October 2024

Sustaining Growth in a Changing Environment

Re-imagine growth with health system outcomes in mind

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Executive summary

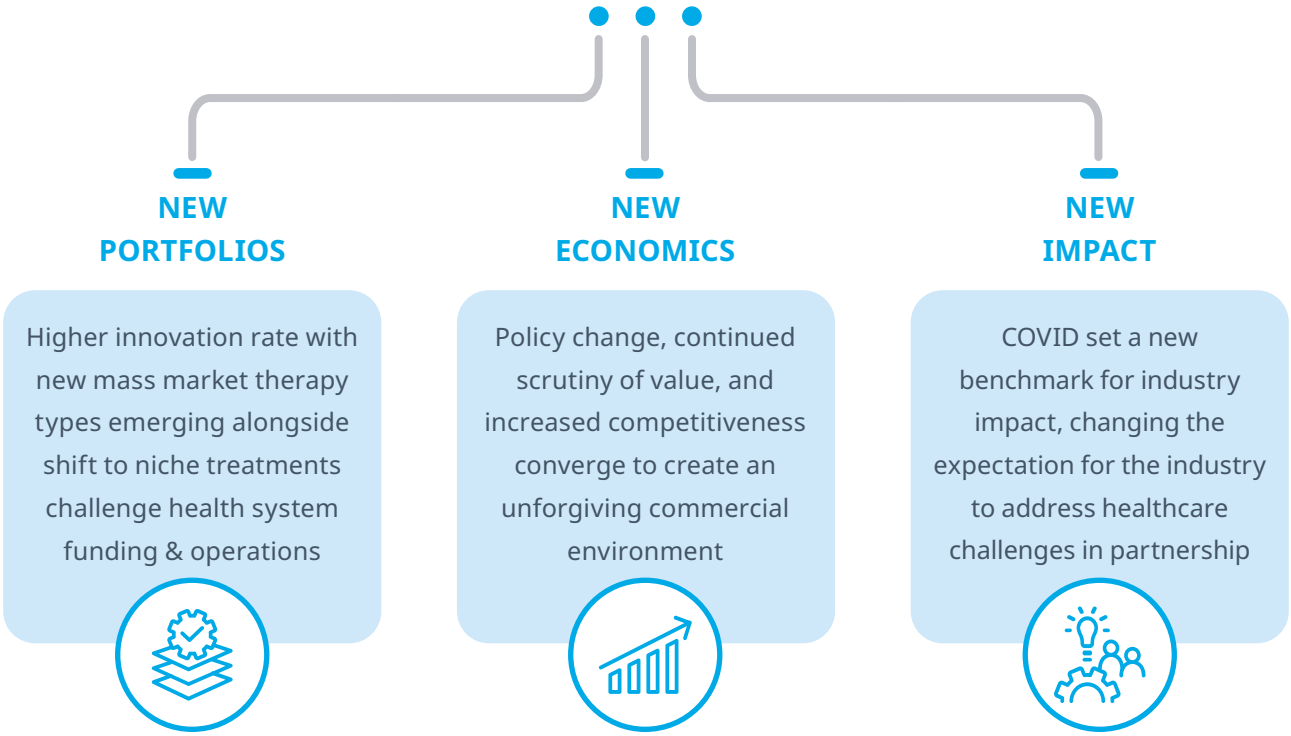
The global pharma industry continues on a track to growth yet must overcome challenges to capture value in a changing environment. Innovation beyond the product is needed, requiring greater agility and more sophisticated commercialisation capability.

Global spend on medicines is strong

Global spend on medicines indicates a continued track to growth for the pharma industry. Growth is projected to continue at ~7% per year and reach $2.2tn by 2028, driven by specialty medicines as well as ongoing innovation in mass market diseases. Biotech is a major growth driver and represents an increasing proportion of new products launched.

Value capture challenges

Capturing value, however, has become more uncertain for pharma companies due to a convergence of factors: Shifting portfolios challenge health system funding and operations. Policy change and value scrutiny add to increased competitiveness in main therapy areas to create an unforgiving commercial environment. Finally, expectations on the industry to rethink its customer model and solve healthcare challenges in partnership have been re-set, to some degree as a result of the role played by the industry during the COVID-19 pandemic.



Reimagine commercialisation for greater impact

Addressing the unique challenges of this environment requires a re-imagination of commercialisation. Science-led innovation and commercial execution are no longer a standalone winning formula.

Leading with experience and evidence

Commercialisation is evolving from a promotion-centric to a cooperative business model that reflects a changing healthcare ecosystem, where success relies on the ability to lead with new experience and evidence of impact for patients and health systems alike.

In this context, pharma companies should consider taking these steps now:

- **Chart the critical path for key assets**
  Develop product strategy on the basis of a robust disease management map, addressing three key dilemmas for launch.
- **Re-think the customer partnership**
  Build brand strategies and contracting models around a foundation of shared value, creating a stimulus to develop new facets of the commercial model.
- **Evolve the go-to-market model**
  Make customer value the core tenet for go-to-market vision, measurements, offering, frontline, and organizational enablers.
- **Future-proof capabilities**
  Strengthen integration of medical, access, and commercial functions for disease area leadership.
- **Innovate enterprise launch**
  Re-imagine enterprise launch, replacing playbooks with a launch engine that is data-driven, outcomes-focused and agile at its core.
- **Step-change speed and value**
  Incorporate new commercial technology, analytics and applied AI into the core value streams of commercialisation for speed and customer value.

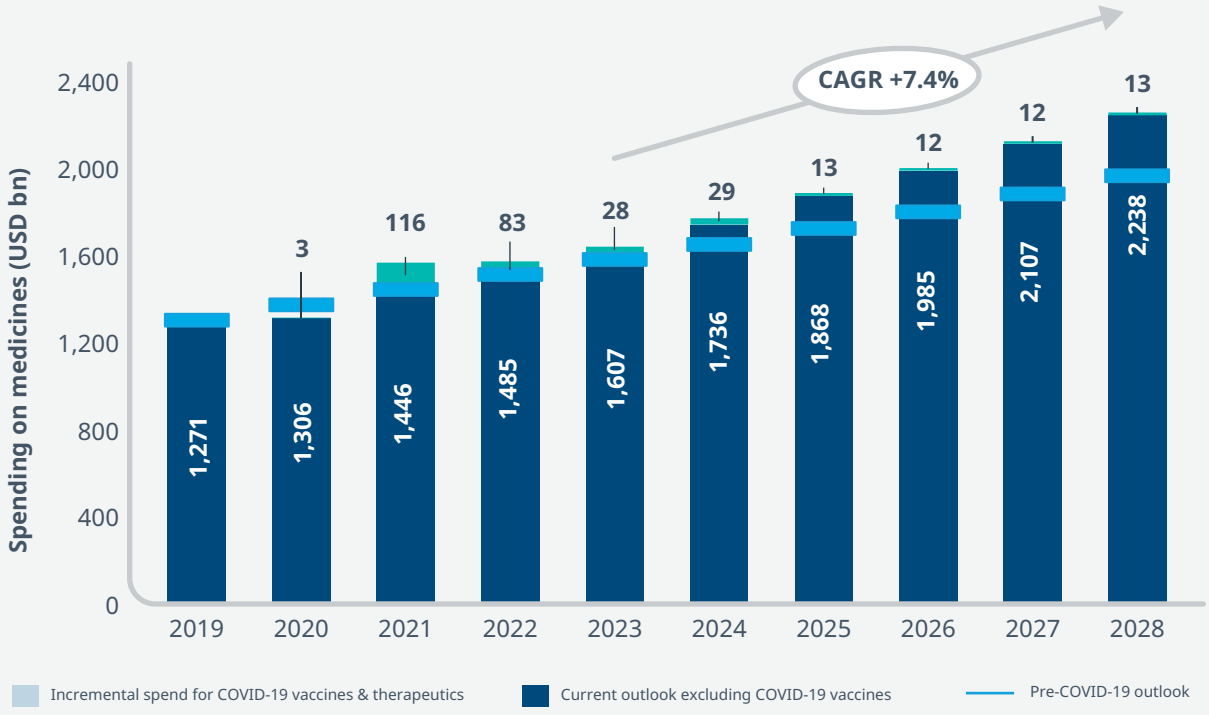
What drives growth

Global pharma market forecast exceeds pre-pandemic growth outlook

Market outlook

GLOBAL PHARMA MARKET EXPECTED TO REACH $2.2TN BY 2028

Pre-COVID and current outlook on global medicine spending (2019-2028, USD bn)



