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WILL CUSTOMER EXPERIENCES SHAPE THE FUTURE OF MEDICAL AFFAIRS?

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The views expressed in this Webinar are those of the presenters, and are not an official position statement by MAPS, nor do they necessarily represent the views of the MAPS organization or its members.



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EVP
Indegene, USA



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AVP, Customer Success
Indegene, USA



Unifying, Simplifying
Systems and Governance



Optimizing
User Effectiveness



CXAI + CXBI for Improving
Customer Experiences



Between 2014-2016

MSL team sizes grew
+12% globally.

+28% in Immunology”
and 31% in Oncology

Medical Affairs Outlook Report, ZS 2017

<https://www.zs.com/-/media/pdfs/zsmedicalaffairsoutlookreport2017web.pdf?la=en>

Meanwhile Globally, the Next-Generation of Customers Are Entirely Mobile and Now Smartphone Obsessed



9 out of 10

physicians believe their time spent on digital for professional purposes will grow in the next year

McKinsey May 2018

Globally, physicians spend at least

1.5 hours online with at least 50% of that on social media²

McKinsey, May 2018

90 million patients

discussing health topics online

McKinsey, May 2018

Medical affairs: Key imperatives for engaging and educating physicians in a digital world
McKinsey, May 2018. <https://www.mckinsey.com/industries/pharmaceuticals-and-medical-products/our-insights/medical-affairs-key-imperatives-for-engaging-and-educating-physicians-in-a-digital-world>

HCPs prefer

simplified but rich experiences

with increasing concentration in digital including: voice & AR

e.g.

- **59% of US HCPs are triple screen users** for professional purposes,
- **12% have used a voice assistant** for professional and
- **53% for personal purposes**
DRG, 2018

Taking the Pulse US, DRG, 2018

<https://decisionresourcesgroup.com/report/671420-digital-taking-the-pulse-europe-2018/>

The Winding Road of Change in Life Sciences

Vocal Millennial Patients
Taking Charge of their Health through Digital Engagement

Intelligent Advances
AI, Machine Learning, Predictive Analytics

RWE
Digital Tools Will Best Handle the Knowledge Transfer

Shifting Geographies
Greater Need to Understand Healthcare Systems of Developing Countries

Millennial HCPs
Rise in Expectations with Out of Industry Real-Time Customer Experiences

Payers Push for Outcomes Based Model

Tougher Regulations and Social Perceptions

Higher Patient Case Loads
Less Face-to-Face HCP-Rep Engagement

Rising to the Challenge

Smaller Sales Teams
Due to Less Blockbusters

Greater Need for Deep Medical Knowledge
Due to More Specialized Therapies

Tech Entrants to Control Costs

Higher Rate of Failed Commercial Launches

The Changing Face of Medical Affairs, March 2017.
<http://social.eyeforpharma.com/clinical/changing-face-medical-affairs>



“

If the pharmaceutical industry is going to **defend itself against being 'Amazoned'** it needs to **go beyond** simply proving the effectiveness of the drugs produced.

”

– PharmaTimes, 2018

Medical Affairs: the navigator of pharma's new world order, PharmaTimes, 2018, http://www.pharmatimes.com/magazine/2018/julyaugust_2018/medical_affairs_the_navigator_of_pharmas_new_world_order

Aggressively Investing in Medical Affairs for the Evolution of Customer Experiences

“

It's simple:

those who fail to invest aggressively in Medical Affairs will be at a significant disadvantage as the industry continues its dramatic shift to a patient-outcome and value-based system.

– PharmaTimes, 2018

”

Medical Affairs: the navigator of pharma's new world order, PharmaTimes, 2018, http://www.pharmatimes.com/magazine/2018/julyaugust_2018/medical_affairs_the_navigator_of_pharmas_new_world_order





Today, we see an even clearer case for Medical Affairs to take on a more **strategic leadership role** in the face of **current technology, economic, and regulatory trends**

– McKinsey, April 2019

A Vision for Medical Affairs 2025. McKinsey, April 2019
<https://www.mckinsey.com/~ /media/mckinsey/industries/pharmaceuticals%20and%20medical%20products/our%20insights/a%20vision%20for%20medical%20affairs%20in%202025/a-vision-for-medical-affairs-in-2025.ashx>



RESEARCH & DEVELOPMENT



MEDICAL AFFAIRS

- * Highly Strategic
- * In-Market Data Generation
- * In-Market Monitoring



COMMERCIAL & MARKET ACCESS

Exhibit 2

Looking forward, Medical can drive improved patient experiences and outcomes.

