



DIGITAL SUMMIT

FROM BLOCKBUSTER
DRUGS TO BLOCKBUSTER
CUSTOMER EXPERIENCE

EXECUTIVE

SUMMARY

TABLE OF CONTENTS

1

About The Event

2

Keynote 1: Connected Health at the Speed of Life

3

Keynote 2: Managing Digital Journeys – Is everybody on-board?

4

Keynote 3: Advancing Life Sciences with Machine Learning

5

Panel Discussion 1: Customer Experience Transformation –
Organizational Mindset Shift

6

Panel Discussion 2: Customer Journey and Engagement – Content Strategy

7

Panel Discussion 3: Capability Reorganization – Next-gen Marketer

8

Panel Discussion 4: Data and Analytics

9

Fireside chat with Pharma and Biotech CEOs

ABOUT THE EVENT

In a first of its kind symposium on digital transformation and customer experience in life sciences, 35+ industry leaders from Life Sciences, Google, Microsoft and Amazon came together to uncover **“How pharma can embrace the fundamental shift from an era of blockbuster drugs to an era of blockbuster customer experience.”**

The 2019 Indegene Digital Summit, held on 16th October in Philadelphia, was an “invitation-only” gathering of 350+ senior leaders from pharma industry. The day-long agenda included 9 sessions, focusing on customer experience transformation, future of digital supply chain, next-gen capabilities, and limitless potential of data and analytics.

Relive IDS2019 [here](#) or [pre-register](#) for IDS2020.

KEYNOTE 1

DAVID BLAIR

Head of Industry,
Healthcare, Google



Connected Health at the Speed of Life

Summary:

We currently live in one of the most remarkable times of the human era – witnessing and living through physical and digital fusion of our lives. There has been an explosion of data and information on various disease states, symptoms, drugs, and interventions; however, with the latest advances in technology and smartphone proliferation, human attention span has reduced to about half of that of a goldfish.

Hence, it is of utmost importance to understand your customer and customer journey through data. This is the starting point for designing great customer experiences according to Google's Head of Industry, Healthcare, David Blair. In his keynote on 'Connected Health at the Speed of Life', David recommended a new way of reaching and engaging healthcare professionals (HCPs) as well as patients.

According to David, "Organizations are expected to provide customers with information when they want it, where they want it, and on device of their choice. It is no longer sufficient for companies to utilize demographics as a tool for channel planning and marketing. They will have to transition into organizations that utilize data to be faster and more relevant to all of their constituents. By doing so, organizations have an opportunity to create remarkable experiences."

The way that you can do this is by using AI and ML to drive all facets of planning, targeting, execution, creative testing, ad serving, commerce, and reporting.

5 KEY TAKEAWAYS for pharma marketers and planners.



Being discoverable across screens and at the right moment



Providing a remarkable, best-in-class experience



Delivering the right solution for every context and every device



Using data and machine learning (ML) in real time



Building an assistive strategy for creative, social, and paid distribution

David also mentioned that for people with diabetes, those who use digital capabilities are twice as fast to get on therapy, compared with those who don't use digital capabilities. The former is also more compliant and stay longer on the drugs. In short, with technological and digital upgradation, life sciences organizations have an excellent opportunity to create remarkable experiences that truly matter.

KEYNOTE 9

NEIL JORDAN

Worldwide General Manager,
Health Industry, Microsoft



Managing Digital Journeys – Is Everybody On-Board?

Summary:

According to Neil Jordan, Worldwide General Manager, Health Industry, Microsoft, "Over the last 10 years in the US, digital transformation in healthcare, especially provider space, has become synonymous with the rollout and digitization of the electronic health records (EHR). In reality, it is just the foundation for collecting and digitizing information. The majority of the value derivation in the marketplace will now come from systems of engagement – clinical system of engagement, consumer system of engagement, and system of insight. AI and ML are, of course, central to all of this. It will be interesting to see if traditional vendors are able to transfer their records into the system of engagement and system of insight."

Data, as currency, are actually going to become more valuable than currency itself. We see that data coming out of systems, people, individuals, and devices are growing in

value, but what is not growing is the way that data are being utilized today. Neil drew attention to the challenges of normalization and management of data, and interoperability of systems. For instance, it is extremely hard to get the data from wearable devices into any meaningful route of the traditional medical system environment today.

