

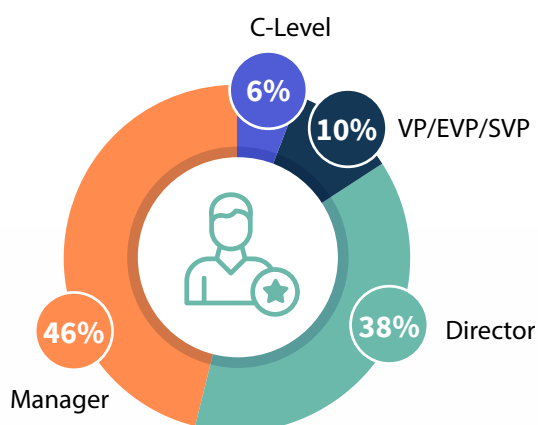
LIFE SCIENCES ENTERPRISE SYSTEMS SURVEY TREND REPORT



EXECUTIVE SUMMARY

Canam Research partnered with SEIDOR and SAP on the topic of life sciences enterprise systems. Responses were collected from C-Level Executives, VPs, Directors, and Managers from a variety of life sciences companies.

Respondents by seniority



Research focused on



Biggest administrative, compliance, and operational challenges



Satisfaction with ERP or enterprise systems



How ERPs are implemented and how well elements of ERPs meet business goals



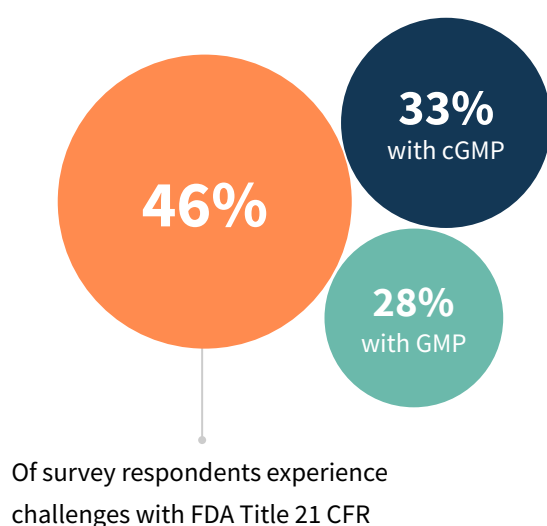
Compliance with ERES



Future focus areas to improve business processes

KEY OBSERVATIONS

Compliance challenges



ERES-compliant digital signature solution

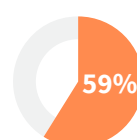


Only **18%** of survey respondents said they have a fully compliant ERES digital signature solution.

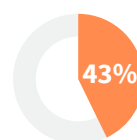
Biggest operational and administrative challenges



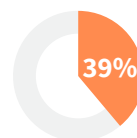
Future focus to improve business processes



Of respondents will focus on analytics or reporting.

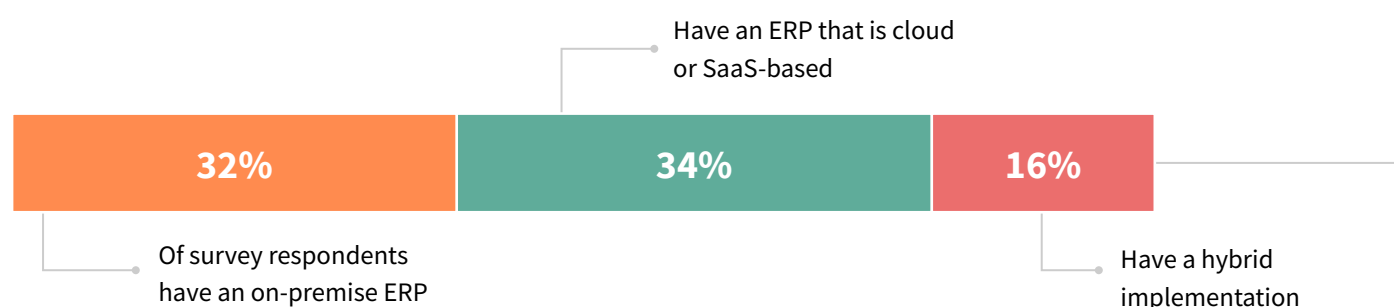


Of respondents will focus on forecasting and trend analysis.

