

# IQVIA ORCHESTRATED CUSTOMER ENGAGEMENT (OCE) SALES

*Marketing Agency Partners Program Guide*

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## SECTION 1.0 PARTNER PROGRAM INTRODUCTION

IQVIA Technologies is investing heavily in developing the most advanced technology portfolio in the Life Sciences industry, addressing our customers' business challenges from molecule-to-market.

To support this bold mission, we're building an ecosystem of partners and supporting them with programs that drive mutual success across the value chain.

Marketing agencies represent a key link between our products and outstanding client results. Our agency programs are therefore designed to equip partners with the skills and resources required to provide our mutual clients with outstanding service and experience.

Agencies enrolled in our programs are provided with:

- Ongoing access to training
- Product documentation and release information
- Individual and organizational certifications
- Business and technical support

Currently, IQVIA Technologies offers Marketing Agency Programs for the following set of products:

- IQVIA Orchestrated Customer Engagement (OCE) Sales
- IQVIA Orchestrated Customer Engagement (OCE) Marketing
- IQVIA Mobile Intelligence CRM (formerly known as Nexxus MI (Mobile Intelligence))
- IQVIA Remote Detailing (formerly known as Kadriga iDetailing)
- IQVIA ePromo

As we expand this suite of partner programs, your teams may become certified to deliver products across our molecule-to-market portfolio, multiplying the value of your IQVIA relationship.

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## SECTION 2.0 ABOUT IQVIA OCE SALES

Orchestrated Customer Engagement (OCE) is a next-generation commercial platform that connects sales, marketing, medical and other customer-facing functions. OCE harmonizes interactions between life sciences organizations and clients to foster trust and optimize performance.

OCE Sales offers an advanced e-detailing module (CLM) to administrate HTML5 multimedia presentations, distribute them to field force users and present them on iPad to medical professionals. The solution also includes interaction feedback tracking and standard reports.

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## SECTION 3.0    **BECOME A CERTIFIED MARKETING AGENCY**

The IQVIA Technologies' Marketing Agency Certification provides our mutual clients with the confidence that the party they select to develop or manage content on IQVIA OCE Sales has the capabilities, commitment and connections needed to ensure their success.

As a Certified Marketing Agency partner, you'll be afforded the opportunity to expand your business relationships with life sciences clients across their customer and product life cycle.

Specific advantages of the partnership, as well as the commitments required of each of our Agency partners, are outlined in the sections that follow.

An active *Certified Marketing Agency*: OCE Sales status is mandatory to work on client projects.

## SECTION 4.0 PROGRAM BENEFITS

Marketing Agency Partner Summary of Benefits	
<b>Streamlined Engagement</b>	
Partner Portal Access	✓
Partner Alliance Management	✓
<b>Learning &amp; Certification</b>	
Self Service eLearning	✓
Certification	✓
<b>Technical Enablement</b>	
Product Documentation	✓
Product Org	✓
Technical Support	✓
<b>Marketing</b>	
Certified Marketing Agency Badge	✓
Listing on IQVIA.com	✓

### Description of Benefits

#### Streamlined Engagement

We're here to streamline your interactions with IQVIA Technologies and create the most positive experience possible: convenient self-service capabilities when you want it, hands-on personal interactions when you need it.

The *IQVIA Technologies Partner Portal* is a hub through which agency team members can access core program benefits, such product training and technical documentation as well as submit support tickets as needed. Additionally, account manager users can manage your overall relationship with IQVIA Technologies, such as making requests for new user accounts as well as adding/renewing your subscription to agency programs.

Please note that Partner Portal functionality is a continually evolving capability with new features being added over time.

Your designated *IQVIA Partner Alliance Manager* and our team of *Partner Service Operations* resources are here to support you. Email [agency@iqvia.com](mailto:agency@iqvia.com) or log a ticket through the Partner Portal to request assistance when needed.

## Learning & Certification

The Marketing Agency OCE Sales learning path currently consists of *Self-Service e-Learning*.

To complete their learning path, team members should log into the Partner Portal and click on the 'Learning' tab, through which access to the learning platform is granted.

Following the successful completion of the required training modules, product org access will be granted and detailed instructions for certification provided.

The *Certification* assessment for OCE Sales is currently a shared assignment, meaning that multiple people may contribute to a common deliverable. This deliverable is assessed against the requirements provided, to determine a Pass or Fail outcome. Please allow for 2 business days for certification assessments and re-assessments (in the event a re-submission is required).

IQVIA additionally reserves the right to require retraining and recertification of team members on a periodic basis (annually) or in conjunction with substantive updates to product functionality. Prior notification of these requirements will be communicated to those affected.

Agency Level Certification Status (if attained) is valid for the duration of the Agency's subscription to the OCE Sales Agency Partner Program.

