

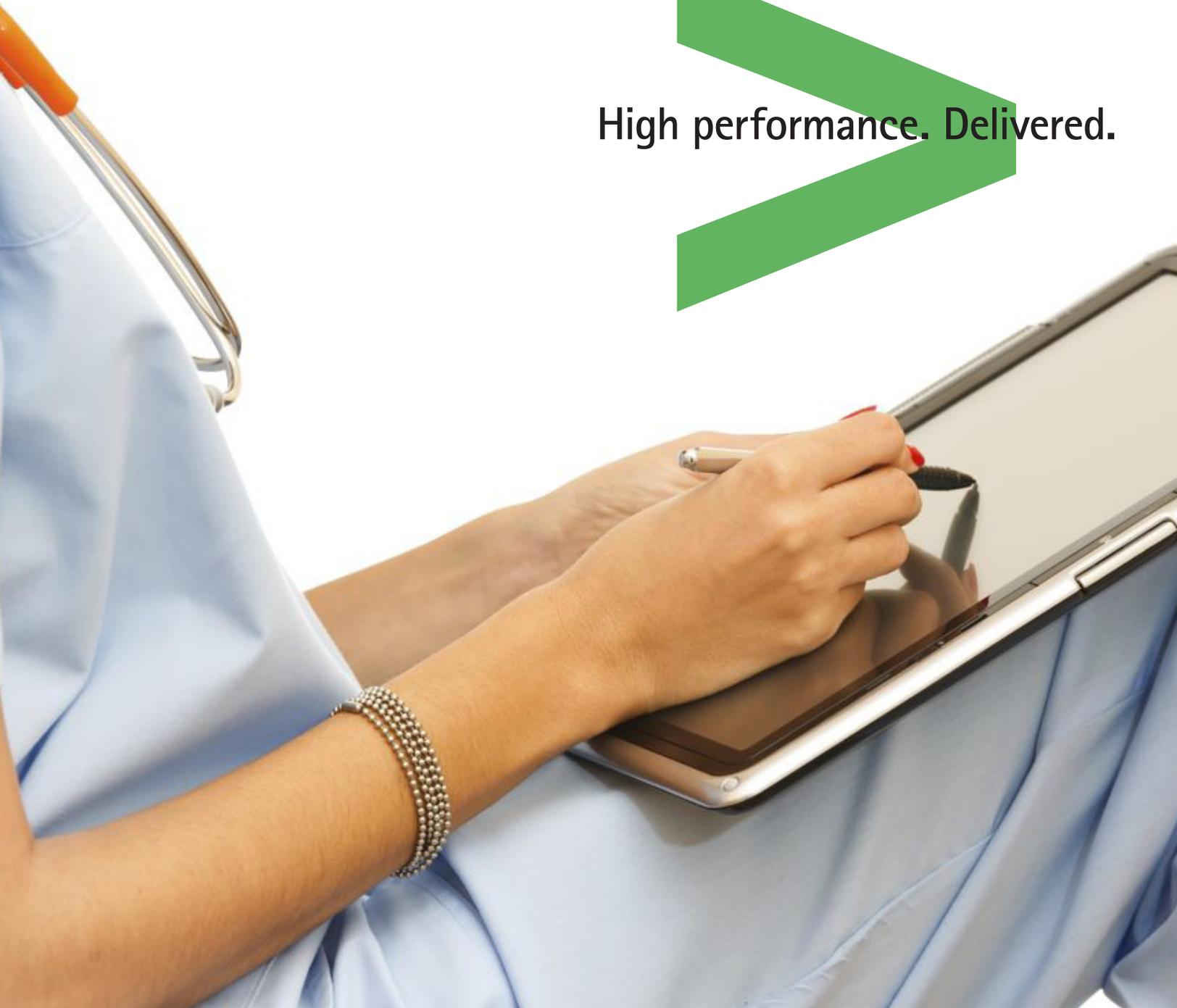
Accenture Life Sciences

Rethink Reshape Restructure...for better patient outcomes

Accenture Commercial Services for Life Sciences: Reshaping the Commercial Model for High Performance



High performance. Delivered.





