

# Digital transformation in Pharma

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# Why Pharma should embrace the Digital transformation?

- Everybody's online
- Patients are more informed than ever
- Today's HCPs Are digital
- Digital increases possibilities for personalization
- Reaching Physicians is Becoming Harder by The Day



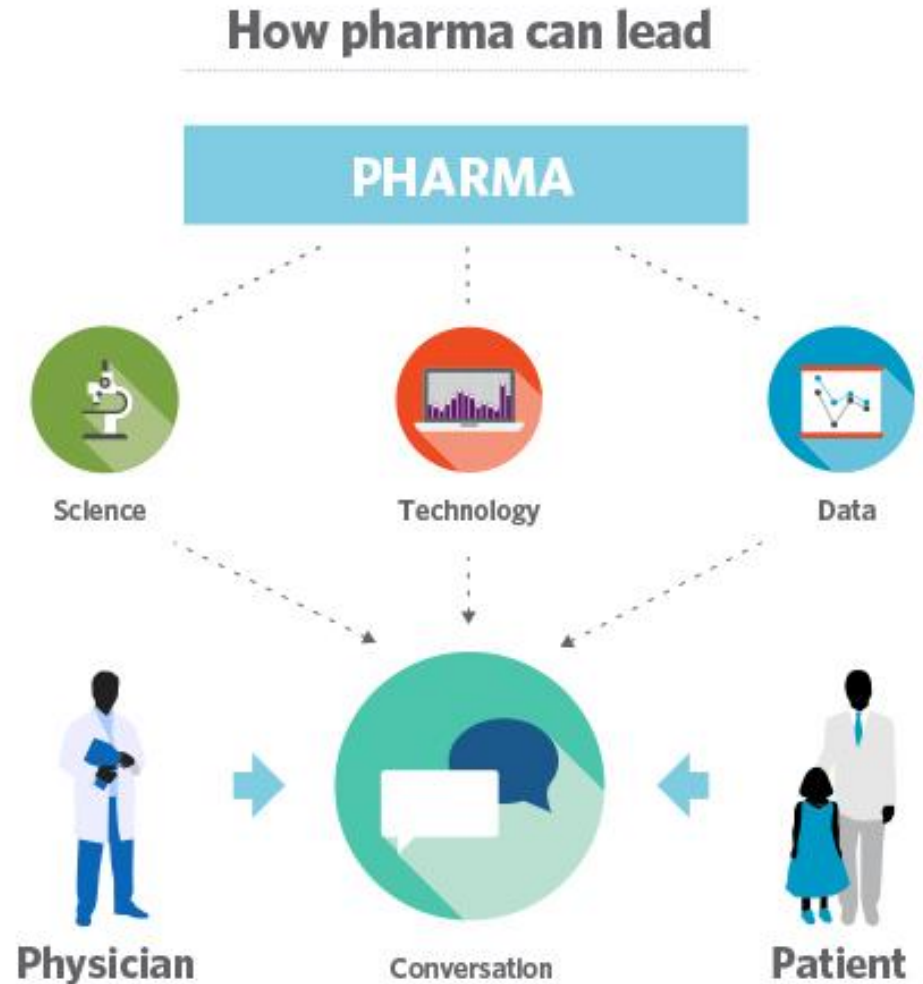
# Health innovation represents new window of opportunity for pharma

Digital health is one of the fastest growing segments in dollars (more than 3 bio in 2017)

The next wave of innovation will see a more comprehensive digitization of the provider landscape. An important aspect will be patient-centric digital health tools. These applications will fall into three functional categories:

- Content app
- Digital Health tools
- Rx Integration

Pharma has a number of key assets—science, technology, data—that can be used to fund, design, develop and support both single and integrated solutions to help improve the physician-patient relationship at the point of care.



