



**Session will start soon**

# Corporate Markets Town Hall

22 January 2025



Chat

**Add your  
comments**



Q&A

**Ask your  
questions**



More



Language and speech >

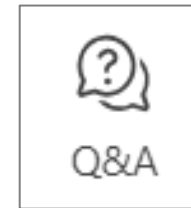


Turn on live captions

**See subtitles**

This session is being recorded and will be shared with all Corporate Markets colleagues afterwards

- Welcome from Stuart
- 2024 highlights
- 2025 growth driver overview – 2025 priorities and OKRs (Swapan, Mirit, Sean and Christina)
- Introducing Spotlight
- Our impact for customers: Pfizer's use of PharmaPendium
- Q&As



**Ask your questions**



# Welcome

Stuart Whayman

## Our Elsevier Go-To-Market story of value

### **Our belief**

By working together, we can shape human progress - to go further, happen faster, and benefit all

### **Our purpose**

We help advance science and healthcare to advance human progress

# Our Management Team



**Stuart Whayman**  
President, Corporate Markets



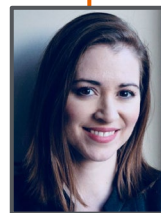
**Mirit Eldor**  
Life Sciences



**Cameron Ross**  
Gen AI



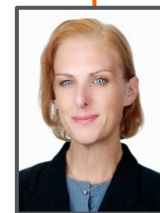
**Darren Webster**  
Global Pharma



**Christina Valimaki**  
Marketing



**Sean Norris**  
Corporate Sales



**Jennifer Fleet**  
Aries



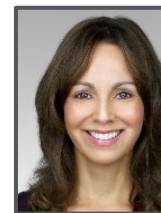
**Paul Heesters**  
Finance



**Swapn Taneja**  
Strategy



**Frank Overmars**  
HR



**Terri Mueller**  
External Comms



**Kevin Ferneyhough**  
Internal Comms



**Florine Rosingh**  
Legal



**Rose L'Huillier**  
R&L Solutions

Direct Reports

Supporting Teams

# 2024 highlights

**Remember: Ask your  
questions as we go through**



Q&A

Q1: DaaS new recurring bookings grew from \$1.6m in 2023 to how much in 2024?

- \$2.6m
- \$3.2m
- \$3.8m



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Q2: Customer NPS performed strongly in 2024, achieving +31 (1pt ahead of target). How many points higher is this than it was two years ago?

- 1 pt
- 10 pts
- 31 pts



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Q3: How many pieces of positive media coverage coverage did Corporate Markets achieve in 2024?

- 35
- 55
- 77



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- 35
- **55**
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Q4: More of us supported our communities by taking RE Cares time. What percentage of Corporate Markets colleagues recorded this during 2024?

- 16.9%
- 18.7%
- 19.2%



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Q5: How many 'at risk accounts' did the marketing team reach through a honed account based marketing approach?

- 15
- 25
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Q6: What was Aries' revenue growth in 2024 over 2023?

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- 8.5%
- 9.5%



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Q7: We've increased our focus on early stage innovation – supporting more bets than ever with the onboarding of \_\_\_\_\_ into the team.

- UX researchers
- LINUX coders
- AI bots



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Q8: Corporate Global Inside Sales responsibilities expanded in 2024 with a 50% increase in renewal base, expanding the teams' regions across emerging markets in \_\_\_\_\_.

- Africa, LATAM and Middle East
- NOAM
- Australia and New Zealand
- APAC



Q8: Corporate Global Inside Sales responsibilities expanded in 2024 with a 50% increase in renewal base, expanding the teams' regions across emerging markets in \_\_\_\_\_.

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- NOAM
- Australia and New Zealand
- APAC



Q9: In Primary Research, the key highlight for \_\_\_\_\_ in 2024 was that we again outperformed paid usage targets, saw increases in Pharma, and outperformed on our NPS scores.

