The Life Sciences industry is at a remarkable inflection point.

As the Life Sciences Industry emerges from the worst of the patent cliff, it now faces a new normal where health outcomes are paramount. In this new environment, companies are developing specialized treatments for more complex, targeted disease areas. However, to bring these products to market, they must show evidence of an improved patient outcome for approval as well as reimbursement. Times have changed significantly and so must the companies that operate within it.
Improved patient outcomes

Patients need them, governments and payers are demanding them and life sciences companies are essential in developing and delivering them.

As the industry enters the new normal of health outcomes, many traditional life sciences companies are faced with the need to make fundamental shifts in their core operations—most of which were built for a blockbuster era. At the same time, rising biotech companies face extraordinary growth and need to scale quickly and efficiently. This new normal requires new customer and patient-centric models that are nimble, digitally-enabled, scalable and cost efficient on both a global and local level.

According to Accenture research, sales lost to patent expiry peaked in 2012. In 2013, the gap will begin to close from new and non-expired products introduced to the market compared to sales lost from patent expiry, and the industry will return to delivering positive value from new and existing products.


Accenture: An unequaled life sciences service provider

Accenture’s Life Sciences group can help life sciences companies address these complex challenges by working with them to take decisive action to deliver better patient outcomes and drive shareholder value by:

Rethinking commercial models and customer engagement to be patient centric and digitally enabled with multiple touch points

Reshaping global supply chains to be patient centered, cost effective, value chains

Restructuring R&D to help bring medicines to patients faster and more efficiently than ever before

We do this through strategic and operational consulting, technology and outsourcing—both individually and collectively as a business service. Our services span the full spectrum of life sciences business models (see page 10).

We are truly global operating in all major life sciences markets with a 10,000+ person practice that is both globally integrated and locally focused.

Accenture’s survey of 200 sales and marketing pharmaceutical executives revealed that the majority are revamping or intend to revamp their organization in 2013.

Delivering results by rethinking, reshaping or restructuring

Worked with a top-five pharmaceutical company to develop a revolutionary clinical data aggregation and exchange platform to accelerate the clinical development process. This cloud-based platform provides unprecedented access to aggregated clinical trial data from various internal data sources as well as multiple external parties. The platform allows the company to collect, analyze and visualize clinical trial patient and operational data across studies and drug programs. It also enables better clinical trial execution and improved efficiency through predictive analytics.

Collaborating with a leading global pharmaceutical company to launch an anti-obesity drug in the United States by providing patient services across multiple channels including web, email, direct mail and inbound/outbound call centers. The program is expected to increase patient adherence by 30% and deliver personalized customer experiences based on patient segmentation analysis and insights from patient interactions.

Helping a major healthcare company collect, aggregate and analyze real-world data from payers, providers and patients to determine the combination of information and services to deliver the best outcomes for diabetes patients. The program is expected to increase revenues by more than $500 million annually, reduce costs by an average of 40% for diabetes patients and decrease visits to the ER by more than 50% for high-risk patients.

Helping a global top-10 pharmaceutical company create a unified digital platform and website standardization that has increased physician engagement by up to 25%. The new platform gives physicians easy access to all brand- and condition-related patient information on their device of choice (mobile, tablet or desktop).
Accenture—helping our life sciences clients deliver improved outcomes for more than two decades

>10,000 skilled life sciences professionals working in 50+ countries

90% of Fortune 500 life sciences companies

All of the top 10 global biopharmaceutical companies

All of the top 10 pharma markets globally

All of the top 10 medical technology companies

All of the top 8 biotech companies

Nine of the top 10 disease areas

A recognized leader bringing innovation to the Life Sciences industry

**Number one** preferred life sciences vendor by IDC Health Insights for the third consecutive year (2013)

**Leader** in Salesforce.com implementations (Forrester Wave, 2013)

**First company** to deliver end-to-end pharmacovigilence services offshore

**First company** to deliver clinical data management offshore

**Leader in IDC Marketscape:**

- Worldwide Life Sciences Sales and Marketing IT Outsourcing (2013)
- Worldwide Life Sciences Drug Safety Services 2013 Vendor Assessment
- Worldwide Business Analytics IT Consulting and Systems Integration Services 2012
- Worldwide Life Sciences Manufacturing & Supply Chain BPO 2013 Vendor Assessment
- Worldwide Life Sciences Manufacturing & Supply Chain Strategic Consulting 2013 Vendor Assessment
Accenture Life Sciences Technology Relationships

Accenture's Life Sciences practice is dedicated to helping companies rethink, reshape and restructure their business to deliver better patient outcomes. Our strategic vendor relationships are essential to achieving these goals.

