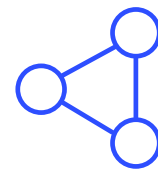
Despite overlapping priorities, longstanding tensions between the two functions persist at many companies. For instance, sales teams cherish their relationships with physicians and hospital executives and believe marketing may be “one-directional” in putting content and messages in the field that sales teams must explain. These issues can — and must — be overcome. Finding specific use cases and processes where collaboration can create momentum toward shared goals is a promising place to start. Customer segmentation, campaign design and content personalization are high-priority capabilities where both digital marketing and selling teams can make meaningful contributions and reap significant benefits.

# Key Findings



## Reorganization Around Capabilities Boosts Alignment and Growth

Technology and talent are other potential points of coordination. Most healthcare and life sciences organizations have powerful marketing and sales technology in place but aren't using the tools to the greatest effect or to the full extent of their functionality. Having the right digital talent can help boost technology ROI and improve performance, but such talent is scarce. To bridge the skills gap, more leading organizations are establishing centers of excellence or shared services for specific capabilities (e.g. digital campaign management and content development). They are also finding such structural changes can help boost alignment and drive organizational change.



## Life Sciences Organizations Face Unique Barriers to Executing Multichannel Capabilities

While nearly all organizations aim for multichannel or omnichannel capabilities, most are still taking foundational steps to realize the vision. Again, the strength of face-to-face channels and a strict regulatory environment present unique barriers. In many cases, data for tracking cross-channel engagement is not yet available. In others, the back-end technology is not yet integrated.



## Organizations That Fail to Adjust Their Go-To-Market Approach Will Lose Customers

COVID-19 accelerated digital transformation at many healthcare and life sciences organizations. Building on pre-pandemic efforts and the substantial gains of the last year, transformation programs will continue to expand, though in some cases budgets have been squeezed.

Transforming digital marketing and selling functions to become growth engines.

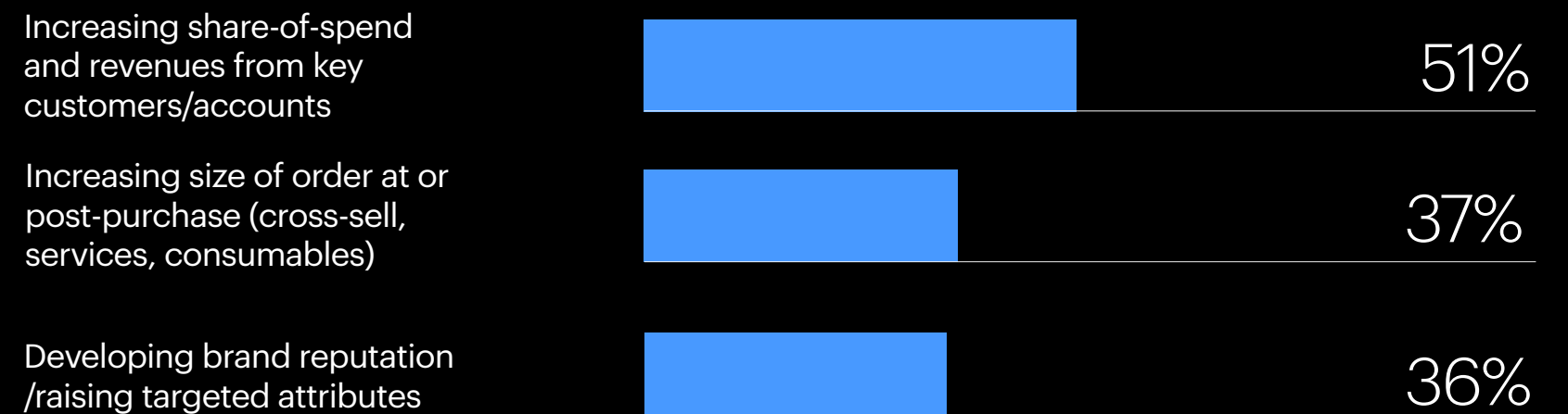


# Marketing and sales are largely aligned on objectives and priorities.

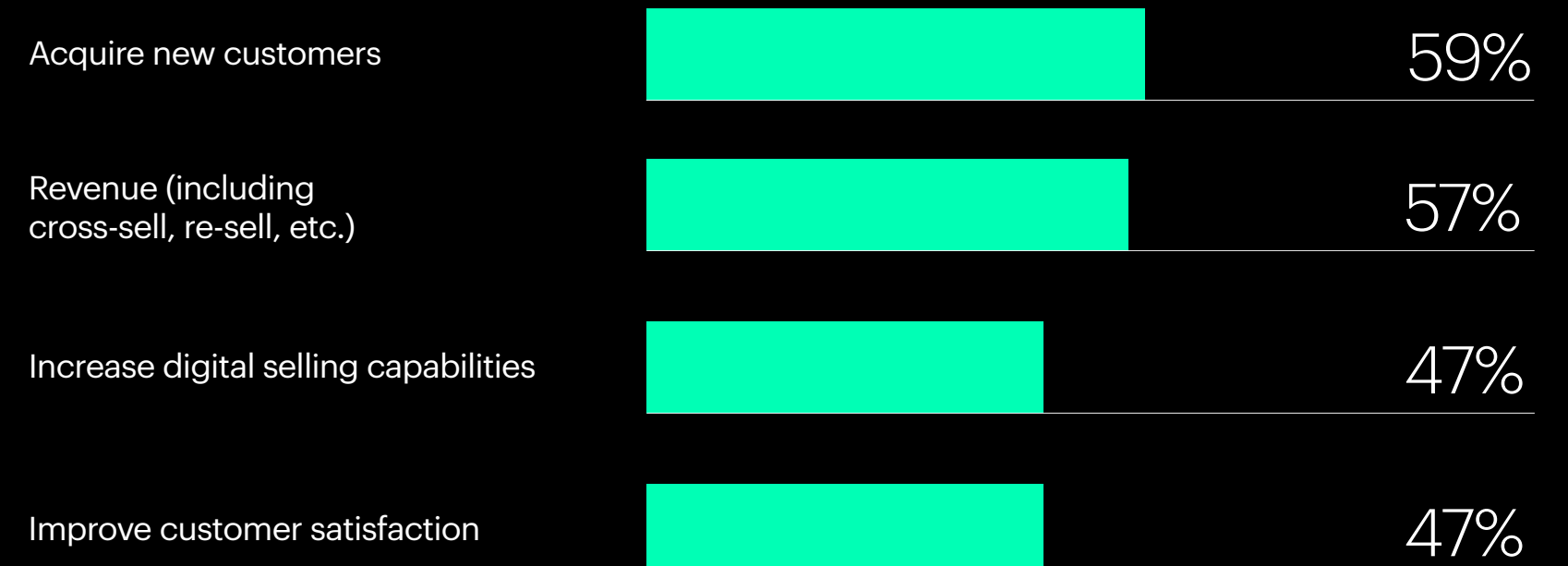
Both marketing and sales are prioritizing growth —with digital marketers focused on increasing share-of-spend and revenues from key customers and accounts. Sales leaders want to acquire new customers, though boosting revenue through cross-selling, up-selling and re-selling is a very close second. They see stronger digital selling as essential to achieving those goals. The emphasis on customer satisfaction further confirms that sales leaders recognize the need to build on existing relationships.

