



28 Sep, 12:10 pm - 12:50 pm

AI Use Case: The Role of Artificial Intelligence for Increasing Coordinator Capacity and Maximizing Efficiency

Findings from a pilot using artificial intelligence (AI) presented during this panel will quantify the impact of automation on increasing Coordinator capacity and efficiency when checking materials for accuracy and quality.

The pilot explores two AI use cases, specifically: 1) Coordinator use of AI to confirm required changes were made by content originators post-review, and 2) simultaneously building catalog that can be utilized for material QC, from scientific exchange among healthcare professionals, to prelaunch disease education for patients, through launch. Upon completion of that final QC, the catalog always remains current.

Metrics include time and money that can be saved and the implications to the Materials Approval Process for increasing Coordinator efficiency given the importance of this functional role in ensuring the quality of content prior to distribution.

Implications include the ability to check more content more quickly to get materials out faster, which is vital for the appropriate allocation of human resources in the face of high material volume.

Findings

- 68% faster than manual process
- 100% accurate
- Reduced scope of quality check
- Capacity more than doubled
- Easy to use; implemented < 1 week
- No disruption to workflow

**The views expressed in this presentation are those of the speakers and not of their employers.
The participation of vendors does not constitute an endorsement.**



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Overview

Company preparing to Launch

- Pre-launch educational campaign underway
- Explosion of assets for small staff (4 coordinators)

Goal

- Improve process efficiencies

Strategy

- Evaluate the use of SecureCHEK AI for increasing:
 - Capacity (check more material in support of MLR calendars)
 - Speed (review faster with confidence) without additional resources



Jonathan Warren: Let's set up our scenario with a little bit of an overview. We have a pre-commercial company that is coming up to a launch for a potential product. To help share the science behind the potential product, the company has begun a pre-launch educational campaign. In addition to this prelaunch educational campaign, the company is expecting an explosion of assets in relation to the launch. Meanwhile, the team of Coordinators will be relatively small at four people to process this explosion of materials. The goal of the team is to improve process efficiencies to address this upcoming explosion of assets. In order to complete this goal, the team decided to evaluate the use of SecureCHEK AI for increasing both their capacity of materials that can be reviewed, as well as the speed of the review process.

SecureCHEK AI Overview

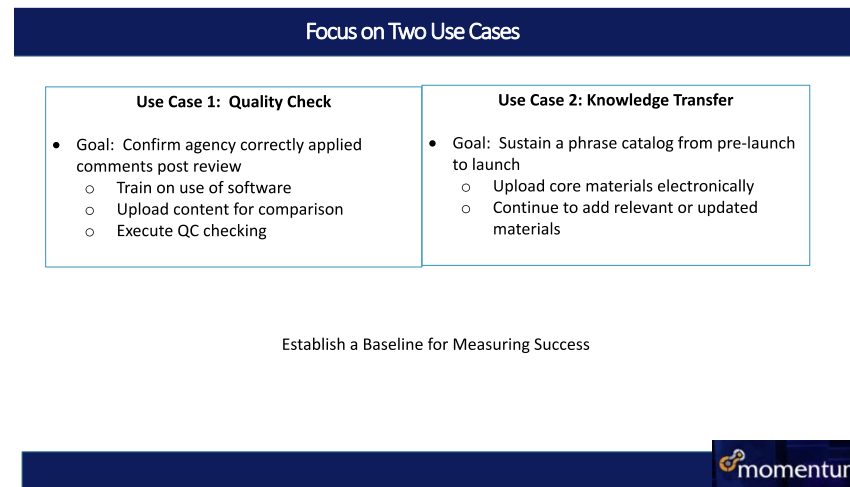
- Checks text/phrases against master catalog to identify deviations from approved text



- Stores approved promotional phrases specific to each brand/customer segment in always-current catalog

- Powered by AI, ML, NLP and OCR

Ilyssa Levins: Before we begin, I think it would benefit everyone to provide a quick overview of SecureCHEK AI. SecureCHEK AI is a cloud-based software-as-a-service (SaaS) that utilizes Machine Learning (ML), Natural Language Process (NLP) and Optical Character Recognition (OCR), which reads images. The technology gets materials out faster by enabling users to upload new content from their desktop to check new content (both text and phrases) against an electronically built master catalog to identify deviations from approved content. SecureCHEK AI stores approved promotional phrases specific to each brand and customer segment in an always-current catalog that remains current throughout the life of the brand.