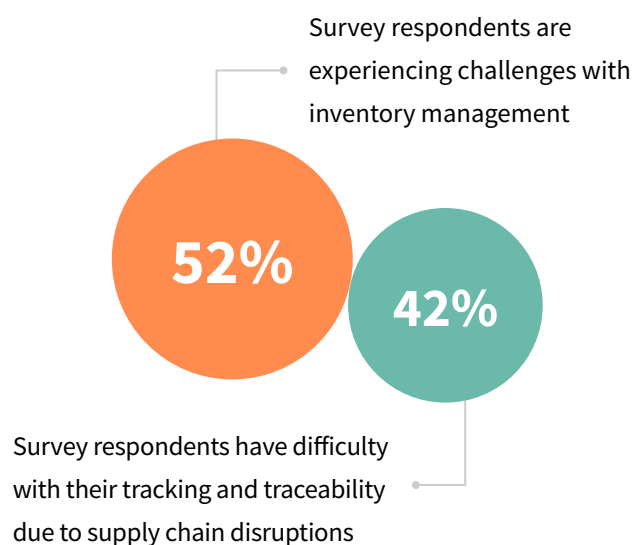


Of respondents will be focusing on compliance and regulatory management to improve business processes.

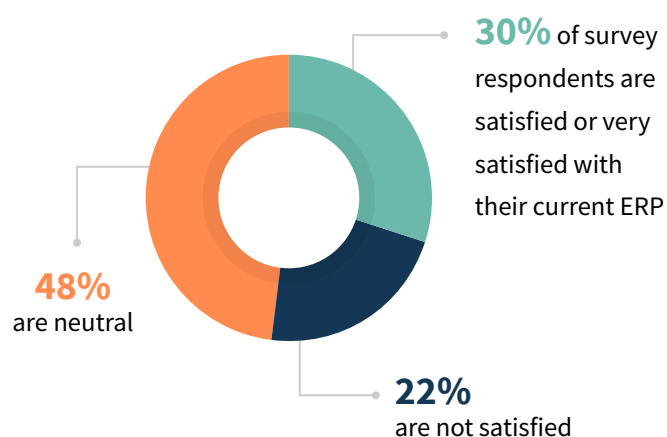
ERP implementation



Challenges with supply chain disruptions



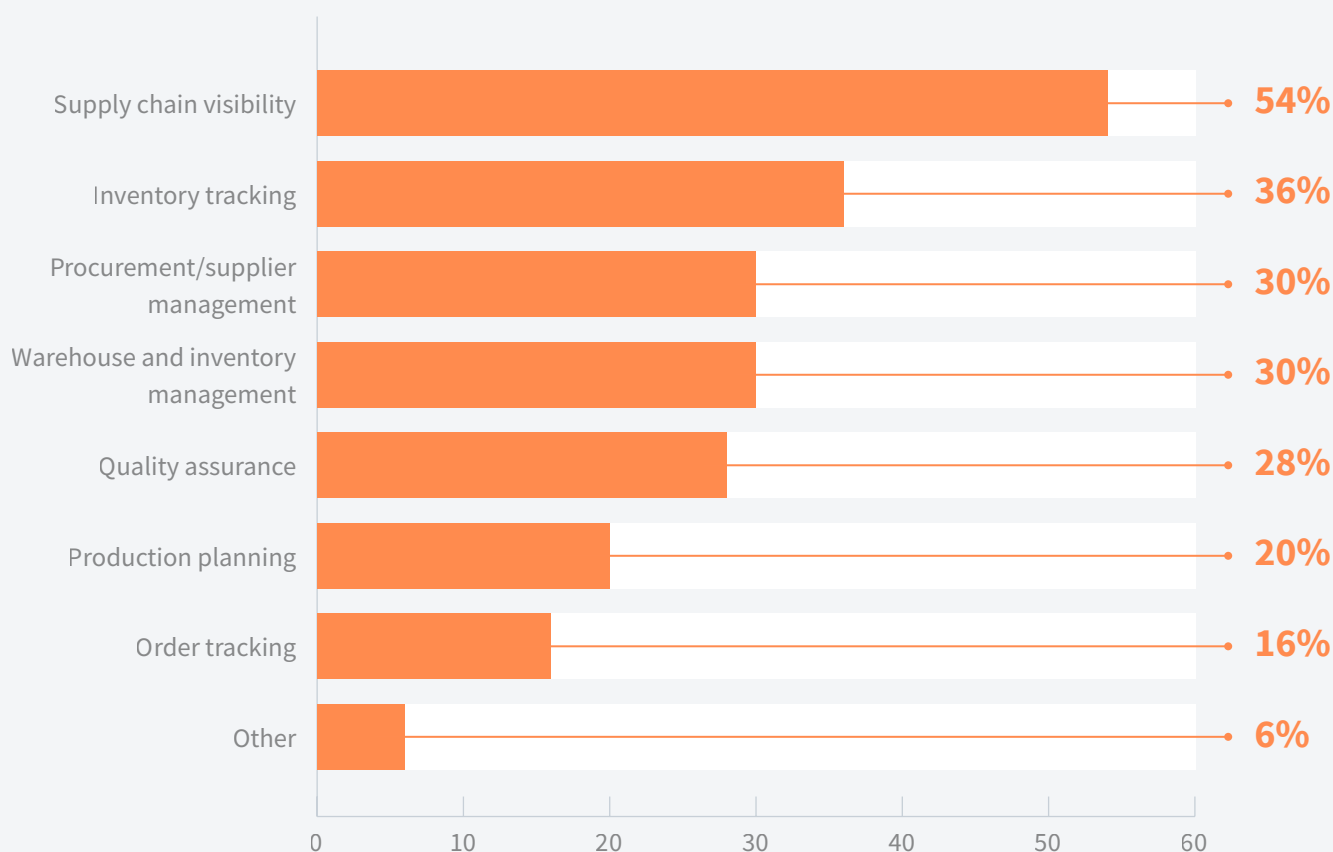
Satisfaction with current ERP or enterprise system



