Right Place, Right Time:
How Health and Wellness Companies Are Capitalizing on the Rapidly Growing Point of Care Communication Channel

ZS Associates Research Study on Point of Care
By Hensley Evans, Aaron Mitchell, Jinan Martini and Pragati Anand
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Point of care (POC) communications, a historically small piece of the consumer-facing communications mix for health and wellness vendors in the U.S., represents a growing opportunity for brands to reach patients and caregivers in settings where they are especially focused on their health and wellness: at the doctor’s office, pharmacy and hospital.

According to our new study, changes in the health-care market, technological advances, consolidation among POC vendors, the emphasis on patient outcomes and the increasing importance of preventive care and patient adherence are driving the POC channel to become a more important part of integrated marketing strategies. Based on qualitative research, ZS estimates that consumer-focused POC marketing investment has grown 10% annually since 2010 — nearly eight times the growth of direct-to-consumer marketing spending overall — to reach $400 million this year. To succeed in POC, marketers need to design POC-specific strategies that consider the patient experience; select, create, and adapt content to the channel; track and measure its impact; and integrate POC messages with their overall DTC promotional and patient communication strategies.

1. Health and wellness vendors are a group led by pharmaceutical manufacturers, but also include over-the-counter medicine companies, pharmacies, health plans, and consumer packaged goods companies selling health-oriented items.
2. ZS Associates conducted research for this study sponsored in part by the Point of Care Communication Council (PoC). This study reflects the independent findings of ZS. ZS, a global leader in sales and marketing consulting, outsourcing, technology and software, is not a member of PoC. For the purposes of this study, we focused on consumer-facing point of care communications and have excluded communications focused primarily on health-care professionals.
Why Point of Care Works

It’s perhaps no surprise that many health-care marketers have been paying significant attention to POC communications in recent years. The reason is simple: it has proven to be effective. The POC industry’s expanding reach, combined with macroeconomic shifts and technology advances, means marketers’ ability to communicate with consumers and their caregivers at the point of care has never been better. (See “Three Venues for Point of Care Communications.”)

Our qualitative research found that POC is becoming a much more important element in the marketing mix for pharmaceutical and biotech companies, and is starting to gain greater traction with other health and wellness companies as well: over-the-counter drug makers, health plans, health-care services, retail pharmacies and manufacturers of health-related consumer products. From our interviews with 23 health-care marketers, leading POC vendors and ZS subject matter experts, we found several factors that explain why POC has become a uniquely valuable channel for many marketers:

Consumers are visiting point of care venues—physician’s offices, pharmacies and hospitals—more frequently. Overall, patients can wait anywhere from 20 to 40 minutes at a physician’s office before their appointments. And, wait times are expected to increase over the next 10 years, as the number of office visits to primary-care doctors rises from 462 million in 2008 to 565 million by 2025. High-risk Medicaid patients in a recent North Carolina pilot program visited their primary-care physicians an average of four times in one year. In addition, they met with other specialists, such as physical therapists, and home health care professionals, behavioral health-care workers and nutrition professionals. They went to their local pharmacy an average 35 times a year. More people entering the health-care system under the Affordable Care Act are expected to increase traffic and wait times in POC venues. The effect increases when you include aging baby boomers who require more care.

Three Venues for Point of Care Communications

Sponsored health and wellness messages appear in various areas where consumers and patients visit doctors, pharmacies and hospitals. In spite of recent consolidation in the POC market, no one vendor works across all venues and all channels. Marketers need to work with multiple vendor partners to reach patients and consumers. Marketers can create messages in various channels to match points in the patient’s journey through the health-care system, to meet consumer and patient needs for the right time and place.

Avenues for engaging consumers and patients include:

- Within the print channel, event-triggered content can be customized to patient need and can be delivered directly at the POC venue.
- Devices allow for event-triggered communications as well as customized content, delivered at the POC venue or via email or direct mail after the interaction.
- Television and video content ideally is tailored for a targeted audience (such as people receiving care for conditions serviced by a particular doctor’s office).