- PharmaPendium
- ScienceDirect
- Reaxys



Q9: In Primary Research, the key highlight for \_\_\_\_\_ in 2024 was that we again outperformed paid usage targets, saw increases in Pharma, and outperformed on our NPS scores.

- PharmaPendium
- **ScienceDirect**
- Reaxys





Q10: We engaged over 50 corporate customers across the \_\_\_\_\_ industry in more than 10 countries into Alpha and Beta AI product innovations.

- Pharmabiotech
- Energy
- Industrials
- Food/Agriculture
- Consumer Goods



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- **Energy**
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- **Consumer Goods**



# 2025 growth drivers

Sean Norris, Mirit Eldor, Swapan Taneja

**Remember: Ask your  
questions as we go through**



Q&A

# Our 2024 performance reflects progress on many dimensions

Objectives		How would we measure success?	
1	<b>Drive monetizable innovation</b> with new products, datasets and use cases	<ul style="list-style-type: none"> <li>● Revenue new products / modules &lt;5 years</li> <li>● # innovation bets actively explored</li> <li>● # of generative AI Pilots</li> <li>● # of customers for Scopus AI</li> </ul>	
	<b>Gain share</b> in all markets and in head-to-head competition	<ul style="list-style-type: none"> <li>● Paid FTA growth on SD</li> <li>● MAU growth for key products</li> <li>● Corporate user NPS for key products</li> <li>● Reaxys vs. SciFinder win rate</li> </ul>	
	<b>Drive go-to-market success</b>	<ul style="list-style-type: none"> <li>● New recurring bookings</li> <li>● New transactional bookings</li> <li>● Journals: Net renewal</li> <li>● Life Sciences solutions: Net renewal</li> </ul>	
4	<b>Improve customer experience, while optimising how we operate</b>	<ul style="list-style-type: none"> <li>● Buyer NPS</li> <li>● Corporate Customer CSAT</li> <li>● Market perception score</li> <li>● Tracker and cookie compliance across products</li> <li>● Instances of end-of-life software and services</li> <li>● Critical products Entry Level resilience status</li> <li>● Access success rate</li> <li>● SSO implementation customer CSAT</li> <li>● Cost growth below revenue growth</li> </ul>	
	<b>Continue to develop an inclusive, engaged, agile and sustainable culture</b>	<ul style="list-style-type: none"> <li>● eNPS: EOS</li> <li>● Engagement: OV</li> <li>● OfficeVibe Personal Growth</li> <li>● Officevibe Fairness</li> <li>● % women in management positions (L4/ L5)</li> <li>● RE Cares % of staff volunteering</li> <li>● Carbon emissions: &lt;50% of 2019 baseline</li> </ul>	
5			

In 2025, we are prioritizing **Customer Focus**, **Commercial performance** and **Team-work**

# Elsevier and Corporate Markets 2025 Objectives

Elsevier's mission & how we deliver on it

Our mission is to help advance science and improve health outcomes for the benefit of society by combining quality content and data sets with analytics and technology - informed decisions lead to better outcomes

Elsevier's Objectives

- 1 Drive monetizable innovation with new products, datasets and use cases
- 2 Improve GTM excellence to gain share in all markets and in head-to-head competition
- 3 Build trust by partnering with the communities we serve
- 4 Improve customer experience, operate faster and at lower cost
- 5 Continue to develop an inclusive, engaged, agile and sustainable culture

Corporate Markets Objectives

- 1 Drive monetizable innovation with new products, datasets and use cases
- 2 Deliver strong commercial growth
- 3 Deliver customer value with Elsevier solution portfolio
- 4 Improve customer experience, while optimising how we operate
- 5 Continue to develop an inclusive, engaged, agile and sustainable culture

Corporate Markets mission

Helping research intensive companies innovate more successfully

# Corporate Markets 2025 OKRs (1/2)



Helping research intensive companies innovate more successfully

Objective

1

**Drive monetizable innovation with new products, datasets and use cases**

- New recurring bookings Advanced Data Solutions (Datasets + SciBite)
- Time to value by customer for Datasets
- # of customers adopting Gen AI solutions
- New recurring bookings Gen AI solutions
- Innovation Pipeline ideas