## Technical Enablement

*Product Documentation* for OCE Sales is currently available in the partner portal.

IQVIA will provide access to a dedicated OCE Sales Org to be Agency's e-Content testing environment. The Agency's use of the OCE Sales Platform is subject to the Salesforce.com ("SFDC") Terms of Service, which are stated in the OCE Sales scope of work agreement.

Agency will be provided with: one (1) admin user and one (1) rep user for certification and test.

Two types of application will be available:

- OCE Sales PC to administrate presentation. This application will be accessible online only through standard Internet browser and using a dedicated URL, login and password provided by IQVIA.

Agency will be able to:

- > Load the HTML5 multimedia sequences as defined in the Technical Guidelines
- > Assemble the sequences in presentation
- > Activate and distribute presentation to the test end user
- OCE Sales offline iPad App to play presentations on iPad. Agencies will be able to:
  - > Download the distributed multimedia presentation
  - > Play the multimedia presentation on the iPad and associate it to the medical doctors preloaded in the application

Should your team require any technical assistance, Technical Support can be requested by submitting a ticket through the 'Support' tab of the Partner Portal. Simply select 'OCE Sales' from the product list and describe the nature of your issue or question. If there are issues related specifically to your client's instance of IQVIA OCE Sales, those requests should be submitted by/on behalf of the life sciences client itself, through the IQVIA Customer Service Hub (<https://www.customerservice.iqvia.com/support/s/>) to ensure appropriate levels of service.

## Marketing

Upon satisfaction of all IQVIA OCE Sales, Marketing Agency Program requirements (see section that follows), your organization will be awarded a *Certified Marketing Agency Badge*. This badge may be used to promote your status to current and prospective life sciences clients. Active certified status is mandatory to support clients on IQVIA OCE Sales.



Additionally, your organization may be *Listed on IQVIA.com* as a certified partner. Inclusion is contingent on a Reciprocal Partner Logo Use agreement executed as part of your Master Agency Certification Agreement. Agencies must maintain an active program subscription to be included on IQVIA.com, which will be updated monthly.



## SECTION 5.0 PROGRAM REQUIREMENTS

As with any partnership, the IQVIA Agency Partner Program has several requirements our partners must meet to enable eligibility for the aforementioned benefits. These requirements are detailed below.

Agency Partner Summary of Requirements	
<b>Active Program Enrollment</b>	
Master Agency Certification Agreement	✓
Agency Program Subscription	Active Subscription, in good financial standing
<b>Certification Minimum</b>	
Active Full-Time Employees Trained (minimum)	1 FTE
Successful Completion of the Required Training and Certification Assignment	✓

### Description of Requirements

#### Active Program Enrollment

All agencies must have a *Master Agency Certification Agreement* in place to be eligible for product level program subscriptions and to be granted access to the Partner Portal.

Additionally, you must have an active *IQVIA OCE Sales Agency Program Subscription* in good financial standing.

Consult the Agency Program Catalog in the IQVIA Partner Portal for a list of agency programs and to enroll in or renew your subscription. Subscriptions to the IQVIA OCE Sales Agency Program are currently offered in twelve-month (12) terms. Your current enrollment status, including contract start and end dates, is visible in the Contracts table of the 'Alliance Management' tab (available only to account manager users).

If your program subscription expires, your organization will no longer be considered a Certified Marketing Agency for IQVIA OCE Sales. Access to all program benefits will be revoked and you will no longer be authorized to support life sciences clients on IQVIA OCE Sales. Additionally, you will no longer be permitted to promote yourself as a Certified Marketing Agency and your organization will be removed from the listing on IQVIA.com.

## Training & Certification Minimums

In addition to maintaining an active program subscription, you must maintain a roster of at minimum one (1) *Active Full-Time Trained Employee* to achieve/retain Certified Marketing Agency partner status. If someone leaves your organization causing you to drop below this minimum requirement, you are required to notify [agency@IQVIA.com](mailto:agency@IQVIA.com) and promptly have another team member trained to retain status.

Following the completion of training your team will be provided with a Certification Assignment. This assignment is designed to validate their collective proficiency in the necessary skills and knowledge required to effectively use IQVIA OCE Sales in support of our mutual customers. Successful completion of this certification assignment is required to achieve Certified Marketing Agency status.

IQVIA additionally reserves the right to require retraining and recertification of existing team members on a periodic basis (annually) or in conjunction with substantive updates to product functionality. Prior notification of these requirements will be communicated to those affected.

Thank you for your interest in becoming a Certified Marketing Agency on IQVIA OCE Sales. We look forward to working with you to ensure a successful partnership. If you have any questions regarding this program, please reach out to [agency@IQVIA.com](mailto:agency@IQVIA.com) or directly to your designated Alliance Manager contact.