At the doctor’s office: POC messages can include television, publications/brochures and wallboards in the waiting room, tablets used to collect patient health information at check-in, printed materials in interactive wallboard displays in examination rooms, and patient education information at the nurse’s station at checkout.

At the pharmacy: POC messages include patient education materials at the pharmacy counter, in materials included in patients’ bags with their prescriptions, and via information kiosks, shelf talkers and publications.

At the hospital: POC messages can be delivered through tablets and printed materials provided during patient admissions, print materials and other displays in exam and patient rooms, waiting room displays and in-room television.
At the POC, patients and their caregivers are hungry for information about their condition and treatment. In fact, 89% watch TV or read wellness information in the waiting room. In a survey, more than two-thirds of patients said relevant communications enhances their waiting room experience. Some 84% said POC messages made them interested in purchasing the promoted brand.

Consumers place high value on POC communications because of the implied endorsement of health-care professionals. Sixty-five percent of patients say waiting room materials are among their most credible sources. Because they are delivered at a health provider's site of business, POC communications are inherently more credible than other forms of patient messaging. This is no surprise, because studies have found physicians, nurses and pharmacists to be highly trusted sources of health-care information. Physicians are the most frequently cited trustworthy source (88%), closely followed by pharmacists (81%) and nurses (77%). These trends hold for over-the-counter (OTC) medications as well: health-care professionals and pharmacists top consumers’ most trusted information sources. In addition, 72% trust OTC product samples they receive from health-care professionals.

POC communications can greatly influence consumer and patient behavior, and, in turn, influence physicians. A recent Kantar Media study found that 11 million adults switched brands after seeing or hearing patient messages at the POC. Of those who watched health-care messages in a doctor’s office in the past year, 18 million asked their physician for a specific prescription drug, and 17 million requested a prescription drug sample. “We discovered that adults who have seen health-care advertising at the doctor’s office are 15% more likely to agree that it’s worth paying more for branded prescription medications vs. generic products,” a summary of the study noted.

In addition, research shows 76% of patients recalled information they saw or heard in the waiting room, and those messages had an influence on health-care professionals. Patients rank POC information almost as highly as information they receive from other physicians. Meanwhile, 75% of health-care professionals say patient requests influence their decisions. These discussions often include OTC products, with patients initiating those conversations 37% of the time [Figure 1].

6. Ibid.
POC has the reach and scale to connect with a large number of consumers. Nearly half (44%) of adults have seen or heard health-care communications at a doctor’s office or pharmacy in the last 12 months. This makes POC communications second to television in terms of reach. Leading POC vendors are present in tens of thousands of locations around the country, giving them a broad reach [see Figure 2].

POC’s impact is more measurable than other DTC marketing. Brands using POC channels know both precisely where and when their messages are placed. Using either anonymized patient level data or prescriber data, they can track new prescriptions (NRx), total prescriptions (TRx) and patient adherence, and then correlate those numbers by physician and medical office. That provides a more granular view than broadcast DTC channels. And the results are strong. Benchmarks from Crossix, a health-care marketing analytics firm, shows 60% to 80% lift in conversion for all POC campaigns among patients who were exposed to or engaged with campaign tactics versus those who were not. Pharmacy initiatives have significantly improved adherence and length of therapy.

These factors add up. Consumers and patients are more engaged at the point of care where they are a captive audience. Through POC communications, they gain knowledge about their conditions and how to pursue healthier lifestyles. They have more productive conversations with doctors and pharmacists. All of this paves a path to healthier outcomes.


