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One challenge for pharma is to meet the changing demands of the customer. Healthcare professionals (HCPs) with more traditional views have struggled to adapt to the rise of the empowered patient and participatory medicine. They need help to guide patients to the right sources of information and away from misinformation about products, clinical trials, and general health. So, the challenge for colleagues from the industry is how to use this continuous stream of data from digital tools and devices and provide actionable health information for both HCPs and patients.

The consumerization of health devices can be shown by the development of continuous glucose monitoring in diabetes, with sensors linked to devices that customers own already. A wearable sensor that can measure blood glucose levels in real time and send them to a phone or reader is convenient and helps people to live life normally. Patients can make decisions to adjust food intake

or exercise based on the readings.

"Regulators say that if the solution is sensible and the integrity of the data can be demonstrated, then they are all for it."

- Andreas Koester

HCPs no longer want visits from the sales force; since the pandemic, they prefer engagement through digital channels. Pharma must understand what information HCPs value and how to serve it seamlessly across channels they trust. Right now, it is multi-silos rather than multichannel, but digital transformation acceleration due to Covid-19 is providing opportunities to improve both channels and personalize content coherently. The pandemic is shaping new behaviors and expectations, and the industry needs partners to help it understand how to meet these requirements. Now companies

are working digitally, they need to plan for how to change the game in a few months' time.

"I get asked is the data science in Technology, in Business, in Commercial? I say it has to be everywhere. We have to start to democratize all these capabilities and build muscle for the enterprise and that means being bilingual and trilingual."

- Joyce Lee

Enterprise transformation at scale is an evolving process. Integration of business transformation and digital transformation is the key. Another option is to scale through strategic partnerships, moving from solutions to platforms and ecosystems, which introduces data, digital capability, and new business models. The lines between business and IT are blurring. For example, data science is not based on technology, in business, or in commercial; it has to be everywhere. Capabilities must be democratized and put to work in building muscle for the enterprise. That means staff can cross over from business to tech and vice versa. Transformation is less about roles and titles and more about the jobs to be done. Teams need to be able to cross-pollinate, and businesses need to invest in digital transformation. Data is not the responsibility of technology alone; work needs to be done on data ownership, data governance, the types of data, and the quality of data. Alongside this, the transforming landscape of patients and HCPs means pharma will have to do

things differently. It is not single-point innovative solutions that will make the difference, but the integration of these solutions; this is where the challenge lies.

While regulatory compliance is a dominant theme in internal discussions, the regulators are not the obstacle to agile innovation. They want the industry to come up with solutions and, if these are sensible and the integrity of the data can be demonstrated, they will support them. They want to work with pharma to ensure solutions that are good for patients and approved by HCPs.

In China, Johnson & Johnson partnered with a Chinese technology company for World TB Day. Their medical education session attracted 20 million viewers, an achievement that was only possible by integrating and expanding with a digital giant partner. Such initiatives demonstrate the value of digital approaches to the wider business. Investment has increased for collaborative transformation across the business, rather than simply for IT. The technology is the easy part, says Joyce Lee; it is the reps' behavior, how they are incentivized, and the business rules that are harder to change. The company has to invest holistically in business transformation to drive its digital transformation.

"You need the metrics and measurements to know if you are going in the right direction, but the customer is your north star."

- Vishu Chittibabu

Vishu Chittibabu did not see a need for an increased budget during the pandemic because the company has a commitment to ongoing

investment in the foundations supporting its technology. The company's resilience and accelerated digital agility during recent events have justified these investments. It is important to maintain customers' data privacy and protect data on an ongoing basis. In addition, the use of Software as a Service (SaaS) has paid off for new approaches taken during the pandemic.

This year, companies have faced 2 challenges: how to change their model to react to the emergency situation and how to pivot to harvest benefits from the new ecosystem it has created. Knowing what channels customers prefer is going to be crucial, which requires more analysis of data from more sources than ever before. Investment in execution competencies will be needed. Technologies must be strengthened to transform processes and anticipate behavioral changes.

Transformation has to be driven by business and business processes. Companies need to be willing to discard the old mindsets and adapt to the changing scenarios to meet new customer demands. Every day, businesses must focus on improving the overall customer experience through measurement tactics, such as NPS. The world moves fast and pharma must be willing to

take risks to keep pace with the changes. Trying new things can provide a springboard to a new paradigm.

"Sustain excellence in execution and have an open mind to try new things, as they can springboard to the new paradigm."

- Giuseppe Firenze

Businesses must have a cycle of measurement and recalibration. Now, HCPs demand and expect new standards. The challenge is to provide both quantity and quality consistently, as customers will go to the place that serves them what they want. Pharma must listen to the customer and take care of the customer. Not everything that was done in the past will work now, but the customer is the North Star to guide the direction of travel.

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