Sales and Marketing spend accounts for an average of 27.5 percent of revenue versus 16 percent for R&D underscoring the need to find a more cost effective commercial model.¹

1. Accenture Research Based on 15 of the Largest Pharmaceutical Companies, 2011

Introduction

The Life Sciences industry is unlike any other with the ability to fundamentally impact the quality and health of peoples' lives. It is also an industry that is undergoing massive change. Every major part of the value chain is in flux as the healthcare industry evolves. The biopharmaceutical industry in particular is facing significant pressures:

- **Product portfolios are shifting** due to loss of exclusivity on multiple blockbuster products with many companies lacking pipelines to make up the difference over the next few years.
- **Customer segments are multiplying and presenting new demands** as patients are becoming more involved in health decisions and require easily accessible and better information.
- **Payers are seeking improved health outcomes** and are increasingly reluctant to cover new therapies that do not clearly deliver a measurable improved health outcome; providers are evolving their businesses to corporate models such as Integrated Care Networks (ICNs) and Accountable Care Organizations (ACOs).

- **Channels to customers are proliferating** both in number and type, including digital as well as retail and trade partners, with the need for distinctive, yet compliant, content developed for each audience and channel.
- **Emerging markets are critical to future growth** but serving these geographies requires complying with new and sometimes unpredictable regulatory mandates.

Meeting these challenges not only requires rethinking product innovation, but adopting new commercial models as well. Commercial models that were built around expensive direct-to-physician promotion of blockbusters have limited relevance to an industry that is looking to create more specialized therapies to deliver better health outcomes for people around the world.

Today, Life Sciences companies need new sales and marketing models that are easily scalable with the ability to reach a much broader set of customers through a much wider range of channels—all at a significantly reduced cost base.

Accenture's Commercial Services are helping Life Sciences companies tackle this challenge head on with fully integrated, end-to-end services that utilize the latest technologies and are delivered by highly trained marketing and analytics professionals around the world, specializing in Life Sciences. Our clients gain continuous access to resources and services that reflect relevant cultural and language needs, while leveraging Accenture's scale, footprint and technology prowess to achieve their global aspirations.

Fast Facts

Accenture's Life Sciences group has:

- Provided commercial services to four of the top five global pharmaceutical companies
- Provided outsourcing services to eight of the top 10 pharmaceutical companies
- Established a Life Sciences Center of Excellence in India with more than 2,500 skilled professionals who possess strong functional and domain experience in commercial operations
- Worked with eight of the 12 *Fortune* 500 pharmaceutical companies in the sales and marketing area
- Provided sales and marketing services and support to clients in 19 countries spanning five continents

- Served a multitude of Life Sciences clients in the sales and marketing area including:
 - Amgen
 - AstraZeneca
 - Baxter International
 - Boehringer Ingelheim
 - Boston Scientific
 - GlaxoSmithKline
 - Johnson & Johnson
 - Merck & Co.
 - Merck KGaA
 - Novartis
 - Pfizer
 - Sanofi
 - Shire



Accenture Commercial Services helps Life Sciences companies address critical industry challenges

Our services are designed to help our Life Sciences clients achieve three industry imperatives:

- Transition to a global model
- Reach local customers and be responsive to their needs
- Streamline and standardize operations for greater compliance and consistency

We are able to help our clients achieve these goals by offering comprehensive services that span the full sales and marketing spectrum. These services are provided 24/7 from more than 50 locations around the world. Our deep experience in the Life Sciences industry is combined with leading marketing and analytics talent, leading practices gleaned from marketing leaders around the globe, proprietary and leading-edge technology and relationships. These differentiators separate Accenture's Commercial Services from more narrow offerings in the marketplace today.