- Outlook for global medicine spending is substantially higher due to pipeline of innovative therapies and shift in mix of spending.
- Key challenges to growth include opportunity fragmentation and financially and operationally constrained health systems.
- Commercialisation capabilities needed to participate in growth have evolved.

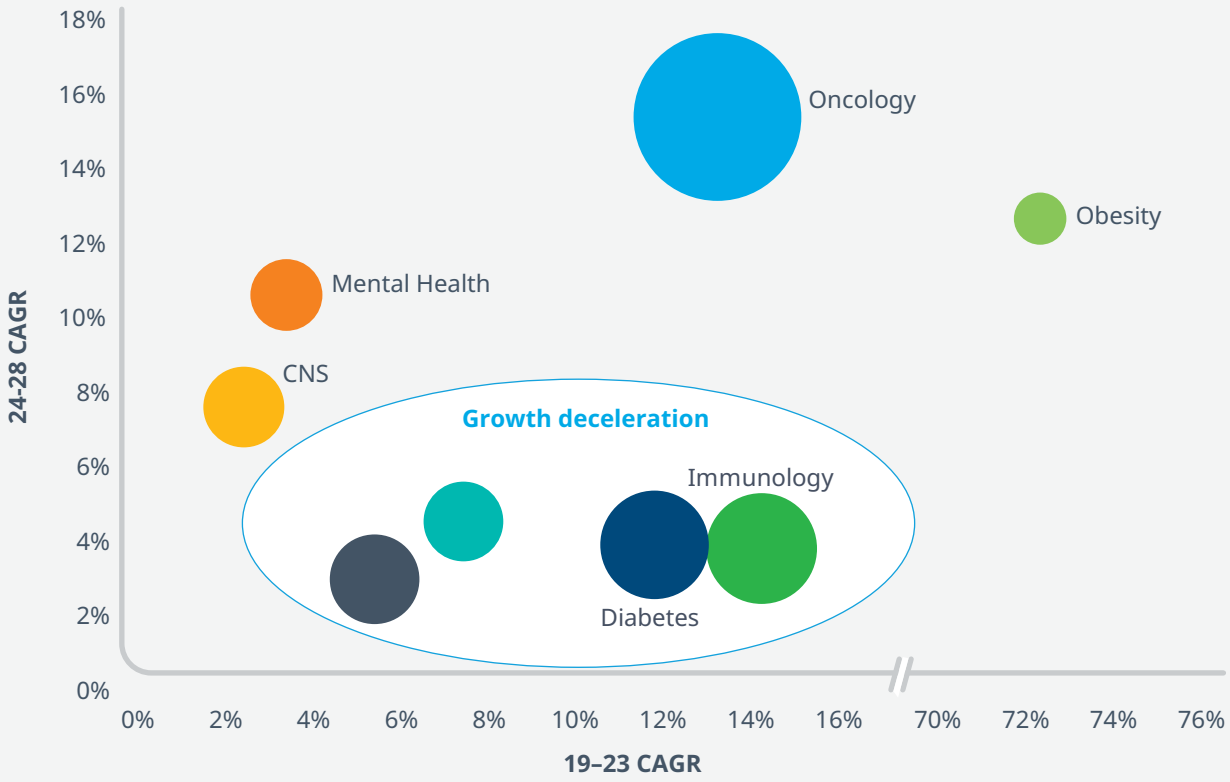
Source: The Global Use of Medicines 2024: Outlook to 2028, IQVIA Institute, 2024; IQVIA Market Prognosis.

Oncology will continue to drive growth, other TA growth is expected to slow

Innovation wave characteristics

ONCOLOGY DRIVES THE MARKET GROWTH

2028 Top 6 TAs and obesity by sales value, value growth (Bubble size represents gross sales)



- The market continues to be driven by oncology delivering above average growth.
- Obesity, CNS and mental health are also expected to see significant growth in the next five years.

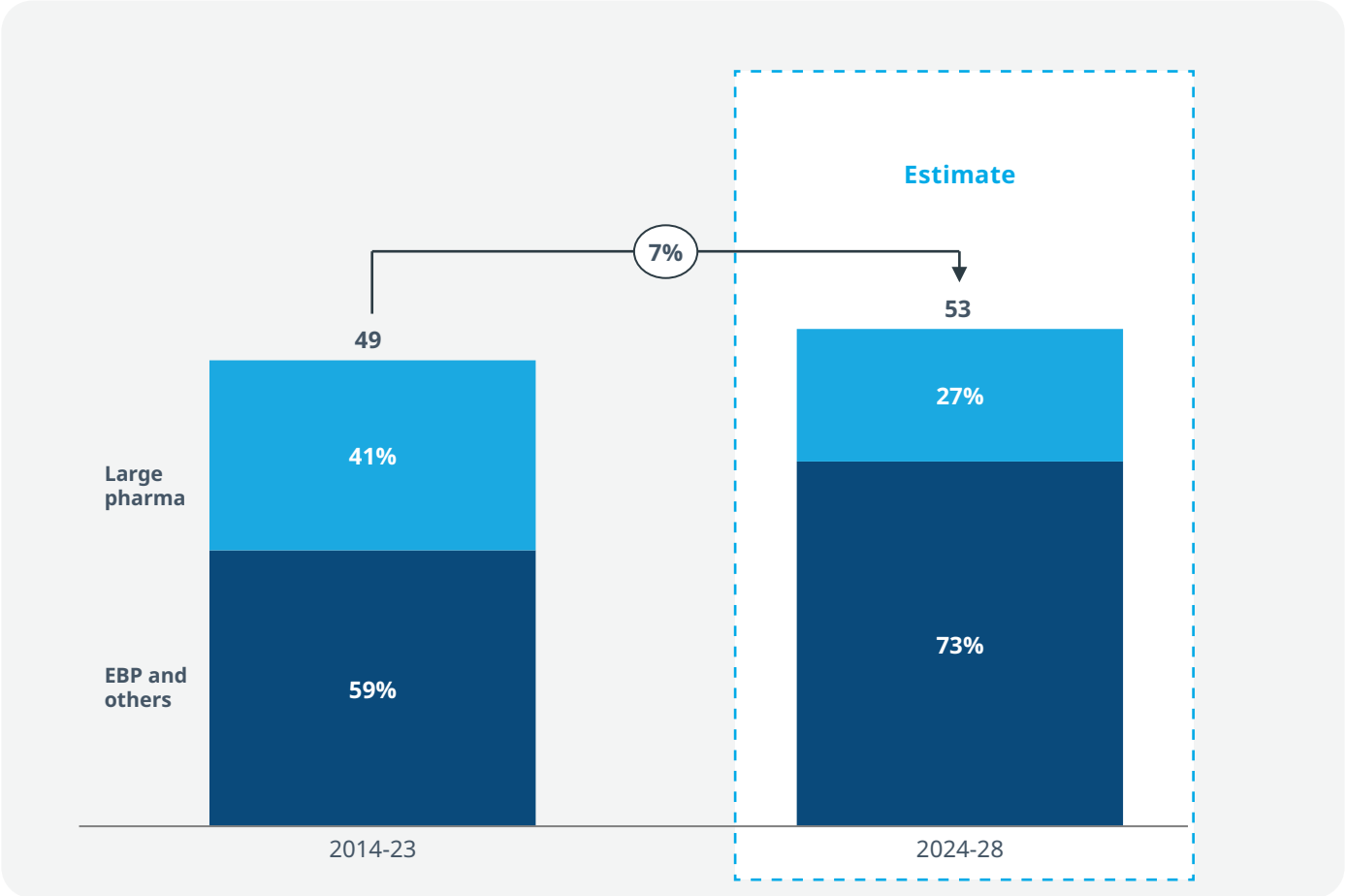
Abbreviations: CNS = Central Nervous System, CVD = Cardiovascular.
Source: The Global Use of Medicines 2024: Outlook to 2028, IQVIA Institute, 2024; IQVIA Forecast Link.