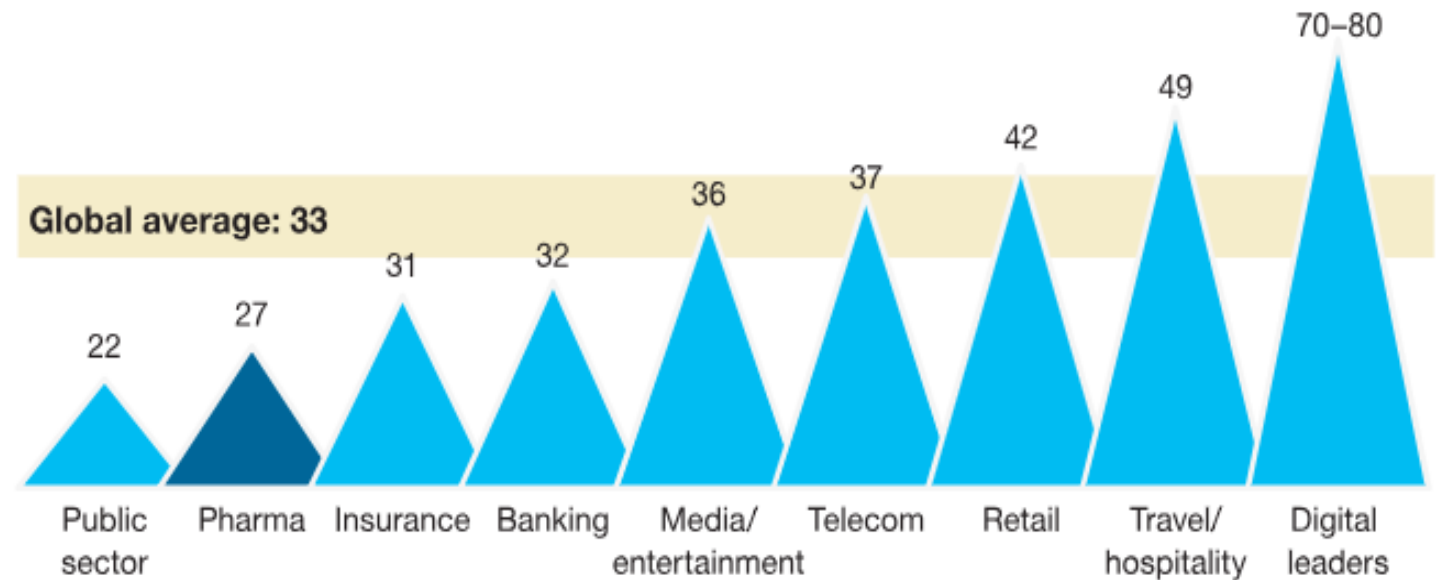
# Where is Pharma now?

Digital maturity of Pharma, in comparison to other industries, shows a clear opportunity for better connection with the key stakeholders: physicians and patients

Potential setbacks for Pharma:

- Strict and rigid regulations
- How to measure ROI?
- Digital consumers expects „*Amazon experience*” regardless of industry

