RETHINK RESHAPE RESTRUCTURE... FOR BETTER PATIENT OUTCOMES

PRACTICE OVERVIEW

BRAVE NEW ERA
A NEW ECONOMIC REALITY.

Market shifts and the digital revolution are changing what ‘health care’ means and how it will be experienced.

*Healthcare Disrupted: Next Generation Business Models and Strategies, 2016*
SHIFT FROM VOLUME TO VALUE

TODAY
Value propositions focused on clinical attributes of products versus competitors’ and physician prescribers.

EMERGING
Value propositions focused on delivering outcome-based health and therapy management services enabled through connected devices, sensors, services, social engagement, and broadly ‘aware’ solutions.

Physicians
Life Sciences Products
Purchasing
Life Sciences Solutions
Health Systems
Payers
Patients
Government
**EMERGING NEW BUSINESS MODELS**

**LEAN INNOVATORS**
Differentiate on their efficient operating model and innovates around those efficiencies.
Many are former generics companies formed as lean, financially-driven, acquisitive organizations with superior supply chain and increasingly diversified products and services.

**AROUND THE PATIENT INNOVATORS**
Have a deep understanding and focus on the patient journey to receive appropriate treatment.
Many companies recasting themselves as digital medicines companies with highly differentiating revenue and operating models.

**VALUE INNOVATORS**
Are committed to outcomes as the basis of the value they deliver to the health system and patients.
Most in this segment are device and therapeutics companies transitioning from products to services; often through extended, remotely delivered services.

**NEW HEALTH DIGITALS**
Provide the foundational elements of the new healthcare ecosystem.
Many companies are either digital-to-health or health-to-digital, where each can leverage and advantaged infrastructure.
A BRAVE NEW ERA
IOT, ANALYTICS, DESIGN THINKING, CLOUD SERVICES

Entering a world of LIVING SERVICES
MACRO-INDUSTRY TRENDS AFFECTING CHANGE

SOCIO-ECONOMIC DISRUPTION
- HC rising faster than GDP
- Silver tsunami/Chronic disease
- Outcome-based reimbursement

SCIENTIFIC DISRUPTION
- New product launches driving growth
- Patent cliff leading to the rise of generics globally
- New science leading to the rise of specialized medicine

DIGITAL DISRUPTION
- Cloud, IoT, wearables
- Consumerization of the patient
- Big Data (adv. analytics, genomics, AI)

BUSINESS MODEL DISRUPTION
- The outside-in enterprise
- M&A & new business models
- The pivot to the patient
ACCENTURE
LEADING IN
THE NEW.
ACCENTURE’S RAPID ROTATION TO THE NEW
THE NEW: DIGITAL, CLOUD, AND SECURITY-RELATED SERVICES, ENABLED BY NEW AND INNOVATIVE TECHNOLOGY

$13.5 billion in FY16...and growing fast!
WHAT'S NEW?
END-TO-END SERVICES ACROSS FIVE BUSINESSES

**WHAT'S NEW?**
END-TO-END SERVICES ACROSS FIVE BUSINESSES

**SHAPES**
- Business Strategy
- Technology Strategy

**TRANSFORMS**
- Management Consulting
- Technology Consulting

**DIGITIZES**
- Interactive
- Analytics
- Mobility

**POWERS**
- Application Services
- Labs
- Ecosystem Alliances

**OPERATES**
- As a Service
- Business Process
- Cloud
- Security
LEADING WITH INNOVATION
ACROSS OUR FIVE BUSINESSSES

ACCENTURE RESEARCH
Trends
Ideate through thought leadership

ACCENTURE VENTURES
Investment & Open Innovation
Shape emerging technologies

ACCENTURE LABS
Research & Development
Prototype through applied R&D projects

ACCENTURE STUDIOS
Solution Innovation
Build with speed and agility

ACCENTURE INNOVATION CENTERS
Use Cases & Assets
Scale re-use with clients

ACCENTURE DELIVERY CENTERS
Industrialization
Industrialize sales & delivery

accenturestrategy
accentureconsulting
accenturedigital
accenturetechnology
accentureoperations
PIONEERING UNIQUE RELATIONSHIPS WITH ECOSYSTEM PROVIDERS