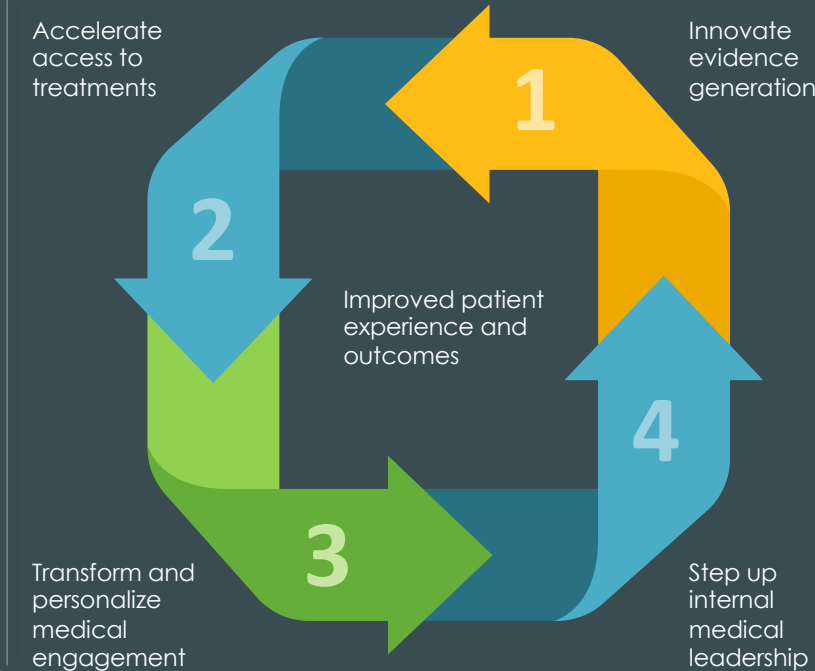
88% of US physicians and 83% of EU physicians consider **real-world evidence** a top criterion in prescribing drugs in addition to the safety profile

The winners in an era of Big Data will transform medical affairs teams into **medical value teams**

– Bain and Company, 2017

Reinventing the Role of Medical Affairs. Bain and Company, March 15, 2017, <https://www.bain.com/insights/reinventing-the-role-of-medical-affairs/>

A Vision for Medical Affairs 2025. McKinsey, April 2019 <https://www.mckinsey.com/~media/mckinsey/industries/pharmaceuticals%20and%20medical%20products/our%20insights/a%20vision%20for%20medical%20affairs%20in%202025/a-vision-for-medical-affairs-in-2025.ashx>