Distribution of Digital Quotient score by industry (global), points, out of 100



McKinsey&Company

# How to measure success in digital?

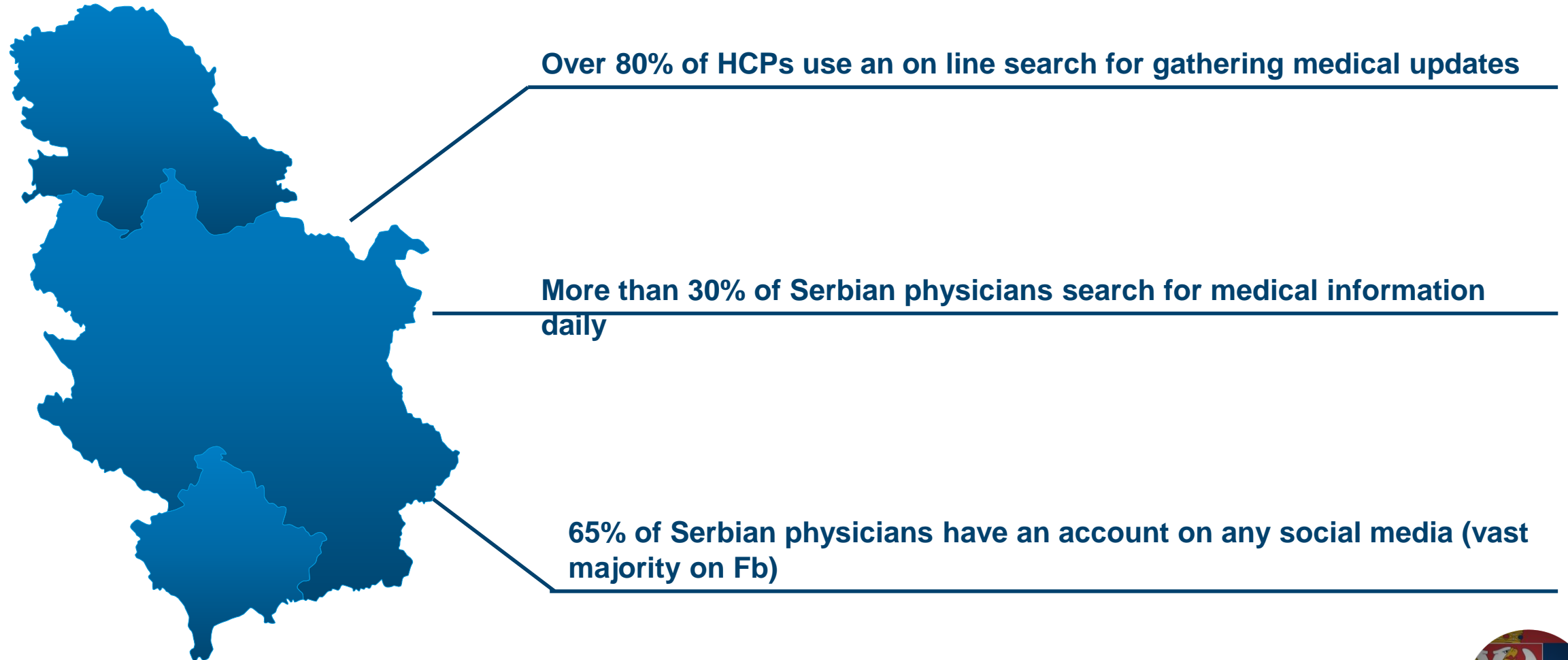
- It is important to note that ROI of Pharma Digital Marketing may not be tangible in the sense that we will see a direct increase in sales.
- The importance of Digital Marketing in the pharmaceutical industry lies in building brand reputation and long-term sustainable growth as a company

## Key insight?

We know that everyone is using the internet these days, with more than 50% of the global population accessing it with mobile devices. HCPs are part of this trend, and it is estimated that HCPs now spend more time on home computers than work computers. This means the audience is available for much more than eight hours a day.



# Is there a potential in Serbian market for digital engagement with Pharma stakeholders?



# What is our goal in digital?

Digital enables us to create *beyond the pill* strategies

- Why is this important?