14. Crossix POC Impact™ (methodology) and RxMarketMetrics™ by Crossix (benchmark results). Actual conversions can vary widely due to, among other things, the years a drug has been on the market, the presence of competing brands, drug sales trends, campaign targeting and campaign messaging.
The Growth of Consumer-Focused POC Spending

With the opportunities apparent, brands have been investing more heavily in POC communications in recent years. Since 2010, growth in spending has outpaced growth in direct-to-consumer marketing (DTC) expenditures overall.

We estimate based on qualitative research that consumer-focused POC spending has grown approximately 10% annually since 2010 to a projected $400 million in 2014. This growth has been nearly eight times greater than the 1.3% CAGR increase for DTC in that period. Our estimates regarding POC growth would imply that POC as a percent of DTC spend would grow from 6.7% to just under 10%. While some of this increase will be based on a shifting of spend toward POC from other DTC channels, we are also seeing POC spend growth coming outside of DTC as well. (For discussion purposes, the estimate presumes linear growth over the past three years. Precise figures are not available.) Pharmaceutical companies make up 87% of consumer-focused POC spending, but other health and wellness marketers also recognize the value of POC. (See "Estimating the Size and Growth of Consumer-Focused POC Communications Spending.")

We expect POC spending to continue growing at a rapid rate in the next few years – likely to exceed $500 million within the next two to four years. (See Figure 3 and "The POC Industry’s Trajectory.")

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15. Point of Care Communication Council (PoC)

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DTC and POC consumer spending

The chart below represents projections for growth in the POC industry using the current growth trend as a baseline along with a growth range that represents the likely future growth of the industry. It is possible that the POC industry could achieve growth at the top end of the range based on the future market trends discussed, as long as POC companies continue to grow their reach across POC venues and provide increasing quality engagement and educational content.

Sources: ZS Associates POC market size estimates based on interviews and secondary research. Nielsen DTC Spend Data. Growth estimates based on ZS Associates analysis.

The Three Factors That Have Driven Growth

We found three primary factors that have driven rapid growth in POC communications spending: enabling technologies, the reach of POC vendors, and the rise of targeted therapies.

Technology advances represent the first major factor. The cost and prevalence of enabling technologies—flat-screen TVs, rapidly evolving tablet technology, inexpensive broadband connections and wireless connectivity – allow messages to be delivered through a variety of devices and settings. The rapid growth in the use of electronic health records has also contributed to more opportunities for POC communication.

A second factor boosting growth has been the broader reach of POC vendors over the last several years. There’s been significant consolidation of POC marketing vendors through mergers (Figure 4), while a number of POC vendors have expanded and others have left the market. These developments have
Estimating the Size and Growth of Consumer-Focused POC Communications Spending

ZS Associates estimates that consumer-focused POC communications spending in the U.S. will reach between $390 million and $440 million in 2014. We conducted research on both the supply side and the demand side of the industry to calculate this estimate.

On the supply side, ZS researched, and reviewed in aggregate, the revenue and market share estimates of top firms across each POC venue—hospitals, doctors’ offices and pharmacies—and extrapolated this data to determine the total POC industry revenue. These estimates were further adjusted to account for spending by both pharmaceutical and non-pharmaceutical companies. While the overall industry growth is estimated at approximately 10% per year, some POC vendors have reported greater than 20% growth per year, which suggests that there could have been market-share shifts between media types and venues that we have not specifically captured.

On the demand side, ZS collected estimates of the share of POC within direct-to-consumer spending by pharmaceutical firms and over-the-counter drug makers through primary and secondary research received from health-care marketers within these industries and advertising and media agencies. In general, the secondary data was found to be sparse and inconsistent, and the demand-side estimates were driven mainly by primary research inputs.

A panel of ZS industry specialists then triangulated the two estimates and calculated the overall POC market size as well as a growth range for the segment focused on consumer and patient communication.

driven the greater reach of individual vendors both in terms of breadth, giving them wider capabilities, and depth of market coverage. This in turn has let brands better integrate their messages across POC channels and venues, and coordinate marketing in more places and through more media using fewer POC vendors (Figure 5).

