



Brand Identity in *a* Consumer-Driven World

Branding strategies evolve to meet new marketplace demands.

Brands are up against new barriers as the control of what product gets prescribed and filled shifts from the physician to the payer and, even more importantly, to the patient. As healthcare consumers claim more and more power over their healthcare and treatment decisions and physician control over brand choice declines, the industry must begin to connect the dots between brand identity and consumer preferences.

“Consumers are acquiring more information from a larger number of resources than ever before, and in very simple terms, if they don’t believe it, they won’t buy it,” says Marc Sirockman, executive VP and general manager at Artcraft Health.

Increasingly, a brand is what customers decide it is rather than what the company might plan to present, says Daryl Travis, CEO of Brandtrust.

“Companies have to face the ever-growing reality that customers have a powerful voice through social media,” he says. “Social media, online, and mobile digital technologies have forever shifted the balance of power into the customer’s hands.

“We’re undergoing a profound shift in the

nature of the relationship between brands and their customers,” Mr. Travis continues. “Customers now have a co-creational role in identifying, defining, and positioning the brand. Brands that disappoint will undoubtedly suffer the same fate as when their customers’ unfriend their Facebook friends.”

Given the new reality where corporate brand image drives pharmaceutical brand recommendation behaviors by both professionals and patients, marketers need to recognize that the drivers of reputation and relationship, including innovation, trust, governance, leadership, and social responsibility, all need to be areas companies invest in to boost product recommendation behaviors and gain brand loyalty, says Camille DeSantis, co-founder and chief of strategy of Guard Dog Brand Development.

“We are in a new reality in pharma, one in which physicians, allied healthcare professionals, and patients buy and recommend products based primarily on their trust, admiration, and appreciation for the companies that stand behind them,” she says.

There has historically been skepticism around the concept that there is a direct correlation between professional and patient recommendation behaviors and the quality of the

corporate brand image, but it has been proven to be true globally. In fact, Guard Dog recently conducted a study in oncology, a market in which product data have been considered the primary driver of recommendation behavior, that has proven that corporate brand image is a primary driver of product choice in cases where products are similar.

According to Ms. DeSantis, the study demonstrated that 64% of an oncology company’s reputation is driven by things other than products and services and innovation.

In fact, when products and services between companies are similar, other factors take on greater significance in driving choice.

“Our study posed a hypothetical situation in which multiple pharmaceutical companies developed a similar oncology product for the same indication,” she says. “All things about the product being identical, including the price, we asked which company’s product would the oncologists recommend. The companies with the best company brand images scored highest, proving that company image alone would have a significant impact on recommendation behaviors.”

Additional independent studies have also proven that a mere 5% improvement in the

“The days of generic messaging are gone; custom educational communications with engaging and approachable content and design are the future.”

MARC SIROCKMAN / Artcraft Health



strength of the company’s brand image and reputation could be expected to produce, on average, a 1.5% uplift in the share price over the year, translating to about a \$550 million increase in market capitalization.

“Thus, any pharmaceutical company that wants to succeed and sustain a healthy, long-term competitive advantage, create differentiation in the short term, and insulate itself from weather storms of clinical disappointment, which invariably occur in pharma, would want to invest in corporate brand identity development that includes all drivers of reputation and relationship,” Ms. DeSantis says.

sage from the brand is most likely about how it can fix the patient’s problem or provide a diagnosis to make things better,” Mr. Schrimpf says. “The patient may not perceive this as an endearing motive on the part of the brand. It is best to create the relationship be-

“The most successful brands have a branding strategy at the core, a central idea of the brand experience.”

VINCE PARRY / Parry Branding Group



Evolving Brand Strategies

Brand reputation and brand loyalty — important factors in brand decision making — can be built through pre-diagnosis relationships with the consumer. Instead of creating messaging around how the product addresses the disease or diagnosis, brands need to start building relationships long before diagnosis occurs.

“In today’s marketplace, corporate branding plays a bigger role in building consumer relationships,” says Paul Schrimpf, associate partner in the healthcare practice at Prophet. “Looking beyond disease states means brands need to be building awareness and relationships well before and long after a condition emerges.”