Which of the following are your biggest operational challenges?

Supply chain visibility was the most common challenge for survey respondents, which is not surprising in light of the supply chain disruptions that have been in the news.

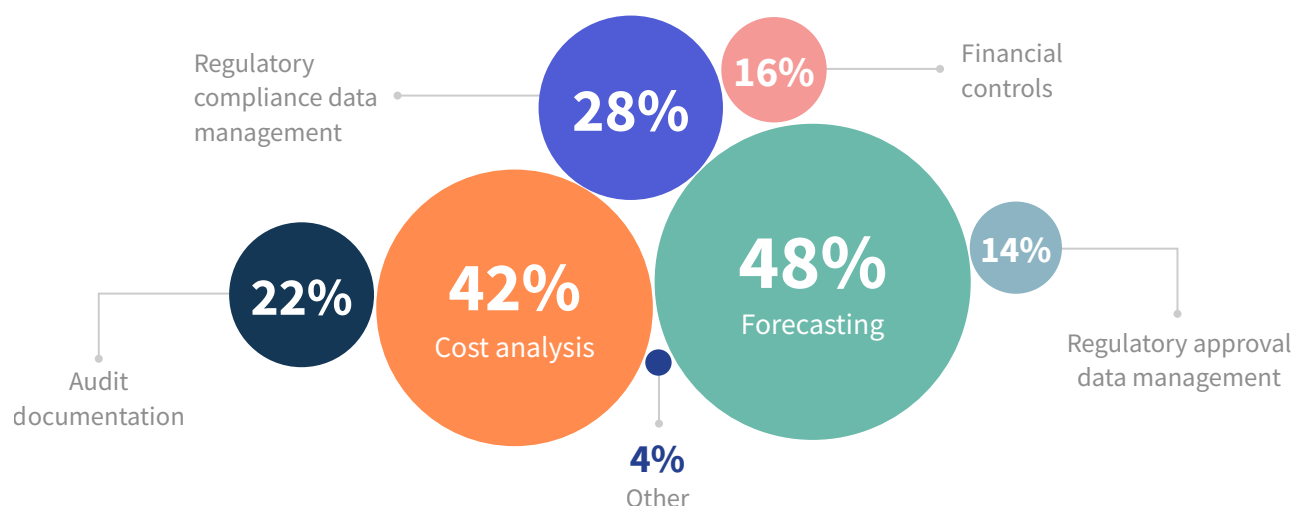
The knock-on effects of supply chain issues can be seen in other challenges, such as inventory tracking, procurement, and production planning.



■ Which of the following are your biggest administrative challenges?

Forecasting is generally a complex discipline to master, and the added issues arising from supply chain disruptions and economic uncertainty make it even more challenging.