Industry imperatives for Life Sciences Sales & Marketing organizations

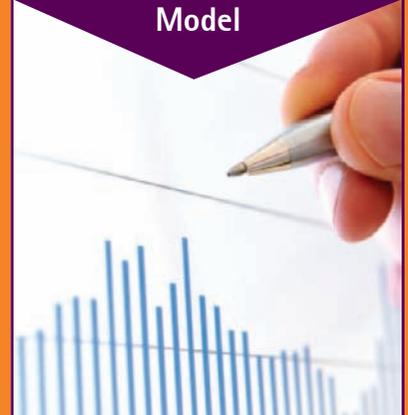
Transform to a Global Model



Achieve Local Reach



Adopt Compliant and Consistent Operating Model



Innovation

Our Services

Accenture's Commercial Services are not standard outsourcing arrangements such as those commonly used for back office finance or technology support. Rather, they combine our capabilities across Management Consulting, Technology and Outsourcing to provide fully integrated, end-to-end services—delivered with speed, at scale where and when needed with the utmost quality by highly skilled sales and marketing professionals around the globe.

Our services include:

- **Brand and Marketing Services** provide Life Sciences companies with brand planning, end-to-end project management and channel experimentation services.
- **Digital Production and Content Services** help Life Sciences companies deliver disease and product content to physicians and patients around the globe quickly and efficiently.

Accenture's Commercial Services allow Life Sciences companies to quickly gain access to needed capability without significant investments—and deploy and scale those capabilities where and when they need them.

- **Multichannel Customer Engagement Services** offers Life Sciences companies seamless integration and management across all major customer facing channels including sales, web, social, mobile, call centers, patient services, direct to pharmacy, and payer engagement.
- **Commercial Analytics and Information Management Services** provides real-time, event-driven multichannel analytics, standard report development and production, and advanced analytics services driving better resource and spend allocation.

We offer these services with many different cost structures including pay-for-performance, pay-per-use, level of service and more. We understand each client environment is unique, and customize our solutions and services to meet the client's precise needs and business objectives. Our services get the job done for you so you can focus your attention on the strategic areas that really matter the most.

The Benefits of Accenture Commercial Services for Life Sciences

Accenture's Commercial Services for Life Sciences are comprised of a comprehensive suite of service offerings that help improve the contribution and performance of Life Sciences sales and marketing organizations. This end-to-end suite of services helps Life Sciences companies:

Increase revenues and profitability

- Up to 5% increase in revenue and profitability through better decisions via analytics
- Up to 7% increase in sales through improved multichannel/digital customer engagement
- Up to 40% increase in reach to non-target customers through new multichannel/digital engagement

Reduce costs

- Up to 20% reduction in operating costs to serve local markets
- Up to 50% decrease in digital content production costs through industrialized processes

Increase speed and scale through BPO construct and hosted technology

- Increase capability through access to highly skilled sales and marketing professionals and leading-edge technology
- Increase consistency and compliance across markets through global scale and industrialized processes



Accenture Brand and Marketing Services

Accenture's Brand and Marketing service offering supports multiple brand and marketing processes across the marketing life-cycle that frees brand teams and marketers to do what they do best: focus on strategic initiatives.

Our Brand and Marketing services include:

- **Brand Plan Management.** This service helps Life Sciences companies manage the processes for creating and managing brand plans, coordinate cross-functional meetings, engage agencies to define initial tactics, and facilitate the submission of brand plans in clients' databases or tools.

- **Project Management.** Accenture applies our considerable project management skills to support brand-specific and/or marketing projects such as the launch of a new product, keeping them on track and on budget.
- **Channel Operations.** We help Life Sciences companies enable and manage channel operations more strategically—including digital, non-digital, direct and indirect channels such as call centers—by bringing targeting and segmentation analysis as well as reporting that allows clients to assess the efficiency of channel operations.
- **Vendor Management.** This service offering includes assessing agency partners and vendors to consolidate their services to realize efficiencies and streamline the delivery of services.

Accenture Digital Production and Content Services

Accenture's Digital Production and Content services help Life Sciences companies produce, deliver, manage, track and enhance marketing content cost effectively across channels—both inside and outside the enterprise. We provide end-to-end marketing operations support including high quality production, content and campaign services as well as field tested digital technology and a robust distribution platform

Accenture provides tools, processes, knowledge and people to reshape how companies source, create, store and access digital content to reduce costs, increase efficiencies and speed time to market while reducing compliance risk and freeing resources to focus on strategy.