For example, the Novo Nordisk cycling team (see sidebar) and the publicity from its events establishes such a relationship with consumers who are yet to be on the treatment.

According to Mr. Schrimpf, brands that “meet” their consumers long before they need the product are on the path to successful branding. Traditionally, drugmakers become involved in a patient’s life after a diagnosis has been made. This is a time when a patient is not feeling well physically or emotionally, and it’s a tough time to be breaking the ice.

“At this point in a patient’s life, the mes-

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“From a branding perspective, we felt it was important to brand the program Get Old to be direct in the way we talk about aging and not to sugarcoat a serious and important issue.”

SALLY SUSMAN / Pfizer



“We are in a new reality in pharma — one in which physicians, allied healthcare professionals, and patients buy products based primarily on their trust in the companies.”

CAMILLE DESANTIS
Guard Dog Brand Development

fore the consumer is in a negative emotional state.”

For example, Pfizer created Get Old, which was relaunched this summer, to foster candid conversations about aging, redefine what it means to “get old,” and encourage individuals to adopt healthy behaviors that help prevent chronic diseases, which are on the rise. According to Sally Susman, executive VP, corporate affairs, at Pfizer, helping people Get Old and age well is both Pfizer’s business and societal responsibility. The Get Old program is also supported by a number of nonprofit organizations and patient groups that collaborate with the pharma company.

“From a branding perspective, we felt it was important to brand the program Get Old to be direct in the way we talk about aging and to not sugarcoat a serious and important issue,” Ms. Susman says. “We also wanted the stopping power of a name that was unexpected to engage our audiences.”

Pfizer is also using new digital platforms and innovative tools to help people manage their overall health as they get older.

Genentech has taken a different approach to connecting with consumers by getting a better understanding of patients’ real-world experiences through a partnership with patientslikeme.com. The agreement between Genentech and patientslikeme.com is the first broad research collaboration of its kind and its aim is to study patients’ experience with disease and treatment.

Efforts like these enable a brand to be viewed as more welcoming once a condition is uncovered, which is often a highly emotional time in a consumer’s life, Mr. Schrimpf says.

Hospitals are already creating a relationship with its community before, after, and during patient care, he notes. For example, Mayo Clinic continually publishes new research findings, which keeps it in the press and front-of-mind with the public, and more importantly, with healthcare professionals. Mayo Clinic also contributes content regarding preventive health to channels such as CNN Health, and through its Mayo Clinic Family Health Book. Such efforts position Mayo Clinic as a resource and an expert with consumers before they even become patients. Maintaining relationships with patients after they no longer have the condition is as important as during their visit, because they can become advocates post-care, Mr. Schrimpf says.

Companies that truly understand the role that medication, therapies, and services play in the lives of consumers know that positioning healthcare brands is vastly different from positioning consumer goods, says Vince Parry, president and chief branding officer of Parry Branding Group.

With consumer goods, it is a celebration of self, an outward expression of embracing brands that help reflect the buyer’s personality. However, when people get sick, they are not themselves. Illnesses fundamentally alter the way a sick person behaves and makes buying decisions. With healthcare brands, it is not a celebration of self, but rather a protection of self.

“What we all expect from a healthcare brand is to help us return to a state of normalcy, in other words, an ‘unsick’ state, as much and as quickly as possible given a particular disease or condition,” Mr. Parry says. “You want to resume your pre-sickness life

Pfizer Uses Twitter to Create a Brand Identity



In an effort to create relationships with the baby-boomer generation, Pfizer has relaunched its Get Old campaign by adding a Twitter hashtag and using other digital media channels. The campaign seeks to challenge boomers and people of all ages to think about aging. Social and digital media channels allow for consumer engagement where these conversations are already happening. By the ongoing evolution of Get Old, Pfizer hopes to engage a wider audience and get people of all ages to have candid conversations around aging — and to make lasting changes in their own lives to age well.

“Social and digital media are powerful tools for engaging consumers, and boomers are one of the fastest-growing user groups online,” says Sally Susman, corporate affairs at Pfizer. “Digital media platforms can have a tremendous impact on how people receive and share information related to their health as well as connect with online communities.”