This trend toward greater alignment has been underway for years and across many different sectors. The appointment of C-level leaders (e.g., Chief Revenue Officers, Chief Growth Officers, Chief Customer Officers) with broad remits have helped clarify the overlap between marketing and sales goals. GlaxoSmithKline, Sanofi, Eli Lilly and Company, Johnson & Johnson and CVS Health are among the organizations that have adopted such titles.

## DIGITAL MARKETING OBJECTIVES (HEALTHCARE AND LIFE SCIENCES ONLY):



## DIGITAL SELLING OBJECTIVES (HEALTHCARE AND LIFE SCIENCES ONLY):






This does not necessarily mean marketing and sales functions should be fully merged on the organizational chart. Rather, the trend reflects “a mindset change around the value of true collaboration between marketing and sales,” according to Michael Klozotsky, chief marketing officer, Intelligent Medical Objects.

Some organizations have also adjusted incentive compensation packages to optimize for overall outcomes and reduce the risk of working at cross-purposes. The metrics are merging even if the capabilities and requirements for success remain separate.

One marketing leader highlighted the value of collaboration, particularly when needs and objectives vary across product lines. For a high-growth business unit of Intelligent Medical Objects, a healthcare data enablement company

and provider of clinical terminology, the sales teams asked the marketing team to adjust its proprietary lead-scoring formula so sales reps received more leads sooner, even though they were less qualified. Loosening the strict qualification process required by more established lines of business was a win-win in that leads moved through the funnel more quickly and sales got what it wanted from marketing. “Marketers going at it alone on segmenting and lead management can be an unwise choice,” said Klozotsky.

Of course, at other companies, fewer but more qualified leads may be the priority. In either case, the key is to ensure that sales and marketing work together to define the best approach.

A man with a beard, wearing a blue and red plaid shirt, is sitting at a desk in a modern office. He is looking at a laptop screen and has his hands on the keyboard. In the background, there is a small round table with a potted plant and another laptop. The office has large windows with sheer curtains, letting in natural light.

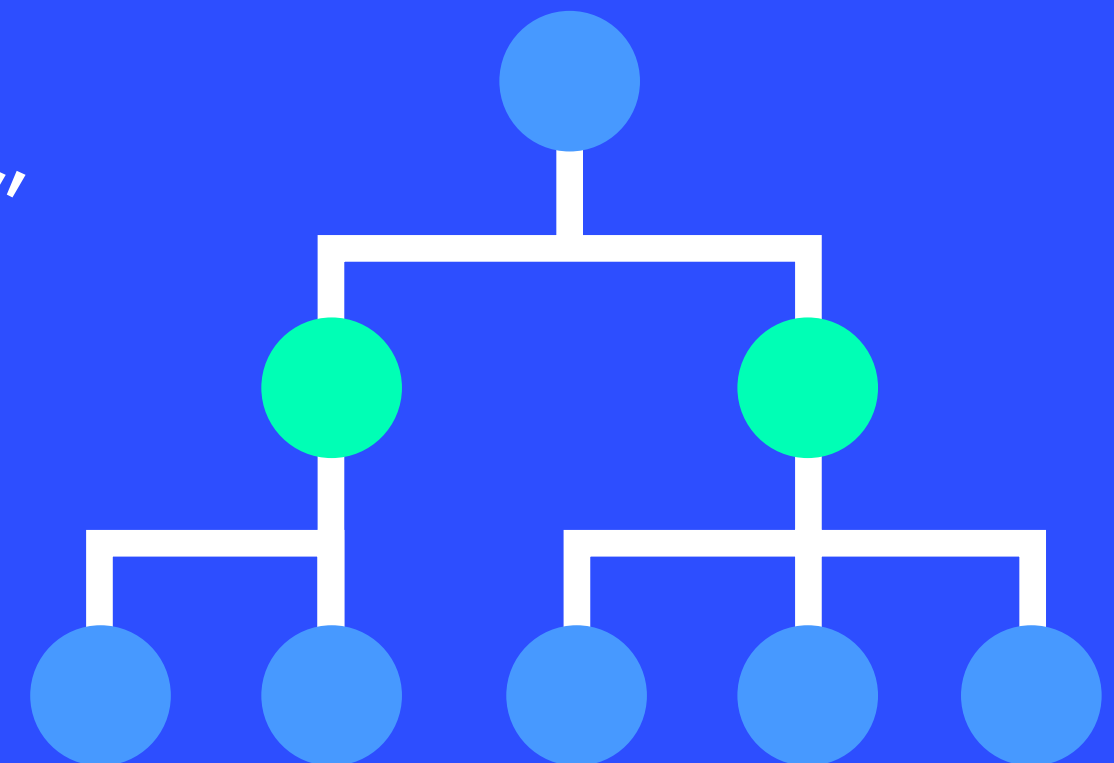
“If we think about everything through the lens of growth and revenue, we stop seeing things handed off from silo to silo and can move toward being part of the same river. Then we’ll see real change.”

Michael Klozotsky  
Chief Marketing Officer,  
Intelligent Medical Objects



“The change has to be both top-down and bottom-up. Once strategies are agreed on, there has to be joint accountability among country and business leaders to drive change through their organizations and help salespeople understand that the change is enabling and not a threat.”