Aprimo
EMC
Explorys
Foresight
Informatica
JDA
Kinaxis
Kony
Medidata
Microsoft
Model N
Oracle
Pegasystems
Revolution-Analytics
Salesforce.com
SAP
SAS
Teradata
Tracelink
Veeva

Largest global SAP practice, with more than 36,000 professionals around the world who have delivered 1700+ projects

41,500+ Microsoft-skilled resources (between Accenture and Avanade), the largest aggregation of Microsoft skills in the marketplace

Received first LSH Oracle Certification

Largest practice of all Oracle Service Providers

Largest provider of Veeva implementations globally

Leading provider of Salesforce.com Automation solutions

Pioneered end-to-end solution running on the SAP HANA® platform
Accenture’s Precision Health Intelligence—connecting the healthcare industry to improve patient outcomes

Accenture’s Precision Health Intelligence (PHI) is a ground-breaking new capability enabling health care companies to aggregate data and utilize analytics across multiple health care stakeholders (including payers, providers, pharmaceutical companies, governments and patients) to form a holistic view of patient health and care. With this new, real-life view of the patient, Accenture’s Precision Health Intelligence helps companies identify and execute very pointed, specific activities to drive adherence, enhance the customer experience and improve patient outcomes.

For example, we are aggregating and analyzing data from a major pharmaceutical company, payers, providers and patients to determine the combination of information and services that will deliver the best outcomes for diabetes patients.

We are also connecting pharmaceutical companies, regulators and payers to accelerate the submission process and get drugs to market faster.

Accenture is uniquely capable of bringing these entities together having worked with nearly every key stakeholders in the healthcare industry for more than 20 years, including:

• Insurance payers
• Hospitals and clinics
• Governments around the world
• Retail pharmacies
• Consumer health companies
• Research institutions
• Universities
• Regulators
• Independent Development Networks (IDNs)
• Technology providers
• Industry associations
Delivering better outcomes in the new normal

Helping an international pharmaceutical and generics company redesign its demand planning process and significantly improve product availability while reducing stock outs. The initial deployment in two target markets has increased forecast accuracy by 24% in just one year. Due to this success, the service has been extended to other European markets.

Working with Novartis to develop a pioneering Patient Safety Information solution that allows patients, sales reps and healthcare professionals to report spontaneous adverse events around the world in real-time through computers and mobile devices. The report is deposited in the company’s central database of patient safety information in less than a minute.

Collaborating with a major pharmaceutical company to create global shared services. Accenture helped design and implement a network of six interconnected global service centers housing multiple business support functions: finance, IT, employee services, indirect procurement, and worldwide real estate and facilities.

Teaming with a leading global pharmaceutical company to build a pioneering digital content and production services management tool and provide marketing planning, creative sourcing, search and approval services across 65 global markets in seven different languages. In the first two-and-a-half years, the company has realized more than $80 million in cost savings, including a more than 30% reduction in content production costs.

Working with a large European–based pharmaceutical company to transform its IT systems. Accenture transitioned 118 applications across R&D, supply chain and sales and marketing in a single wave in just four months. The program reduced IT application costs as much as 60% in a three-year period while improving quality.
Accenture Life Sciences Clients

Accenture is proud to serve a wide range of life sciences clients across multiple segments.

Some of our clients include...
Abbott
Astellas
AstraZeneca
Baxter
Bayer
Becton Dickenson
Boston Scientific
Eisai
Gilead
GlaxoSmithKline
Merck & Co
Merck Serono
MHRA
Novartis
Pfizer
Roche
Sanofi
Shire
Takeda Pharmaceuticals
Teva
UCB
Vertex

Industry Associations

Accenture’s Life Sciences practice is committed to the advancement of the industry and is actively engaged in facilitating and delivering pre-competitive initiatives such as TransCelerate. Our participation in various industry associations includes:

- AdvaMed
- ABPI
- BayBio
- BioNJ
- CDISC
- Drug Information Association
- iBio
- MassBio
- PhRMA
- Pharmaceutical Management Science Association
- Society for Clinical Data Management
- TransCelerate
We offer a full range of core offerings and business services to help you rethink, reshape or restructure for better patient outcomes.
Accenture Business Services for Life Sciences: A new, flexible model to help you drive your business performance on a global scale

Accenture combines its industry experience with its management consulting, technology, and business process outsourcing capabilities and assets to provide business services that deliver specific outcomes.