Pfizer refreshed the GetOld.com campaign by adding the hashtag #FOGO (Fear of Getting Old), as well as adding engaging new content, such as videos, blogs, and tools about healthy aging that use a mix of wit and wisdom to challenge misperceptions of aging and address consumers’ fears of aging head on.

“We also encourage consumers to join the Get Old Facebook community or follow us on Twitter,” she says.

For more information, visit facebook.com/GetOld or twitter.com/GetOld

even if that resumption is not completely back to the levels before you became ill.”

Healthcare brands must view the patient as a consumer who has become ill and seeks to restore essential aspects of self that illness has compromised.

“So in today’s consumer-driven marketing environment, the brands that recognize and reflect that a ‘resumer model’ is the goal of positioning will thrive much better than brands that still believe they are positioning to a traditional consumer model,” Mr. Parry says.

Branding Challenges

Marketers are always challenged to deliver the right message, at the right time, to the right audience. Understanding the best con-

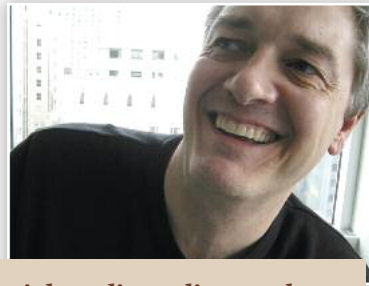
Team Novo Nordisk: Changing Diabetes, Creating a Brand



Novo Nordisk is using social media and real patients to create a brand identity that illustrates its mission to change the way patients live with diabetes. The diabetes treatment maker sponsors a men’s cycling team, a women’s cycling team, and an Ironman team — whose members conquered living with diabetes through lifestyle changes and treatment.

According to the drugmaker’s European website, Team Novo Nordisk’s mission is to inspire, educate, and empower people affected by diabetes. The Type 2 diabetes athletes cycle, swim, and run competitively, and maintain a proper diet and diabetes management to stay healthy and active. Acting as ambassadors and role models for other patients, they share their experiences on the site and other social media channels.

Team members include a young mother struggling to balance the needs of family and managing her disease; a man who has lost more than half his body weight through cycling; a senior citizen who is successfully and healthfully managing his disease by cycle racing.



“Social media, online, and mobile digital technologies have forever shifted the balance of power into the customer’s hands.”

DARYL TRAVIS / Brandtrust
@BTCEO



“While product brands still play an important role in today’s marketplace, a strong corporate brand is also required to aid in launch and adoption.”

PAUL SCHRIMPF / Prophet
@prophetbrand

duits and communication strategies for achieving this result within budgetary restraints has always been and continues to be the greatest challenge to brands and brand marketers, Mr. Sirockman says.

“However, patients must be addressed on their terms as they follow their own path to treatment and wellness,” he says. “The days of generic messaging are gone. Custom educational communications with engaging and approachable content and design are the future.”

Traditionally, marketing strategies have focused on identifying specific moments, or touch points, when a consumer’s decision could be most influenced. One example of such a strategy would be the funnel approach, which is directed to consumers who have a number of potential brands in mind when considering a product or service. For that audience, the goal of the marketing effort is to lead those consumers through a process — the “funnel” — that methodically reduces the number of choices, ultimately leaving only a single brand choice. Today, however, the funnel concept fails to capture all of the touch points and factors that consumers now leverage in making their initial decision, and it doesn’t address the motivation and process behind their adherence to that decision.

“Brands now need to position themselves more strategically through education in multiple formats as consumers take control and actively seek out and pull information helpful to them in making their purchasing decisions,” Mr. Sirockman says.

Other challenges for the industry include grappling with the value of digital venues and, most importantly, integrating them with other, nondigital media. To date, these efforts are still very fragmented.

Mr. Parry says multiple agencies are still the norm for delivering the brand experience.

“Most of the time, clients are not getting the benefit of a unified brand experience, but rather a splintered one, with each agency putting forth initiatives that are — at best — not amortizing parallel initiatives, and — at worst — going off in different directions,” he says. “The most successful brands have a branding strategy at the core: a central idea of the brand experience.”

