Auditing & Measurement, PoC3 Compliance & Best Practices

Scott Nesbitt,
Chief Analytics & Strategy
Officer at PatientPoint

Richard Murphy,
EVP at BPA Media and
iCompli

Ray Rotolo,
Co-Founder & Partner
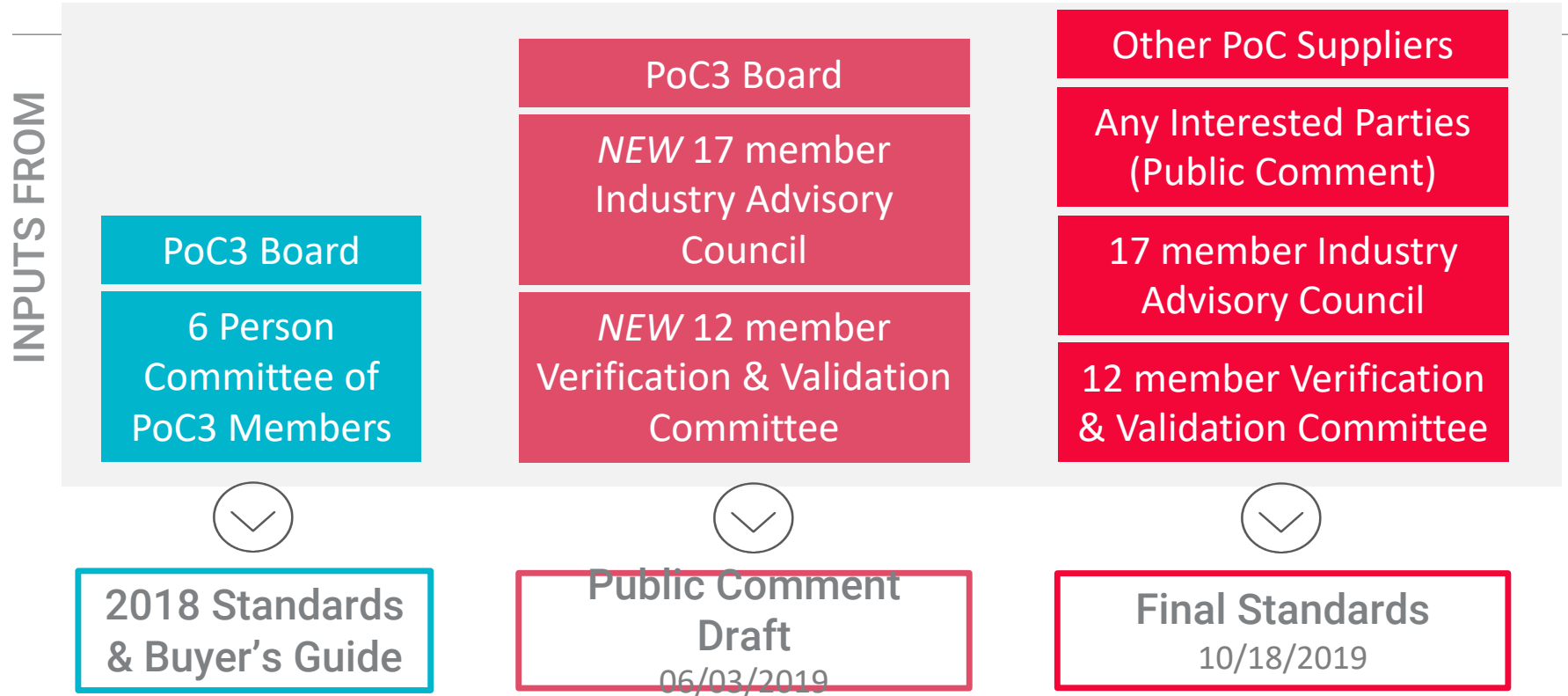at PlaceBridge

Ken Shultz,
SVP of Audit Services
at AAM

Purpose of the PoC3 Verification & Validation Committee

- *The Point of Care Communication Council (PoC3) has created Verification and Validation Guidance for media buyers and their clients with the intent to:*

  1. *Define industry* **best practices**

  2. *Gain feedback and buy-in from the Industry – Represented by the* **Industry Advisory Council** *(IAC) of Pharma Companies, Ad Agencies, Consultants, Measurement Organizations, and Auditors*

  3. **Engender trust** *among those that transact at the point of care*

  4. *Provide a clear mechanism that enables media buyers and their clients to see which point of care (PoC) media vendors have* **certified and are adhering to the auditing requirements** *set forward by the PoC3*

Standards Development Process – Input from many

PoC3 Board	PoC3 Board	Other PoC Suppliers
6 Person Committee of PoC3 Members	*NEW* 17 member Industry Advisory Council	Any Interested Parties (Public Comment)
	NEW 12 member Verification & Validation Committee	17 member Industry Advisory Council
		12 member Verification & Validation Committee