Speaking about the importance of understanding the consumer mindset, Neil urged the industry to take note of how one of the retailers achieved a different level of personalization and understanding through initiatives such as digital shelving and in-store cameras that help map customer journey in the store and customize messages. It is important to evaluate how willing the consumers are to have their data made available as long as the data are used in a certain way to help consumers' experience become more targeted. Since we, as an industry, are always so careful in dealing with consumers, we might not realize that the consumers' mindset is way ahead of where we think it might be.

Other than technology, there are elements that will accelerate digital transformation. Neil mentioned 4 key elements, outside of culture, that can drive digital transformation at organizations – data, collaboration, experience, and trust. He emphasized on the need for creating great experiences –how the process of drug discovery and research (outside pharma as well) has not embraced experiential collaborative mindset. “Retool the experience. Use AI and other advances within organizations for people to work together.” Neil added.



**Data, as currency, are actually going to
become MORE VALUABLE THAN
CURRENCY ITSELF.**



KEYNOTE 3

SHEZ PARTOVI

Worldwide Lead - Healthcare,
Life Sciences, Genomics,
Amazon Web Services



Advancing Life Sciences with Machine Learning

Summary:

Shez Partovi's keynote at the Summit centered around "Advancing Life Sciences with Machine Learning." Shez, the Worldwide Lead - Healthcare, Life Sciences, Genomics, Amazon Web Services, provided interesting insights and real-life examples on how AI, ML, and big data can be incorporated within the pharma domain to unlock value. His Keynote primarily focused on how these advanced technologies are revolutionizing the early phase research and clinical trials, digital therapeutics, and commercialization space.

Shez mentioned that AI, ML, and big data can optimize hit rates during early phase research to build pipeline of molecules with high success rate. He provided an example on how an early phase research for a compound witnessed a hit rate optimization, going from 128 million to 69 candidates in just 1 year using AI and ML. "These technologies can also tell on real-time basis as to where in

the world you should recruit from, how much is it going to cost, and how long will it take for a clinical trial?" Shez added.

Today it is possible to build a dossier for a compound (like an EHR for a drug) and utilize this to identify gaps in therapy and potential areas of side effects as well as incidents that need to be captured. This adds significant value to the organizations by demonstrating that the drug is actually efficacious in the field and not just at the lab. It doesn't end there; companies can also build predictive models on what doctors are going to prescribe, which opens up the opportunity to target physicians with highly personalized and relevant information.

Last, but an equally important area, is digital therapeutics. It has seen a lot of developments recently and has almost limitless potential when incorporated with AI, ML, and big data. Digital therapeutics can be viewed as a digital asset given to the patient in combination with the drug to improve health outcomes. According to Shez, "The most interesting part is that, if allowed access, organizations can also offer a personalized machine learning model at individual level. With capabilities to predict health events and trigger interventions, digital therapeutics can have a phenomenal impact."



**WITH CAPABILITIES TO PREDICT HEALTH
EVENTS AND TRIGGER INTERVENTIONS,
digital therapeutics can have a
phenomenal impact.**



PANEL 1

MODERATOR
TIM VAN TONGEREN
 DT Consulting



PANEL MEMBERS

NINA (CHRISTIANE) BELLY

Global Medical Affairs Information Transformation and Capability Realization Lead, MSD



DAVE TANG

VP, Global Medical Office, Allergan



MICHELE HOLCOMB

EVP, Strategy and Corporate Development, Cardinal Health



JEFF FRENCH

Chief Digital Officer, ViiV Healthcare



MARC SCHWARTZ

Global Multi-Channel Marketing Lead, Sanofi



Customer Experience Transformation – Organizational Mindset Shift

Summary:

The first panel discussion on driving organizational mindset shift toward customer experience started with how to define customers in pharma and highlighted the key challenges and opportunities for leaders in embracing this definition. In every business scenario, customers mean different entities to different functions. However, as we operate in a connected world, every stakeholder involved in delivering better patient outcomes is to be holistically viewed as a customer.

The panel agreed that the first step toward a great experience is to articulate what customer experience is and then sensitize the articulation within the organization. For example, a great customer experience could be better accessibility to credible information from medical affairs' point of view. As an industry, we need to figure out a common language around customer experience for multiple groups, create a shared vision on what it could feel like, and have some tangible value associated with the vision. The way we have operated traditionally needs to be disrupted, which will require buy-in from all stakeholders. Just having the technology is not enough, it's how we utilize it to plan the various stages of a good connected experience.