Jamie Moccia: What's really interesting when starting with SecureCHEK AI is that we identified that the AI technology not only services one use case, but it actually services both and can be used in a number of ways: 1) to pre-check materials and 2) post review materials. I am going to dive into a little bit of both. During the pre-check, it is super important that messaging is consistent amongst all cross functional teams within the organization. It's also important that the vendors that the brand teams work with are utilizing the knowledge that they have, or at least have a tool to utilize to ensure they are on the right track. Typically, this is where AI technology comes into play. Here's a quick example:

If an agency wanted to check for consistent phrasing or even claims, they would upload their content into the software for comparison. If there was any variability from what was already in the catalog, it would be identified, allowing the agency to correct. That eliminates back and forth between agency and MLR committee. Now, during the knowledge transfer use case, you can also use SecureCHEK AI to QC materials post-review. Meaning, you can compare V1 to V2 to ensure all MLR comments were pulled through correctly. This is important because it eliminates the human error aspect of things. It also eliminates the need for the coordinator to go line by line.

Not only does this impact the operations side in a positive way, you are also keeping the catalog current by uploading the final materials upon final QC. Again, I think it's important I put it into perspective and give you an example: As a coordinator, you are responsible for ensuring changes are pulled through correctly while also ensuring no content was added or changed. By utilizing this software, it's identifying the changes to the document, meaning the coordinator only has to confirm the changes to complete their task. What was important for the pilot was to establish our baseline for success.

Baseline Attitudinal Survey and Calculation of Coordinator Hours Yearly	
<p>Survey of 4-Member Team (Average of Responses)</p> <ul style="list-style-type: none"> • 15% - 50% of requested changes incorrectly executed by agency • Assets returned to agency at least 1 additional time for rework • Types of errors <ul style="list-style-type: none"> • Missing context • Fair balance of safety information • Missing document numbers and typos • Additional content changes made 	<p>Calculation of Hours Spent Yearly</p> <ul style="list-style-type: none"> • On average, each coordinator currently spends 1 hour on quality checking; annually = <ul style="list-style-type: none"> • Promotional = 504 hours for 504 assets • Medical = 384 hours for 384 assets <p>*Based on average total number of hours spent on a given asset per coordinator; assumes launch versus maintenance; small company versus large</p>
<ul style="list-style-type: none"> • Claims housed in a word document or excel 	



Ilyssa Levins: What's really interesting that we have found executing pilots and working with the industry, is that most companies do not have a baseline for understanding how many hours are spent correcting errors, and also determining attitudes towards the actual errors that came in. To measure success, the SecureCHEK AI team worked with Argenx on two baselines: The first was through a survey to capture coordinator experiences with the quality of content in assets to be checked post- review. The second was to establish the amount of time spent on any one asset. This baseline was executed with a calculator created for the pilot. Jamie, do you want to speak to the findings from the survey as it relates to what you saw from agency changes coming in?

Jamie Moccia: It's apparent through the survey results that we are spending an enormous amount of time QCing material in its initial stage and in its final stage. What stood out to me the most is how much time could be saved by using artificial intelligence doing half of the work for us. What I think is important to note here is the variance and how large it is. This really speaks to the vendor quality, and again, by having this as a tool, it eliminates the need for agencies to stay abreast to all phrasing changes.

