



A DIGITAL BOOSTER DOSE FOR HEALTHCARE

AUDIO TRANSCRIPT

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By

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Reimagining India's pharma commercial workforce model in the Never Normal

The COVID-19 pandemic and the subsequent restrictions have undoubtedly caused a major upheaval in how pharma companies engage with Healthcare Providers (HCPs) and HCPs, in turn, engage with their patients. The rapid acceleration toward remote visits and virtualization of care during the pandemic demonstrate that conventional engagement models are moving in the direction of “never normal.”

THREE EMERGING TRENDS IN THE VIRTUAL HEALTHCARE SPACE

While the virtualization of healthcare was long expected, the pandemic has finally proven to be the tipping point. The recent HCP-Patient survey conducted by Accenture confirms the imminent transition in the HCP-patient dynamics. Here are some notable findings of the survey.

Finding 1 Patients say yes to digital but miss personalized services

Lockdown restrictions and the danger of infection has prompted patients to use new technologies to address healthcare issues. Even the doctors are now encouraging patients to use various apps to manage their health conditions. On the other hand, 62 percent of the patients surveyed felt that the extensive usage of technology had reduced direct access to their healthcare providers, thereby affecting the quality of care.

Finding 2 Doctors respond favorably but some doubts persist

The doctor community has quite seamlessly embraced virtual tools to manage health outcomes for their patients. Online chat, telephone and video conferencing are the most popular options. However, as the survey reveals, lack of empathy in virtual discussions, delayed diagnosis and patient privacy issues are concerns that still persist while delivering health services through the digital medium.



Finding 3 Doctors need "right" information, not more information

In the wake of COVID-19, volume of information sent by pharma companies to HCPs through digital channels has increased significantly. However, despite the digital engagement, doctors feel that the pharma companies have not fully understood their changing needs and expectations for patient treatment.

FOUR KEY IMPERATIVES TO BOOST PHARMAS' DIGITAL SUCCESS

As evident from the above-mentioned findings, the future commercial agenda of Indian pharma companies will have a significant digital influence. The objective—more than just communicating product details—would be to deliver a hyper-personalized customer experience while addressing the existing challenges around relevance, empathy and privacy.

We believe a winning agenda to deliver success for pharma companies will hinge on four key aspects:

NUMBER 1 Curate differentiated experiences for HCPs

With COVID-19 reducing physical touchpoints, what is needed is an intelligent and closed-looped communication with the HCP, powered by the right tools and personalization, along with content management and renewed digital marketing capabilities.

NUMBER 2 Teaming with HCPs key to effective patient management

As the HCP-patient interactions increase over various digital platforms, both the stakeholders require each other's support to enable a superior patient and practice management. Pharma companies can facilitate doctor-patient interactions in a manner that addresses the gaps arisen due to digital channels—lack of empathy, delayed diagnosis and patient privacy.

NUMBER 3 Harnessing analytics to drive continuous improvement

As the engagement moves towards hyper-relevance, pharma companies must invest in improved intelligence to derive data-driven, actionable insights to understand HCPs and patients better.

NUMBER 4 Defining new sales structures for efficiency

With customer needs becoming more nuanced and granular, pharma companies must gradually depart from conventional sales or business unit structures and define new sales structures or "plays" that help serve customer needs more efficiently.

THREE CRITICAL STEPS TO REVITALIZE PHARMA WORKFORCE

The re-imagined commercial agenda in the never normal will warrant pharma companies to redefine their work processes and re-align their workforce. Here are three strategic themes imperative to transform pharma companies' workforce.

NUMBER 1 RE-IMAGINE ROLES

As pharma companies become more connected and sophisticated, their workforce needs diverse new skillsets to gain competitive advantage and adopt intelligent technologies to upskill and reskill existing talent. Three such roles that will undergo a metamorphosis are:

• **ONE** Transforming medical representatives into intelligent representatives

For medical representatives, engaging the HCPs by leveraging specific intelligence based on behavioral preferences will be the key. Armed with a closed-looped CRM, representatives can effectively use data insights to plan, deliver and report calls. This is where skills such as digital awareness and analytics will be put to good use. The emphasis is to see through doctors' eyes to



understand their needs and solve problems by serving customers as individuals, not as numbers in a call roster.

· TWO Transforming brand managers into CX managers

As doctor interactions become more dependent on omnichannel digital platforms, a brand manager's role will be pivotal to facilitate a uniform interaction experience across all channels. Therefore, the communication and choosing the right templates and promotional items must also include a better understanding of doctors and patients and how they want to be engaged. This would also include building ecosystems to offer the right solutions and regularly adjust to meet changing customer expectations. In the future, brand managers will have to acquire skills such as content management for continuous engagement across multiple channels and experience management to retain a multichannel identity and branding across the company.

· THREE Think beyond the patients

As the Accenture survey suggests, virtualization of healthcare is all about HCPs making further customizations into how they operate—both clinically (teleconsultation) and commercially (payments). One area where pharma companies can differentiate themselves is by helping doctors manage their practice and patients better. They can do so by acquiring critical skills in disease awareness (identifying key gaps that impact patient experience and clinical outcomes) and various digital engagement tools to perform these functions.

NUMBER 2 PUTTING IN PLACE RIGHT-SIZED STRUCTURES

In a muted growth scenario, pharma companies must tackle the legacy of a “one-size-fits-all” organizational structure head-on and create a new competitive reality that propels them ahead of their competitors. With so much diversity, winning in the Indian market is about winning in

many Indias.” However, the pharma industry has been straddled by uniform sales structures across the country, irrespective of the potentiality or winnability.

Identifying growth hotspots at a micro-territory level based on potential assessment drivers can shape a company's operating structure, such as divisions and marketing mix. Some of the vital assessment drivers are doctor needs, patient profile, disease burden, economic potential in a specific territory, competitive intensity, prescription and dispensing patterns. Adapting sales structures with a view on expected ROI can help pharma companies drive significant efficiencies.

03 INSTIL A DIGITAL WORK CULTURE

For pharma leaders, organizational transformation will revolve around embedding digital skills across the company. Since native digital-pharma experience is limited, companies will need to employ a hybrid approach that requires:

- A digital center of excellence (CoE) led by a business expert with a good understanding of digital technologies and the external digital ecosystem.
- Digital champions within functions who can identify and resolve problems through digital interventions.

Since data empowers leaders and individual employees to make quick and accurate decisions, a CoE can manage the seamless flow of data-driven insights across business models, functions and project teams. Moreover, as processes mature, predictive and prescriptive analytics will help teams make data-driven and insightful business decisions.

THE ROAD AHEAD

Though virtual healthcare has been here for a while now, the pandemic became a crucial catalyst in forcing pharma companies to



accelerate their digital transformation journey at scale. Many pharma companies are already taking steps around the digital imperatives, but the difference lies in how fast they execute their strategies. The key is to harness the power of these structural shifts and new tools and technologies to deliver high-quality and hyper-personalized patient experiences and healthcare services, while also improving business outcomes and resilience to counter future disruptions.

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