Key results '25

- Successfully launch Gen AI modules with Day 1 revenue and growth plan
- Marketing campaigns based on value stories to grow Datasets/ Gen AI modules in mid-tier accounts
- Expand Datasets value at existing accounts by addressing new use cases/ pricing
- Focus data platform roadmap on highest value customer use-cases
- Build early stage innovation pipeline focused on biggest unmet customer needs

The "How"

2

**Deliver strong commercial growth**

- New recurring sales
- New transactional sales
- Journals: Net renewal uplift
- Life Sciences solutions: Net renewal uplift
- % Sales team with bronze belt certification <priority portfolio>
- Reaxys vs. SciFinder win rate
- % Accounts with health score >xx

- Regional GTM planning across sales, marketing & product
- Product & Value prop training and certification for all customer facing teams
- Roll out customer success approach & processes
- Develop approach for high growth segments <Biotech, CRO>

3

**Deliver customer value with Elsevier solution portfolio**

- Paid FTA growth on SD
- MAU growth for key products
- Corporate User NPS for key products
- Aries market share (% of journals/ submissions)
- Ensure / maintain ISO 27001 & ADA compliance for key products

- Implement systematic customer feedback loop (win/loss, renewals) to inform product and GTM improvements
- Expand content coverage on products to enable new use cases e.g. clinical trials, polymers
- SD value prop and pricing update & portfolio price/value mgmt.
- Develop product & commercial strategy for Aries to gain share in mid-market
- Ensure products meet accessibility, ISO 27001 standards and ADA

# Corporate Markets 2025 OKRs (2/2)

Helping research intensive companies innovate more successfully

4

**Improve customer experience, while optimising how we operate**

- Corporate buyer NPS
- Market perception NPS
- Instances of end-of-life software and services
- Access success rate
- SSO implementation customer CSAT

5

**Continue to develop an inclusive, engaged, agile and sustainable culture**

- Engagement: EOS; OV
- Spotlight usage
- Carbon emissions: <50% of 2019 baseline

- Execute on brand story of value
- Enhance portfolio story and value proposition
- Access and entitlement improvement across portfolio
- Proactively manage resources, stopping low value activities to enable reallocation towards growth drivers
- Improve how we work every day faster, better, safer and more cost effectively, e.g. by leveraging Generative AI

- Engage senior leadership group in strategic thinking and implementation
- Regular communication with broader team on priorities and progress
- Roll out new recognition platform to highlight achievements across all CM teams
- Implement action plans focus areas: Trust in leadership, Growth & development opportunities

# Customer Focus: Start with the customer – not the solution

A deep understanding of our customers is helping us with...



## How we innovate

### Innovation launches

- Scopus AI
- ScienceDirect AI
- Reg AI
- Embase AI
- Reaxys Vector Search
- Reaxys Target & Bioactivity
- Embase Clinical Trials
- New Reaxys API
- ScienceDirect images, OA and society datasets



## How we capture value

- Focus on value drivers
- Competitive differentiation
- Confidence in pricing conversations

### 2025 focus areas

- Win/loss analysis
- Reaxys playbook in action
- Value-based pricing
- AI thought leadership



## Building trust and long-term relationships

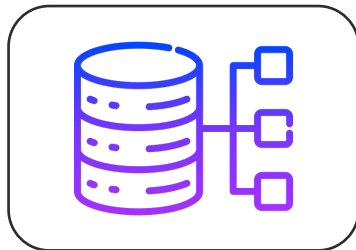
- Deliver a positive customer experience across their entire journey
- Be a problem-solver
- Help customers through difficult moments

All of us - together



# Seizing the opportunity: Catalysts that will accelerate our growth in 2025

## Datasets



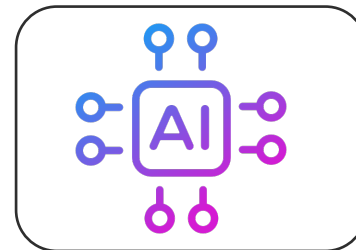
We saw in 2024 a greater demand for datasets, we grew this ASV by 50%YOY. This trend will continue in 2025 with more customers are combining our data and their own to drive innovation and insight. A great opportunity to value base sell and overperform in 2025.