The rise of targeted therapies is the third driver of rapid growth in POC communications. With the development of blockbuster drugs fading as a dominant factor in their business models, pharmaceutical companies in the past five years have launched drugs to treat narrower segments of patients with complex conditions like rheumatoid arthritis and certain types of cancer. Most therapies entering the market today target less than 1% of the U.S. population. Among the 100 top-selling drugs in the U.S., the median patient population has shrunk from 690,000 in 2010 to 146,000 in 2014.16 Forty-one of these top-sellers now serve 100,000 patients or fewer, up from 23 in 2010.17

For drug industry marketers, broadcast advertising is too blunt a communications instrument to cost-effectively target narrower segments of consumers for these emerging treatments.

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17. Ibid.
Figure 4. **Consolidation in the POC Industry Leads to Broader Reach by Fewer Vendors.**

Recent deals like the merger of Catalina Health and Adheris have widened POC vendors' reach across media channels and patient venues. This merger exemplifies the consolidation of POC vendors that has spurred the industry's growth. The figure below illustrates the consolidation trend in recent years.

![Consolidation in the POC Industry Leads to Broader Reach by Fewer Vendors.](image)


Figure 5. **The Current POC Landscape**

In the above illustration, a 3 x 3 framework categorizes the different types of POC venues and communication platforms and shows how a number of firms today provide coverage for the venues and media types.

![The Current POC Landscape](image)
The three drivers of historical growth—increasing vendor reach, technology access and targeted therapies—will continue to boost growth of POC communications for the rest of this decade. For example, technology innovations will expand health-care information resources and consumer engagement. Technologies, from wearable trackers of personal health indicators to remote patient monitoring and telemedicine, will radically shift how health care is delivered in the future and could expand the definition of POC as it evolves. The number of smartphone health apps for Apple and Android devices, which have doubled in the last two and a half years to 100,000, is likely to increase further. This in turn provides more communications channels that can expand the reach and scale of POC vendors.

Low-cost and easily accessed communications enable telemedicine and remote care services to spread rapidly and allow doctors to interact with more patients to meet rising demands. Outpatient health clinics at retail store chains like Walmart and CVS provide access to care for commonly treated conditions. And pharmacists are becoming more involved in encouraging patient adherence to treatment regimens, with leaders like Walgreens providing advanced training for pharmacists in patient counseling and chronic-care management.

The reach of POC vendors will continue to widen, especially as larger firms—fueled by increased investments—expand into more venues. Further consolidation in the POC industry could lead to fewer vendors providing more comprehensive market coverage. Importantly, consolidation affords brands easier paths to purchase access to POC venues on a national scale and in targeted markets.

But three additional factors will help accelerate the industry’s expansion in the coming years:

- Health-care industry changes brought about by the Affordable Care Act and the spread of Accountable Care Organizations
- The addition of aging baby boomers to the POC audience
- The shrinking of pharmaceutical sales forces

The Affordable Care Act (ACA) and Accountable Care Organizations (ACOs) will bring more insured consumers into the health-care system and reshape how they receive services. Some 8 million Americans are newly covered under private health plans since the law went into effect. Another 24 million are expected to obtain insurance through exchanges by 2024. These new consumers are likely...
Our qualitative research suggests that the POC industry is following a classic “S curve” of growth as it matures (see graphic above).

In interviews, a number of marketers told us similar stories. Early in the POC market’s evolution, they recognized the promise of highly targeted and relevant messages delivered where patients received care. Many marketing teams conducted multiple pilot programs with a wide variety of vendors, all with different business models and approaches.

Marketers learned as they went, fielding a large number of projects but with small investments in each. Some projects had demonstrable ROI and others had none. The variability in impact, along with the large number of vendors and some instability among them, and questions about regulatory and legal issues, resulted in steady but relatively slow growth for POC communications spending early on.