Growth will be driven by innovation, with more new active substance launches expected

Innovation wave characteristics

MORE NAS LAUNCHES COMPARED TO PAST PERIODS

US new active substances (NAS) annual average launches[1]



- The next five years will see growth in the launch of new active substances requiring health systems to play continuous catch up with pace of innovation.
- The pace of innovation is being driven by R&D from emerging biopharma.

1. Average launches projected at 50–55/year (250-275 launches within 5 years), split between large pharma and others (mostly Emerging Biopharma (EBP), but also some mid-tier regional players) not accounting for potential M&A. Large pharma defined as current global sales >=$10bn
Source: The Global Use of Medicines 2024: Outlook to 2028, IQVIA Institute; IQVIA Market Prognosis; IQVIA analysis.

New science and technologies power emerging innovation

Innovation wave characteristics

NEW SCIENCE INNOVATION

Recent and expected significant innovation areas[1] 2024-28

- MASH disease modifying therapies (e.g., resmetirom)
- Disease-modifying therapies for Alzheimer's disease
- BiTEs (e.g. for multiple myeloma)
- CRISPR-gene editing (e.g. Casgevy for sickle cell disease)
- Gene therapy (e.g. for haemophilia)
- Novel obesity therapies (re-set of CV risk management)
- Psychoplastogens for MDD
- mRNA vaccines (e.g. for glioblastoma)
- Stem cells for CNS disorders (e.g. PD and ALS)
- Remyelination in multiple sclerosis

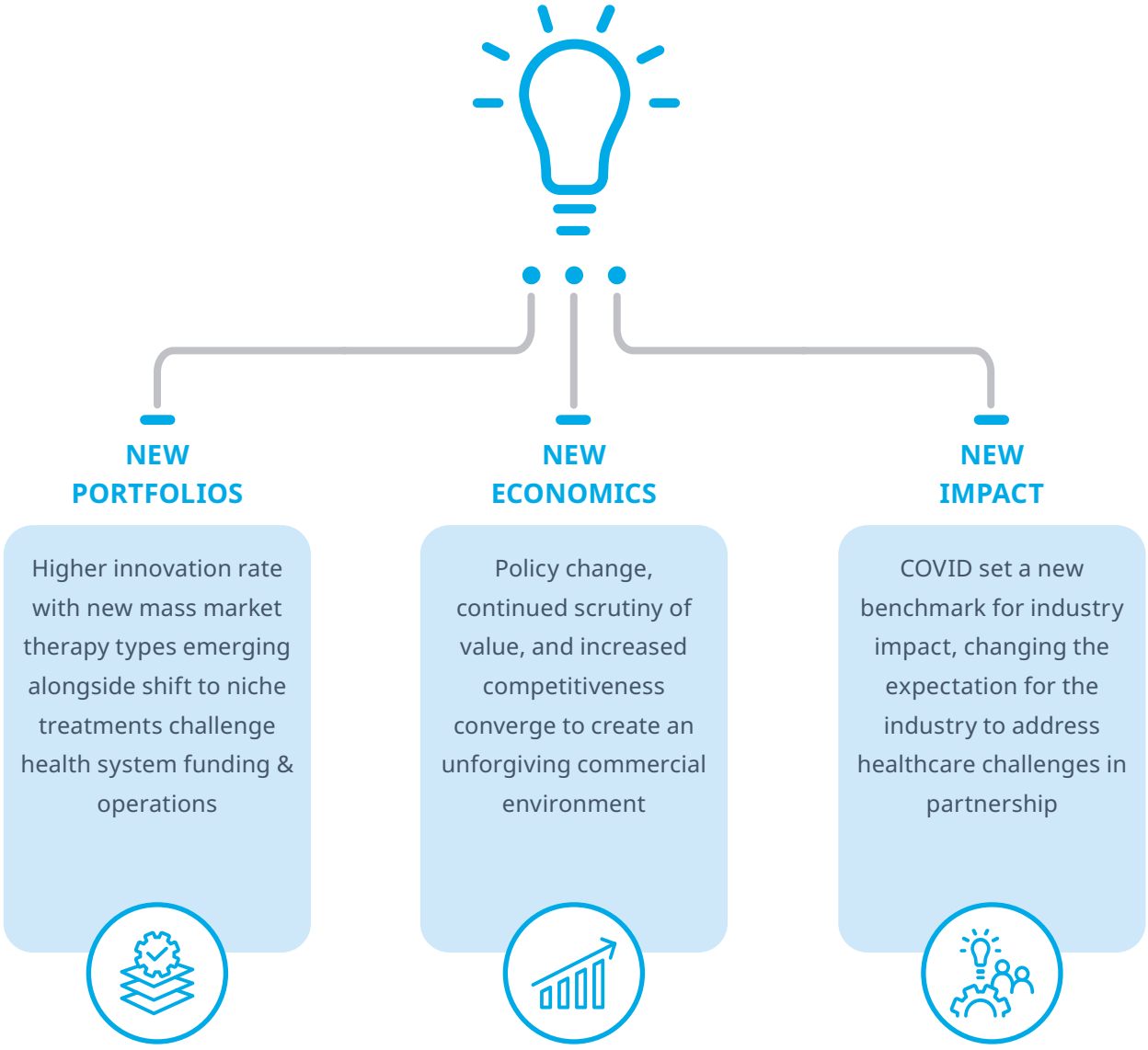
Innovation will be driven increasingly by advanced biotherapeutics and novel technologies, impacting both specialty and high prevalence conditions.

1. Based on anticipated outcomes for patients, healthcare systems and society.
Source: A renaissance for cardiometabolic innovation, IQVIA Whitepapers, 2023; Evidence-based insights for healthcare; IQVIA Institute, 2023, IQVIA pipeline review.