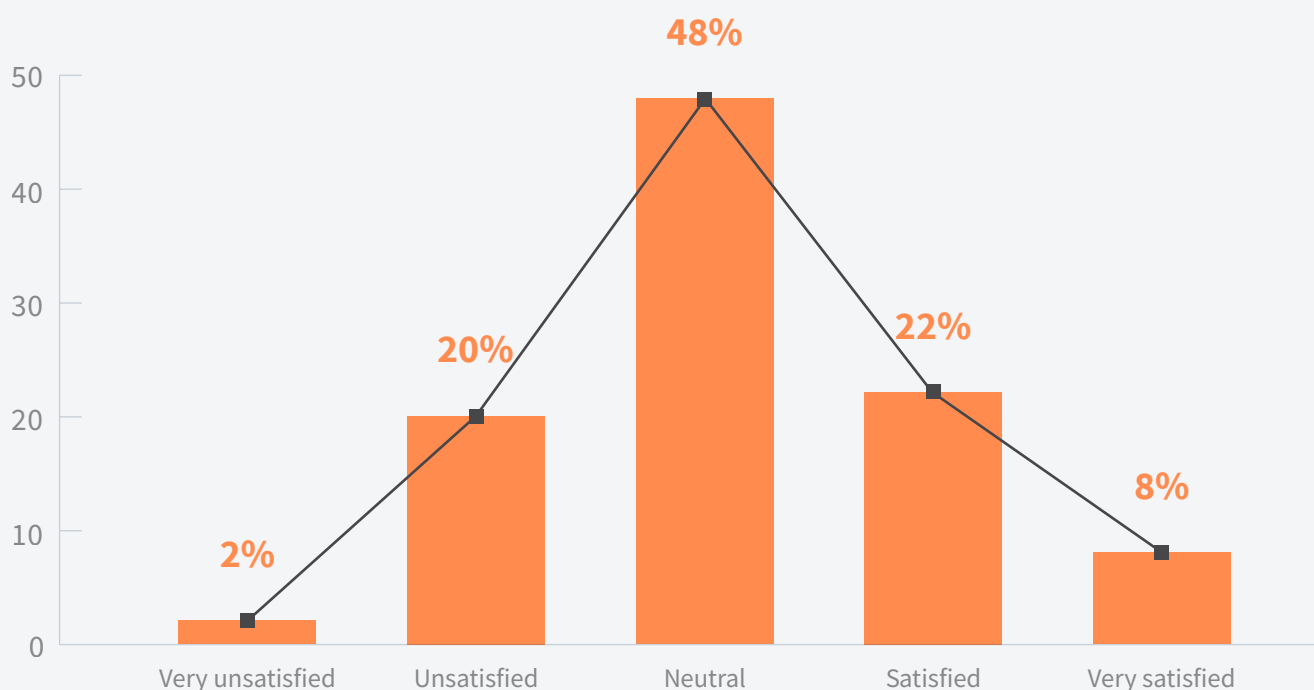
Inflation is likely making cost analysis a more difficult task as well. Various regulatory issues collectively present a significant administrative challenge for life sciences companies.



■ On a scale of 1 to 5, rate how satisfied you are with your current ERP or Enterprise System.

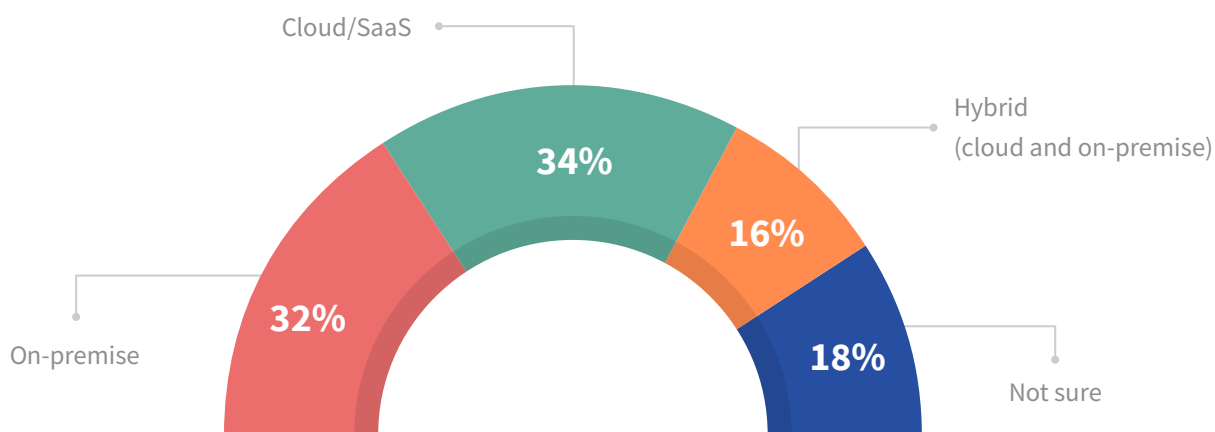
Significant dissatisfaction exists with ERP and enterprise systems in the life sciences sector. Only 8% of survey respondents could be described as net promoters; most are neutral or very unhappy with their ERP.

Many life sciences ERPs are on-premise. It is likely a struggle to adapt or change these legacy systems during an era of rapid change and ongoing disruptions to supply chains.



■ Which of the following best describes your ERP implementation?