One of the effective ways of mitigating risks in customer experience transformation is deciding when to highlight risks and providing a mitigation plan during the journey. Often, teams don't explicitly talk about the risks during

collaborative discussions due to fear of pushback to their ideas. As CX leaders, we need to make sure that all risks and facts are brought to the table as early as possible and mitigation plans are put in place. To develop a new mindset around CX, as an industry, we need to challenge ourselves to think differently. From an advocacy point of view, we need top-down support to promote a customer experience-driven culture.

In terms of the opportunities ahead, data-driven marketing will become increasingly important to drive change across the organization. For pharma leaders, leveraging data and insights ahead of time and mapping customer journeys can play a crucial role in delivering a connected customer experience. From a medical affairs' point of view, streamlining the dissemination of credible information to stakeholders, understanding trends, and helping patients/HCPs find information quickly, is important for customer experience.



DIGITAL SUMMIT

FROM BLOCKBUSTER **DRUGS** TO
BLOCKBUSTER **CUSTOMER EXPERIENCE**

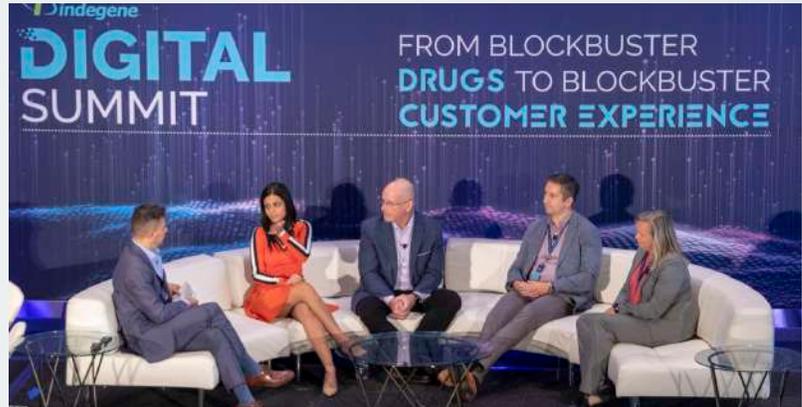
PANEL 2

MODERATOR MARC VALDIVIEZO

VP, Strategy and Applied Digital Transformation, Indegene



PANEL MEMBERS



RAAKHI K SIPPY

Global Head, Marketing Operations and 3rd Party Partnerships, GSK



JOHN McCARTHY

Principal Consultant, DT Consulting and Former VP, Digital, AstraZeneca



PAUL TUNNAH

Founder and CEO, Pharmaphorum



TARA STEWART

Worldwide Head, Multi-Channel Hub, Bristol-Myers Squibb



Customer Journey and Engagement – Content Strategy

Summary:

In this age of connected customers, content is central to the customer journeys that life sciences organizations want to drive for their customers. While digital capabilities and tools allow for personalization at speed and scale, an organization's content strategies need to evolve to keep pace with the digital savvy customer. Our panel experts focused the discussion on evolving customer needs, content strategy, MLR reviews, content reuse, next-gen modular content, and ROI on digital and traditional assets.

The content needs of the customers have changed as they are increasingly consuming content in micro formats or smaller chunks in their everyday lives. However, pharma has not caught up to this trend and still delivers content in mostly larger formats. Meanwhile, there are a multiple sources of information for digital savvy customers, and pharma has to cut through that information noise to make their content more interesting and relevant for their customers.

The root cause for the current state of affairs is pharma's mindset, as they have not separated content supply chain from the tactics and channels of distribution. A shift has to occur from a "channels and tactics" approach to a "content marketing and distribution" approach. For example, although search engine optimization is driven by content, we are not thinking about it at the origin of content creation.

The industry has been more focused on efficiency of content generation rather than effectiveness of the content. There is an opportunity to improve effectiveness and

output of content generation if supply chain thinking is applied to the process. This would allow continuous improvement and innovation at every step of the process.