Agencies and salesforces delivering tactical solutions should all be guided by a branding strategy, not just communication and sales strategies. But unless there is a central branding authority, business will proceed as usual, and clients will over-spend on doing and redoing promotional plans.

“In today’s noisy market, the healthcare brand that shouts with one, resounding voice will trump a chorus of inharmonious solo performers,” Mr. Parry says.

A strong corporate brand and reputation go a long way toward helping companies manage a challenging landscape, Mr. Schrimpf says.

“This is what the future of pharmaceutical marketing looks like,” he says. “In fact, it’s already underway. In January 2013, Abbott Labs spun off AbbVie, a distinct corporate brand with a focus on patient-centric innovation.”

According to Mr. Schrimpf, AbbVie is using its corporate brand to communicate how it is addressing serious health issues. It is investing in being experts and partners in areas such as hepatitis C, oncology, and renal disease.

“AbbVie is positioning itself around serious therapeutic areas in healthcare rather than a pipeline of drugs,” Mr. Schrimpf says. ^{PV}



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Brands Cannot Live on Efficacy Alone

As a more patient-powered marketplace tightens its control on decision-making, pharma needs to focus even more on bringing consumer value to the brand.

A decade or more ago, pharmaceutical drug companies focused more on marketing their products rather than marketing through their brands. Now they are being forced to behave

more like consumer-packaged goods companies to stay in the consumer's mind at the point of decision. Building a brand for consumers to identify with brings value to its products, which helps differentiate the company from the intense sea of competition.

Three Best Practices to Creating Value Within the Brand

1. Brand to an entire community, not just one or two community members. With regulated healthcare brands, the customer has to admit that maybe he/she has a problem, then go to a primary care doctor — who may or may not involve a specialist — then a prescription is generated and the customer has to go to a pharmacist — who may substitute for the brand based on an insurance company's policies — and only then can the customer receive the goods. The point is that a regulated healthcare brand must focus on every link in the chain. In addition to appealing to the end customer, the brand has to appeal to the PCP and specialist as a reflection of those doctors' practicing identities. It also has to appeal to the pharmacist so he/she can endorse the doctor's advice. And it has to appeal to the insurance company representatives so they feel that they are providing the best value for the money.

2. Drive perceptions about the disease state, not just the drug. The value of a brand in the industry is directly proportional to the picture it paints of the disease or condition in question. Decades ago, over-the-counter antacids drew a picture of a condition called heartburn, illustrating how the problem of excess acid production

calls for an acid neutralizer (Tums or Rolaids). Zantac, an H2 antagonist from GSK, then redrew the picture by illustrating how the condition is really more complex than simple acid neutralization. Zantac worked to reduce histamine receptors in the stomach, thereby reducing acid production. GERD (gastroesophageal reflux disease) replaced heartburn, and the Zantac brand achieved blockbuster status. Healthcare brands that teach the industry how to think about medical conditions in new and smarter ways earn esteem and success.

3. Recognize that a doctor is not a doctor is not a doctor. While doctors have many things in common — a desire to work in the healthcare field, a college education, a medical school degree — the reasons they became the kind of doctor they are vary immensely. What compels people to go into the field of plastic surgery has nothing to do with their colleagues who choose urology. Even among physicians who are in family practice — general practitioners, pediatricians, and even ob/gyns — have different motivators and self-dynamics that must be considered in order to create a healthcare brand to which they can identify. Brands that show all members of the physician community flattering, yet unique, reflections of themselves will win the industry's heart.

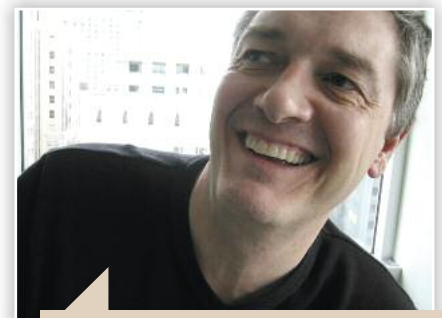
Source: Parry Branding Group.
For more information, visit parrybrandinggroup.com.