CORE DELIVERABLES FOR MEDICAL AFFAIRS

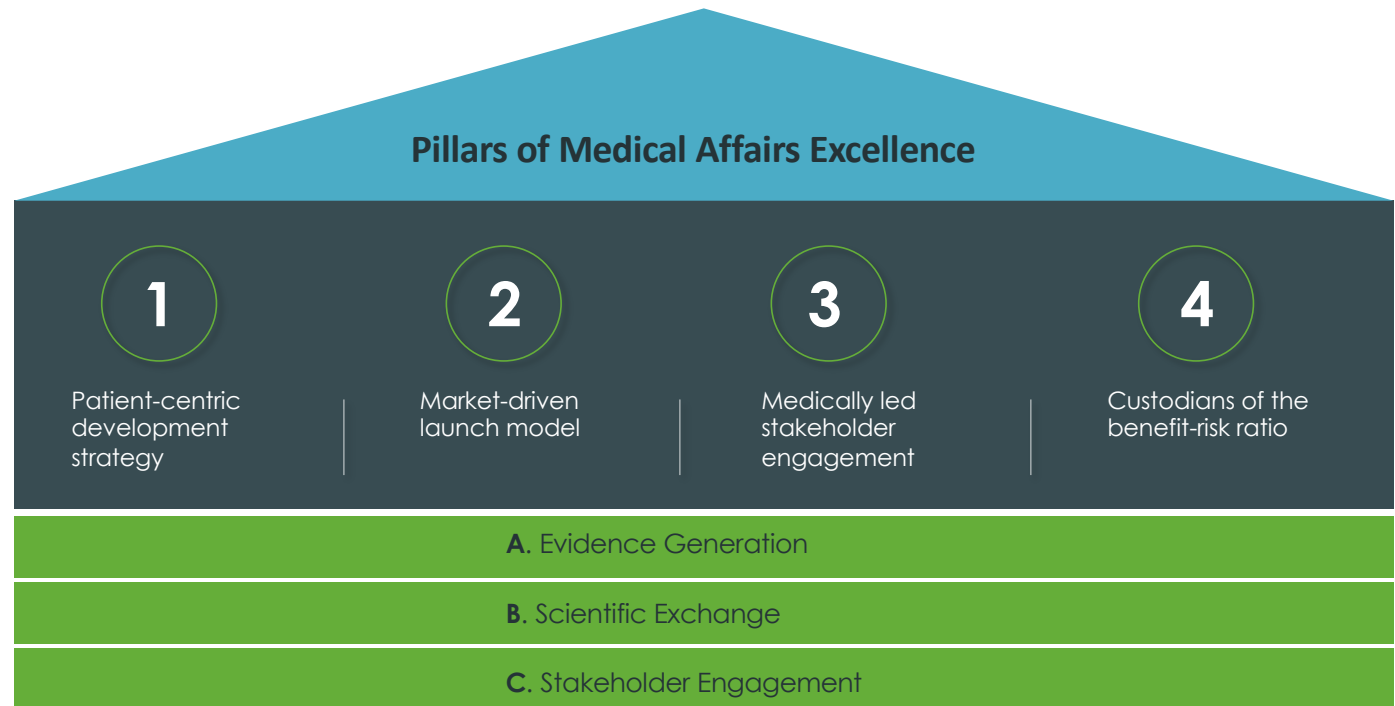
- 1 Lead rapid-cycle, integrated evidence generation across HEOR, RWE, Phase 111b/IV and other data, supported by micro-analysis to tailor information to needs of individual patients.
- 2 Clearly articulate clinical and economic value (including data) to build trust with partners and accelerate access to treatment to ensure that the right patient gets the right treatment at the right time
- 3 Upgrade physician and patient decision making by engaging providers, patients, and others with tailored information that improves outcomes, supported by a reimagined insight-generation process
- 4 Provide strategic medical direction to the organization steering resources for maximum medical impact, injecting new capabilities, and upgrading performance at scale.

THE ABCS OF MA EXCELLENCE

Implementing the four-pillar framework is a critical Step toward operationalizing an optimized MA organization. Before these benefits can be achieved, Biopharmaceutical companies will need to focus on the development of a distinct set of core capabilities that are essential across each of the pillars:

– Deloitte, 2015

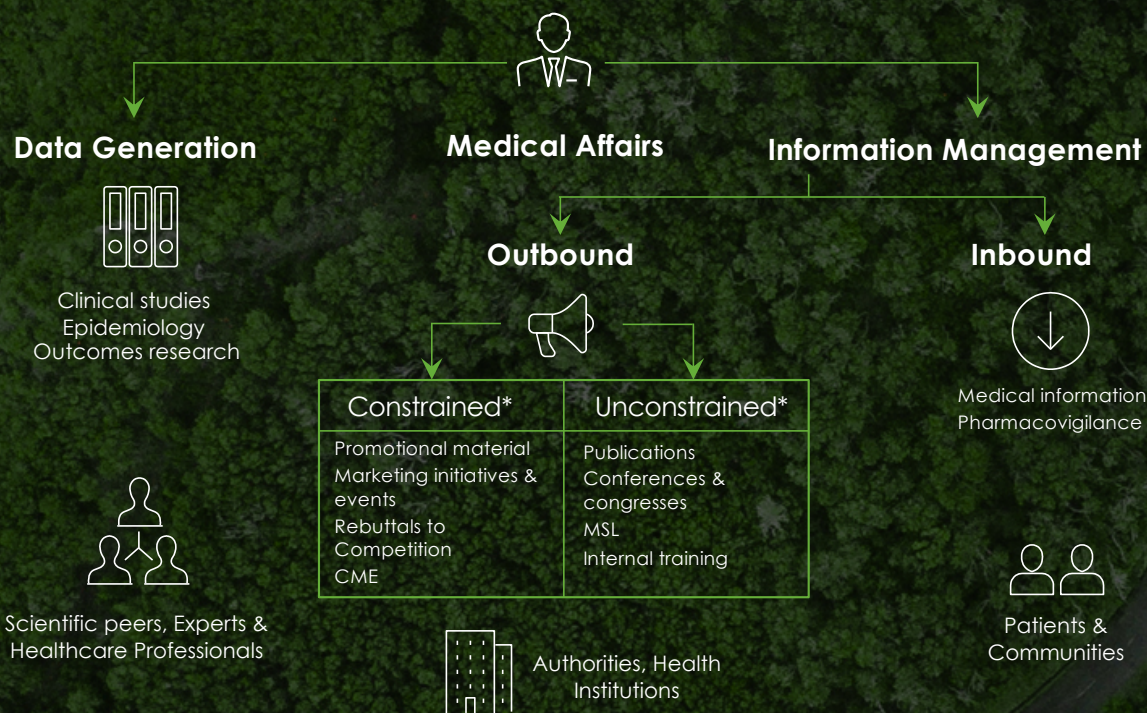
Medical affairs Driving influence across the health care ecosystem. Deloitte, 2015, 2015
<https://www2.deloitte.com/content/dam/Deloitte/us/Documents/life-sciences-health-care/us-lshc-instant-insights-medical-affairs-031715.pdf>



Next Gen Medical Affairs: A CX Based Approach To Stakeholders

THE MEDICAL AFFAIRS ACTIVITY:

Involved in operations & control, expert in product & ecosystem



Must Become More Omnichannel & Digital

Trends Driving the Increased Importance of Medical Affairs & Best Practices for Preparing to Address Them. MRGN Advisors, 2014. <https://www.mrgnadvisors.com/news/medical-affairs-2014>



Omnichannel is the enablement of many channels to **deliver real-time & bi-directional communication to achieve impactful customer experiences along the customer journey**

Digital has transformed the way
society as a whole interacts and has
disrupted numerous industry models

McKinsey April 2019

Digital R&D The Next Frontier for Biopharmaceutical. McKinsey April 2019.

<https://www.mckinsey.com/~media/McKinsey/Industries/Pharmaceuticals%20and%20Medical%20Products/Our%20Insights/Digital%20RD%20The%20Next%20Frontier%20for%20Biopharmaceuticals/DigitalRDthenextfrontierforbiopharma.ashx>