Fiona Garin  
VP Strategic Marketing, EMEA,  
BD

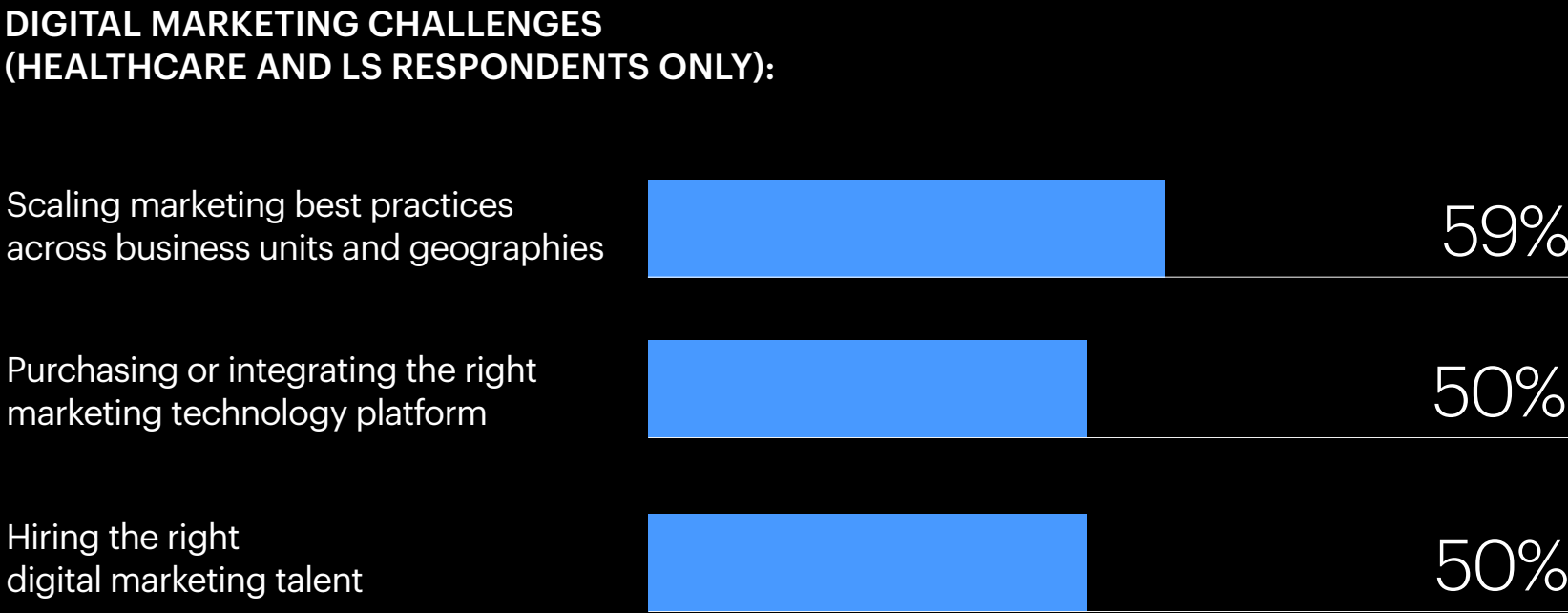




# Tech and talent are significant challenges.

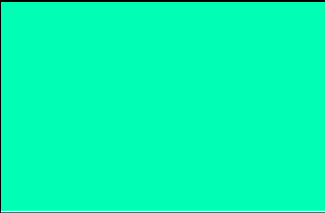
Nearly 60% of digital marketing leaders see scaling best practices across the business as their top digital marketing challenge. Standardized processes and integrated technologies will be key to overcoming it. For pharmaceuticals, those best practices include streamlining review and compliance processes, optimizing the mix of branded and non-branded content and enhancing multi-channel engagement capabilities.

Access to the right talent and right technology were the next most common challenges, which confirms the intersection of these issues. In fact, the most common technology-related challenge cited by marketing leaders was “lack of skills to operate,” well ahead of “budget” and “integration.”



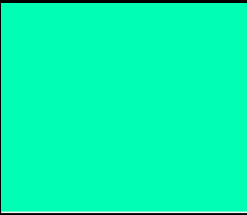
DIGITAL SELLING CHALLENGES  
(HEALTHCARE AND LS RESPONDENTS – ONLY ONE  
CHOICE SELECTED):

**People:** Having people with the right skills, incentives, processes and teams aligned for selling success, as well as leadership alignment on digital selling strategy



33%

**Customer Experience:** Providing buyers the most effective digital experience while maintaining relationship quality typical of personal interaction



25%

**Data:** Having adequate, consistent data and metrics to enable decision-making, promote seller success and provide ROI for digital selling investment



25%

Sales leaders also see skills and talent as a top concern, along with leadership alignment on digital selling strategy. Digital skills development efforts in healthcare sales teams also showed poor results relative to other sectors (25% vs. 36%). Interestingly, more mature digital selling organizations cite technology as their top challenge. The implication is that even top performers feel they are falling short with technology (e.g., sales force automation systems). In the past, salespeople often relied on simple spreadsheets to manage the pipeline; today, however, they rely on complex tools that require significant data inputs to show value. The steep learning curve may impact productivity in the short term.



Scarce talent is a challenge that sales and marketing leaders can address jointly. For example, rotation plans can provide digital marketers with assignments within sales teams and vice versa with the goal of boosting long-term alignment and strengthening relationships. Some companies establish centers of excellence for specific tasks or sub-processes where talent is particularly hard to come by. One European pharmaceutical company centralized its marketing and communications talent in a center of excellence to ensure consistent messaging and experiences across different national markets and product lines.

Critically, the change was supported by strong leadership and robust change management to ensure the change took hold. This organization's success demonstrates why such operating model adjustments are an increasingly common tactic in larger healthcare organizations.