Value capture challenges

Continued growth is not guaranteed, science-led innovation and commercial execution are no longer a standalone winning formula

Value capture challenges

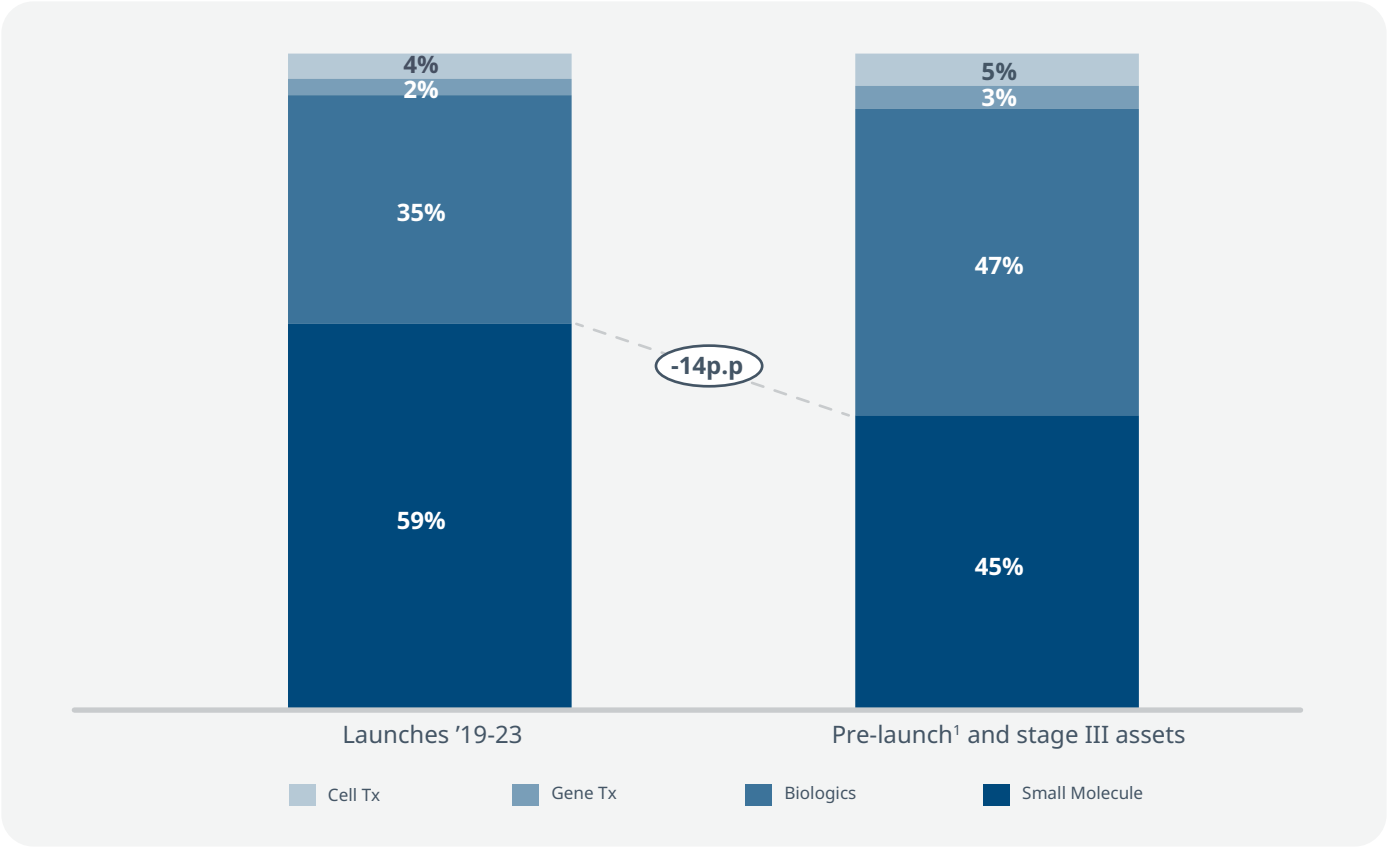


A continued evolution in drug types is expected to challenge health system uptake and outcomes

New portfolios — key challenges

NEW ACTIVE SUBSTANCE PIPELINE EVOLUTION

New Active Substances by drug type



Assets in development demonstrate a continuation of an evolution in drug types, layering on of more complex therapies such as Cell & Gene and novel modalities in oncology such as ADCs, bi-/multi-specifics and radioligand therapies.[2]

1. Registered and assets awaiting registration.
Source: Global Trends in R&D 2024, IQVIA Institute, 2024; IQVIA Pipeline Link; IQVIA analysis.
2. Within oncology, cell and gene therapies represented 11% of clinical trial starts in 2023.

Duality of portfolios require a differentiation of pharma's commercial model

New portfolios — key challenges

PREVALENCE SPECTRUM OF NEW THERAPIES

	PRECISION MEDICINE	MASS MARKET INNOVATION
Example TAs	SMA, hATTR, PH1, SCD, Oncology	Obesity, Alzheimer's, Depression
NNT[1]	~1	Millions
Target population	~1 per 10,000 or fewer	~1 per 100 or greater
Price	High	Low-moderate
Budget impact	Moderate	High
Demand on health system operations	High	Variable *some innovations fit existing care pathways (e.g., obesity) while others require innovators to facilitate (e.g., MASH, Alzheimer's, depression)*

Growth drivers from both high specialty and mass-market innovation trigger new demands on health systems and place requirement on industry to diversify its commercial model.

1. Number Needed to Treat, i.e. the number of patients you need to treat to prevent one additional bad outcome.
Source: A renaissance for cardiometabolic innovation, IQVIA Whitepapers, 2023; The Global Use of Medicines 2024: Outlook to 2028, IQVIA Institute, 2024; IQVIA analysis.

In context of this duality, the launch environment sees complexity increase

New portfolios — key challenges

MORE COMPLEX LAUNCHES

	PAST 2010	FUTURE 2020+
Patient Journey	Few HCPs involved (usually 1-2)	Increasing # of HCPs (>7)
Health system readiness	Health system readiness challenge by exception only (e.g. CGT)	Health system capability and capacity gaps becoming the norm
Practice of care	Individual	Team based, anchored in clinical decision support tools spec. to a single institution or population
Opportunity fragmentation	RCTs mean # endpoints and eligibility criteria	+18-25% increase ('10 vs.'20)
Evidence requirements	RCT data, episodic, event-related	Integrated, patient relevant evidence: RCT, RWE, patient generated; continuous over life cycle
Stakeholders	Simple/one at time: Regulator-Payer-HCP	Complex and inter-dependent payer-led network
Customer engagement	1:1 detail, rep-led; SoV focus	Few-to-many / Many-to-many; AI driven integrated models and 'made to measure' customer-facing roles

Launch environment becoming more complex, with innovators having to master multiple, co-existing models.

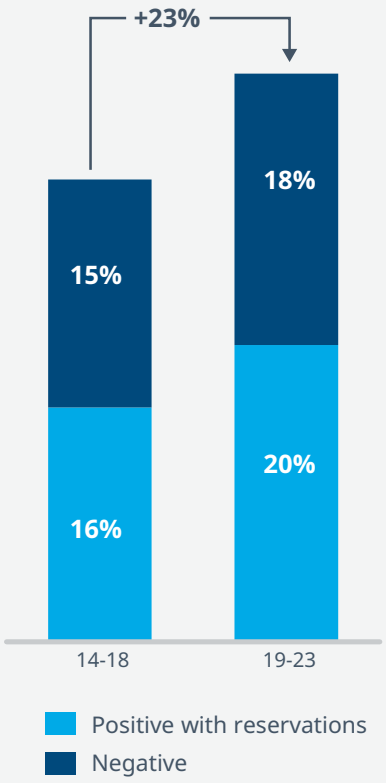
Source: Global Trends in R&D 2024, IQVIA Institute, 2024; Global Oncology Trends 2024, IQVIA Institute, 2024; The Global Use of Medicines 2024: Outlook to 2028, IQVIA Institute, 2024.

