Copy Approval
Working Effectively with Marketing

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Objectives

To identify the following in relation to Copy Approval:

• Current working practices with Marketing Departments
  • Successful practices for working effectively
  • Common issues and frustrations

• Insights into the views of your Marketing colleagues

• Suggestions for best working practices and increasing efficiency between your Medical Information and Marketing teams
Exercise 1

In your groups, discuss the following:

1. What is your role in the copy approval process?
   • What do you find works well?
   • What parts of the process don’t work so well?

2. Using the flip chart sheets and marker pens, capture:
   • Effective working practices you currently have in place
   • Any issues/frustrations with your current processes

In your groups present your findings to the rest of the room
Please rate your experiences of working generally with Marketing from Strongly Negative (1) to Strongly Positive (5) when considering the following:

Medical Information views on marketing (n=25)

1= Strongly negative, 5 = strongly positive
Survey Insights

Please rate your experiences of working specifically on copy approval with Marketing from Strongly Negative (1) to Strongly Positive (5) when considering the following:

Medical Information views on marketing (n=25).
1= Strongly negative, 5 = strongly positive

Flexibility in timelines
Understanding of MI's role in Copy Approval
Clarity of comments/feedback
Usefullness of comments/feedback

Percentage (%)
Survey Insights

When working with Marketing on copy approval, are there any particular working practices that they have put in place that you have found particularly effective?

• Discussions pre-zinc
• Engaging MI early in the process
• Zinc tracker with planned jobs
• Regular face-to-face copy approval catch ups
• Involve reviewers in agency selection process:
  ‘Check agency work/comments and sack agencies that do not do their job properly (high cycles due to amends not being made or errors). Involve reviewers in agency selection process. Co-collaborate and co-create projects with reviewers’
When working with Marketing on copy approval, are there any particular working practices you have put in place that you have found particularly effective?

- Encourage a concept meeting to help shape content ahead of zinc review
- Offer suggestions with comments (find solutions – don’t just say no)
- Weekly face-to-face catch up meetings
- Pre-zinc discussion
- Talk to them!
- Reviewers code club
- Write guidance documents for consistency
- Train external agencies on the code and company specific practices/expectations
- Checklist for job bag owners
- For those without zinc – an instigated tracker that all can view
- Training on what MI requires from Marketing with all ZINC jobs (e.g. PI if needed, highlighted refs, etc)
- Invite marketing to shadow us to show we do other things than copy approval!
Survey Insights

Have you ever become frustrated while working with Marketing for any reason?

Answered: 23  Skipped: 2

Yes - Please provide further...
Survey Insights

Have you ever become frustrated while working with Marketing for any reason?

- Lack of basic Code understanding
- Very tight time lines
- Lack of communication,
- Not actioning comments
- Do not check the agency work, lack of ownership on projects
- Pressure to adhere to unrealistic timelines
- Not providing marked up references
- Global material pushed down to regions/countries
- Everything is always urgent!
- Lack of compromise by a Marketing colleague
Exercise 2

In your groups, try to put yourself in your marketing team’s shoes:

1. What would they think of your role within the copy approval process?
   • What are they impressed by?
   • What might they find frustrating?

2. Using the flip chart sheets and marker pens, capture:
   • What do you think they would like to see more of?
   • What do you think they would scrap if they could?

In your groups present your findings to the rest of the room.
Survey Insights

Please rate your experiences of working generally with Medical Information from Strongly Negative (1) to Strongly Positive (5) when considering the following:

Marketing views on Medical Information (n=38)
1= Strongly negative, 5 = strongly positive

- Approachability
- Availability
- Openness to working in new ways
- Clarity of communication
- Level of expertise

Percentage (%)
Survey Insights

Please rate your experiences of working specifically on copy approval with Medical Information from Strongly Negative (1) to Strongly Positive (5) when considering the following:

Marketing views on Medical Information (n=38)
1= Strongly negative, 5 = strongly positive
Survey Insights

When working with Med Info on copy approval, are there any particular working practices that they have put in place that you have found particularly effective?

- Introduced an electronic copy approval system
- “Being really specific in comments and offering exact words, rather than suggesting “this is not right!””
- Regular face-to-face meetings
- Zinc jobs tracker with urgent jobs marked up
When working with Med Info on copy approval, are there any particular working practices you have put in place that you have found particularly effective?

- Collaboration on items before official copy approval
- Allowing time for desk reviews as well as face to face discussions
- Weekly job prioritisation
- Materials tracker
- Co-creation
- Involvement in the development of projects
- Booking time in reviewers calendars for review
- Speaking in person!
Survey Insights

Marketing Survey – Q5: Have you ever become frustrated while working with Medical Information for any reason?

Answered: 38  Skipped: 0

No

Yes - Please provide further information.
Survey Insights

Have you ever become frustrated while working with Medical Information for any reason?

• Chasing up
• Lack of consistency when approving materials
• Comments that do not relate to code issues (opinion based comments)
• Missed deadlines for jobs/timelines
• Inconsistency between reviewers
• Repeated review cycles as different changes are requested in later cycles.
• Excessive requests for supporting information.
Exercise 3

In your groups, take inspiration from one another’s experiences and discuss the following:

1. What would be the perfect Copy Approval process?
   • What part of the process would you change?
   • What would you keep the same?

2. Using the flip chart sheets and marker pens, capture:
   • What practices could you put in place to improve the effectiveness of the process?

In your groups present your findings to the rest of the room
Survey Insights

On a scale of 1 (not useful) to 10 (very useful) please rate how effective you think the following suggestions could be for working practices which could be employed by Medical Information departments within the industry:

Medical Information
Effectiveness of potential working practices
1 = not useful, 10 = very useful

- Working with marketing on claim development
- Working directly with agencies
- Providing more in-depth training for Marketing teams on Copy Approval Practices
Survey Insights

On a scale of 1 (not useful) to 10 (very useful) please rate how effective you think the following suggestions could be for working practices which could be employed by Medical Information departments within the industry:

Marketing
Effectiveness of potential working practices
1 = not useful, 10 = very useful
Final exercise

In your groups:

Using any media to hand e.g. flipchart pieces, markers, coloured pens, electronic.

Create a presentation/poster/leave piece to provide to marketing/directly to the agencies to highlight your expectations of jobs that come through.

In your groups present your findings to the rest of the room.
What next?

The findings from the survey and insights from today’s session will be written up in an article for the next edition of PIPELINE.

If you have any questions, or any breakthroughs with implementing these ideas we would love to hear from you. Please feel free to email us at:

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