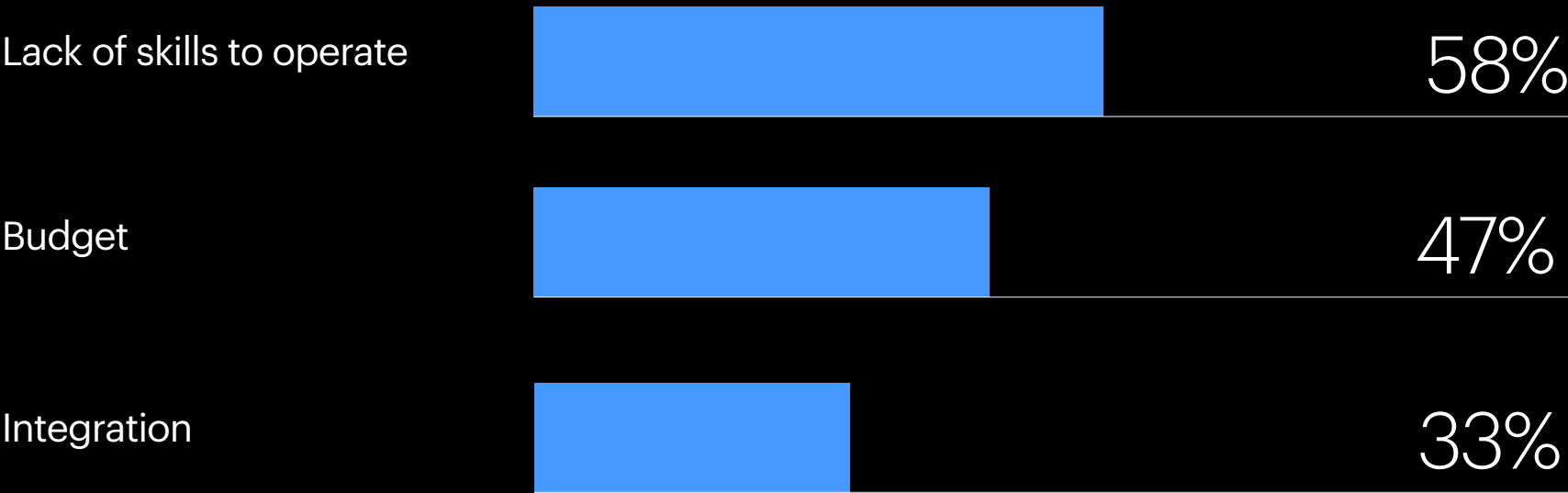
“There are more tools than one can possibly buy, but they’re only as good as the people who wield them, if they know how to take the insights from those tools and apply higher-order thinking.”

**Michael Klozotsky**  
Chief Marketing Officer,  
Intelligent Medical Objects





DIGITAL MARKETING – CHALLENGES TO USING TECHNOLOGY (HEALTHCARE RESPONDENTS ONLY):



Healthcare and life sciences companies under-index in the use of enabling tech cross-functionally compared to other industries. Less than 60% of firms have integrated CRMs and marketing platforms, for instance. These lagging numbers are a function of the need for more extensive technology integration. In our interviews, marketing and sales leaders spoke of “connecting the pipes” and “putting together the tech puzzle pieces.”

Several firms are using technology to streamline medical, legal and regulatory review processes to accelerate time to market. Others have automated internal compliance reviews by creating a database of approved claims that can be linked and inserted directly into marketing materials. These focused applications can yield surprisingly large gains in efficiency and effectiveness.

STATE OF TECH AND DATA INTEGRATION (ALL RESPONDENTS)

57%

of respondents said that their CRM (e.g., Veeva, Salesforce) is integrated with their company’s digital marketing platform (e.g., Marketo, Pardot) and there is rich data flow between the two.

63%

of respondents said that sales, marketing and service/support collaborate to put in place a technology roadmap for how digital tools and data will integrate over time.

69%

of respondents said that “When it comes to data I trust, I prefer Account Sales Intelligence vs. Digital Marketing data.”

“We are adopting the most recent technologies, but changing the mindset and having a digital mindset is as important as the tech itself.”

Nico Gariboldi  
Senior Director of the Global Digital and Technology Hub, Pfizer



# Organizational silos and legacy issues continue to challenge many organizations.

Increased integration and collaboration between marketing and sales is a function of increased digitization within both functions. But healthcare—and life sciences in particular—was generally slower than other sectors in digitizing both functions. Even post-COVID, legacy territorial issues continue to challenge some healthcare organizations and the old cliché about sales not trusting marketing (and vice versa) still applies at many firms.

## DIGITAL MARKETING VIEWS ON COLLABORATION (HEALTHCARE AND LIFE SCIENCES ONLY)

Feedback and collaboration are periodic, software-enabled (e.g., supported by structured CRM data both teams can understand), and result in manual updates



43%

Feedback and collaboration are periodic and conducted through structured in-person conversations that result in manual updates



33%

Feedback and collaboration are ad hoc, conducted through unstructured in-person conversations that result in manual updates



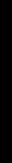
12%

Feedback and collaboration are regular and software-enabled (e.g., supported by structured CRM data both teams can understand), and disconnects are resolved automatically through algorithms



11%

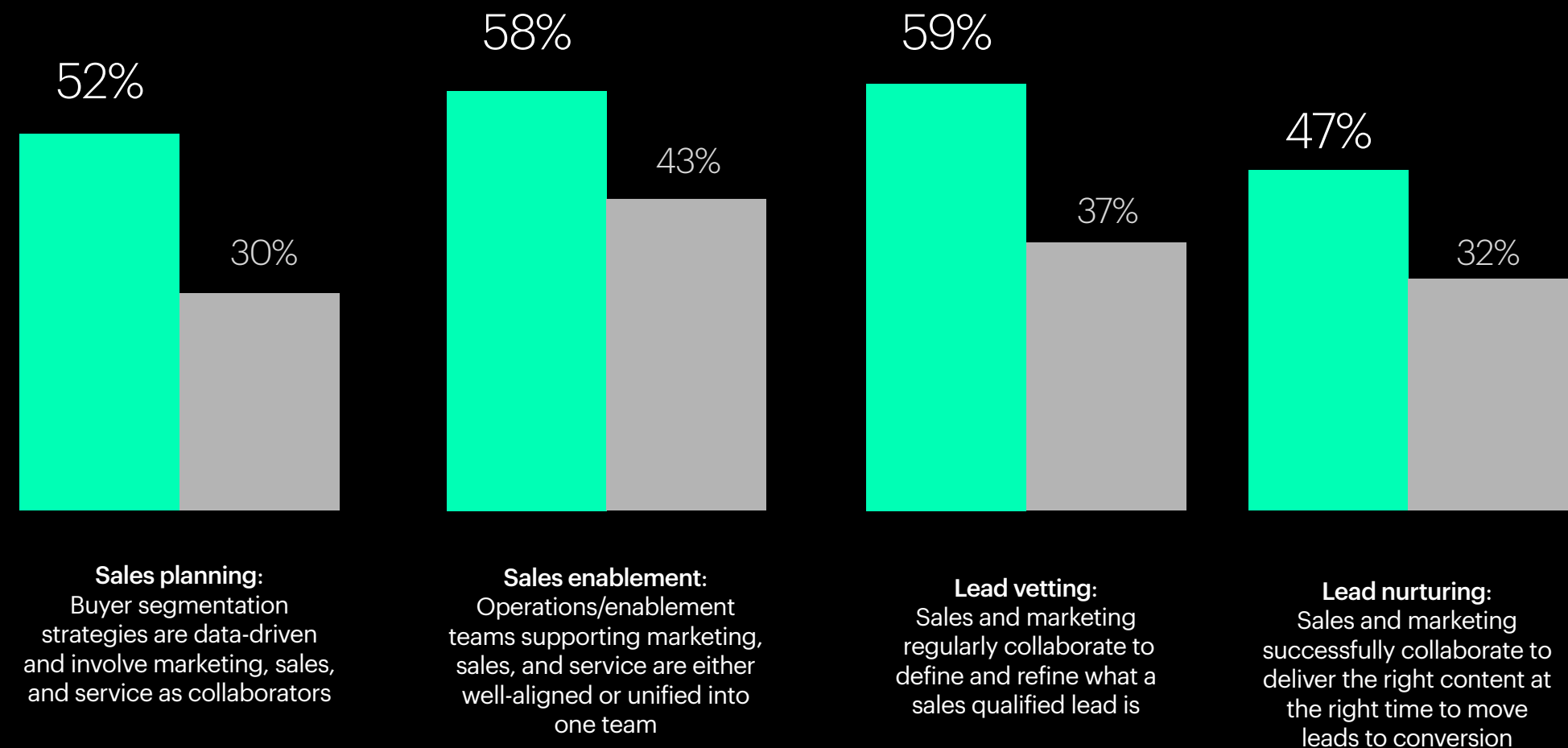
There is currently little or no collaboration/coordination between marketing and sales teams