Jonathan Warren: We see many types of mistakes while completing quality checks. Some examples are that we may meet on a material and determine that changes need to be made, and when those materials are resubmitted for that QC to occur, a lot of times the updates might not be made correctly, and sometimes even not at all. It could be a bit of a challenge to go through and look at a piece when it's many, many pages and having to find what has been left out. We do have tools that we utilize through our document management systems that help. But at the end of the day this still isn't necessarily stopping all the issues that we are seeing based on the numbers here.

Updates that might not be done correctly can include spelling out acronyms at first use, ensuring that we are carrying global language updates throughout the entire material, and not just on one slide or one section. And then, even a lot of times how we are tagging our references using superscript or daggers, which may not be done correctly and that has to be aligned. In addition, when it comes to the promotional side, we often will see errors around fair balance of safety information, missing document numbers for our own audit tracking purposes so that we know what materials are being utilized in terms of communications, as well as, and I think this is the biggest challenge, the additional changes that no one asked for popping up. This can be a challenge since these aren't flagged for coordinators, so we have to do a manual page by page check just to make sure these additional changes are not there in addition.

Ilyssa Levins: When we did the calculation of the hours spent, on average each coordinator at Argenx currently spends one hour on checking. Annually on the promotional side, we learned that there were 504 assets, or 504 hours spent on checking in a year. For medical, there were fewer assets, 384 or 384 hours spent on checking the assets/yearly. This is based on the average total number of hours among the four coordinators. What we wanted to point out is that Argenx is moving into launch mode and is not in maintenance, and it's a smaller company versus a large company. Companies could use the SecureCHEK AI calculator to assess what functional roles are spending, what number of hours on their job, which then becomes a baseline for calculating the efficiencies with AI. Jamie, can you talk a little about where the claims are housed and the role of the SecureCHEK AI catalog building?

Jamie Moccia: Right now, we are guiding our content creators and their agencies to develop a core claims document, and with that, it is routed through the review and approval process. Upon approval, all those claims would be populated into this catalog and easily identified through the technology. Meaning, if there is any variance or if the text doesn't match, it will be easily identified. What's really great about the technology that I found is that it not only gives you what was populated in the catalog, but it will also give you a percentage match. So, say there's the word "the" is off versus "then," the technology will tell you that the asset is 10% off or this is 90% correct. This is really useful especially if Brand teams are looking to have different text variations. They can propose it that way and say, look, this is 90% of what was already approved and now we are looking to expand the verbiage. It can be used that way as well.

Findings and Discussion

Use Case #1: Time Savings for Quality Checking

- ❑ 45 min manual checking versus 14 min with SecureCHEK AI or 68% faster
- ❑ Use of Calculator indicates time savings

Promotional QC of 504 assets/year:

504 hours with potential savings of 338 hours (equivalent of 42.25 days)

- Could review another 338 assets


Medical QC of 384 assets/year

384 hours with potential savings of 261 hours (equivalent of 32.5 days)

- Could review another 261 additional assets

Use Case #2: Catalog built electronically with core materials

Upload of content for QC keeps catalog always current



Ilyssa Levins: Let's go through the findings and have a discussion. Essentially, Argenx checked assets, manually and using SecureCHEK AI. It was like an A/B: you check with your own human eyes and then you check with the SecureCHEK AI technology doing the comparison, and then look at the data. I want to emphasize that no software replaces humans. SecureCHEK AI is a decision support tool so the data that it serves up enables Coordinators to actually make decisions about the quality of content. It was determined that checking with SecureCHEK AI cut the time of checking by about 68%. There are different levels of savings in terms of time based on the document being checked. This data was added to the calculator along with the total number of assets checked and the amount of time for checking these assets. And what is really telling, and we shared the numbers with Argenx, it was pretty astounding. Coordinators would gain another 42 days for checking additional assets, so with the 68% faster, with the number of assets that are being checked, and with the savings associated with the speed, not only would they have more days to check assets, but they could check another 338 assets. For Medical QC with fewer materials, the coordinators could gain more than one month to review another 261 assets. This tells so much about the capacity that could be increased.