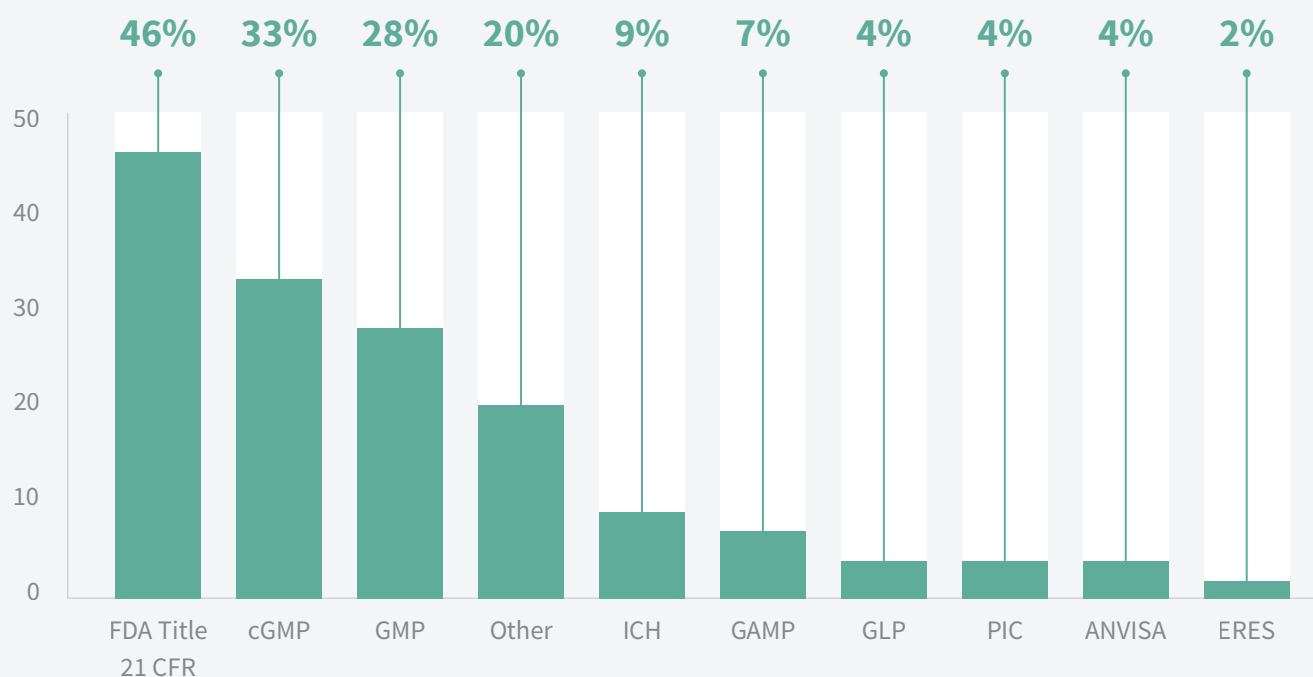
ERPs are often on-premise or a hybrid with some elements in the cloud and on-premise. These are likely legacy technologies that will be difficult to support in the future and will not be as easily adapted to new compliance requirements.



■ Which of the following are your biggest compliance challenges?

FDA Title 21 CFR is a complex compliance challenge since there are so many elements that need to be addressed, such as audits, systems validation, electronic signatures, and more.

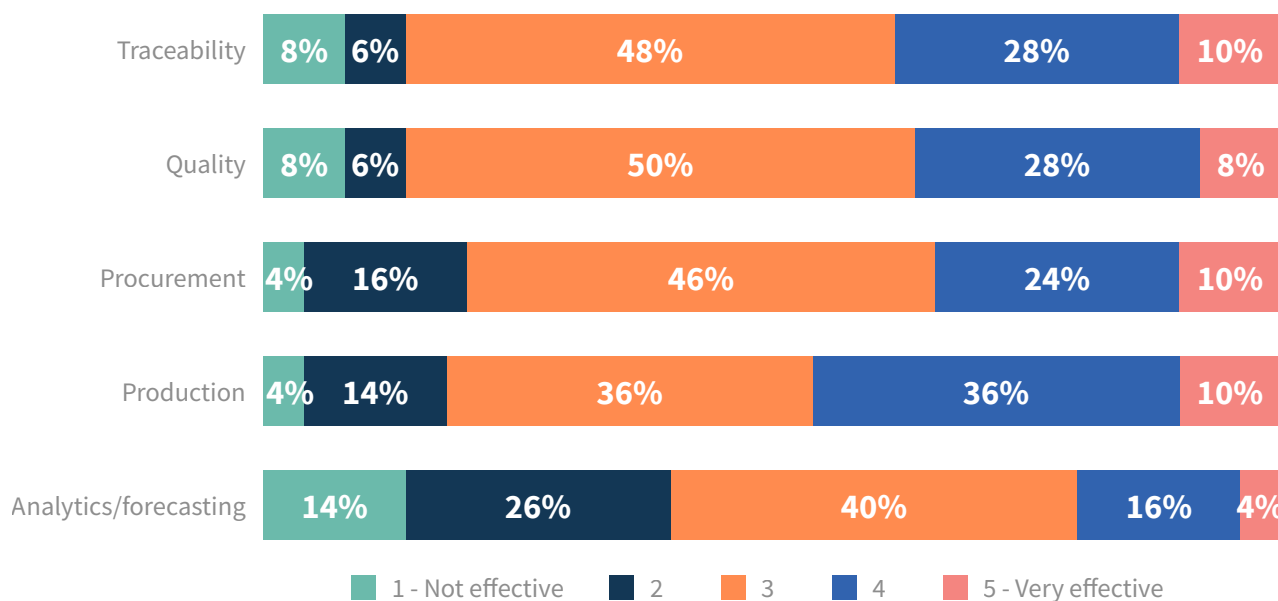
GMP and cGMP also represent significant technical challenges to ensure the proper design, monitoring, and control of all manufacturing operations.