On the topic of outcomes from content and their measurement, pharma is more focused on advertising-based outcomes rather than customer engagement and customer experience-based outcomes. This is due to the fact that pharma organizations are driven to measure returns on investment (ROI) on digital investments and assets, and returns are translated to "how is the ad working" as opposed to "how are we engaging the customers." In fact, everyone is asking for ROI on digital assets as it is easily measurable compared to non-digital assets, and hence, a higher level of scrutiny is applied to digital investments. Despite the fact that ROI cannot be measured directly on non-digital assets, pharma still bases bulk of its marketing activity on non-digital assets.

The speed to market of content is an important aspect of content supply chain. For organizations, it is crucial to get the operational fundamentals right to accelerate

content's speed to market. The unification of the right technology and channel, along with the copy approval process, serves as a building block to achieve faster speed to market. Once the building blocks are in place, the next step is to think about customer journeys, build content around those customer journeys, and activate it to drive the desired experience.

The panel also discussed the issue of global to local content utilization. The utilization rate of global content in local markets is an indicator of quality of content since quality content ought to be reusable. In order to increase the reuse of content, data-driven conversations with agency partners and global brand leaders can help organizations identify challenges and make the right decisions. Although not all the pieces of global content in a given campaign can be reused in local markets, approximately 60% of the content tends to be transcultural and can be reused.

At the cutting-edge of content supply chain trends is intelligent, modular content. One of the biggest barriers to modularization of content is getting the middle management

on board with the concept of modular content, even when C-suite executives have bought into it. The current notion in pharma is that we cannot create free text content and rely on machines to assemble it into a finished promotional asset. The first step toward overcoming this barrier is to get all the stakeholders to understand what format-free content is. To achieve modularization of content, a few companies are adopting a different operational model for content creation, where core content creation is decoupled from derivative asset creation. Although the ultimate goal is a truly modular content that can be personalized based on data, a quick win could be to logically break down larger pieces of content like webinar and congress materials into smaller chunks.

Accelerating volume and velocity of content are overloading the medical, legal, and regulatory (MLR) review functions, requiring some level of transformation to accelerate the speed to market of assets. In one of the cases, a global organization has combined its digital asset management with copy approval and is piloting the centralization of

its MLR functions and activation of content at the hub level to accelerate speed to market. Another organization has adopted a completely different operating model in terms of copy approval, where the MLR function is not responsible for approval of assets but provides guidance only and the marketing function is accountable for the final approval decision. Here, standalone modules with the business rules are taken through MLR reviews and not the asset in its final state. The assembly of modules is automated to form the final asset, and the final asset is reviewed by MLR to test the

machine. Ultimately, the review of low-risk pieces in the content would be phased out.

On the topic of global versus local customer journey approach, the panel agreed that there are certain commonalities and triggers that echo with brands on a global level, and there would be a few variations at the local market level in terms of channels, budget, and market access. While customer journeys and core insights about the key customers remain the same globally, the activation of customer journeys is truly a local activity.



A shift has to occur from a “CHANNELS AND TACTICS” approach to a “CONTENT MARKETING AND DISTRIBUTION” approach.



PANEL 3

MODERATOR
SANJAY PARIKH

Executive VP and
 Member of the Board, Indegene



PANEL MEMBERS



TINA GOYAL

Global Head, Marketing
 Innovation and
 Execution, Novartis



NATHAN BOWMAKER

Head of Global
 Commercial
 Operations,
 AstraZeneca



ROB LYNCH

VP, Marketing
 Services,
 Fresenius Medical
 Care



SHAWN FERRY

VP, Marketing and
 Integrated Channel
 Strategies,
 Teva Pharmaceuticals



CRAIG McGETTIGAN

Head, Multichannel
 Engagement, US
 Business Operations
 and Support, Sanofi



Capability Reorganization – Next-gen Marketer

Summary:

There is a strong impetus for the life sciences industry to change and drive digital experimentation across the organization. Fundamentally, when we look at the pharma industry, we have been successful in doing what we have been doing for many years. However, in the current landscape, the key question is how do we accelerate the pace of change?

According to the panel, we need to look at capability reorganization through three different lenses. The mindset lens – we are beginning to recognize the unprecedented power of data and digital

and are starting to experiment more. The cultural lens – we still operate in a siloed environment, but moving forward, collaboration will be critical for better outcomes. Connecting the dots through R&D, medical, and marketing, particularly on the data side, is very essential to address the end-to-end patient journey. The capability lens – our ability to act on real-time insights is far behind, as compared to other industries that are organizationally set up with digital and technology at the core of what they are doing.