2018 Standards & Buyer's Guide

Public Comment Draft
06/03/2019

Final Standards
10/18/2019

PoC3 Verification and Validation (Auditing) Committee

Samantha Brown	Director of Business Intelligence	**Mesmerize Marketing**
Jim Decker	Vice President	**CheckedUp**
Steve Geunther	Vice President	**Alliance for Audited Media (AAM)**
David Linetsky	SVP, Life Sciences	**Phreesia**
Scott Nesbitt	Chief Analytics & Strategy Officer	**PatientPoint**
Richard Murphy	Executive Vice President	**BPA Worldwide**
Larry Newman	Chief Operating Officer	**Health Media Network (HMN)**
Ray Rotolo	Partner	**PlaceBridge**
Ken Schultz	Senior Vice President	**Alliance for Audited Media (AAM)**
Dan Tassone	Senior Director Product Strategy and Integration	**Health Monitor Network**
Paul Theisen	Managing Partner	**PlaceBridge**
Colleen Tricarico	Manager	**BPA Worldwide**

Industry Advisory Council (IAC)

Wendy Arnon	President	**Pathway Group (Omnicon)**
Benjamin Assor	SVP, Director of Media Activation	**Solve(d) (FCB Health)**
Sarah Bast	Group Vice President	**Publicis Health Media**
Mark Boidman	Managing Director Media and Tech	**PJ Solomon**
Nicole Diviagracia	VP Director	**Havas Media Group**
Jeffrey Erb	President	**McCann Health Engagement**
Jennifer Greufe	Managing Partner	**Junction 37**
Lisa Hentze	Associate Director	**Outdoor Media Group**
Liz Hopkins	Associate Director Marketing	**Abbvie**
Sarah Kadish	Group Partner	**J3**
Maureen McGrath Svoboda	Director TBX Pharmaceutical Connections	**J & J**
Colleen Millway	Former Director of Media	**BMS**
Shannon Mitchell	Associate Director US Consumer Media	**Merck**
Andrea Palmer	President	**Publicis Health Media**
Harlan Schwartz	SVP Media	**Klick**
Anupam Singh	Director of Media	**Teva Pharmaceuticals**
Julie Young	Executive Director of Marketing	**Foamix Pharmaceuticals**

SOURCE: PoC3.org

Examples of Key Provision in the PoC3 Standards

Comprehensive Standards

1. *Two Types of Required Audits*

2. *Introduction of the Certification and PoC3 Seal*

3. *Common and Consistent Definition of Terms*

4. *How Deliverables are Counted*

5. *Best Practices to Implement Over Time*

1) Two Types of Required Audits Performed 2 Different Ways

The guidance within the document encompasses both network level and campaign level auditing, which are defined as follows

1. Network Audit

- *An in-person **physical audit** where personnel from an <u>independent 3rd party auditor</u> visit PoC locations to observe and record information. This type of audit is done at a PoC vendor product line level.*

- *The objective of a physical audit of a digital network is to confirm that the device is **physically present and on**. The objective of a physical audit of a print network is to confirm that the display is physically there/installed.*

2. Campaign Audit

- *A digital audit that is not performed in-person, but instead uses **electronic logs and data** to verify ad campaign information from a PoC vendor. The objective of a digital campaign audit is to confirm that ads were delivered at the frequency contractually committed.*

    AND/OR

- *An in-person **physical audit where individual campaign information (**ads) are verified as being present (i.e. confirmation that the correct campaign poster is installed).*

2. PoC3 Certification

The PoC3 Certification Seal confirms that the PoC vendor and its third-party auditor(s) have submitted a signed affidavit, or a PoC3 Verification and Validation Certification Form, to PoC3 verifying that they have complied with all PoC3 audit requirements for their product offerings at both network and campaign levels. These signed affidavits must be submitted annually to PoC3 to obtain approval for continued use of the PoC3 Certification Seal. **The PoC3 Certification Seal represents compliance with all areas within this document labeled as "requirements" and marked with an asterisk,** but not within supplemental areas highlighting best practices.

PoC3 CERTIFICATION SEAL

2) Introduction of the Certification and PoC3 Seal

Clients and Agencies can feel confident information is accurate and independently 3rd party audited in a consistent manner according to the PoC3 Guidance

3) Common and Consistent Definition of Terms

Clarity of terms so clients and agencies know what is being bought and measured

Example: What is a location?

- **Location (Medical Office):** A unique physical address wherein a practicing HCP receives and treats patients.
  - A location consists of unique HCP business units at a distinct address. In situations where multiple HCPs exist within the same building or street address, the location will be considered distinct if there is a different floor or suite number.
  - Places where an address, suite or floor, and HCP list match shall be counted as one location.

4) How Deliverables are Counted

Clear requirements as to what constitutes success and calculations about deliverables

1st Quarter, 2020					
Location	Install Date	Open Hours	Open Days	Play Days	
A	2016	M-F 9-5	64	64	
B	2015	M-F 9-6	64	62	
C	2016	S-S 9-7	90	87	
D	2016	S-S 9-8	90	80	
E	2014	M, W 1-6	25	23	
			333	316	94.9% SUCCESS - 5 locations

5) Best Practices to Implement Over Time

- **Requirements**
  - *Overall Auditing*
  - *Network Auditing*
  - *Campaign Auditing*
  - *Key Metrics*
  - *Success Criteria*
  - *Sample Size Calculations*

- **Best Practices**
  - *Network Auditing*
  - *Campaign Auditing*
  - *Measurement*

Example

HCP/PROVIDER AUDITING AND VERIFICATION

- It is recommended that PoC media companies use a third-party independent organization (not self-reported) to obtain an up-to-date list of HCPs twice per year or call HCP offices twice per year to verify the list.

Panel of Auditing Experts