- ENTERPRISE SOFTWARE LEADERS
  - SAP
  - Microsoft
  - Oracle
  - IBM
- CLOUD STARS
  - medidata
  - Veeva
  - salesforce
  - workday
  - ServiceNow
  - Pega
- DIGITAL GIANTS
  - Google
  - Apple
  - Alibaba
  - Amazon Web Services
- INFRASTRUCTURE INCUMBENTS
  - HP
  - Cisco
  - IBM
  - EMC
- ORIGINAL EQUIPMENT MANUFACTURERS
  - Siemens
  - Schneider Electric

STRUCTURAL DIFFERENTIATION
INVEST EARLY IN THE NEW
SCALE FASTER THAN MARKET
RECOGNIZED DIGITAL LEADER IN THE MARKET

“Digital Leader continues to impress”
-After Q2 FY16

“Roll on digital, roll on – Digital Cloud investments drive growth.”
-After Q3 FY16 earnings

“Accenture the ‘overall winner’ on net exposure to growth services”
-May 2016 CIO Survey

“Accenture Interactive biggest and fastest growing Digital Agency network”
-2016 Advertising Age

Accenture in Leader category in terms of Digital Services, Digital strategy, Digital experience, Analytics

“Accenture has always managed to be ahead of the curve in identifying and gaining capabilities in new growth areas.”
-March 2016

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LEADING IN THE NEW IN LIFE SCIENCES.
# ACCENTURE IN THE NEW LIFE SCIENCES

## USING M&A & COLLABORATION TO DOMINATE DISEASE AREAS
- M&A
- Enterprise Architecture
- IT Strategy

## BUILD AGILE BUSINESS MODELS
- Digital Disruption
- Competitiveness
- CFO & Enterprise Value
- Talent & Organization
- Operations

## MAXIMIZING PRODUCT LAUNCHES
- Patient Health
- Service Strategy
- Value-based Transformation

## MAXIMIZING R&D PRODUCTIVITY
- R&D

### M&A
- Accelerated ERP M&A Integration
- Accelerated M&A IT Synergies
- Accelerated IT Divestiture

### Digital Disruption
- Finance Transformation
- Procurement Transformation
- HR Transformation

### Competitiveness
- Supply Chain Visibility & Security
- Digital Supply Network
- Supply Chain Transformation

### CFO & Enterprise Value
- Intelligent Patient Solutions & Patient Platforms
- Insight Driven Solutions
- Intelligent Access & Launch Solutions

### Talent & Organization
- Intelligent Marketing Solutions

### Operations
- Development Life Sciences Cloud (ALSC)
- Research Life Sciences Cloud (RLSC)
- Digital R&D/ Intelligent Data
- Process & Org Transformation
- Clinical Processing
- PV & Regulatory
DELIVERING BETTER OUTCOMES
across the life sciences enterprise

INTELLIGENT PATIENT SOLUTIONS

Accenture Intelligent Patient Platform

MEDICAL AFFAIRS

Research & Development

Commercial Strategy and Optimization

Discovery and Pre-Clinical Development

Clinical Development

Pharma-covigilance

Regulatory

Intelligent Access and Launch

Intelligent Patient Solutions

Intelligent Marketing Solutions

Insight-driven Solutions

Accenture Life Sciences Cloud for R&D

Accenture Intelligent Patient Platform

SUPPLY CHAIN

Develop and Launch

Plan

Source

Make

Deliver

Customer Value

ANALYTICS AND INSIGHTS

Accenture Life Sciences

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FAST FACTS ABOUT OUR PRACTICE

