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In March 2020, when the pandemic gripped the entire globe, pharma companies decided to be empathetic with their customers and pause all active promotion. There was a fall in patient visits and claims volumes in the early months of the pandemic, while telemedicine saw a sharp rise. Companies now need to figure out the ratio of in-patient visits versus telemedicine that will continue in the long term. Another influence is the economic impact, namely, unemployment and how long people can afford to pay for care. In addition, engagement preferences of healthcare professionals (HCPs), and to what extent they want to continue with digital channels, must be taken into account. Views are mixed and depend on factors like geography and specialty. Access, affordability, and patient support are increasingly important in the next normal, and services around them will be critical in the new business model. There are also questions about the ongoing role of the large field forces. The new environment has brought about a test-and-learn approach that allows for experimentation with the full marketing mix, as opposed to the traditional approach over

an indexed face-to-face channel.

"People are now willing to collapse boundaries, embrace new things... Projects that would have taken years have been done in six weeks."

- Ashish Jajoo

Simplicity is important for optimizing HCP engagement. HCPs are humans first, so the goal is to create experiences that fit in with how they live. It is critical to look at other industries and see how they create good customer experiences as pharma moves beyond face-to-face interactions with HCPs.

Pharma companies have adopted digital consumer activation strategies from other industries over the years, but they have been lagging behind in their HCP engagement strategy adoption beyond face-to-face interaction. Whatever strategies are chosen, it is essential to have a sound IT foundation and connected

platforms to support them. Pharma needs to move to a culture of analytics, both to drive decision-making and to show the returns on investments. Segmentation needs to be granular and the information dissemination approach needs to replicate the Netflix model.

"You can't underestimate the change management needed internally to use the power of data science to drive decision making, omnichannel and customer experience – different roles, different ways of operating, different teams in the mix."

- Bharti Rai

A potential resizing of the field sales force should start with the overall engagement strategy. Any change has a cost in terms of customer disruption, so the potential benefits must be weighed. Disruption must be planned for and mitigated. Those who commit to an omnichannel approach and, as a result, resize the field force should not only consider promotional response analytics, market coverage, territory coverage, and other traditional inputs; but also redefine the productivity of sales professionals. With the right marketing technology investments and a strong change management plan, sales professionals' roles can be reimaged and productivity may be increased.

Once the IT and data management foundations are in place, advanced data analytics can improve the delivery of customer experience. A lot can be learned from other industries. Predictive analytics informing on the next best actions and recommendation engines, like the one used by

Netflix, are very powerful tools when adopted at scale. An "always on," real-time orchestration engine tied to a decision engine can drive a connected customer engagement in a rep-driven orchestration model or a balanced omnichannel orchestration model.

Pharma can also learn from the telecoms and financial services industries, which use analytics to predict churn. These tools can predict when a patient may discontinue the medication. The goal is to create a frictionless customer experience, and this requires a full breadth of analytics, which can provide a full view of how the company is interacting with customers, regardless of the department.

The cultural revolution that is needed to drive this transformation should not be underestimated. It is not only the rep in the field who must learn to accept recommendations made by technology, but the C-suite also has to trust it to decide the company's path. Culturally, this is very difficult, particularly for risk-averse pharma.

"Looking at other industries is critical. We are looking at FMCG and how they create good customer experiences."

- Florent Edouard

Pilots are also a useful tool, allowing fast learning in particular markets and quick decisions about whether to scale up. The pandemic has made people more willing to share knowledge, break down boundaries, and embrace new approaches. Collaboration and a sense of community are enabling rapid scaling, with projects that would have taken years now done in weeks.

Managing multilevel execution on a global level and a local level requires a good balance between control and trust. Controls are required to preserve standards around the overall customer experience, brand experience, and equity but, beyond that, allowing freedom for local execution is beneficial. Companies need to trust the local, customer-facing organizations and provide them with a data-informed menu of decisions that they can make and the flexibility to carry them out. Local teams need to feel that they have authorship in the overall global strategy. A global framework can be set, informed by technology and local insight, with good closed-loop processes knitted into strategic brand planning. It is both an art and a science; pharma must trust the data and let them inform decisions but, at the same time, allow room for local insights and execution.

Now, pharma should re-explore some of the capabilities like key account management (KAM), that didn't take off in the past. In the new world, it is vital to have good scientific-based discussions with HCPs, and having capabilities that enable the right people to have these discussions is critical in the new commercial model. Everything promotional must be left to the other channels in the mix. Rather than delivering slides, the

capabilities should aim to provide measurable, meaningful, bite-sized content that will touch the HCPs. Customers must also be given full transparency about the reasoning behind data collection and processing, which must be to ensure the best customer experience.

"Trust the data and let them inform decisions but allow room for local insights and execution."

- Patrick Barry

Companies need to focus on capability evolution across the business, in sales, marketing, and advanced analytics. Those that embrace change to address the needs of the new environment will be successful, and those who adhere to the antiquated reach and frequency model will face challenges to compete effectively in the new normal. However, the change management needed internally to use the power of data science to drive decision-making, omnichannel, and customer experience cannot be underestimated.

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