Accenture Commercial Services for Life Sciences

Brand & Marketing Services

- Brand Plan Management
- E2E Project Management
- Channel Operations
- Vendor Management

Digital Production & Content Services

- Content Production
- Content Management Services
- Campaign Management
- Content Platforms & Distribution

Multichannel Customer Engagement Services

- Sales Enablement
- Mobile App Services
- Social Media Sentiment Monitoring
- Direct to Pharmacy Services
- Channel Management Services
- SF Digital Content iRep/CLP Services
- Web Enablement Dynamic Content
- Patient Services (e.g., RADIANT)
- Tender Management Contracting Services

Commercial Analytics & Information Management Services

- Marketing ROI/ Mix Customization
- Customer Insight
- Health Outcomes Insight
- Campaign Analytics
- Channel Analytics
- Content Analytics

Our Digital Production and Content services include:

- **Content Production.** This service offering decouples creative from production when possible to save costs, expedite turnaround and more tightly manage the creation and deployment localization of content.
- **Content Management Services.** We help brand and marketing teams make their brand dollars go further and increase return on asset development by organizing and managing assets efficiently so they can be found by partners, agencies and vendors, and leveraged as appropriate. The Content Management tools we customize and deploy support the appropriate lifespan of marketing assets, including retirement and decommissioning. We implement Marketing Resource Management (MRM) and Digital Asset Management (DAM)

technology enablers and processes across all relevant marketing operational areas (e.g. budgeting, calendars, workflows, approvals, etc.), expediting location of assets, ensuring access to them and appropriate protection of them, and facilitating use through multiple channels.

- **Campaign Management.** This service offering helps Life Sciences companies plan, design, execute and analyze campaigns and campaign performance across tactics, channels and markets.
- **Digital Platform and Distribution.** Through this service, we provide the technology and digital marketing experience to equip companies with scalable, integrated digital platforms that host web, mobile, email and tablet content cost effectively so it can be distributed how and where it is needed.

Our Digital Production and Content Services have allowed companies to save from 35 to 60 percent in total spend in the first year of collaboration, while delivering superior quality to both U.S.-based and offshore providers. Whether you need end-to-end support or point solutions for specific brands, we can work with your team at all points in the marketing process.

Accenture and avVenta Team Up to Offer Clients End-to-End Marketing Operations Capabilities

Accenture acquired avVenta Worldwide in October 2012, a provider of digital production services. By leveraging avVenta's delivery center in San Jose, Costa Rica, companies will now be able to manage content from initial creation through distribution to provide greater speed to market, responsiveness and relevance, while capturing greater return on their marketing investments. The combined companies' capabilities include marketing strategy, marketing planning and analytics, customer experience management, technology platform implementation and maintenance, marketing operational services and new product design and launch services.

Client Snapshot: Digital Production and Content Services

Accenture is providing digital production and content management services to a large global pharmaceutical company that enables low cost content creation, and efficient reuse and approval of content across 12 major global markets and in seven different languages—English, French, German, Spanish, Italian, Chinese and Japanese. Over the first two and a half years of service, the company has realized tens of millions of dollars in cost savings, including a more than 30 percent reduction in content production costs and a significant increase in digital content availability as well as asset reuse.



Client Snapshot: Campaign Management Services

This global pharmaceutical company had used multiple third-party vendors to design and execute its marketing campaigns. This approach resulted in process redundancies, increased costs due to inefficiencies, and risk-prone campaign roll-out methods. The client asked Accenture to assist in mitigating these costs and risks by developing an automated process to manage campaign operations.

Accenture worked with the client to develop a standard operating model for campaign management activities. The program detailed responsibilities for the client, Accenture, and different fulfillment vendors to avoid duplication of effort and costs and create standard processes for all parties. The onshore/offshore Accenture team translates the company's marketing tactics into Siebel-based campaigns and reporting. Daily collaboration with client groups and third party vendors verifies that campaigns are being managed well within specific markets.

The client is now able to increase its volume of campaigns to 300-400 campaigns a year covering all channels and provide greater consistency while decreasing costs by 25 to 30 percent.

Multichannel Customer Engagement Services

Accenture's Multichannel Customer Engagement services help Life Sciences clients define and deliver compelling and dynamic experiences across digital and traditional channels to increase customer awareness and engagement. Our approach gives companies clear visibility into the effectiveness of each channel and enhances online and offline marketing investments.