1%

## WHAT TOP-PERFORMING DIGITAL SELLING ORGANIZATIONS DO (ALL INDUSTRIES):

■ = Industry average



Collaboration currently takes multiple forms and is largely tech-enabled, but ample improvement opportunities remain. In our overall research, healthcare shows low maturity in cross-functional collaboration between sales and marketing compared to the average of other sectors (31% vs. 54%). Looking at specific processes and activities, healthcare lags in cross-functional teamwork to meet sales plans (26% vs. 43%).

Our research shows that healthcare executives are less likely than their peers in other sectors to say marketing, sales, and service align on sales plans and remain active collaborators throughout the customer lifecycle (22% vs. 34%). The unique traditions of the sales detail in life sciences and hospital visits to demo medical equipment no doubt account for some of the gap, which also indicates a correlation between collaboration and higher levels of digital selling performance.

**“Sales teams are understanding more and more the value of multiple touchpoints for their customers, who want and receive digital info and content from other sources.”**

**Nico Gariboldi**  
Senior Director of the Global Digital and Technology Hub,  
Pfizer





Marketing and sales leaders are certainly aware of the need for cross-functional alignment. More than 80% say they regularly assess the effectiveness of their teamwork to meet sales plan objectives. While that may be good news, only 60% of sales leaders view the value marketing provides as essential, an exceptionally low proportion given the necessity of working digitally today. That 76% of sales leaders say that marketing, sales and service perform well as a team in providing real-time data intelligence on prospect activity (e.g., prospect reading content or clicking on an ad) is more encouraging.

Michael Vinson, Executive Client Director at GE Healthcare, described future success as, “sales embracing tech and omnichannel, which is the future, and marketing getting better at customer outreach, data gathering and demand creation in a digital format.”

# 60%

of sales leaders viewed the value marketing provided as essential.

Another opportunity for marketing to add value is to evolve and enhance its listening capabilities. That means tuning in across all channels and around the clock for clues about interested prospects—who they are, what their concerns and priorities are, what information they seek and when they may want to interact for more detail. Such powerful, real-time demand sensing translates into powerful sales insights that drive effectiveness and efficiency, as well as improving the relevance and timeliness of response. It also, over time, strengthens the organization’s ability to target content and messaging.

# 76%

of sales leaders said that marketing, sales and service perform well as a team in providing real-time data intelligence on prospect activity.

“Marketing says, ‘We know the plan, now you need to execute it,’ which causes issues with sales, which says, ‘You have no clue who my customer is!’”

Altaf Shamji  
Commercial Consultant,  
Mirati

**MIRATI**  
THERAPEUTICS

# There are many opportunities to increase collaboration and integration.

To catch up to other sectors in digital marketing and selling capabilities and navigate sector-specific complexities, healthcare and life sciences organizations need to increase integration and collaboration. Automation of funnel activities and personalization of content are impossible without marketing and sales working together closely, especially given the unique difficulties and regulatory challenges of content development in life sciences.

Our interviews confirmed that marketing and sales leaders want to collaborate more, building on the gains of the last year. The many potential areas of collaboration include journey mapping, sales planning, sales enablement, lead management and account-based marketing (ABM). There is also room for more coordination in building technology roadmaps and promoting trust and confidence in data sets.

Regarding ABM, Klozotsky of Intelligent Medical Objects said, “Marketers can send out as much swag as they want, but if you don’t have sales as a partner, you won’t find the right kind of success.” Getting it right can produce real benefits. Consider how top performers, within sales planning, excel at cross-functional alignment and embrace data.

Customer-centricity is one way to promote more integration. After all, customers — especially prescribers and hospital administrators — see one company and brand, not separate functions. Pfizer’s Gariboldi described how “integration and alignment maximize the experience for customers who get messages from many different touchpoints,” including sales, the website, advertising and other sources.

“We have to work more closely to uncover and anticipate needs much earlier in the entire customer journey. And we need to develop jointly holistic metrics across the journey, not fragmented analytics for one sales call or marketing interaction.”

Fiona Garin  
VP Strategic Marketing, EMEA,  
BD





Claudia Adreani, Director of Customer Excellence at Boehringer Ingelheim, said “We can’t assume to know whether customers want to meet in-person or via digital. We must give them options and track their choices for insight.”

There is clear upside in unifying the marketing and sales perspectives around customer needs. “We want to anticipate customer needs by truly understanding suboptimal interactions and pinpointing where drop-offs occur or leads are lost between marketing and sales,” said Garin of BD.

Alignment takes more than sharing data and technology platforms. Some leaders invest time in regular status and “touchpoint” calls with their counterparts in sales. At a global pharma company, marketers continue to “ride along” with sales representatives even on virtual calls with customers. Another marketing leader considers “more dynamic and actionable conversations” with sales teams to be a leading indicator of a healthy cross-functional relationship. These comments suggest that both new technology and good old-fashioned communication are part of the solution.

“We are having honest conversations about the gaps that exist and how to solve them. We are all trying to do the right thing for patients and HCPs so everyone is on the same page.”