## Hard-to-find resources

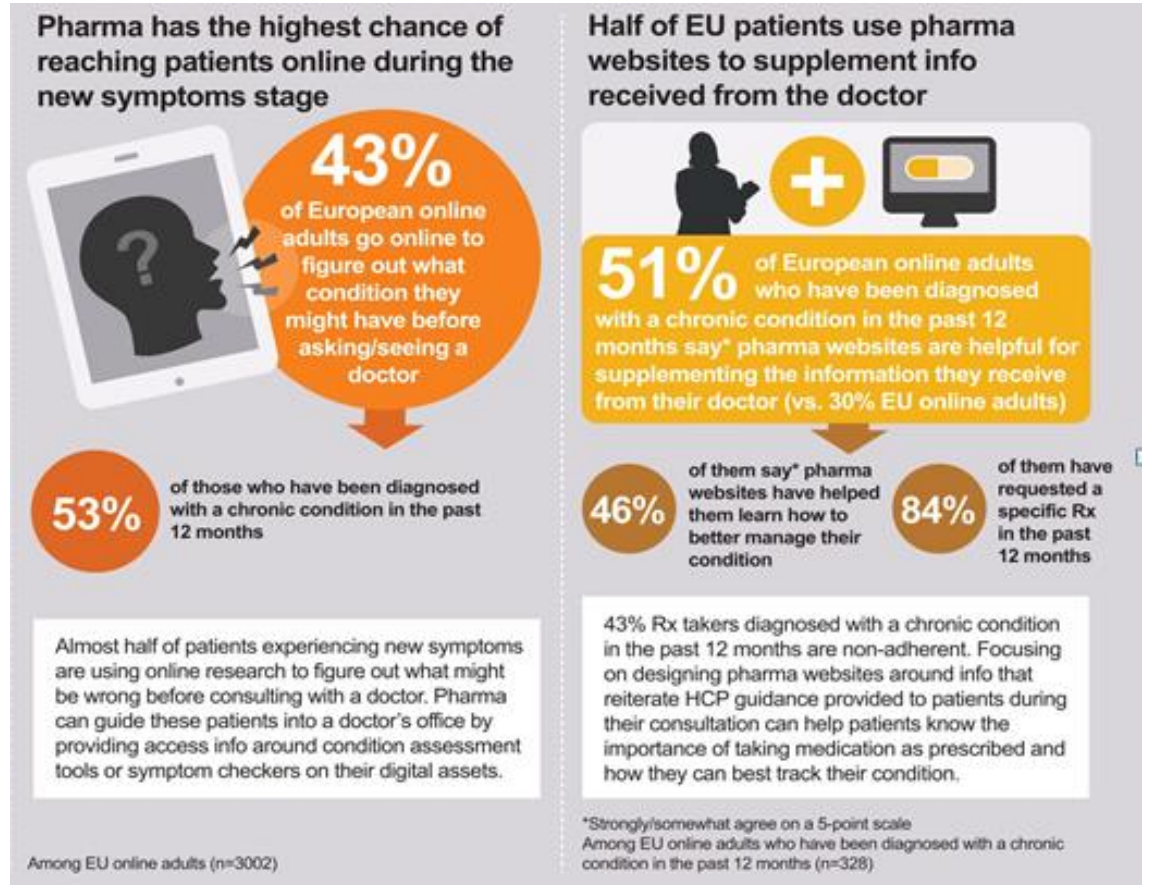
 **54%**

**of medical oncologists** are more likely to prescribe a product if that company has better patient support and beyond the pill services