Our Multichannel Customer Engagement services include:

- **Sales Enablement.** This service helps our clients accelerate the transition to a digitally and mobile enabled sales model through consistent, replicable, easy to use processes and sales tools that can better track effectiveness and impact.
- **Mobile App Services.** Accenture provides quick prototyping and development of mobile applications for physicians, patients, office staff and caregivers through this service.
- **Social Media Sentiment Monitoring.** This service provides clients the means to understand the voice of the customer and how their products and services are viewed by physicians and patients.

- **Direct to Pharmacy Services.** These services provide direct sales and supply chain support for clients focused on driving new relationships through the pharmacy channel in geographies where the pharmacies play a critical role.
- **Channel Management Services.** Accenture provides end-to-end management of channel providers to help ensure they are following structured business processes, meeting SLA's and delivering the customer experience desired by the client.
- **Salesforce Digital Content Services.** These services combine Accenture's strength in sales enablement with our digital content production capabilities to provide clients with an end-to-end solution for the creation, distribution and performance of materials presented to customers via mobile devices.
- **Web Enablement/Dynamic Content.** This service provides technical development support for physician and patient web channels, providing clients with the ability to create a personalized experience for their customers based on leading real-time decision engine capabilities.
- **Patient Services (e.g., Radiant).** These health management services enable patients to engage with our clients to improve their health outcomes while reducing medical cost 1-5% and lowering administrative cost 5-25%.
- **Tender Management Contracting.** These services help clients identify, qualify, compete and win on a global basis through greater process consistency and insight driven analytics decision making.

"Accenture brought a broad and deep range of knowledge, experience and delivery capabilities to assemble a single integrated team with the ability to deliver a transformation project as large and complex as this one. The digital knowledge Accenture brought was truly cutting-edge and has helped us lead the industry in how we source, develop and manage our digital content around the globe."

– Senior Executive, Global Pharmaceutical Client

Client Snapshot: Multichannel Customer Engagement Services

One major pharmaceutical company is using a combination of Accenture's channel management, analytics and compensation management services to better manage performance against sales quotas and related payouts. An Accenture-built solution is providing sales information faster and more directly, lowering the cost of sales performance and speeding analysis and payouts to its sales force roughly 20 percent faster than the industry average.

Client Snapshot: Sales Enablement

A large global pharmaceutical company based out of Europe is using our sales enablement service to quickly roll-out new mobile Veeva processes and tools to its sales organizations in 25 countries for both smartphones and iPads. Accenture is also providing ongoing application support services. This service has helped the company deliver these new capabilities to its sales force an estimated 40 percent faster than had it been done independently, and at a significantly lower cost.

Client Snapshot: Mobile App Services

A hybrid onshore/offshore Accenture team helped global pharmaceutical leader AstraZeneca UK deliver brand promotional content on mobile platforms. Working together, we developed an 'eDetailing' solution—interactive sales presentations for select mobile devices which allows full use and interaction with the web app without Wi-Fi access. The solution allows AstraZeneca UK to capture and store usage statistics and customer interaction data even when the device is used offline.

Now AstraZeneca UK can more easily track and measure physician interactions, and adapt promotional content based upon customer (physician or medical group managers) preference. The bottom-line: a more personalized, efficient interaction between sales reps and doctors, and a savings of over 80 percent compared to traditional agencies delivering similar mobile capabilities.

Analytics and Information Management Services

Life Sciences companies generate and acquire massive data sets containing channel, product, customer and market information. Managing that data is difficult. Synthesizing it and applying the right analytics to extract useful market insights is even more difficult. While this process is critical for market success, most Life Sciences companies' core analytic expertise lies in R&D. Today's sales and marketing organizations need new analytic capabilities, from segmenting by customer lifetime value to determining the best multichannel content distribution path. Accenture's Analytics and Information Management Services provide these essential data management and analytic capabilities on a cost effective and efficient basis, freeing sales and marketing organizations to focus on putting the insights generated into action that drive revenue and customer engagement in the market.

Our services in this area include:

Marketing ROI / Mix Optimization.