■ On a scale of 1 to 5, rate the effectiveness of the following elements of your ERP or enterprise systems to meet your business goals/needs.

ERPs and enterprise systems have some clear areas of weakness or lack of performance. Analytics and forecasting show the most weakness, with few survey respondents ranking their ERP as effective or very effective in these areas.

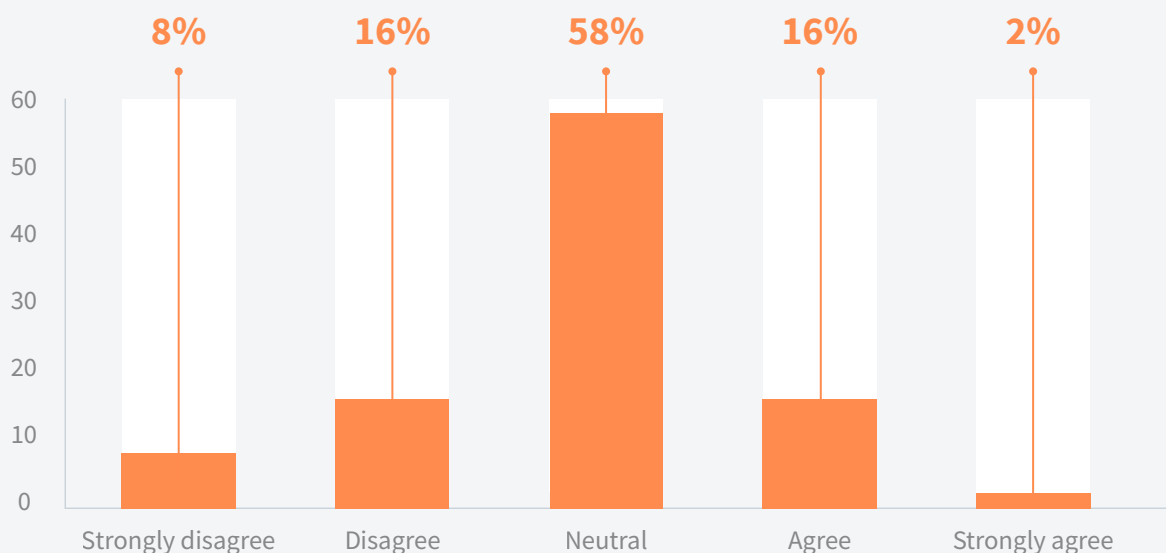
Overall, most survey respondents find the performance of various elements of their ERP merely adequate, so there is plenty of room for improvement.



■ Rate your level of agreement with the following statement: Our company has a fully implemented ERES-compliant digital signature solution.

Looking at the responses to this question, it is safe to say that relatively few life sciences companies are confident about their ERES solution.

Many have something that works but could be more robust. Nearly 25% of respondents clearly state they don't have a fully compliant ERES digital signature solution. There is room for improvement.