New innovation wave faces greater value scrutiny from payers and legislators

New economics — key challenges

GREATER VALUE SCRUTINY AND LOOMING POLICY CHANGE

HTA recommendations (DE, FR, UK)



Legislative changes in US, DE, EU

United States

Inflation Reduction Act (IRA)

- From 2025/2026
- Medicare Part D redesign shifts liabilities to payers, increasing manufacturer price pressure
- Pricing negotiations with Medicare for select drugs

Germany

GKV Stabilization Act

- Since Jan 2023
- Free-pricing period reduction from 12 months to 6 months
- Orphan drug threshold reduction from €50m to €30m

EU

EU HTA regulation

- From 2025 (oncology)
- EU-wide HTA assessment

- **EU Pharma Legislation Revision**
- From 2025
- Reduction in regulatory timelines + incentives to launch across EU in 2-3 years

Continued value scrutiny as response to cost containment measures. Legislative changes across key markets adding further uncertainty.

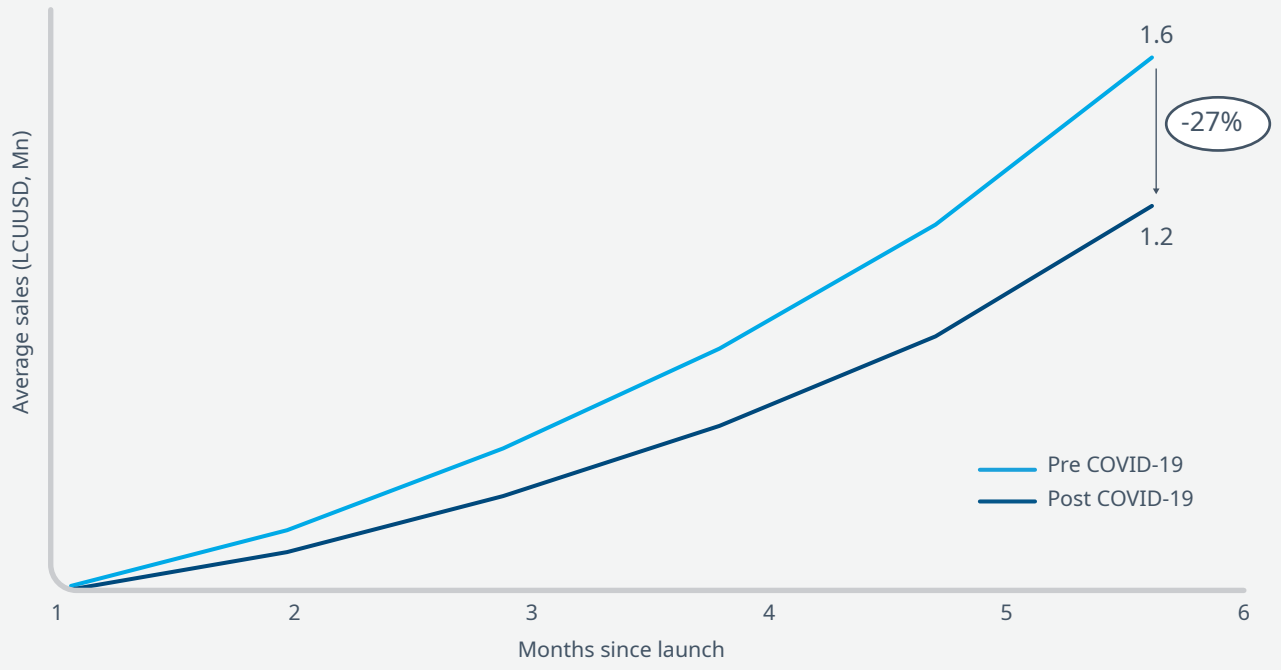
Note: 116 oncology products excluded from US formularies as per 2023. US top payers exert unseen control via formulary exclusion since 2017.
Source: Journey into the Whirlwind - Post-COVID pricing and evidence policy changes and their implications for development and commercialization IQVIA Whitepaper, 2023; How will the EU Pharmaceutical revision impact you IQVIA Blog, 2023; EU HTA: Business as usual for market access strategy or time for change, IQVIA Blog, 2023; IQVIA HTA Accelerator; Published national formularies; IQVIA analysis.

Environmental challenges converge to suppress performance in new product launch

New economics — key challenges

LAUNCH PERFORMANCE CHALLENGE

Performance of innovative launches pre-COVID versus post-COVID[1]



c.27% lower annual average for new brands/NAS sales Jan 20-Dec 22 versus Jul 16-Dec 19

Environmental challenges include greater difficulty accessing patient pools due to fragile or constrained health systems (e.g., patient backlogs), squeezed budgets driving payer constraints, and reduced interactive engagement opportunities with HCPs.

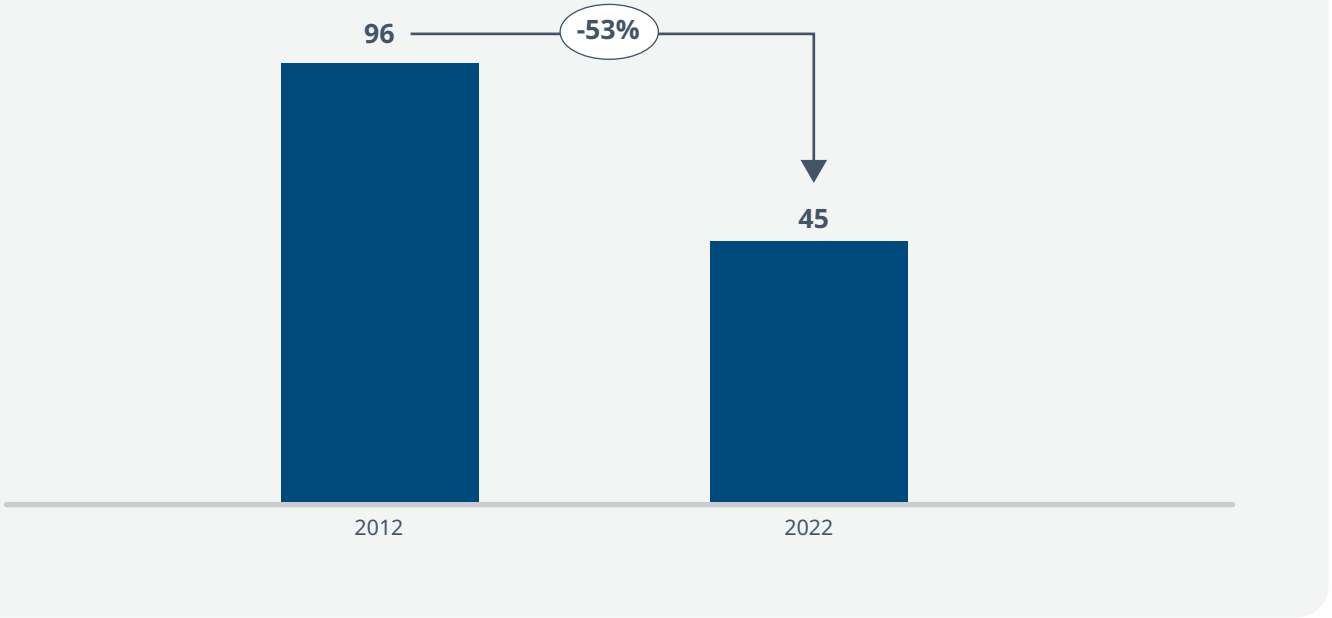
1. Rx only; USD in CER; Pre-pandemic launches: H2 2016 to 2019; Includes NAS launches as well as other launches considered to be significantly innovative (e.g. non-NAS launches in a new therapy area, orphan disease or new combinations including an innovative branded medicine); Excludes Hep C products, COVID-19 Vaccines and Treatments; Countries included are US, China, Japan, UK, Germany, Italy, France, Spain.
Source: Launch Excellence VIII – the challenge of change: building excellent launches in the post-pandemic environment, IQVIA Whitepaper, 2023; IQVIA MIDAS; IQVIA EMEA Thought Leadership.