**Lisa Plimpton**  
Senior Director of US  
Commercial Omnichannel  
Strategy and Field Excellence,  
Alexion



# COVID reinforced the need for digital transformation plans and integration.

Digital sales and marketing teams are mostly moving forward with transformation plans. In many cases, they are building on pre-pandemic efforts and the substantial gains of the last year. More than a fifth of marketing leaders say they have accelerated their transformation plans, with another 30% saying transformation plans were not affected by the pandemic. However, 26% said transformation investments were decreased as a result of the lockdowns, meaning transformation teams will have to do more with fewer resources.

# 80%

of leaders in healthcare said the pandemic increased their use of digital selling, with nearly two-thirds expecting to adopt digital selling faster than planned.

## COVID IMPACT ON DIGITAL MARKETING TRANSFORMATION (HEALTHCARE AND LS RESPONDENTS ONLY –AGREE/STRONGLY AGREE):



More than 80% of sales leaders in healthcare said the pandemic increased its use of digital selling, with nearly two-thirds expecting to adopt digital selling faster than planned. Of course, most healthcare organizations were seeking to adopt more digital selling techniques before 2020, if only to stay connected to increasingly distracted customers.

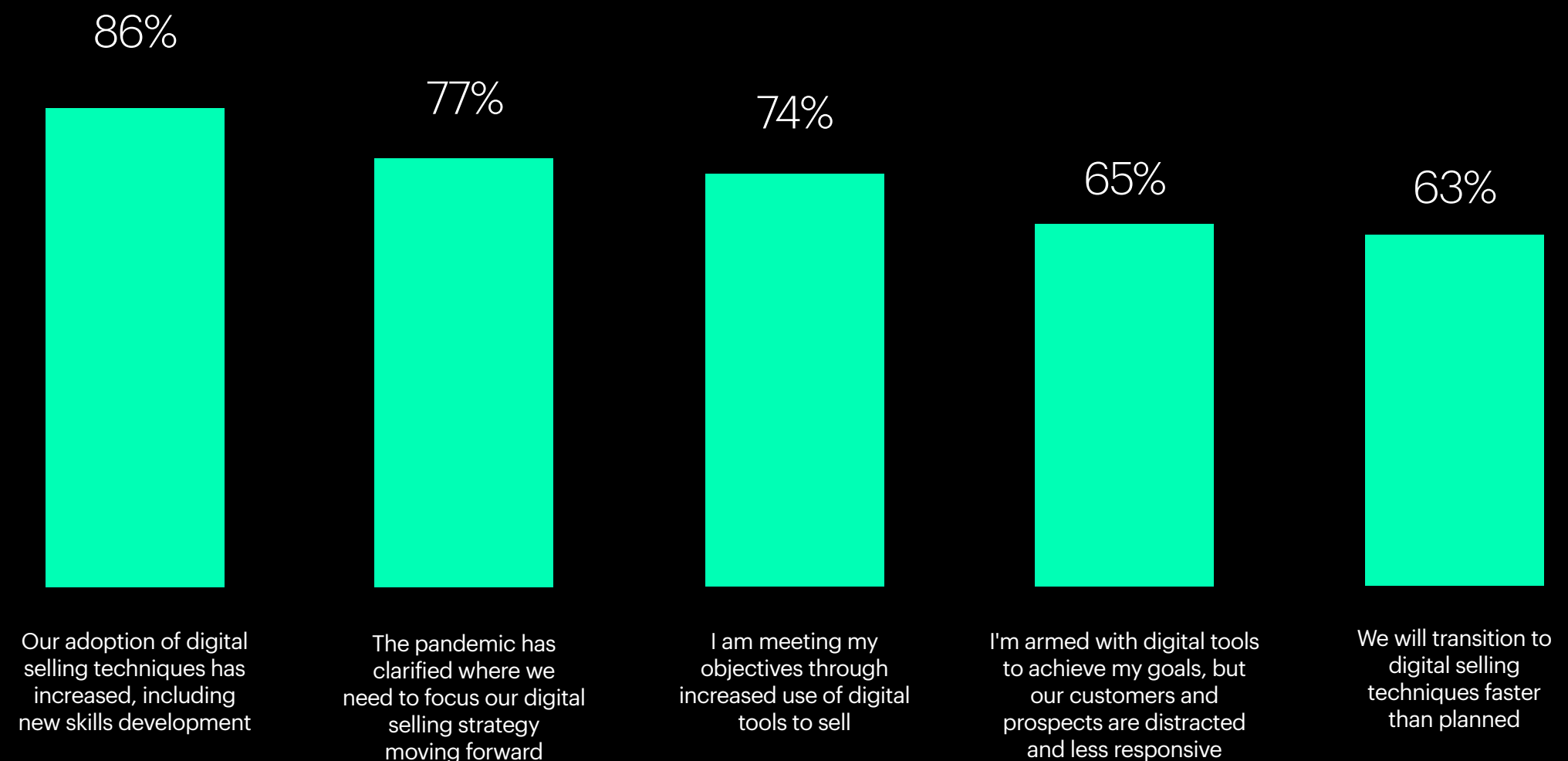
At one global pharma specializing in rare diseases, the shift to all-digital selling and remote working in early 2020 represented a major shift for what was always a face-to-face culture. However, sales reps quickly saw the value of digital content, including non-branded research reports, that helped educate their customers.

“The pandemic forced early adoption of omnichannel and digital, but leadership was able to push through tons of front-line resistance in sales because customers required it.”

Michael Vinson  
Executive Client Director,  
GE Healthcare



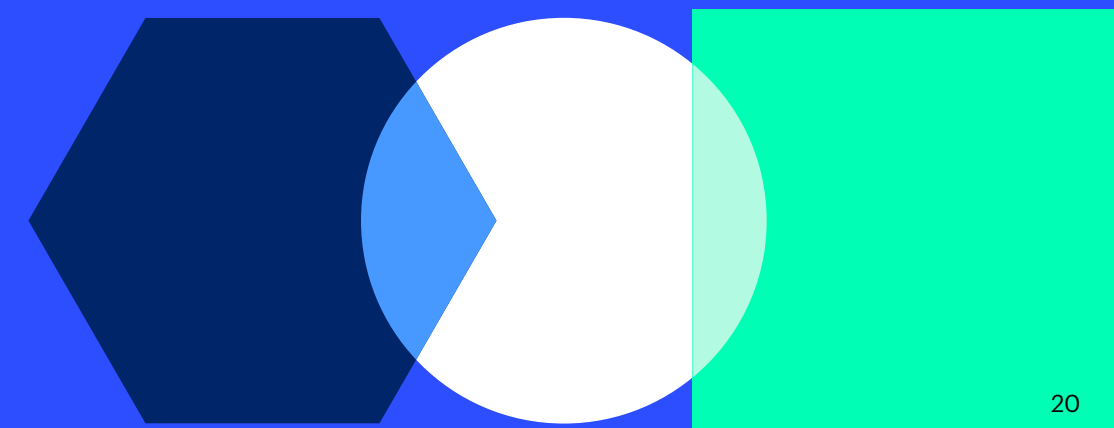
# COVID-19 IMPACT ON DIGITAL SELLING TRANSFORMATION (HEALTHCARE AND LS RESPONDENTS ONLY – AGREE/STRONGLY AGREE):





“As our field force goes back to in-person visits, the big open question has been how our customers will react. We are taking a hybrid approach based on HCP preference that includes both face-to-face and virtual engagements, and our reps continue to assess the right balance.”