Marketers became more comfortable with and knowledgeable about the POC channel. Their medical, legal and regulatory teams gained experience with POC. And POC vendors consolidated and became bigger, more sophisticated organizations. Now, marketers are starting to invest more strategically — in fewer channels but with more significant spending.

to increase demand for services, and their greater numbers can be expected to lengthen their doctor’s office waiting times.\(^\text{22}\)

The influx of new patients comes at the same time as ACOs rise in number, from a few dozen in 2010 to close to 600 at the end of 2013, covering 18 million people.\(^\text{23}\) ACOs change the insurance reimbursement model to focus on cost containment and outcomes rather than treatment and services rendered. They could make venues like doctors’ offices and hospitals more open to POC communications, a complement to their own patient-education efforts.


The changing reimbursement landscape will also force consumers to foot more of their health-care bill. That, in turn, should motivate them to become more knowledgeable about health-care services. In 2011, consumers with health insurance spent 4.8% more out of pocket than the prior year, and uninsured consumers paid 4.3% more.24 Yet consumer interest in medical information has been growing since the 1990s, the early days of the World Wide Web. Bearing more of the cost burden should encourage consumers to become even more informed about their conditions and treatment options.

In addition, the focus on patient outcomes as a key driver of health-care professional incomes creates incentives for professionals to educate and empower consumers at the point of care and other channels.

**Demographic shifts resulting from the aging baby boomer generation** will also heighten the importance of preventive care and adherence, and make POC communications even more relevant. More than 55 million Americans will be over 65 by 2020, and they are projected to be managing multiple, chronic health conditions. Many will be initiating therapy for the first time to address conditions that come with age. They will seek treatment more often at doctors’ offices.25 They are more empowered than their parents’ generation to take on more of their own health-care responsibilities, like arranging physician appointments.26 In short, they represent an active and engaged audience for POC messaging.

These factors make adherence an important driver of POC investments. Consider that while disease is widespread—more than half of Medicare fee-for-service beneficiaries over 65 have two or more chronic conditions (such as high blood pressure, high cholesterol, heart disease, arthritis and diabetes)27—Americans demonstrate poor adherence to their doctor’s orders. An estimated one-third to one-half of patients in the U.S. do not follow prescribed medication regimens, a trend that leads to medical complications and hospitalizations that cost billions annually.28 These conditions elevate the importance of POC communications for adherence. Doctors, pharmacists and hospital health-care practitioners can use tools enabled by POC communications to educate patients about the benefits of following their prescribed treatments at treatment initiation as ongoing condition management.

**The declining access to physicians’ offices for pharmaceutical sales representatives.** This trend has forced pharmaceutical companies to reduce spending on sales reps and invest in other channels for influencing the prescription decision, including POC marketing. In 2013, only 55% of prescribing physicians were accessible to pharma sales reps, compared with 65% in 2012.
and 77% in 2008, according to the AccessMonitor™ survey by ZS Associates. Early indications from our pharmaceutical clients suggest they are starting to redirect some resources once devoted to sales forces to other channels, including POC communications to consumers.

All of these six factors—including increasing vendor reach, targeted therapies, technology access, the changing health-care landscape, aging baby boomers and shrinking pharmaceutical sales forces—are interrelated. An environment of outcomes-based incentives and higher costs to patients should motivate consumers to become more educated about their health and health-care choices. They create great opportunities for POC messaging about wellness and treatments, and patients’ need to adhere to prescribed therapies.

**Capitalizing on the Opportunity**

Given these six factors, now is the time for marketers to capitalize on POC communications. Nonetheless, a POC strategy shouldn’t begin by focusing on tactics specific to physician waiting rooms or pharmacy foot traffic. Instead, it starts with understanding the patient experience (see Figure 6).

Only by knowing when and how patients wind their way through the health-care system to deal with these conditions—the consumer journey—can marketers determine how best to use POC communications to educate patients on particular therapies and encourage adherence. A POC strategy for a product must be tailored to its customer population and the time they spend in POC venues to receive care. As a result, the POC channel provides some health and wellness products with greater opportunities than others.