These services are offered via a pay-per-use, pay-by-service or pay-by-outcome commercial model that allows the service and payment to flex up or down based on the business need. They can be delivered as individual consulting, technology or business process outsourcing engagements or as outcome-based services.

Our business services deliver measurable outcomes for our life sciences clients:

**Accelerated R&D Services**
- Up to **15%** improved speed to market
- Up to **30%+** cost reduction
- Increased quality, transparency, consistency and compliance

**Supply Chain Transformation Services**
- Increase inventory turns by up to **25%** and sales revenue by up to **5%**
- Up to **10%** decrease in transportation costs
- Enhance working capital efficiency by up to **20%**

**Commercial Services for Life Sciences**
- Up to **7%** increase in revenues and profitability
- Up to **50%** reduction in costs
- Increased speed to market, global scale, consistency and compliance

**Enterprise Services for Life Sciences**
- Up to **20%** savings in large scale transformation programs through implementation accelerators
- Industrialized approach and solutions with reduced deployment and compliance risks
- Up to **30%** increase in AO productivity
Accelerated R&D Services help life sciences companies bring drugs to market faster, at less cost and with reduced execution risks.

Accelerated R&D Services help life sciences companies leverage cloud, mobility and analytics to deliver integrated functions across R&D:

- **Up to 15% faster**
- **At lower cost, often up to 30%**
- **With increased quality, transparency, consistency and compliance**

Our services include:

- **Clinical Services**: Full clinical services focused on the traditional ‘pain points’ of effectively identifying the right patients, ensuring efficient clinical trial metrics and streamlining the process between data capture and reporting leveraging the latest technology and CDISC standards.
- **Regulatory Services**: Integrated end-to-end cloud based regulatory services using CDISC standards and the industry’s only integrated cloud based processing platform to improve regulatory quality, speed and operational efficiency.
- **Pharmacovigilance Services**: Full PV services delivered in English and Japanese leveraging mobile and web based data capture to drive compliance with new regulations in a patient and physician focused manner to increase productivity and improve quality; driving more efficient compliance across all PV processes.
- **CDISC Conversion Services**: Retrospective and prospective conversion of clinical data to CDISC standards.
- **Standards Management Services**: Provides end-to-end accountability for intelligence, governance, distribution, training and compliance of standards across clinical and regulatory services.

**Accenture Life Sciences Cloud for R&D**: A technology platform that accelerates the end-to-end R&D value chain through a core set of business capabilities enabled by security, integration and collaboration services providing advanced analytics and operational reporting.

The Accenture Life Sciences Cloud for R&D is a comprehensive, first of its kind technology platform designed to provide actionable insights from clinical, operational and safety data.
Accenture Commercial Services for Life Sciences

Accenture Commercial Services help life sciences companies increase customer engagement and marketing effectiveness, while reducing costs and operational complexity.

Accenture Commercial Services help life sciences companies:

- Achieve up to 7% increase in revenues and profitability
- Achieve up to 50% reduction in costs
- Increase speed to market, global scale, consistency and compliance

Our services include:

- **Brand & Marketing Services**: Provide comprehensive marketing management and operations for new and mature brands
  - Launch Services
  - Established Brand Services
- **Digital Production and Content Services**: Digital content creation, execution, management and distribution services
  - Content Production Services
  - Content Management Services
  - Campaign Management Services
  - Content Platform Management & Distribution Services
- **Multichannel Customer Engagement Services**: Seamless integration and management of marketing campaigns across customer segments, channels and geographies
  - Channel Enablement Services (Accenture Life Sciences Cloud for Commercial)
  - Health Care Professionals Services
  - Payer Services
  - Patient Services
- **Commercial Analytics and Information Management Services**: Generation and utilization of fact-based insights across campaigns, channels, customer segments, brands and services to improve marketing effectiveness
  - Customer and Channel Analytics Services
  - Market Analytics Services
  - Digital & Social Analytics Services
  - Campaign Analytics Services
  - Health Outcome Analytics Services
- **Accenture Life Sciences Cloud for Commercial Services**: A unique set of customized apps, assets, solutions and global services that help companies accelerate their move to the cloud and maximize customer engagement using Salesforce.com.
  - Infrastructure and Application Modernization Services
  - Multichannel Customer Engagement Services
  - Marketing and Collaboration Services
  - Innovation Services