Requirements for commercialisation change as a result of opportunity fragmentation

New economics — key challenges

FEWER BLOCKBUSTERS

A harsh operating environment and more continuous innovation on Standard of Care (SoC) reduces blockbusters (2012 value equivalence)[1]



Decline in blockbusters reflects an increasingly harsh operating environment, including growing cost pressure, intensifying competition and shrinking white space.

1. Value equivalence at 2022 defined as $3bn (vs $1bn in 2012). Adjustment reflects equivalent ambition level of market share attainment that is delivered against increasing R&D infrastructure. Between 2012-2022: 91% increase in global Rx market value, 47% decrease in market share that $1bn represents, 96% increase in number of products with sales over $1bn, 60% increase in R&D investment needed to develop and bring a new asset to market.
Source: Aiming higher: a blockbuster ambition fit for our times, IQVIA Blog, 2023; IQVIA MIDAS.

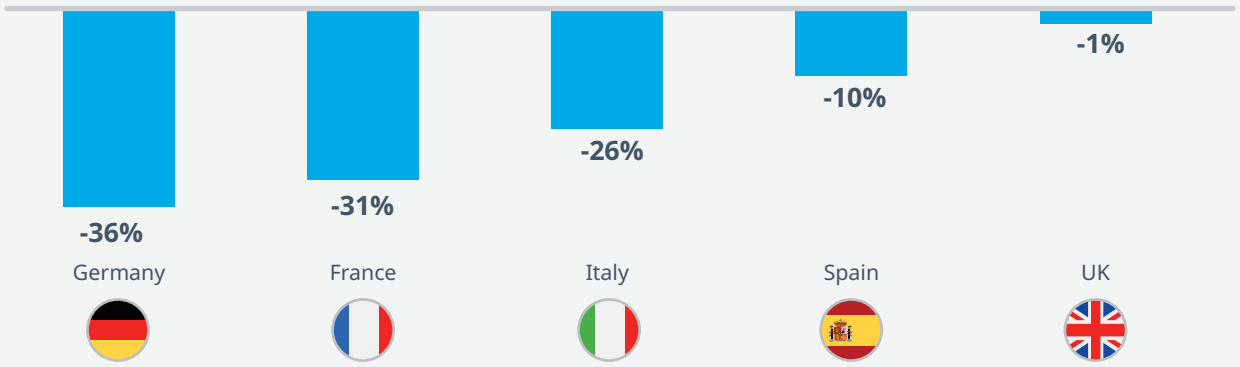
Reduced physician access disrupts Pharma's traditional promotional model

New impact — key challenges

1. PHARMA'S PERSISTENT CHALLENGE: PHYSICIAN ACCESS

Post-pandemic, interactive time with physicians has gone down overall making every interaction count from a perspective of customer value creation.

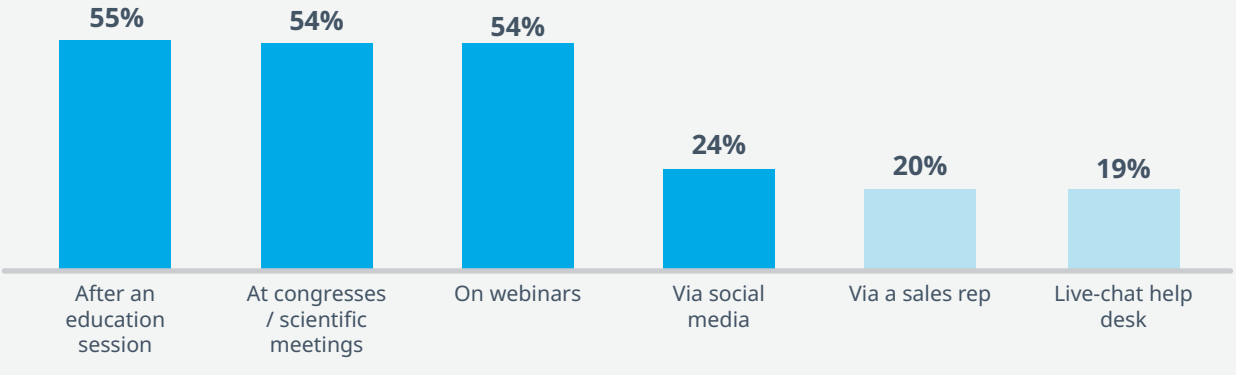
1:1 Physician interactive contact time decline (2023 vs 2019)



2. OMNICHANNEL HCP ENGAGEMENT IMPACT

HCP information consumption preferences have changed with the market ripe for an evolution of engagement formats. Recent surveys reveal a significant gap between HCP demand and pharma supply of medical information, for example showing low preference for seeking information via pharma sales reps or live chat help desks.

How do HCPs wish to be able to request information



Source: The future of HCP engagement impact – a multi-stakeholder study, EPG Health, IQVIA, 2023; IQVIA Channel Dynamics, Dec 2023.

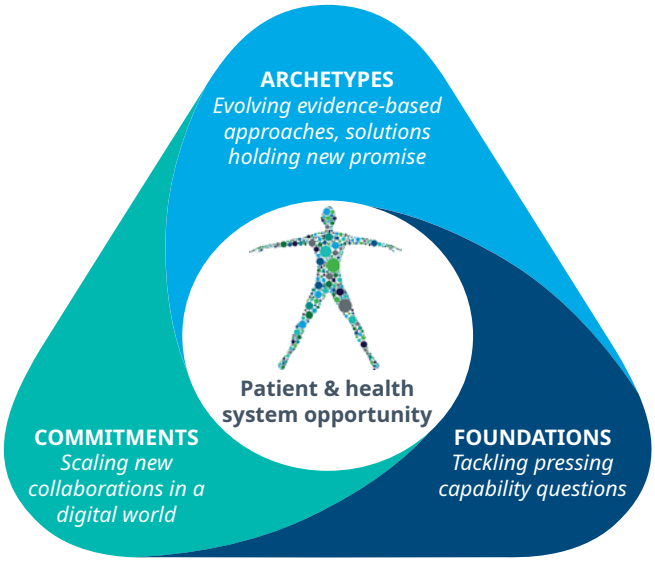
Pharma is expected to assume an active solutioning role in the healthcare ecosystem

New impact — key challenges

3. PHARMA'S CHANGING ROLE

The disruption of healthcare systems during the COVID19-pandemic raised the visibility of the deep inter-dependence across sectors. As a result, new emphasis is being given to partnership, both in terms of corporate branding and flagship programs, design of go-to-market models, and priority initiatives forming at franchise level.