## Price Increase



A priority for 2025 is to drive pricing confidence across the GTM teams as we have a material opportunity to realize greater price increases for the value create for customers. 2.9% is below the attainable average (5.6%), we aim for 5% as a new average.

## AI Innovations



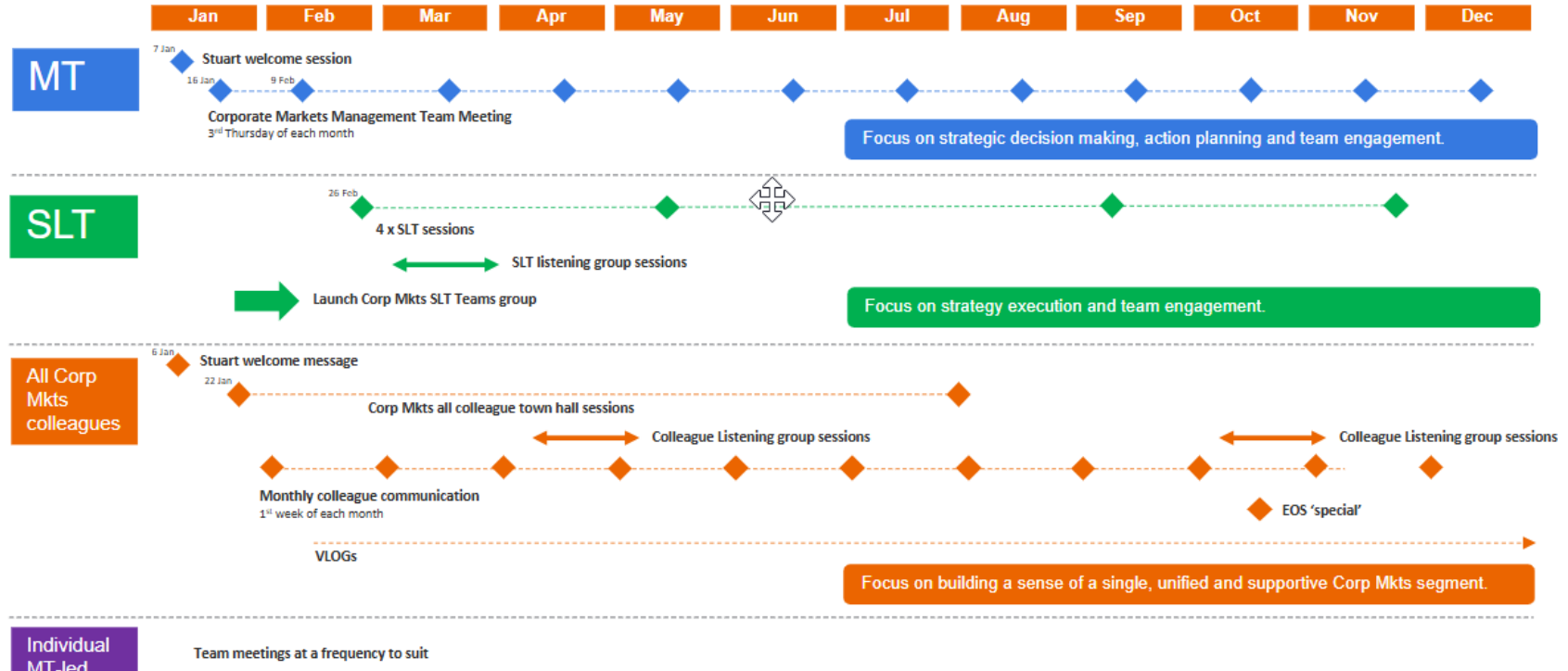
Elsevier is at the forefront of AI innovation in our markets, achieving success in 2024 with the launch of Scopus AI. In 2025, we will introduce more AI advancements across our portfolio, enhancing the value we deliver to our customers.