**Lisa Plimpton**  
Senior Director of US Commercial  
Omnichannel Strategy and Field Excellence,  
Alexion





In late 2019, Boehringer Ingelheim's Director of Customer Excellence Claudia Adreani set a goal to achieve 50% digital customer engagement by the end of 2020 and faced skepticism. Just a few months later, marketing and sales were 100% digital. "If the pandemic had happened 10 years earlier, it would have been a much harder transition, but we had remote training and other basic digital capabilities in place," she said. "However, now we are faced with optimizing our engagement and conversion and supporting those who have encountered challenges in transitioning to remote engagement."

The advantages of digital marketing and digital selling are becoming clearer. Firms are gathering the data to enable true multi-channel engagement. They are adopting new AI-based tools to track the content of remote sales calls to gain new insights into customer preference. They have new visibility into what makes for effective content. They are refining their digital experiences to better support different types of customers and products. Such gains will lead to expanded transformation programs.

Generating strong returns from these investments requires a holistic approach that addresses organizational talent, and process factors, in addition to leveraging advanced technology. When it comes to technology, long-term thinking is required.

As Shamji, the consultant at Mirati, told us, "Everyone loves to talk about digital transformation, but wants to jump right to the execution rather than building the necessary infrastructure." That infrastructure includes not just sound investments in technology, but also adjustments to the operating model and a strategic focus on the new and upscaled capabilities transformation can deliver.

Organizational factors, leadership and change management have a significant role to play as well. BD's Garin told us that one of the examples of transformation within a business was "a marketing leader who was innovative, bold and willing to drive the change and make the decisions to reinvest in the digital journey and streamline structure." Changes to the operating model will go hand-in-hand with transformation programs.

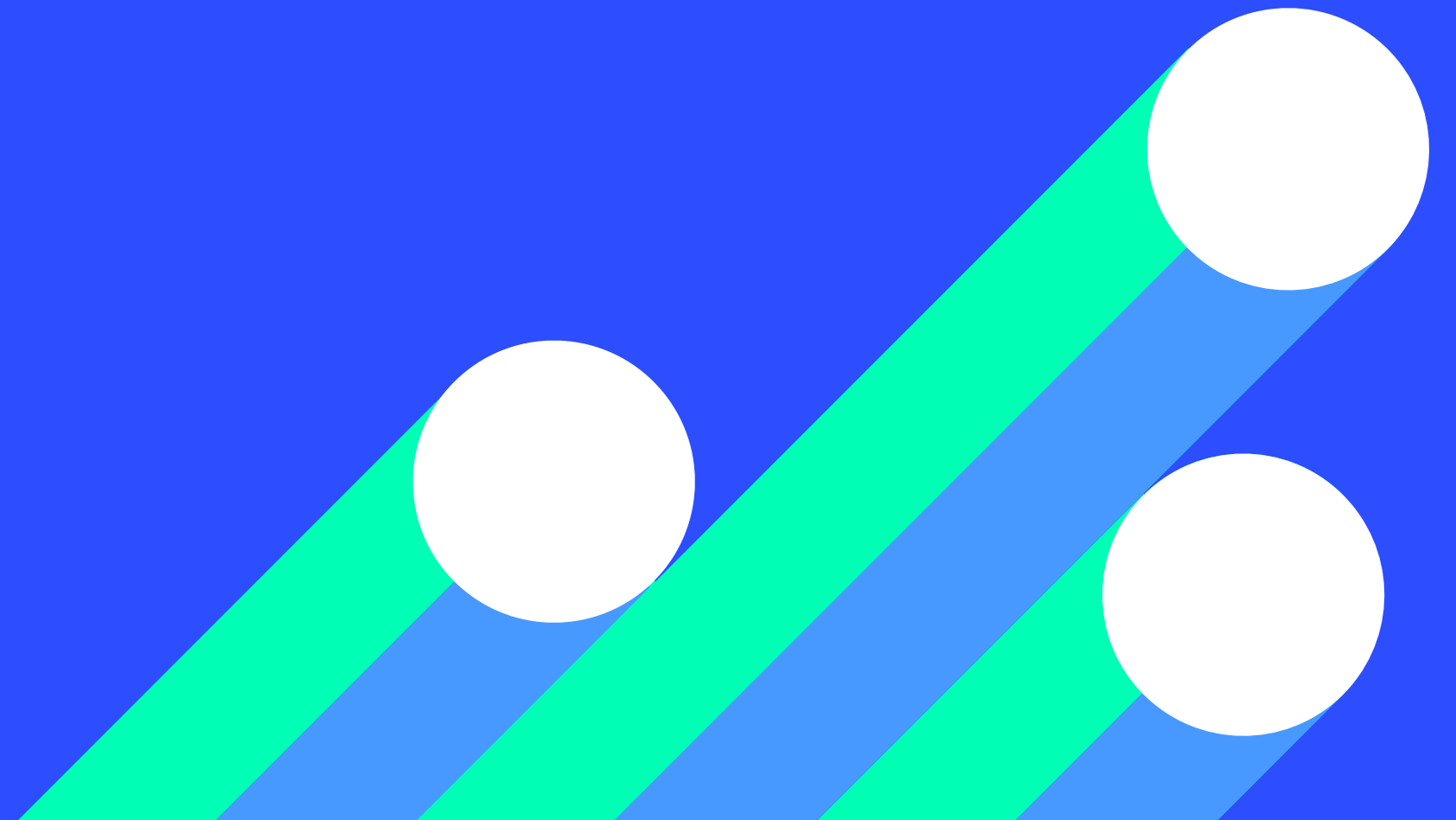
Looking ahead, the speed of digital marketing and selling means today's breakthrough innovations will scale up rapidly to become business-as-usual and standing operating procedures in the near future. The most effective approaches will ensure that the efficiency and flexibility of digital will be balanced with the human aspect of key customer relationships.