15,000+ life sciences professionals in 50+ countries

ALL of the top 10 global biopharmaceutical companies

9 of the top 10 global medical technology companies

ALL of the top 8 largest biotech companies

ALL of the top 10 global pharma markets

5 Life Sciences Solution Factories

Helping 95% of Fortune 500 life sciences companies deliver improved outcomes for more than two decades

21+ years of business process outsourcing experience

Deep expertise in 9 of the top 10 therapeutic areas

250+ medical professionals

3 Life Sciences Innovation Centers (Dublin, Murray Hill, Sophia Antipolis)

7 Life Sciences Centers of Excellence across the globe

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INNOVATION IN THE NEW LIFE SCIENCES

OPEN INNOVATION & THE ACCENTURE HEALTHTECH INNOVATION PROGRAM:
We work with top-tier accelerators, start-ups, venture capitalists, universities and corporate R&D labs to build innovative solutions and bring them to market.

ACCELERATORS:
- Startup Health
- Matter
- DreamIT
- Treehouse
- 1871
- 1776
- Enterprise Ireland
- NYC Digital Accelerator
- Rocketspace
- Galvanize

VENTURE CAPITALISTS:
- Accenture Ventures
- Google Ventures
- Merck Ventures
- Greylock Partners
- Trident Capital
- Andreessen Horowitz

UNIVERSITIES:
- Stanford University
- MIT
- Essec Business
- Indian Institute of Technology Madras
- Zhejiang University

ACCENTURE LABS:
200+ researchers piloting cutting-edge prototypes, platforms and customer experiences with clients
- Bangalore
- Beijing
- Dublin
- San Jose
- Redwood City
- Sophia Antipolis
- Washington D. C.
- Tel Aviv

ACCENTURE HEALTHTECH INNOVATION PROGRAM
bringing curated startups together with leading life sciences and health companies to solve the world’s greatest health issues

- 500+ applicants
- 8 semi-finalists
- 3 finalists
- Mentoring
- Investing
- Collaborating
THINKING IN THE NEW LIFE SCIENCES

PHARMA’S GROWING OPPORTUNITY IN PATIENT SERVICES
Key Findings from a Survey of 200+ Patient Services Executives in the Pharmaceutical Industry.

ALL TO WIN? OR ALL TO LOSE?
How a disruptive business model is driving digitization in life sciences.

PATIENT SERVICES: PHARMA’S BEST KEPT SECRET
Survey of 10,000 patients around the world examining their unmet service needs in seven different therapeutic areas across the entire patient journey.

INJECTING AGILITY INTO MEDICAL TECHNOLOGY
Three steps to create an agile operating model in the new digital, outcome-based healthcare environment.

PEOPLE + TECHNOLOGY: A NEW DOUBLE-HELIX FOR LIFE SCIENCES

AFFORDABILITY AND VALUE: THE ECONOMICS OF PHARMA’S NEW SCIENCE
Our research reveals what High Performers are doing right and how pharma companies can achieve for high performance in the future.

INDUSTRY AT A CROSSROADS: THE RISE OF DIGITAL IN THE R&D ORGANIZATION
Key findings from a survey of 76 Pharmaceutical R&D senior executives from the US and Europe.

HEALTHCARE DISRUPTED
Next generation models and strategies for life sciences.
UNPARALLELED LIFE SCIENCES GLOBAL DELIVERY AND INNOVATION CENTER NETWORK
WE BRING THIS ALL TO LIFE WITH REAL RESULTS.
DELIVERING OUTCOMES TO OUR CLIENTS

Accenture worked with a leading global pharma company to customize Salesforce Service Cloud to its precise need enabling its call center in Brazil to enroll and support nearly four million patients 20% faster while lowering its operating costs by 25%.

Accenture is working with Boston Scientific to provide an analytics-driven digital health solution to help improve patient outcomes and reduce the cost of treating chronic cardio-vascular conditions. This solution is powered by the Accenture Intelligent Patient Platform.