A 2013 Accenture survey of 200 sales and marketing pharmaceutical executives indicates they plan to increase their use of digital interactions by 26 percent on average over the next two years.
Supply Chain Transformation Services for Life Sciences

Supply Chain Transformation Services help life sciences companies move beyond their traditional “one-size-fits-all” approach to an end-to-end value chain with an integrated, lean, global, collaborative and customer-focused supply chain.

Supply Chain Transformation Services help life sciences companies:

- Increase inventory turns by up to 25% and sales revenue by up to 5%
- Achieve up to 10% decrease in transportation costs
- Enhance working capital efficiency by up to 20%

Our services include:

- **Planning & Analytics Managed Services**: Co-delivers and manages forecasting and planning capabilities which may include discrete staffing and/or management services to improve and complement the existing organization and create capacity building. This service also enables organizations to access real-time actionable supply chain data, reduce expenses and improve efficiencies across their supply chain network.

- **Quality and Compliance Services**: Helps organizations avoid poorly connected quality and compliance processes, information gaps and operational silos by establishing a single global harmonization of standards, people, process and technology resulting in visible, fast and more predictable results.

- **Control Tower Services**: Manages daily planning and execution of global logistics operations, while also enabling continuous collaborative improvement, driving efficiency, and reducing costs.

- **Secure Supply Chain Services**: Helps companies implement changes in their supply chain to accommodate the particular regulatory and trading partner requirements and enable significant benefits. This holistic offering has identified various ways to help improve the security of our clients’ supply chains through strategic changes, operational improvements, and the implementation of technology.

- **Contract Manufacturing Services**: Assists companies with setting up and running a Collaboration Hub which allows companies to network with their contract manufacturers, exchange quality and compliance information and provide critical inventory visibility.

- **Sourcing & Procurement Tail Spend Management Services**: Achieves savings for indirect materials and services by managing the diverse and fragmented spend in a company.

- **Plant Closure Services**: Provides strategic program management, technical and manufacturing, and regulatory and quality support.

It’s time for life sciences companies to take everything they know about supply chains and turn it on its head. It’s time for value chain transformation.
Enterprise Services for Life Sciences

Enterprise Services for Life Sciences helps companies increase the value they generate from their current ERP footprint by addressing changing regulatory requirements, emerging-market expansion, enterprise consolidation and harmonization, and total cost of ownership reduction.

Enterprise Services help life sciences companies:

- Achieve up to **20%** savings in large scale transformation programs through implementation accelerators
- Reduce deployment and compliance risks
- Increase AO productivity by up to **30%**

Our services include:

- **ERP Strategy and Planning Services**: Understand current ERP architecture, strength, pain points and cost drivers
- **ERP Implementation Services**: Integrate the organization, optimize key processes and leverage better, more comprehensive data to make fact-based decisions
- **ERP Run Services**: Increase productivity and quality, as well as improve service execution and reliability
- **ERP Analytics Services**: Achieve end-to-end data warehousing and analytics solutions for improved knowledge capture and ultimately better decision making
- **ERP Mobility Services**: Embrace business to employee (B2E), business to consumer (B2C), business to business (B2B) and machine to machine (M2M) business opportunities
- **ERP Mid-Markets Services**: Address cost barriers to entry in emerging markets by providing managed ERP services
- **ERP Master Data Management Services**: Lower costs, increase quality with a dedicated staff and decreased cost variability
- **ERP on Demand Cloud Services**: Lower infrastructure and applications costs and boost systems’ performance while setting up newer ERP technologies like Analytics and Mobility

Enterprise Services for Life Sciences helps companies address core and transformative IT challenges by delivering cost-saving technology and enterprise resource planning (ERP) solutions.
What sets us apart

**Thinking and delivering it.**
The strategic acumen to frame the vision, and the technology and process skills to deliver the desired outcomes.