To build capabilities for a transformational journey, we need to free up marketers to do new things. Once we free up their time to think differently, the next critical challenge is to accelerate the delivery of digital experience in an impactful manner. Hence, learning new skills around being agile and omnichannel becomes a basic and critical lever for marketers to impact the transformation journey.

Over time, the fundamentals of what a marketer should do hasn't changed. However, it has become a lot more complex due to availability of data and tools that expand our

ability to reach our customers and deliver a customized experience, requiring specialized subject matter expertise. It's unreasonable to expect that we would find all of these capabilities in one person. Hence, we require different people, with varying levels or different types of subject matter expertise, to work together on execution.

We are operating in a very regulated environment and need subject matter experts. Having said that, we do need to upskill our current marketing population and demonstrate what good looks like. Hence, parachuting in pockets of excellence from outside, in terms of talent, can help accelerate the pace of change. The other perspective is that partnerships could play a key role at the ground level in operating markets. Partners can come in and perform things that we don't have capability to do on the ground. In this way, we're trying to look at things that we can do pragmatically today and sharpen the skills that we have in our marketing population.

The panel also discussed the possibility of performance metrics for pharma marketers

revolving around the objective of customer experience. We often don't align our objectives and goals to what we are trying to accomplish for the product. If you need to move someone from awareness to interest to consideration, then certainly the customer experience KPIs are very important, but at the heart of it, it really goes back to setting very clear and specific objectives and goals. The role of our local marketer is transforming as well. The role of any customer-facing organization today is the one of orchestration, because you are orchestrating a customer's journey.

If you think from a customer's point of view, it's more of the softer elements that matter to them.

We are in the most emotive industry, yet, when we look at our communication overall, it tends to be very scientific and rational. Thus, digital gives us a greater insight about our customers and our ability to connect with them.

In conclusion, the core competencies for a marketer remain the same. What has changed is the volume of data or the number of sources. We now have the ability to create more actionable insights, which hopefully will lead to better segmentation, better customer journeys, better KPIs, and better content. However, every organization needs to figure out the right way of orchestrating these particular activities.



**WE ARE IN THE MOST EMOTIVE INDUSTRY, YET,
when we look at our communication overall, it
tends to be very scientific and rational.**



PANEL 4

MODERATOR DAVID KREUTER

Sr Lecturer, Columbia University and Former VP, Global Business Analytics and Insights, Pfizer



PANEL MEMBERS

venu GOPALAKRISHNAN

Sr Director, Decision Support and Market Analytics, Amicus Therapeutics



ASHISH SHARMA

Executive Director, Data and Platform, Commercial Effectiveness, US Pharma, Novartis



BARBARA SALAMI

Sr Director, Customer Experience Optimization, US Pharma, GSK



TIM VAN TONGEREN

Managing Partner, DT Consulting



Data and Analytics

Summary:

The discussion opened up with some critical data points on how pharma, as an industry, is perceived by customers. According to the recent Trust Barometer study by Edelman, pharma industry fares lowest when compared to 15 other industries and is in the "distrusted" category. As an industry, pharma needs to dig itself out of this perception as we want people to trust and act on the insights that we provide. Pharma needs to build trust to plug the emotive gaps and not the rational gaps. To make this shift, pharma leaders should pick points of entry (or areas) to demonstrate the value of data and insights.

Every opportunity to influence our customer can be an entry point for data and analytics. For example, for a patient, when thinking from a clinical trial point of view, how do we make sure we are making it easy and clearing out the friction points? From the commercial side, how do we begin to think more about the patient's condition? Maybe because of financial situation, he/she might need a coupon, and how do we make sure it's easy? Hence, there are many opportunities to clear the friction.

From what could emerge as a best practice, addressing the trust factor is critical. HCPs, for example, want pharma to make interactions simple and relevant. Across the organizations, it is not simplicity and relevance that customer-facing teams struggle with, it is the trust. From a best practice stand point, you have to start measuring trust and other critical metrics, and get the feedback loop activated.

In a strong, operations-focused organization, the right data infrastructure is critical to ensure that the speed of operations matches the speed of analytics delivery. For example, if we have the right

data-integrated pipelines, new insights on a daily basis could help the operations function churn out new content on a daily basis. To build the right data infrastructure, the first step is to find a way that reduces data preparation time from minutes to seconds. The second step is to narrow down data from multiple sources such as agencies and syndicated sources to standardized formats. If we have these two addressed, we have a system that can receive any new incoming data and can focus on how only the variables are influencing the decisions.

