**ORCHESTRATE**

TARGET LIST STANDARD QUESTIONS

Purpose of the document -To gather all critical requirements and specifications for how Orchestrate will receive, process, and manage the target list data across brands, channels, and segments—ensuring alignment with client, EVERSANA, or third-party data sources, consent rules, refresh frequency, and business logic (e.g., segmentation, Test & Control).It ensures a standardized, compliant, and scalable approach to audience orchestration and targeting setup before execution begins.

1. How will Orchestrate Procure the target file?
   1. EVERSANA D&A
   2. Client
   3. Third-party

*(Information(i) Please see at the bottom standard target list data fields needed if provided by client or third-party. )*

1. Are we orchestrating more than 1 brand or 1 indication of the brand?
   1. Yes
      1. List number of brands and corresponding Indication (if applicable)

|  |  |  |  |
| --- | --- | --- | --- |
|  | Brand | Indication 1 | Indication 2 |
|  |  |  |  |
|  |  |  |  |

* 1. No

1. Will each brand or indication has separate target lists?
   1. Yes
   2. No
2. Are there overlapping users between brands?
   1. Yes
   2. No
3. Will Media and Orchestrate have different target files?
   1. Yes
   2. No
4. How will we get unified golden records in target list?
   1. Run EVERSANA MDM(Master data management) service for creating unified golden records
   2. Client provided OMNI ID
      1. How often is this refreshed?
         1. Weekly
         2. Monthly
         3. Quarterly
      2. How often will Orchestrate expected to sync the refreshed profiles
         1. Weekly
         2. Monthly
         3. Quarterly
5. Are there email addresses available in the target list? (applicable for HCPs and Patients)
   1. Yes
   2. No
6. Are these emails opted-in for marketing?
   1. Yes
   2. No
7. How is Orchestrate expected to handle null value when no email address is available?
   1. Purchase it from data provider external to Eversana
   2. Null email address values are not applicable to receive emails
8. Is there Test & Control random?
   1. Yes
   2. No
      1. Is there any specific business logic to be considered for stratification purposes? Please add in box below:

|  |
| --- |
|  |

1. Test & Control should be split on which level:
   1. Franchise (overlapping users who are in control group will be suppressed from all brands and indications)
   2. Brand level (overlapping users who are in control group will be suppressed only for a given specific brand)
   3. Brand + Indication level (overlapping users who are in control group will be suppressed only for a given specific brand and one of its indications)
2. **Audience Segmentation & Targeting**
3. Are there existing audience segments or labels in the data?
   * Yes
   * No
4. Can the data be used to build lookalike or suppression lists? (Email opt-out flag, Do-not-call indicator)
   * Yes
   * No
5. Are there fields that indicate lifecycle stage, preferences, or behavior (lead\_status ; customer\_type (e.g., Prospect, Active Customer, Lapsed))
   * Yes
   * No
6. HIPAA compliance (if applicable)
   1. as the data been collected with appropriate consent (e.g., GDPR, HIPAA, CAN-SPAM)
      1. Yes
      2. No
   2. Are there fields indicating user consent status (opt-in/opt-out)?
      1. Yes
      2. No
   3. Are there restrictions on how the data can be used?
      1. Yes

Please explain

* + 1. No
  1. Is any PII (personally identifiable information) included?
     1. Yes
        1. List fields
     2. No

**8. Data Refresh & Maintenance**

* How often is the Target list refreshed or updated?
  + Monthly
  + Quarterly
  + Bi-annual
  + Annually

**10. Are their segments in the target list**

* 1. Yes

Please list

* 1. No