“ Research shows that functional attributes of the brand drive recall and emotional attributes drive trial and engagement. ”

MARIA CASINI

Guard Dog Brand Development



“ A product is made in a factory; a brand is made in the mind. And building a brand is a whole new ballgame in today's customer-driven world. ”

DARYL TRAVIS / Brandtrust

There are too many players in the decision-making mix for brand loyalty to survive on efficacy alone anymore.

Marketers must realize that brands are about feelings, not facts, says Daryl Travis, CEO, Brandtrust. Facts are important but only to the extent that they engender feelings in the customer's mind and heart. A company might be very proud of how well a product performs,

but it is how the customer feels about the product that ultimately counts.

"A product is made in a factory; a brand is made in the mind," he says. "That realization should compel the industry to change the way it thinks about how people think about brands and stir a revelation that building a brand is a whole new ballgame in today's customer-driven world."

Value within brands exists when the brands create emotional value within the customers' lives, Mr. Travis says.

"If we want our brands to play a part in people's lives, we do this most effectively through the practice and public expression of how it ideally contributes to their lives."

Maria Casini, co-founder and chief of strategic design at Guard Dog Brand Devel-

BRAND POSITION VS. BRAND PERCEPTION

Experts outline the risks associated with misaligned brand position and brand perception.



MARIA CASINI, Co-founder and Chief of Strategic Design, Guard Dog Brand Development

Brand perception — or image — is based on the stakeholders' gut impression of the product based on real experience with that product or with experience with other similar products. Image is heavily influenced by what stakeholders expect or hear from others, too. A marketer cannot control image but it can influence it by having a solidly researched brand identity strategy, which includes archetype, positioning, and value proposition. We often see inconsistencies between positioning and brand perception in cases where the product brand is marketed in silos — meaning, the brand positioning is interpreted by different agencies all touching the same product.

For example, the advertising agency interprets the positioning one way for print; the digital agency interprets the positioning their own way for Web and social media; and so forth.

We highly encourage our clients to bridge the siloes within their organizations and ensure that there is a single brand steward who oversees the entire health of the brand by making sure everyone who touches that brand stays on a singular strategy, not nuances of the same strategy. This minimizes the risk of brand image fragmentation, which is costly both in terms of marketing costs and lost product sales.



VINCE PARRY, President and Chief Branding Officer, Parry Branding Group

The single greatest risk to brand success is a lack of internal consensus on what the brand stands for. If different disciplines (marketing, sales, medical, regulatory) and different geographies around the world do not see the brand in a unified way, then customers never will either. Also, different internal views spawn a desire for different agencies to deliver

the brand experience. This can fragment brand perception very easily. The risks are external customers will not prize and esteem a brand with a fuzzy positioning or multiple positionings, and market share will stall. They are also internal clients who will spend much more money than necessary to account for the lack of synergy among parallel marketing initiatives.

The solutions are very simple, yet it is surprising how often companies do not avail themselves of them.

First, have only one brand position for all audiences. This can be scary for clients because it erroneously suggests the same messaging, which is very different. Here, we can take a lesson from the consumer goods world. The art of positioning is finding a common denominator that appeals to different constituencies for the same reason. For Volvo, the common denominator was that different people valued one unifying idea: a secure driving experience. It is no different for healthcare brands. The position has to be simple enough and broad enough to drive a unified brand perception.

Second, companies spend an enormous amount of time and money doing research on messaging, competitive intelligence, and usage patterns — everything except brand equity (how the market perceives the brand). Brand equity research is the best way to understand a) how your brand values are resonating with all customers; b) if your desired brand values match the perceived brand values; and c) if your brand values are growing over time in the hearts and minds of customers. Lilly — a company that does a good job evaluating perceptual equity for its brands — measured and guided Prozac from values of safety and simplicity, to a value of trust, to a value of revolutionizing medicine by making the treatment of depression turn-key for primary care physicians. With no concerns about overdosing and complex titration, PCPs didn't have to refer their depressed patients, and became more heroic to them in turn. Without brand equity research, clients are driving blind in short- and long-term brand planning.