In pharma, KPIs should be actionable and help take next best action and decision for better customer experience. Though KPIs vary across different geographies, it all comes down to the local marketer who will utilize insights and take action. Apart from the usual metrics, we should introduce and view metrics from different lenses such as customer view metrics (you get what you were looking for?), experience metrics (How did you feel about your interaction? Would you come back? Would you refer us?), and idea of "how did you feel" (Did you feel valued? Did you feel heard?) – these are some of the new layers to be incorporated in the existing metrics.



DIGITAL SUMMIT

FROM BLOCKBUSTER **DRUGS** TO
BLOCKBUSTER **CUSTOMER EXPERIENCE**

FIRESIDE CHAT

MODERATOR

JAMIE PECK

VP, Business Development,
Indegene



PANEL MEMBERS



**NANCY
PHELAN**

CEO, Adhera
Therapeutics



**SHANE
SCHAFFER**

CEO, Cingulate
Therapeutics



**MARK
SIMON**

Partner and
Co-founder,
Torreya



**SANJEEV
AGARWAL**

Chairman,
Althera Pharma



**DAVE
LENNON**

President,
AveXis, Inc



**ANIL
NAMBOODIRIPAD**

President,
Promius Pharma



Fireside chat with Pharma and Biotech CEOs

Summary:

This panel focused on how small pharma organization and biotech CEOs, who are building their organizations from ground up, can leverage their exhaustive industry knowledge to incorporate customer experience in every facet of their business. Delivering personalized customer experiences results in long-term impact on patients' lives as well as the revenues of the company.

The panel agreed that the current state of healthcare experience is unsatisfactory, not only for the patients but also for their families and caregivers due to complexities involved at multiple stages

of the patient journey. At present, organizations are making an effort to provide great customer experiences only in specialty care and rare disease areas. However, the lack of incentives makes it difficult to execute this vision in primary care. Also, to meet the short-term revenue and shareholder expectations, these organizations face pressure to employ traditional tactics with little or no bearing toward customer experience.

Unlike 10 to 15 years ago, pharma companies today are no longer sole owners of drug-related data and information. In fact, they have little or no control over the vast amount of data and information being generated through various third-party sources and disseminated through a multitude of channels. Furthermore, the heavily regulated nature of the industry hinders pharma organizations from delivering exceptional customer experiences as they are restricted with regard to how and what they can communicate to customers. To overcome this challenge, the panel came to a consensus that a new paradigm needs to be established, where the industry and

regulators come together and work towards providing information that is authentic, unambiguous, transparent, and credible. This is well aligned with one of pharma's key responsibility, which is to make their drug-related information easily accessible to payers, patients, and physicians.

The proliferation of digital technologies has created new ways of ensuring patient adherence and delivering remarkable customer experiences. While traditionally organizations employed push mechanisms to improve adherence, digital technologies allow pharma organizations to engage patients on a much larger level and partner with them to drive better patient outcomes. Although the panel discussed in length on the importance of digital technologies and radical changes on the digital front, they were of the opinion that reps still play a critical role in terms of delivering information, supporting patients, and ensuring access to the company's products.

The panel also highlighted the fact that commoditization of support services like diagnosis, fulfilment, and payment has

enabled these organizations to focus more on innovation and deliver better patient outcomes and experiences. Furthermore, the panel stressed upon the importance of understanding and leveraging the rise of influencers and their impact on the patient advocacy ecosystem, especially in smaller space.

The panel also considered the utilization of digital technologies from investors' point of view. While evaluating an organization, the investor community generally considers metrics like quarter-on-quarter growth in the

number of prescriptions. They also take a look at the journey of a product candidate through the clinical trial stage and how the candidate is progressing toward its targeted milestones. Hence, the community has multiple data points at their disposal on which they base their decision. However, when it comes to evaluating the company's digital initiatives, they currently lack the right metrics to quantify the efforts in terms of revenue outcomes. This inhibits investors from getting on board with the new models that utilize digital capabilities.



DIGITAL SUMMIT

P: +1 732 750 2901 **W:** <https://digitalsummit.indegene.com>