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**NEED FOR IMPROVED CRM TOOLS TO INCREASE IN PHARMACEUTICAL
SALES AND MARKETING OVER THE NEXT FIVE YEARS**

*Front Line Strategic Consulting Assesses Market Opportunities in the Pharmaceutical
CRM Tools Market and Forecasts its Growth to 2008*

August 20, 2003, San Mateo, Calif. — Strong competition and increasingly strict marketing guidelines are heightening the pharmaceutical industry's interest in advanced customer relationship management (CRM) technologies. In a report entitled ***Pharmaceutical Customer Relationship Management: Tools to Improve Sales Force Effectiveness and Productivity***, analysts from Front Line Strategic Consulting, Inc., note that the CRM tools provide significant opportunities to improve physician detailing effectiveness and efficiency.

In the report, Front Line notes that the global pharmaceutical CRM market is maturing with a number of software technologies such as Siebel System, Inc.'s *Siebel Pharma*, Dendrite International's *WebForce*, and iAnywhere Solutions, Inc.'s *AvantGo Mobile Pharma*[™]. In addition, technologies, including tablet PCs, will help drive demand with improved features such as electronic signature capture and increased mobility.

According to Front Line, the estimated size of the pharmaceutical CRM tools market will be \$455M in 2003, and is expected to reach almost \$625M in 2008. The U.S. will be the predominant geographical area of market expansion while Europe and Japan will account for 30% and 8%, respectively, of sales in 2008. Growth will be tempered, however, by reductions in corporate spending and potential implementation hurdles that may deter pharmaceutical clients from investing in costly CRM systems.

“Because sales representatives are granted, on average, 90 seconds per physician visit, pharmaceutical manufacturers will leverage CRM technologies to enhance the effectiveness and improve the relevance of their presentations to better influence physicians’ prescribing habits. However, rapid ROI on a CRM system will depend on the development of proven, yet innovative, implementation strategies,” says Rochelle Ellis, analyst, Strategic Market Reports division for Front Line.

About Front Line

Headquartered in San Mateo, Calif., Front Line is a leader in strategic consulting and market analysis for the Life Sciences industries, offering strategic business intelligence through exclusive consulting engagements and comprehensive strategic market reports of key therapeutic and technology areas. Front Line was founded in 1992 and specializes in combining diligent research methodology with intelligent strategic planning for their pharmaceutical and biotechnology customers. www.frontlinesmc.com

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