These services enable our clients to quickly determine the effectiveness of their promotional spend and the return they can expect, using interactive, what-if scenario planning tools.

Customer Insight. This service provides a view across customer feedback channels, from performance data to call centers, social media analytics to feedback from the sales force. Our teams compile the data and turn it into customer segment level insights to inform critical decisions for the brands, from customer lifetime value to new product adoption sentiment.

Health Outcomes Insight. This service provides a view of customer performance as it pertains to achieving targeted health outcomes and leverages extensive experience with healthcare and payer data as well as big data technologies

Campaign & Channel Analytics. These services give clients a clear, unbiased view of the campaign performance. They provide clients with a scorecard of channel performance indicators giving clients an early view on which channels are resonating with targeted customers/segments.

Content Analytics. This service area provides insight into which pieces of content are most effective by customer segment, helping clients to identify winning patterns in customer dialogue and avoid costs producing content that is ineffective.

Client Snapshot: Analytics and Information Management Services

In just three months, Accenture launched a service that provides a major Life Sciences company with analytic insights and master data management capabilities for a key business unit with over 150 products.

The company turned to Accenture to help redesign its strategy and performance reporting framework (KPIs) across the entire business unit and subsequently awarded Accenture a five-year service contract to provide analytics and master data management services. Accenture built and operates an interactive reporting service—hosted in a private cloud—which delivers more than 100 management reports and dashboards to the global management and sales personnel. The solution incorporates a master data management solution and patent-pending data quality reporting system that enables the company's data stewards to manage 15 subject areas and more than 100 business rules and KPI definitions across more than 40 data sources.

Our Differentiators: What makes Accenture Commercial Services for Life Sciences Unique?

Accenture is the leading provider of end-to-end, integrated commercial services in Life Sciences because we have a unique combination of experience, scope and scale. We help our clients not just design, but also build and operate, a new, more powerful and effective commercial model.

We are unique because we:

- Have deep industry knowledge
- Deliver end-to-end, integrated services
- Bridge strategy and implementation
- Drive new capabilities at scale
- Provide 24x7 global delivery excellence
- Bring leading sales and marketing practices from other industries

Deep Industry Knowledge

Accenture understands the magnitude of challenge and change pharmaceutical companies are facing. We serve 90 percent

of the largest pharmaceutical companies in the world, 25 of the top 29 health companies in the Fortune 500, and numerous biotechnology and national health services. Our perspective on commercial challenges is comprehensive and informed by broad real world experience.

End-to-end, Integrated Services

Fragmented or inconsistent practices and processes add cost and slow delivery. Accenture's Commercial Services provide end-to-end consistent, reliable support across the entire commercial life-cycle. Our integrated approach acknowledges and understands how decisions in the development process affect decisions in the commercial process. This holistic approach enables Life Sciences companies to realize the full value of the organization, not just the individual parts.

Bridge Strategy and Implementation

Accenture has the unique ability to work with companies to conceptualize new business models as well as help operate them. We take a highly pragmatic approach that is grounded in realities of what is doable today with a clear eye to the future.

New Capabilities at Scale

As a result of our work with several consumer-facing industries around the globe, Accenture operates in and has a deep understanding of individual markets, customer segments and channels. Our talent pool of sales and marketing professionals hones their skills through the continuous training and capability-building initiatives. Accordingly, we provide the market insight necessary for pharmaceutical companies to help achieve their customer-centric visions, and develop and deploy market-relevant offers and services. Our teams are adaptable and scalable to support changes in the go-to-market model.

24x7 Global Delivery

Accenture's Global Delivery Network includes over 50 Delivery Centers and represents one of the largest of its kind. Several of our centers have developed deep knowledge and teams dedicated to delivering commercial services for Life Sciences companies. Our network allows companies to establish or expand their presence around the globe, and our multidisciplinary teams use consistent processes, tools, architectures and metrics to provide efficient and cohesive collaboration. Our commitment to continuous improvement is reflected in our ongoing investment in training. In 2011, we invested almost \$800 million in training and professional development and provided more than 9 million hours of learning for our people. With a global network to draw upon, companies can take advantage of time zone differences, language differences, labor arbitrage, and industry skills to find the service they need when and where they need it.