Powerful healthcare ecosystem partnerships



- **Cross-sectoral healthcare clusters**: patient-oriented ecosystems leveraging PPPs in care pathways digitalization.
- **Target Population Outputs**: measurement of gaps and outputs at each step in the care process to align stakeholders on priority interventions.
- **Pathfinder initiatives to accelerate early diagnosis**: collaborations to improve diagnosis and care pathways.

Healthcare ecosystem partnerships will play an increasingly powerful role as a vehicle to demonstrate impact, with groundwork remaining on the design of evidence-based approaches, partnership capabilities, value measurement, and platforms to scale.

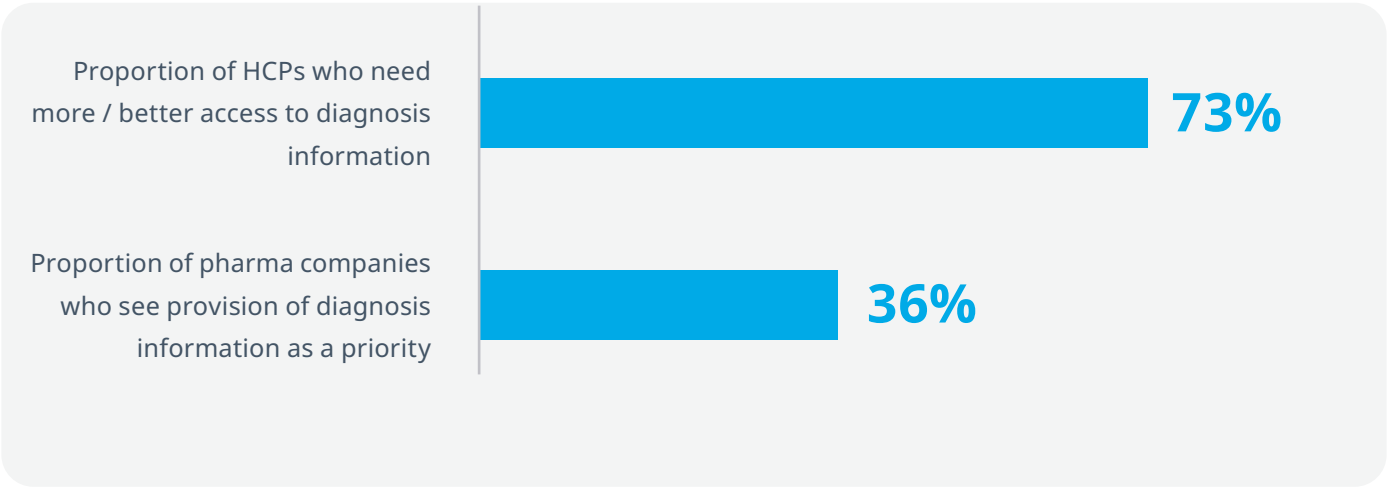
Source: Home - Health Innovation Manchester, Greater Manchester Combined Authority, Target Population Outputs (TPOs): Creating High-Value Health Systems Through Strategic Public-Private Partnerships, Harvard Health System Innovation Lab, 2023; HSJ Partners: Can Collaborative Partnerships with Industry Drive Much-Needed Improvements in Lung Cancer Outcomes in the UK? , Novartis follows Pfizer, GSK, J&J and Sanofi as it launches a fresh corporate rebranding, PHSSR.org; IQVIA analysis.

The market is ripe for the creation of new experiences

New impact — key challenges

4. DEMAND AND SUPPLY OF MEDICAL INFORMATION

Mismatch between supply and demand for diagnosis information



Doximity is a rapidly growing peer-to-peer platform that allows medical professionals to access peer-based guidance and information. Today the 'LinkedIn for doctors' provides HCPs with opportunities to connect across more than two million members.

5. ADJUSTING TO NOVEL HEALTHCARE DELIVERY MODELS

New e-health models on the rise, copying the convenience and services focus of consumer industries, offer tailored healthcare journeys based on a stream of patient generated data. Such models are increasingly converging:

- **E-pharmacies:** Growing from mail-order OtC into broader healthcare incl. eRX with a vision of 'single click' health management cooperating with PharmaCos and insurers (e.g. Zur Rose)
- **Industry-led consumer-directed services:** digital healthcare experiences offering access to independent telehealth providers, tailored support, online pharmacy fulfilment, and direct-to-home delivery (e.g. LillyDirect)
- **Health-tech platforms:** Maturing direct-to-consumer health-tech platforms delivering online primary care, prescription, and delivery services (e.g. Ro Health)

Source: The future of HCP engagement impact – a multi-stakeholder study, EPG Health, IQVIA, 2023; doximity.com; ZurRose; LillyDirect; Ro Health; IQVIA analysis.

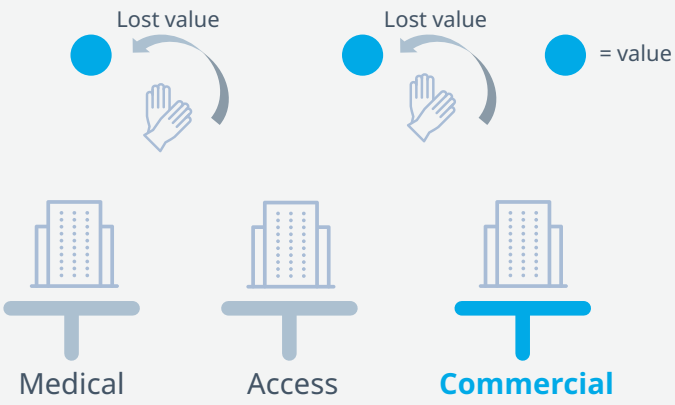
Reimagine growth

... with health system outcomes in mind

Connecting science to health system and patient value takes re-imagination of commercialisation