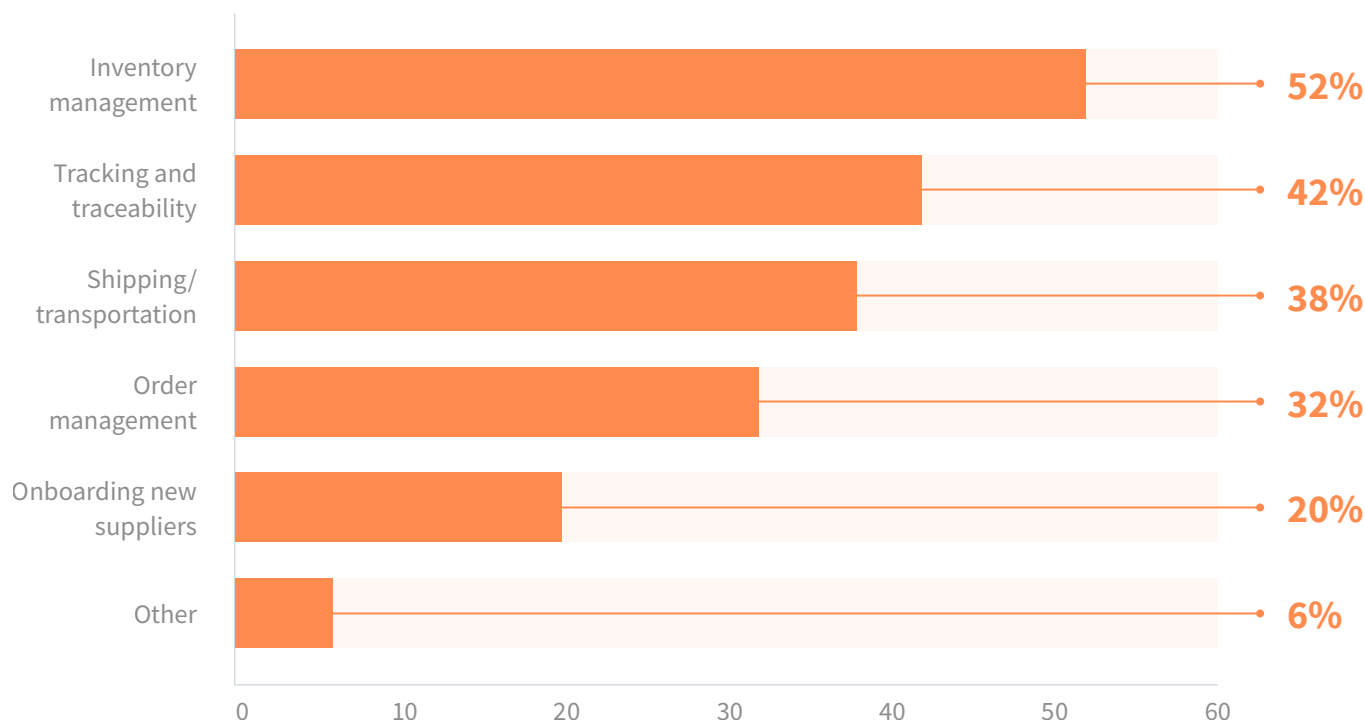


■ What are your biggest challenges brought about by the supply chain disruptions?

Like other industries, life sciences must manage significant administrative overhead with inventory management.

Tracking and traceability is also a critical compliance hurdle that is coming in the near future, and this is likely exacerbated by supply chain issues.

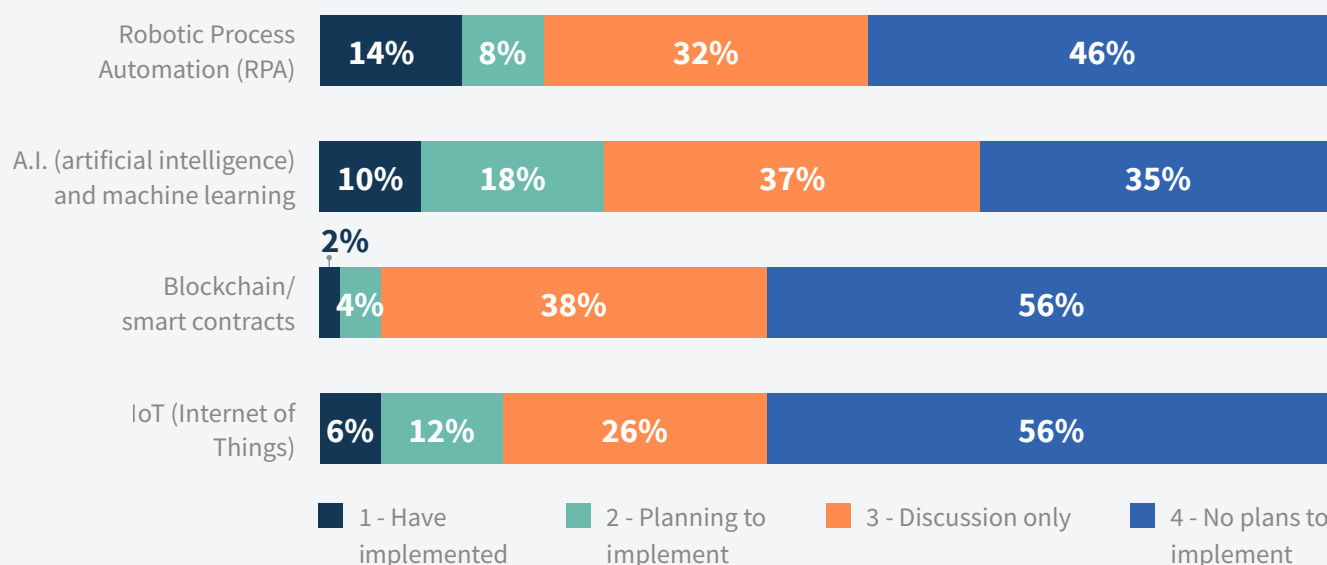
As disruptions in the global supply chain persist, the ability to onboard vendors efficiently is now a competitive advantage.