The patient’s path is likely to include at least two if not all three venues (doctor’s office, pharmacy, and hospital)—and many trips to each venue. For patients who have more than one condition, the journey is more complicated.

**Figure 6. The Patient’s Path**

An effective POC strategy starts with understanding the consumer experience. The diagram below illustrates the activities of a patient with a cardiovascular event who eventually leaves a hospital. Note the visits to different point of care venues.
There are five steps to developing an effective POC communications strategy:

1. **Understand the consumer and patient experience.** Gaining insights requires observing consumers as they move through the health-care system and how POC venues for a specific brand fit into that experience. While most brands have created a detailed patient journey, it is likely that they have not mapped that journey to the POC. Marketers need to see how consumers navigate across POC venues to understand their relationship to each venue and how the venues relate to one another. Then they can identify communications opportunities to encourage a consumer’s progression through treatment. For example, marketers should target people suffering from a chronic disease like arthritis at their primary-care physicians’ offices and at the practices of rheumatologists and other specialists who treat them.

2. **Determine the content for each stage of the patient’s journey and the level of consumer engagement at each venue.** Once you understand the specific needs of the patient at each stage of the journey, the next step is to identify the disease education and brand information that will help address those needs—and how best to deliver that information. By collecting information about the journey (through noticing the barriers consumers face as they move between venues), and the frequency and reasons for visits to each venue, marketers can design communications that encourage a patient’s progression.

For example, a patient who visits a doctor’s office several times in the course of treatment often has different information needs as his condition progresses. POC communications can deliver a series of messages and educational content to match these steps. POC messages can also help pharmacists and doctors communicate common or complementary messages to patients about their condition and treatment, and adherence to medication regimens. Brands may need more than one vendor to communicate messages to achieve the desired reach and point in the consumer’s journey; it is important to consider all possible channels and appropriate POC vendors to meet these needs.

At each stage of the journey, the patient is at a slightly different point in his experience of receiving care. Marketers need to determine such factors as the behavioral and emotional factors that affect a consumer’s ability to make better decisions, the number and types of conditions a patient is managing, attitudinal differences among consumers, target channel preferences and key stakeholder influence and guidance. Additional considerations include environmental factors such as access, policy, and culture at specific venues, and the frequency of a patient's interactions at health-care and other venues.
3. **Put the right content in the right channel.** Since the context in which a consumer gets her information matters greatly (for example, patients’ anxieties may be accentuated in the doctor’s office), marketers must use educational information and develop brand content for POC platforms and venues that addresses those settings. In developing marketing materials and television spots, marketers should create messages that are tailored to consumers and patients in POC venues, recognizing that they can leverage content developed for one channel in another. Up-front planning for a brand’s POC communications, done in concert with a brand’s overall communications strategy, can minimize the incremental creative costs involved in making content for each channel and receiving legal approval for each message. Advance planning can enable brands to insert calls to action for an audience that are consistent with the venue and moment in a patient’s journey. The benefits are worth the effort. Just as marketers learned in the 1990s that throwing “brochure-ware” online to create a new website was not the most effective way to engage a new audience, POC communications must match the audience’s mind-set with the venue in which it will receive it.

4. **Coordinate POC communication strategy and execution with other marketing programs.** Because no one POC vendor works across all venues and all channels (or is present in every doctor’s office a marketer may want to reach), marketers must identify multiple vendors to achieve the appropriate mix of programs to reach consumers and patients. They need to optimize patient-targeted promotions and education in concert with those targeting physicians, for example, and integrate POC into their overall mix. They can compare POC spending against other physician-targeted promotional investments, making POC one of the few DTC channels that can be compared with promotions aimed at health-care professionals. Marketers must include multiple POC vendors in their plans.