Through prioritization, teamwork, confidence and worldclass execution we can exceed our 2025 goals and overperform.

# 5 for Teamwork in '25

## 1. Communication: Frequent & two-way

### 2025 timetable



# Introducing Spotlight

Kevin Ferneyhough

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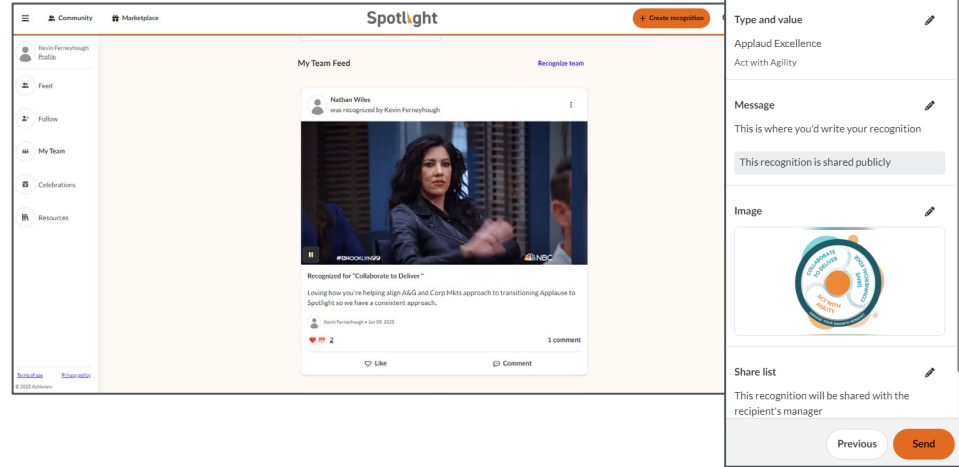


Q&A



*Shining a light on excellence and celebrating moments*

- Arrives on 4 February
- Replaces Applause
- Enables and encourages frequent cross team recognition
- Managers can award recognition posts



## January

Continue to submit recognition nominations through Applause

## February

Use Spotlight for peer-to-peer recognition

## March

New 'nomination' process in Spotlight for February and March – then quarterly



**All 'awards' in Applause to be spent by 31 March 2025**



# How we're helping our customers benefit society

Ivana Kotevic

**Remember: Ask your  
questions as we go through**



Q&A



# Acknowledgements



## Elsevier Pharmapendium team

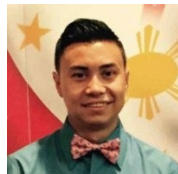
### Pfizer



**Matt Martin**  
Executive Director,  
Global Head of  
Computational  
Safety Sciences



**Dennis Pelletier**  
Senior Principal  
Computational  
Toxicologist



**Darien Capunitan**  
Senior  
Computational  
Toxicologist



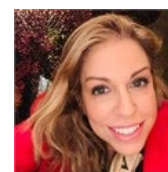
Olivier Barberan



Thomas Vargues



Sakshi Upadhyay



Tammy Ryerson



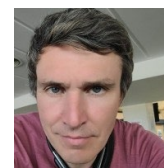
Herb Rund



Amy Nielsen



Igor Denisov



Arseniy  
Moshkevich



Aliaksandr  
Dubouski



Branka Martinovic



Abhijeet Kadam



Ahmet Bektes



Patrice Dehanne



Yeliz Angin



Andries Wijand



**QUESTIONS**



**ANSWERS**



**“I have no special talent. I am only passionately curious.”**

Albert Einstein