Accenture helped a leading global pharmaceutical company create an integrated global transportation management strategy doubling its cost savings and increasing operational control enabling the company to distribute its products globally with greater speed, consistency, responsiveness, and security.

Accenture keeps a medical technology company's business-critical internet technology running smoothly and securely to support $6 billion worth of its commercial transactions annually.

Accenture worked with a top-five pharmaceutical company to develop a revolutionary clinical data aggregation and exchange platform to accelerate the clinical development process.

Accenture worked with a large European-based pharmaceutical company to transform its IT systems, transitioning 118 applications across R&D, supply chain and sales and marketing in just four months and reducing IT application costs as much as 60% while improving quality.
INVESTING IN MAKING A HEALTHIER WORLD: ACCENTURE DEVELOPMENT PARTNERSHIPS

Leading the way to Improved Maternal Health Outcomes

Merck for Mothers is a 10-year, $500 million initiative operating in more than 140 countries to reduce maternal mortality worldwide. In its third year, it has contributed to improve access to quality maternal healthcare and family planning services for an estimated 4.7 million women in 30 countries around the world. Accenture Strategy Talent & Organization and Accenture Development Partnerships (ADP) developed a management capability tool that improves clinician’s ability to make decisions by streamlining the process.

A Learning Study on Gestational Diabetes to Improve Maternal and Child Health

Novo Nordisk is a global leader in diabetes. Changing Diabetes® is their commitment to improving life for people with diabetes. The World Diabetes Foundation is an independent trust dedicated to the prevention and treatment of diabetes in the developing world. Accenture Development Partnerships worked with these two organizations to better understand gestational diabetes awareness, diagnosis, treatment and follow-up in Barranquilla, Colombia. The program, called Vida Nueva, mobilized local and global stakeholders to make sustainable advances in maternal and child health by improving standards of care. Gestational Diabetes Mellitus (GDM) is a temporary form of diabetes that occurs during pregnancy, affecting 14 percent of expectant mothers worldwide. GDM is an underlying factor for maternal and newborn mortality, but timely treatment offers an opportunity to improve pregnancy outcomes.
A RECOGNIZED LEADER IN THE LIFE SCIENCES INDUSTRY

TOP IT SERVICES VENDOR

Ranked as Top IT Services Vendor in Life Science Industry for five years in a row by IDC Health Insights.

EUROPEAN LEADER

Leader position on Everest Group’s PEAK Matrix for European Life Sciences ITO.

DIGITAL AND COMMERCIAL LEADER

Leader in all four IDC MarketScape Worldwide Life Sciences Sales and Marketing reports and in Everest Group’s Peak Matrix for Life Sciences Digital. Ranked by Ad Age as the Largest Digital Network Agency in the world.

R&D LEADER

Leader in all four IDC MarketScape Worldwide Life Sciences R&D reports and in Everest Group’s PEAK Matrix for Life Sciences Clinical and R&D IT Services.

WINNER’S CIRCLE

As-a-Service Winner’s Circle for Pharma BPO R&D and Commercial Services by HfS Research.
WHO WE WORK WITH

OUR CLIENTS INCLUDE:

• Abbott
• Astellas
• AstraZeneca
• Baxter
• Bayer
• Becton Dickenson
• Boston Scientific
• Eisai
• Gilead
• GlaxoSmithKline
• Horizon Pharma
• Merck & Co
• Merck Serono
• MHRA
• Novartis
• Pfizer
• Roche
• Sanofi
• Stryker
• Takeda Pharmaceuticals
• Teva
• Transcelerate
• UCB
• Vertex

PHARMACEUTICALS | BIONTECHNOLOGY/BIOSIMILARS | GENERICS

CONSUMER HEALTH | GLOBAL HEALTH AUTHORITIES | HEALTH STARTUPS

MEDICAL TECHNOLOGY & DEVICES | WHOLESALERS/DISTRIBUTORS | SERVICE PROVIDERS
WHO WE ARE

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APAC Life Sciences

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Managing Director
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