5. **Track and measure impact.** POC is a valuable channel because it can be measured in ways that DTC advertising cannot be. POC is targeted to a venue so marketers can determine when and where content is placed. This allows marketers to link POC investments to brand impact by, for example, looking at physician-level prescribing data before, during and after POC campaigns to measure conversion. Most other advertising media track only the city or metropolitan area in which an advertisement ran. POC is much more specific. To be effective, POC tracking methodologies and analysis need to be established early in a marketing program.
Right Place at the Right Time: The Point of Care Opening

More brands are taking advantage of a growing point of care communications channel because it works. POC gives brands, including pharmaceutical companies, OTC medicine manufacturers, pharmacies, health plans, health-care services and health-related consumer-products companies, the opportunity to present messages in the right place to people seeking information important to their health.

A series of trends has converged to spur the POC industry’s growth and made it the right time for POC to be a valuable part of corporate communications strategies. The growth and expanding reach of leading vendors enables brands to reach millions of consumers in venues and at times that make messages impactful.

A rapidly changing health-care industry further elevates the potential of POC as a messaging medium. The Affordable Care Act’s adding millions of people to the health insurance system and the aging baby-boomer generation will require more services to care for their conditions. Health-care professionals’ increased emphasis on patient outcomes and the rising importance of preventive care and patient adherence make POC a key element in integrated communications strategies.

Based on this research, we have found that while most brands have some measure of point of care presence, many are not thinking holistically about their strategy for supporting and educating patients at the point of care. As the POC industry matures and evolves to deliver better ways to educate patients, they could create significant opportunities for brands to educate and engage patients in their own health awareness, involvement and management. By executing effective POC strategies that take advantage of the unique capabilities the channel offers, brand managers can maximize the potential of this growing opportunity.
About the Experts

Hensley Evans, a Principal at ZS based in New York, leads the firm’s patient marketing strategy practice. Hensley has developed and implemented strategic solutions that combine marketing efforts with consumer health support programs for pharmaceutical, biotech, OTC and provider clients, and has driven health and wellness initiatives in the consumer goods industry. Hensley holds a B.A. in economics from Duke University and an M.B.A. from the University of Pennsylvania’s Wharton School of Business.

Aaron Mitchell, a Principal at ZS based in Zurich, is a leader within the ZS marketing practice. He has worked with numerous life-sciences companies to improve the development of commercial strategies for global brands throughout their life cycle. He has focused particularly on product development and launch strategy for pipeline brands, as well as growth strategy and customer-centric marketing for in-line brands. Aaron holds a B.S. in mechanical engineering from the United States Military Academy at West Point and an M.B.A. from the University of California at Berkeley.

Jinan Martini, an Associate Principal at ZS based in New York, focuses on consumer and patient marketing strategy. Jinan has well over a decade of experience in developing consumer marketing strategies and designing successful relationship marketing programs. Jinan holds an M.S.W. from Colorado State University and still draws from her work in the field to bring knowledge and understanding of patient behavior to her marketing strategies. She also holds a B.A. in Anthropology from The Colorado College.

Pragati Anand is a business consultant at ZS in New York, with a strong background in business analytics and market research in the health-care and pharmaceutical space. He has led multiple sales and marketing engagements, including market-opportunity assessments, product launch and go-to-market strategies. He also has designed innovative market-research solutions through crowdsourcing of customer insights. Pragati holds an M.B.A. from INSEAD with an emphasis on strategy and innovation, an M.S. in engineering management from Duke University and a bachelor’s degree in environmental engineering from Delhi College of Engineering, India.
About ZS Associates

ZS Associates is a global leader in sales and marketing consulting, outsourcing, technology and software. For more than 30 years, ZS has helped companies across a range of industries get the most out of their sales and marketing organizations. From 21 offices around the world, ZS experts use analytics and deep expertise to help companies make smart decisions quickly and cost effectively. ZS comprises multiple affiliated legal entities.