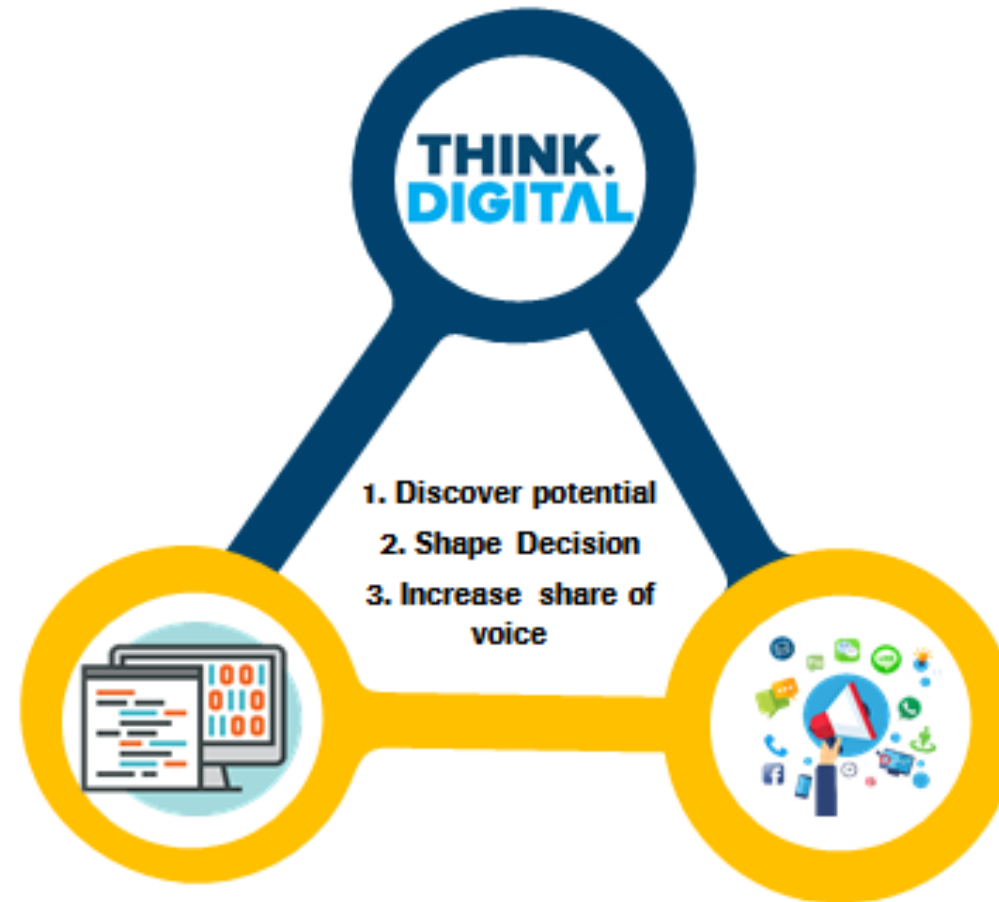


**...yet only 26%**

think it's easy to access valuable beyond the pill services from pharma.\*\*



# What is digital for us?



## DATA

*We already sit on a wealth of data, which are usually locked away in different technical and organizational silos*

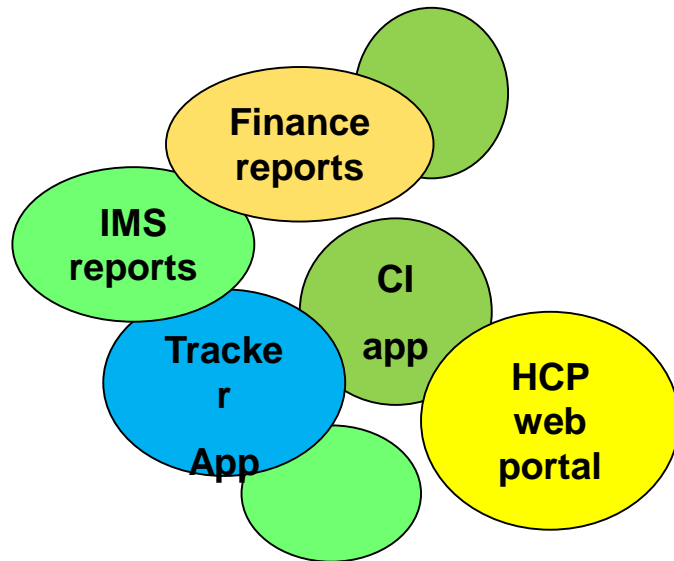
## CHANNEL

*Digital-<sup>S</sup>engagement technologies open up a whole new world for promotion and the exchange of information*



# Why is digital necessity for us?

Implementing newly established digital channels and tools alongside with already present tools that collect business related data gives us the opportunity to gather relevant data in a scale never seen before.