■ Where is your company in the adoption cycle for the following technologies?

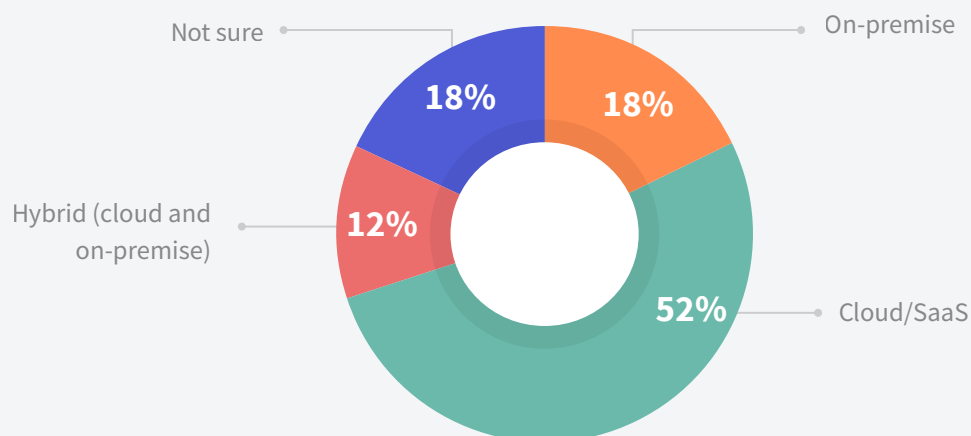
Newer and emerging technologies are being adopted, with RPA, AI, and IoT showing the most uptake. These technologies are able to improve productivity and visibility in the supply chain and inventory.

While very few have implemented blockchain or smart contracts, a sizable cohort is at least discussing the technology. Once the technology has matured, it can likely provide a lot of value to life sciences companies.



■ How would your organization prefer to implement an ERP?

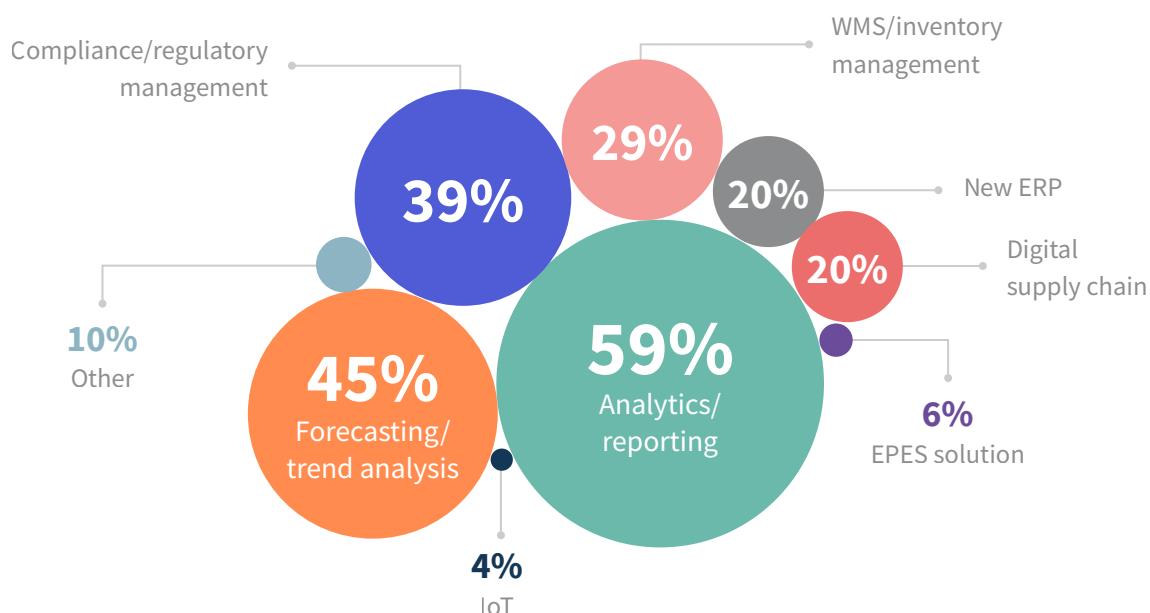
Survey respondents appear to know that it would improve business performance if their ERP were to be cloud-based or SaaS. Indeed a majority would prefer a cloud-based system.



■ What will your company focus on in the next 12 months to improve business processes?

The future focus of survey respondents aligns fairly well with areas of weakness and dissatisfaction uncovered in the survey.

Analytics, reporting, forecasting, compliance, and regulatory management showed a need for improvement. And that is where resources will be focused in the coming months to improve business processes.



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