Next Gen Medical Affairs: A CX Based Approach To Stakeholders

Must Become More Intelligent



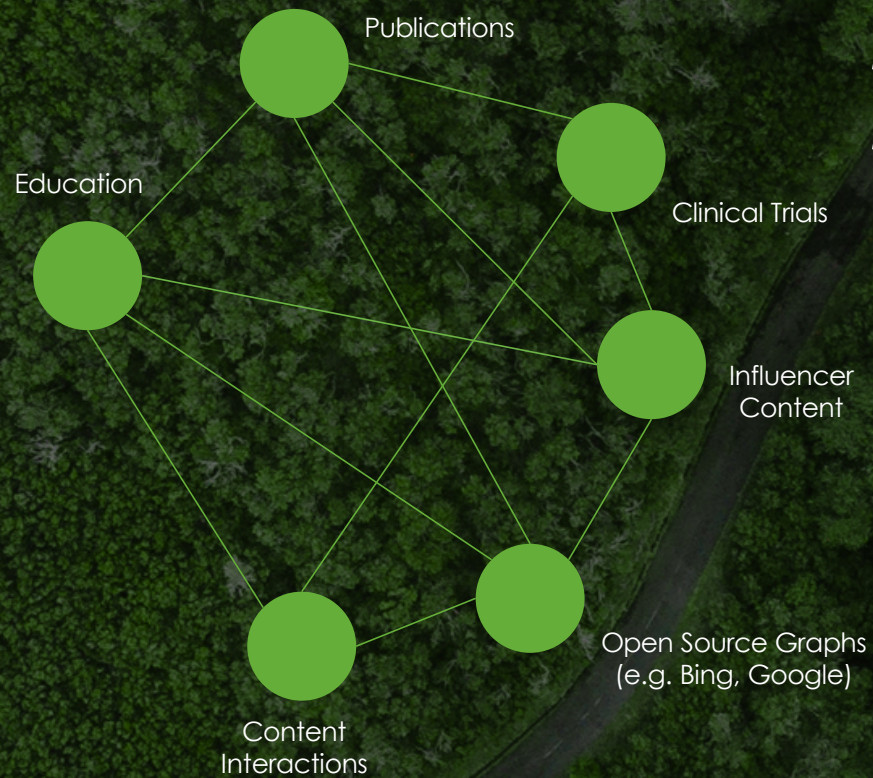
Journey Graph



Knowledge Graph

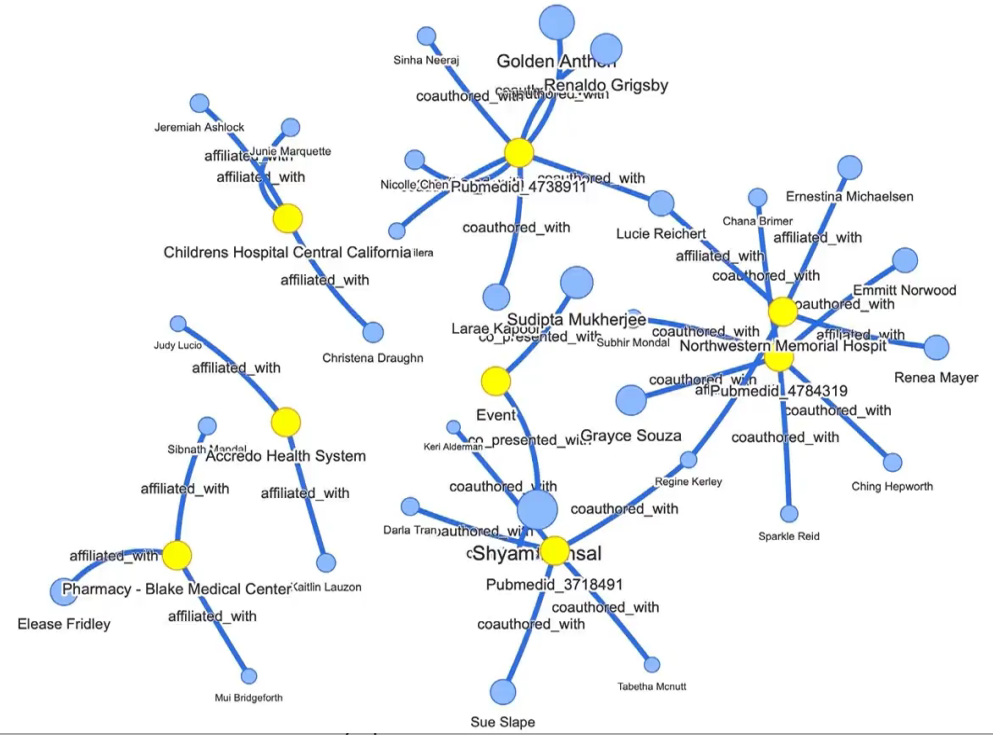


Relationship Graph



- Deep Customer Graph
- Relationship Graph**
- Knowledge Graph
- Journey Graph

All Customers



Knowledge Graph

7 Steps to Achieving a Digital Medical Affairs Model



Start A CX Approach >
Maximize Omnichannel and Digital **Drive automated insights and stakeholder understanding** that to drive intelligent engagements



Develop a winning **digital channel strategy**, not a series of 'one-off' efforts. Find a way to **unify the channel efforts**



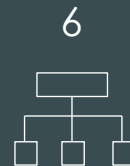
Build a **content-development engine** that continuously delivers fresh insights



The system that hosts the digital content should **enable personalization through content recommendations**



Quickly being able to **re-purpose content** across channels is a key driver to keeping costs low



Proper segmentation of content to keep the level of detail and sophistication appropriate for the physician



Measure impact across all content, activity, and channel data

Medical affairs: Key imperatives for engaging and educating physicians in a digital world. May 2018.
<https://www.mckinsey.com/industries/pharmaceuticals-and-medical-products/our-insights/medical-affairs-key-imperatives-for-engaging-and-educating-physicians-in-a-digital-world>