**Global.** Ability to mobilize the best people, at the right time and in the right place—anywhere in the world.

**Innovation that works.**
Innovation-driven and continuously challenging the status quo to bring new ideas that will help life sciences companies outperform their competitors.

**Broad and deep capabilities.**
Extensive skills in consulting, technology and outsourcing across all functional areas with a keen focus on R&D, sales and marketing, and supply chain.

**Outcome-driven service.**
Comprehensive services that deliver specified business and patient outcomes in critical areas of the business.

**Delivery excellence.**
Consistent performance delivering outcomes 24x7 on a global basis.

**Unique insights.**
Research that enriches our hands-on experience.

**Accountability.**
Personally committed to helping our clients achieve their business objectives.

**Hands-on experience.**
More than 20 years of working with the largest life sciences and healthcare companies across mature and emerging models.
Accenture Global Delivery Network for Life Sciences

Wayne, PA
- Accelerated R&D
- Commercial Services
- Compliance & Validation
- Enterprise Services

Latin America
- Accenture Advanced Enterprise Solution (AAES)
- Commercial Services
- Compliance & Validation
- Enterprise Services

Bratislava
- Enterprise Services
- Life Sciences Solution Factory

Barcelona
- Distribution & Supply Chain
- Innovation Center—SAP and Oracle
- Life Sciences Center of Excellence

Rome
- Accenture Advanced Enterprise Solution (AAES)
- Compliance & Validation
- Enterprise Services

NCR
- Distribution & Supply Chain
- Infrastructure Outsourcing

Mumbai
- Accelerated R&D
- Commercial Services
- Compliance & Validation
- Distribution & Supply Chain
- Medical Technology

Pune
- Accelerated R&D
- Compliance & Validation
- Enterprise Services
- Infrastructure Outsourcing
- Life Sciences Solution Factory
- Life Sciences Center of Excellence—Testing
- Microsoft Hub

Bangalore
- Accelerated R&D
- Commercial Services
- Compliance & Validation
- Enterprise Services
- Infrastructure Outsourcing
- Innovation Center—SAP and Oracle
- Life Sciences Solution Factory
- Life Sciences Center of Excellence—Cloud

Chennai
- Accelerated R&D
- Compliance & Validation
- Life Sciences Center of Excellence

Kolkata
- Commercial Services
- Enterprise Services
- Infrastructure Outsourcing

Shanghai
- Accelerated R&D
- Commercial Services
- Life Sciences Center of Excellence
- Medical Technology

Dalian
- Accelerated R&D
- Commercial Services
- Compliance & Validation
- Life Sciences Solution Factory
- Life Sciences Center of Excellence

Manila
- Accelerated R&D
- Accenture Advanced Enterprise Solution (AAES)
- Compliance & Validation
- Enterprise Services
- Life Sciences Solution Factory
- Life Sciences Center of Excellence
Providing cost efficient and high quality delivery to our clients 24x7

5 Life Sciences Solution Factories

6 Life Sciences Centers of Excellence across the globe with over 3,000 skilled life sciences professionals

250+ medical professionals

No. 1 Outsourcing Provider by the International Association of Outsourcing Professional (IAOP) in 2012 for the fifth year in a row

21 years+ of Business Process Outsourcing experience

170,000+ employees across 50 locations within our Accenture Global Delivery Network

Serving clients in 39 languages in 150 countries
Contact us
To learn more about how Accenture can help your company, please visit accenture.com/lifesciences or contact our managing directors:

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About Accenture
Accenture is a global management consulting, technology services and outsourcing company, with approximately 275,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world’s most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US$28.6 billion for the fiscal year ended Aug. 31, 2013. Its home page is www.accenture.com.

About Accenture Life Sciences
Accenture's Life Sciences group is dedicated to helping companies rethink, reshape or restructure their businesses to deliver better patient outcomes and drive shareholder returns. We provide end-to-end business services as well as individual consulting, outsourcing and technology projects around the globe in all strategic and functional areas—with a strong focus on R&D, Sales & Marketing, and the Supply Chain. We have decades of experiences working hand-in-hand with the world’s most successful companies to improve their performance across the entire Life Sciences value chain. Accenture’s Life Sciences group connects more than 10,000 skilled professionals people in over 50 countries who are personally committed to helping our clients achieve their business objectives and deliver better health outcomes for people around the world.

Accenture Life Sciences
Rethink Reshape Restructure...for better patient outcomes