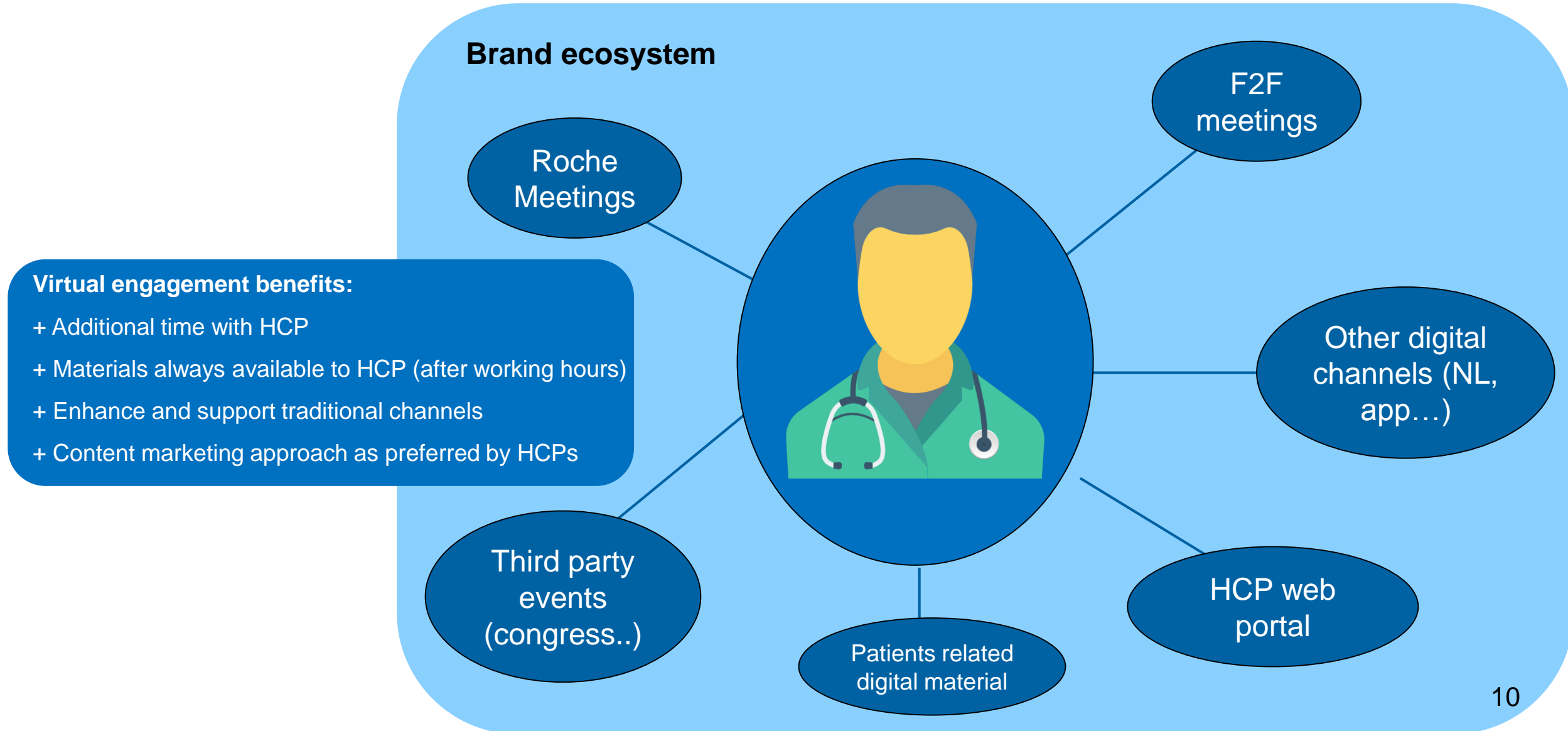
## Analytics



## Data – driven decision making

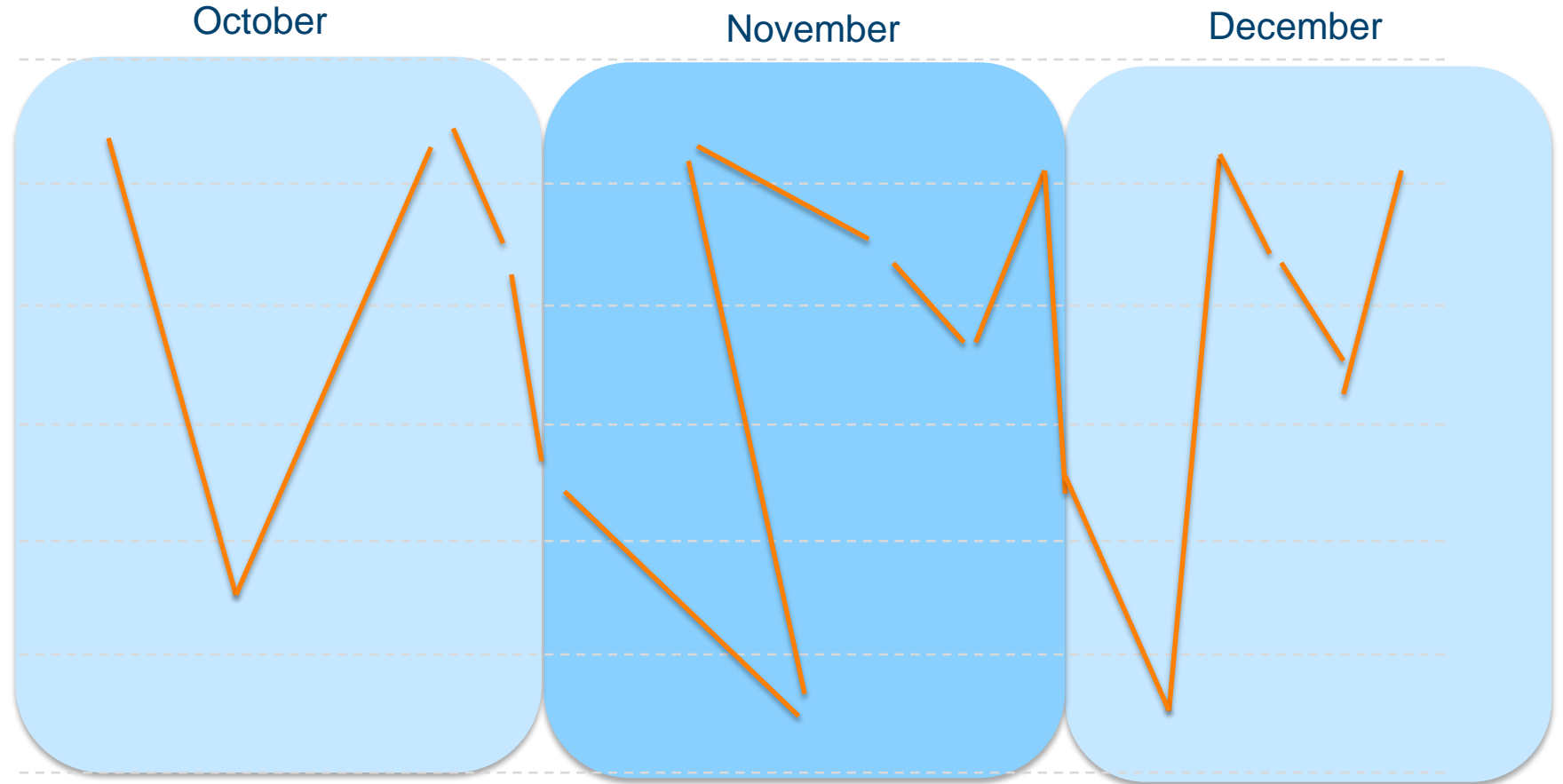


# Digital transformation – allows us to be more customer-centric



# Digital channels fully embedded in overall brand strategy

## Customer journey map for Q4



Significant increase in „touchpoints” of selected customers with our messages & content:

- 6 F2F meetings
- 7 expected „touchpoints” with our digital content
- 2 meetings

**Example**

# Selected KPIs for our digital activities

KPI	Brief	Potential KPIs
<b>Reach</b>	What is the digital reach to HCPs?	<ul style="list-style-type: none"> <li>• Proportion of HCPs accessing digital channels.</li> <li>• Percentage of HCPs in portal, e-mail databases.</li> </ul>
<b>Penetration</b>	How extensively the digital channel is being used?	<ul style="list-style-type: none"> <li>• Proportion of HCPs requesting reach through the digital channel.</li> <li>• Proportion of HCPs using offered tools such as calculators.</li> </ul>
<b>Effectiveness</b>	How is the digital channel faring, compared with other channels?	<ul style="list-style-type: none"> <li>• Analytics on 360-degree view of the HCP.</li> <li>• Repeat activities through the digital channel.</li> <li>• Correlation of trends in increase/decrease of physical vs. digital channels.</li> <li>• Referrals effectiveness</li> </ul>
<b>Engagement</b>	How engaged are the HCPs?	<ul style="list-style-type: none"> <li>• Visit frequency.</li> <li>• Breadth of activities</li> </ul>
<b>Experience</b>	How is the customer experience?	<ul style="list-style-type: none"> <li>• Percent of new HCPs joining through digital channels.</li> <li>• Trend on average time spent on activities.</li> <li>• Churn rate</li> </ul>

# How Digital Transformation Is Rewriting Our Business Model?



## New tools

### Boost innovation

New digital tools allowed us to be more differentiated vs competitors.



## Precise targeting

### Data-driven decision making

Wealth of data collected from various sources allowed us more precise targeting of our customers



## Customer in focus

### Customer - centricity

Switch from brand to customer centricity



## New brand offerings

### Beyond the pill

Digital allows us creating comprehensive strategies for brands which includes full service and support for customers