MARC SIROCKMAN, Executive VP, General Manager, Artcraft Health

Inconsistencies between brand positioning and brand perception create fragmentation within the market that can generate a negative perception among the intended audience. Generally, if you don't understand something, you move away from it. A clear strategy and superior customer insight are critical to the success of pharmaceutical companies and their brands. To that end, we partner with our clients to address the multiple perspectives of each of the stakeholders they need to serve, including primary and specialist physicians, key opinion leaders, legislators, payers, pharmacists, and, especially, patients and caregivers. The brand position must be clearly defined, targeted, and approachable. It is crucial to focus not just on the "I" but also on the "we" as the personality and identity of a brand are developed. That approach unifies the brand message and ultimately influences the stakeholders' perception.



DARYL TRAVIS, CEO, Brandtrust

There are considerable risks when inconsistencies exist between brand positioning and brand perception. Perception is nine-tenths of the law, so to speak. Perceptions are formed through experiences. Brands need to be acutely aware that "The little things you do are more important than the big things you say." Brand behavior is much more critical than brand communications because that's how people ultimately frame and judge a brand's authenticity. And you can be assured if a brand is not true to its positioning or ideal on some level the customer will know. This may be the single most prevalent problem brands face in becoming something more than another face in the crowd.

opment, says both function and emotions play a role in brand value and cautions marketers from emphasizing one over the other.

“We know from research that functional attributes of the brand drive recall and emotional attributes drive trial and engagement,” she says. “So it is critically important to ensure that every product brand benefits from market research that is designed specifically to uncover the emotional drivers of choice and balance those drivers with the functional attributes of the brand.”

Likewise, she says, given the significance of the corporate brand in driving product choice, corporate brand identity drivers in reputation and relationship need to be researched and invested in routinely to ensure that the products have their best opportunities for success and to build value.

True brand value depends on a clear strategic marketing campaign that properly aligns the brand’s vision with its products and builds brand equity over time, says Marc Sirockman, executive VP, general manager, Artcraft Health.

“Effective global branding must be single-minded, resonate well in the key markets and within the patient population, and be easily

adaptable to changing conditions within the marketplace,” he says. “In the pharmaceutical industry, where patent life and the duration of market exclusivity are limited, brands must work harder and faster to create lasting value that extends beyond a particular product’s expected lifespan. It’s about a brand name and a perceived value that resonate with prescribers and consumers alike, and the first step to achieving that is establishing a solid foundation of communication strategies that focus on educating and empowering these audiences and increasing their awareness and ability to make informed and enlightened decisions.”

Consumers will experience the value of a brand when it resonates with part of their emotional lives and connects with them not only for what the product does for them but what the brand stands for.

Since people respond to others who live according to like principles and ideals, there is plenty of reason to suggest they do the same with brands. A company’s mission, therefore can be the expression of what the brand stands for but in fact, a better way to resonate with consumers is to define the company’s ideal. Unfortunately, most businesses create what they think is a working vision of what business

they’re in, where they want to go, and how they want to be perceived, but unless this is articulated and activated in terms of a life-improving ideal, they fall short of a brand’s full potential, Mr. Travis says.

“Insight into this process comes from how well you understand the people most important to the brand’s future — both customers and employees — and how you can attract them to a brand that contributes to their lives in a truly meaningful way,” he says.

Mr. Travis says there are three questions that can help define a brand value statement: what is its value to your customers; how does it affect the way your employees feel about their company; and how does it promote esprit de corps and a willingness to innovate in the ever-challenging face of change?

He suggests that an effective way for a business and brand team to think about a higher calling or ideal is to frame it as if the company were a nonprofit organization.

“Under that circumstance the message is not concocted as fodder for an advertising campaign nor is it a marketing gimmick or a public relations stunt,” he says. “As a result, a brand ideal guides a business to success because it differentiates it and makes a lot of noise.” PV

“I enjoy the fact that it is a big focused group on the pharma, bio pharma and med device group. It is a good size group with a mix of roundtables, break outs and plenary sessions. Good spread of big, medium, and small companies. A well rounded mix of people with good expertise and has a good informal aspect to it as well.”

Jeff Simmons, Manager External Manufacturing, Daiichi Sankyo



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