Jonathan Warren: When doing the comparison, I did the manual QC first. Then afterwards, I timed myself using SecureCHEK AI to see what the difference would be. I found that while using SecureCHEK AI, I was able to really determine where to focus my energy instead of figuring out where to focus my energy, like you need to do with a manual check -- since SecureCHEK AI is going to show you every single place where there is some sort of discrepancy between the versions you are checking. Since I'm able to take my energy and focus it where it needs to go, this allows me to figure out what is important here first that needs to be checked. Because you may run into a large issue that needs to be addressed before you can really move any farther in the QC. So, it also allows me to prioritize my QC in a more efficient manner, in my opinion. In addition to that, if I'm able to pick up these big mistakes early on, it allows me to spend less time identifying the error, then start to take action so I can remedy whatever that error is, and hopefully in the grand scheme, this material would be able to get through, corrected and reviewed and approved faster than without it. We may be a little limited on time, and SecureCHEK AI frees up a great amount of time. I think that's amazing because with that time, I can work on other things.

Jamie Moccia: We all worked really closely to start utilizing the technology and even getting trained on it. I think it's really intuitive especially compared to other software we've used in the industry. By allowing us to have the time to focus our energy just on the discrepancies within material, we now have the opportunity to find the gaps within the process and create efficiencies there. So as long as the QCing of material is a well-oiled machine, everything else will run just as smoothly. What I had proposed is that we compare V1 to V2, so by doing this, where 1, executing that post review final QC and then once we have that final version and it's checked all the boxes, we then remove V1 and keep V2 in the catalog and then it is always current and always up to date.

Ilyssa Levins: The goal is for users of SecureCHEK AI to have an API connection between the AI software and to a company's content management system, for example, let's say PromoMats or Vidori, so every time the content is approved in its final form through the review process in the content management system, it would automatically through the API connection pull the approved materials through and back into the SecureCHEK AI catalog so that the catalog is always current that way as well. (Then we can push the updated catalog back to the content management system so that there is centralized access to the materials.)

Discussion: Implications for Implementing AI for QC

Coordinators who oversee materials and lifecycle management can deliver greater promotional review efficiency with artificial intelligence

- Help increase speed to market and get materials to target audiences faster for QOL improvements sooner
- Increased capacity enables coordinators to deliver efficient quality checking, plus + ...
 - Ensure adherence to the process
 - Train all key stakeholders
 - Spot process inefficiencies
 - Recommend changes to Veeva
 - Reduce consulting time
 - Have access to an always current phrase catalog for current and historic claims



Ilyssa Levins: Coordinators are really important, and it really demonstrates that checking with AI enables Coordinators who oversee materials and lifecycle management to deliver greater promotional review efficiency. Jamie, would you address your company's mission and why your role is so important?

Jamie Moccia: I think this not only provides value to the Coordinators, but it also provides value to anyone that's involved in the process. As long as material is adhering to something that reviewers have already reviewed and approved, it makes their life that much easier. As far as a personal perspective, this is where the industry is headed and as long as we can get materials to patients and HCPs faster, the sooner patients can be treated. And that's what really matters at the end of the day.

Jonathan Warren: Looking at the overview situation and our goal get more material in and get it through faster, and ideally both, a lot of us just do extra things besides their actual coordination side of things. I've never seen someone's job to only work on a materials review committee, whatever their role may be. With those other projects that I'm working, these are all still related to the materials review process. We need to get the assets printed and fulfilled and get them to where they need to go. We may need to get Veeva Vault integration set up just to make sure that things are going well, or adjust our settings based on gaps identified by SecureCHEK AI. In addition, we also help project plan with our material project owners and that can get time consuming especially when there is a launch on the horizon. Even if you just look beyond your normal to dos, this can also help free up time so that you can expand your own skill sets. If there is a shadowing opportunity that you haven't had time for, maybe this helps you create time to do that. Essentially, it allows, I think, more to get more done, you can get it done it faster, and hopefully this allows you to free up time to better support your business as well as your own skill sets.