"There is a risk of reverting back to the assumption that face-to-face is best after the pandemic."

Claudia Adreani  
Director of Customer Excellence,  
Boehringer Ingelheim

# Key Recommendations: Moving Forward for Better Outcomes

Given the fast-moving nature of digital marketing and selling, there is a lot that senior leaders can do to advance the state of integration between these two critical functions. Based on the results of this study, we make the following recommendations to digital marketing and digital sales leaders and teams seeking significant performance gains or planning major investments or initiatives.







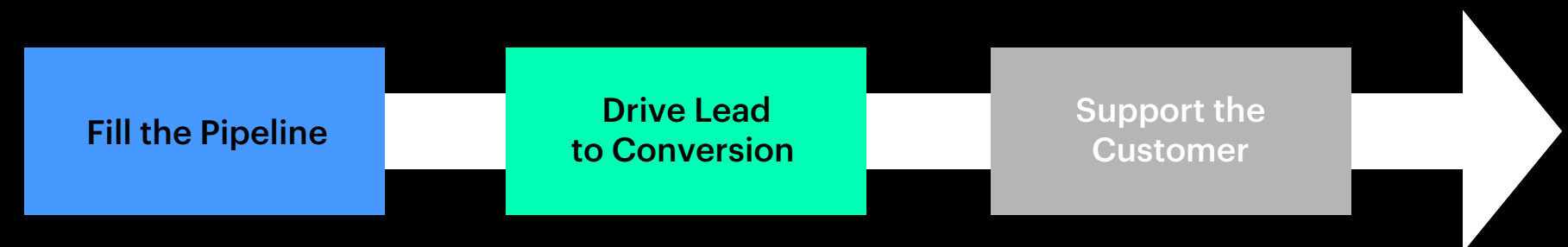
## 1. Choose the right sandbox for collaboration

Specific use cases that offer tangible improvement opportunities are strong candidates for increased integration between marketing and sales. Executives may focus on steps in the customer lifecycle where responsibilities are not clearly defined or where handoffs can be bumpy. When marketing prepares communications about a new research finding, for instance, they should ensure sales is looped in so they can provide context as they share or follow up with customers and prospects.

Alternatively, single product lines or geographies may be good candidates for piloting new collaboration approaches. Coordinating on the deployment of new technology in support of cross-functional processes is another avenue to explore new ways of working together.

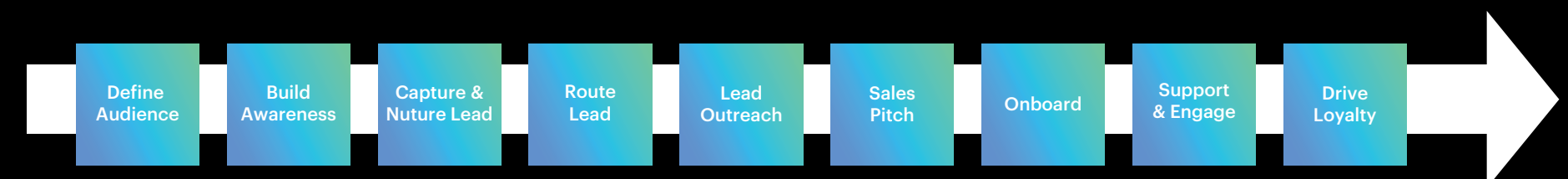
In many organizational models, marketing and sales teams play separate and sequenced roles in the sales process.

■ Marketing ■ Sales ■ Unclaimed



In the digital era, sales and marketing teams must partner throughout the full funnel to drive a customer's buyer journey.

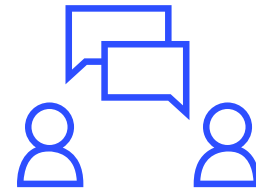
■ Marketing ■ Sales





## 2. Share data repeatedly and in real time

Every marketing and sales executive is looking for deeper customer understanding, but potentially valuable insights may be concealed when data is left stranded in standalone systems. Top performers are more likely to operate from common data sets and share data more extensively. Lead performance data, campaign results and third-party market data are just a few examples of data that can yield richer insights when blended and actively analyzed.



## 3. Align around customer needs

Speaking of customers, engagement and satisfaction are critical goals for both marketing and sales teams. Therefore, customer insights should be rigorously applied in journey mapping, segmentation, content development, campaign design and other processes to the tools used for digital sales calls. This may seem an obvious priority, but our research and market experience tell us it's worth reiterating.



## 4. Get creative to bridge the talent gap

The talent shortage is acute and will only get worse in the years to come. Identifying immediate-return skills, knowledge gaps and mapping future needs are important strategic steps. Beyond establishing shared services models and/or centers of excellence, strategic sourcing models and partnerships with external providers can shorten the path to innovation and agility. Rethinking the organizational structure around specific capabilities or functions may reveal opportunities to improve efficiency, effectiveness and productivity.

# Conclusion

COVID-19 has accelerated transformation tenfold, raising the expectations patients and customers have of their care experiences. It's also changed the roles healthcare growth executives and senior strategists are playing within their organizations. Leaders that fail to adjust and modernize their go-to-market approaches and capabilities will lose customers. If marketing and sales teams start working together as true partners, both functions will excel both separately and together, helping to boost ROI and to elevate the trajectory of the organization's transformation.

Prophet helps its healthcare clients find innovative approaches to growth. Our strategists help healthcare organizations —from payers to providers to pharma —develop a steadfast commitment to becoming more customer-centric, helping them drive relevance, create better patient experiences and compete against the biggest disruptors.

## Our Solutions

Culture and employee engagement

Organizational design and operating model

End-to-end patient experience strategy

Product, service and touchpoint design

Market sizing and value proposition development

Digital marketing and sales strategy

Brand positioning

Brand portfolio and architecture

# Let's Talk

Prophet is a digitally-powered, creatively-inspired consultancy that helps our clients unlock uncommon growth in the face of disruption. Unprecedented levels of change and disruption require new thinking and transformative approaches to growth. From purpose to product, brand to experience, customers to operations, we bring the insight, rigor and expertise needed to help our clients realize transformative opportunities.

Our global team combines insight, creativity, data and technology to help our clients unlock growth that is human-centered, transformative and durable. We are guided by a mission and set of values that are focused on a higher-order approach to growth. Our global footprint operates within a single P&L, enabling us to bring the right people with the right experience together to solve our clients' current business challenges from across our 12 global offices.

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