Accenture has supported P&G since 2008 by providing interactive production management support such as those in our Digital Production and Content Services. Teams of Accenture employees within our Global Delivery Network help P&G execute a wide variety of digital marketing efforts across the globe, providing services and developing assets in 20 languages including major European and Asian languages as well as Russian.

Leading Sales & Marketing Practices from other Industries

Accenture works with many leading companies to develop and deliver new marketing and sales models, including P&G, Yahoo, PepsiCo and Nestle. Our work with these companies delivering commercial services enables us to bring our Life Sciences clients the most cutting-edge sales and marketing practices pioneered and proven in other industries. Leading practices are identified and shared across industry teams to help all our clients obtain potential benefit from our exposure across industries and geographies.

Our Proprietary Assets and Relationships: Accelerating Speed to Value

Accenture's commitment to the Life Sciences industry is reflected in the assets, performance accelerators and alliances which we have established in order to bring leading services to our clients.

Assets & Accelerators

Accenture continues to invest in developing solutions and assets to help pharmaceutical companies meet the sales and marketing challenges of today's evolving market dynamics. Some of our proprietary assets include:

1. Accenture Veeva Accelerator Suite (VAS)

This is a set of proprietary tools, templates and frameworks to jump start and accelerate Veeva projects. This comprehensive suite includes Accenture Meta Data Export Tool which provides an easy way to extract meta data information

from Veeva and Salesforce to expedite the design phase. It also includes Accenture Veeva Testing assets which accounts for 80+ Test Scenarios and Scripts as well as accelerators for data migration, data integration and data alignment.

2. Accenture Campaign Management Solution

This solution provides clients with an operating model, core set of technology applications and business processes to enable them to quickly engage customers, including health care providers, patients and pharmacists, through multiple channels outside the sales force. Our asset helps Life Sciences companies quickly integrate their customer data across multiple channels and create a holistic picture of customer activity. This information is then used to develop critical insights on customer response and behavior to inform future marketing and drive increased customer value.

3. Accenture Multichannel Analytics Platform

Accenture's Analytics Platform for Life Sciences companies allows marketing teams to determine the value of interacting with physicians through a wide range of digital and non-digital channels. The platform helps identify opportunities to increase the impact of promotions, improve the potential lifetime value of channel partnerships, and reduce overall cost-to-serve.

4. Accenture Marketing Services Platform

Our Marketing Services Platform is a set of business services, capabilities and technologies that enable the Content Management Lifecycle. The Platform consists of pre-configured and standard components based on leading-practice business processes. It leverages cloud technology for maximum scalability and agility. Digital Asset Management (DAM) and Digital Rights Management (DRM) are two integral components of the platform.

Long-standing, Complementary Vendor Alliances

Our global teams work with a broad network of alliance partners to provide cost effective, leading-edge sales and marketing solutions. We have long-standing relationships with enterprise and analytics software leaders including Microsoft, Oracle, SAP, Salesforce.com and SAS.

We also have a close collaboration with many of the leading sales and marketing technology providers in Life Sciences. Some examples include:

- **Veeva.** A leader in sales enablement, Veeva provides cloud-based customer relationship management and regulated content management software.
- **Aprimo.** Aprimo's integrated marketing automation software enables B2C and B2B marketers to improve their control of campaign management and execute innovative multi-channel campaigns cost effectively.



Contact us to learn more

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About Accenture's Life Sciences Practice

Accenture's Life Sciences practice is dedicated to helping companies rethink, reshape or restructure their businesses to deliver better patient outcomes and drive shareholder returns. We provide consulting, outsourcing and technology around the globe in all strategic and functional areas—with a strong focus on R&D, Sales & Marketing and the Supply Chain. We have a long history of working hand in hand with our clients to improve their performance across the entire Life Sciences value chain. Accenture's Life Sciences practice is committed to helping our clients achieve their business objectives and deliver better health outcomes for people around the world.

About Accenture

Accenture is a global management consulting, technology services and outsourcing company, with approximately 259,000 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\$27.9 billion for the fiscal year ended Aug. 31, 2012. Its home page is www.accenture.com.

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