Commercial model evolution

COMMERCIAL MODEL IN 2000s AND 2010s



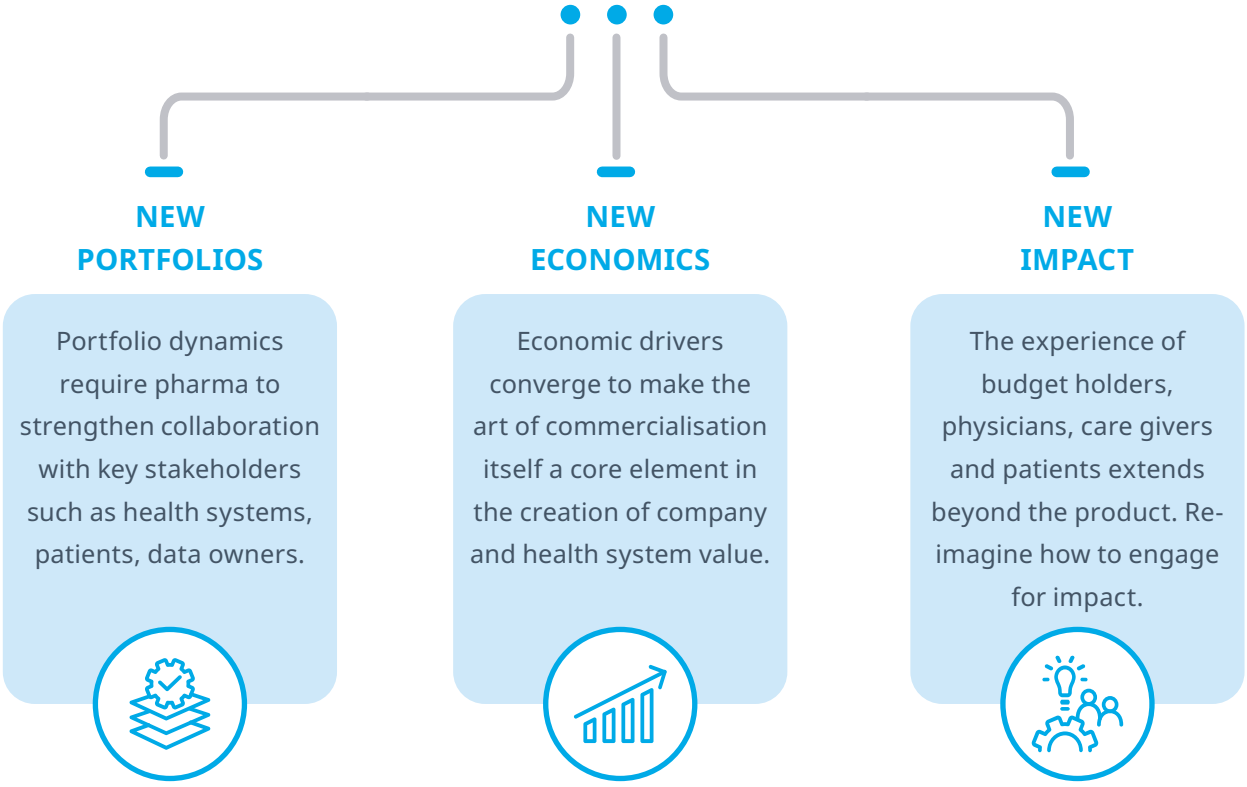
Functions largely operated in silos, with Commercial reacting to inputs from Medical and Access and value lost along the way

COMMERCIAL MODEL TOWARDS 2030

Functions aligned and focused on value creation for patients and health systems, with medical, access, and commercial playing earlier and more prominent roles in connecting science to value

A product and promotion-centric business model gives way to a cooperative, customer-led model

Sustaining growth in a shifting environment



1. Oxford dictionary definition: involving mutual assistance in working towards a common goal.

Lead with experience & evidence, facilitating the creation of shared value

Leadership fundamentals and winning themes

LEADERSHIP FUNDAMENTALS

Hypercompetitive markets
Success drivers: customer experience, speed of execution, clinical practice focus, ecosystem leverage

Complex/underdeveloped markets
Additional success drivers: market shaping, health system partnering, advocacy

WINNING THEMES FOR VALUE AND IMPACT

01 Chart the critical path for key assets

02 Re-think the customer partnership

03 Evolve the go-to-market model

04 Future-proof capabilities

05 Innovate enterprise launch

06 Make a step-change in speed and value

1. Experience in the broadest definition of term including health system partnering experience, HCP, and patient experience.
2. Evidence in the broadest definition of the term including RWE for commercial differentiation.

Chart the critical path for key assets

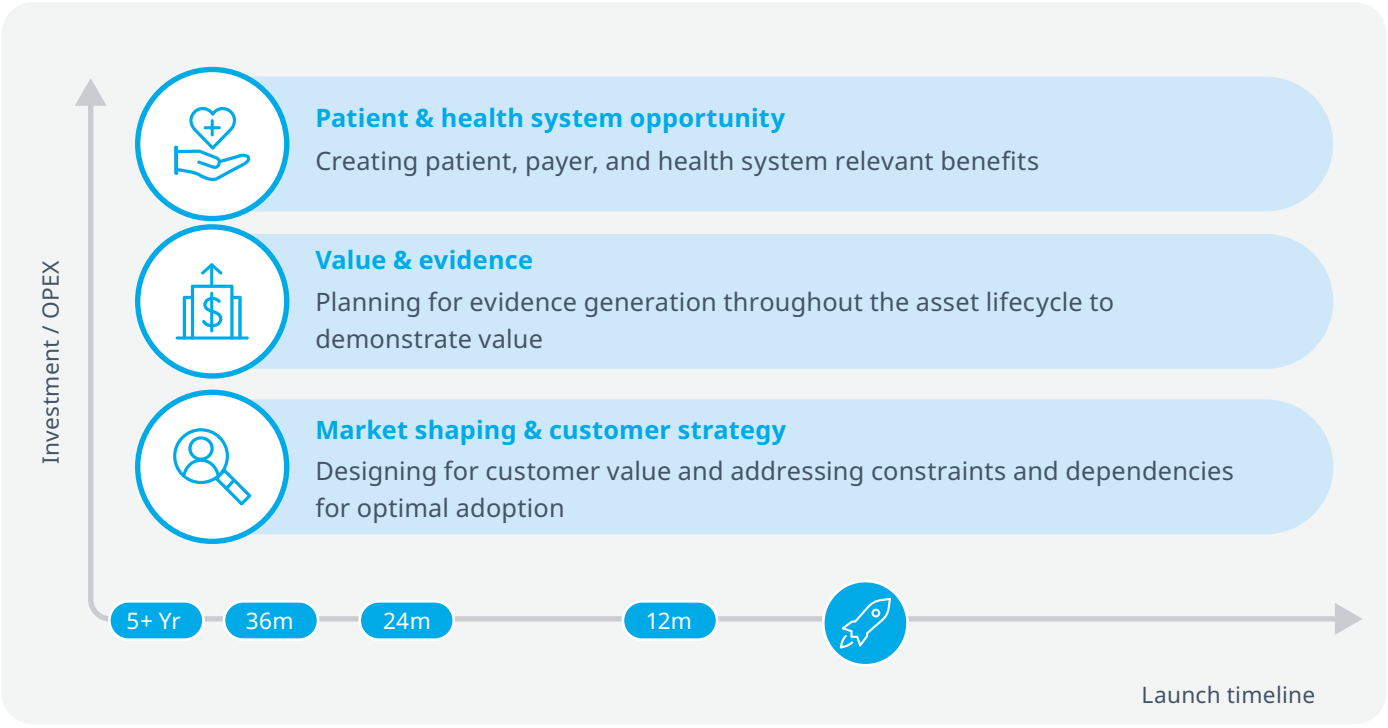
Plan and invest for optimal value creation

Today's environment calls for a driver-based, agile approach to define unique product strategies and corresponding roadmaps to launch and patient access.[1] This stands in contrast to historical approaches dominated by a long-list of indiscriminate pre-launch activities by function.

The product strategy and critical path relies on a robust **disease management map**. This map should integrate analysis of (i) care pathway, (ii) funding flow, and (iii) patient journey. The map is foundational to inform the nature and size of the opportunity, align cross-functional interventions, and support modelling of required OPEX investments.[2]

The launch strategy and critical path take their starting point in the resolution of three dilemmas pertinent to any cross-functional team:

- **Innovation dilemma**: How to address varying perceptions of innovation?
- **Value and evidence dilemma**: How to balance the requirement for early launch in a context of rising evidence thresholds?
- **Commercialisation dilemma**: How to accommodate diverse stakeholder needs in a focused plan for commercialisation?



1. For a review of the specific considerations of launch strategy for multi-indication assets see Success Multiplied: Launch Excellence for Multi-Indication Assets, IQVIA Whitepaper, 2023.
2. Re-defining OPEX modelling for a competitive future, IQVIA Whitepaper, 2022.

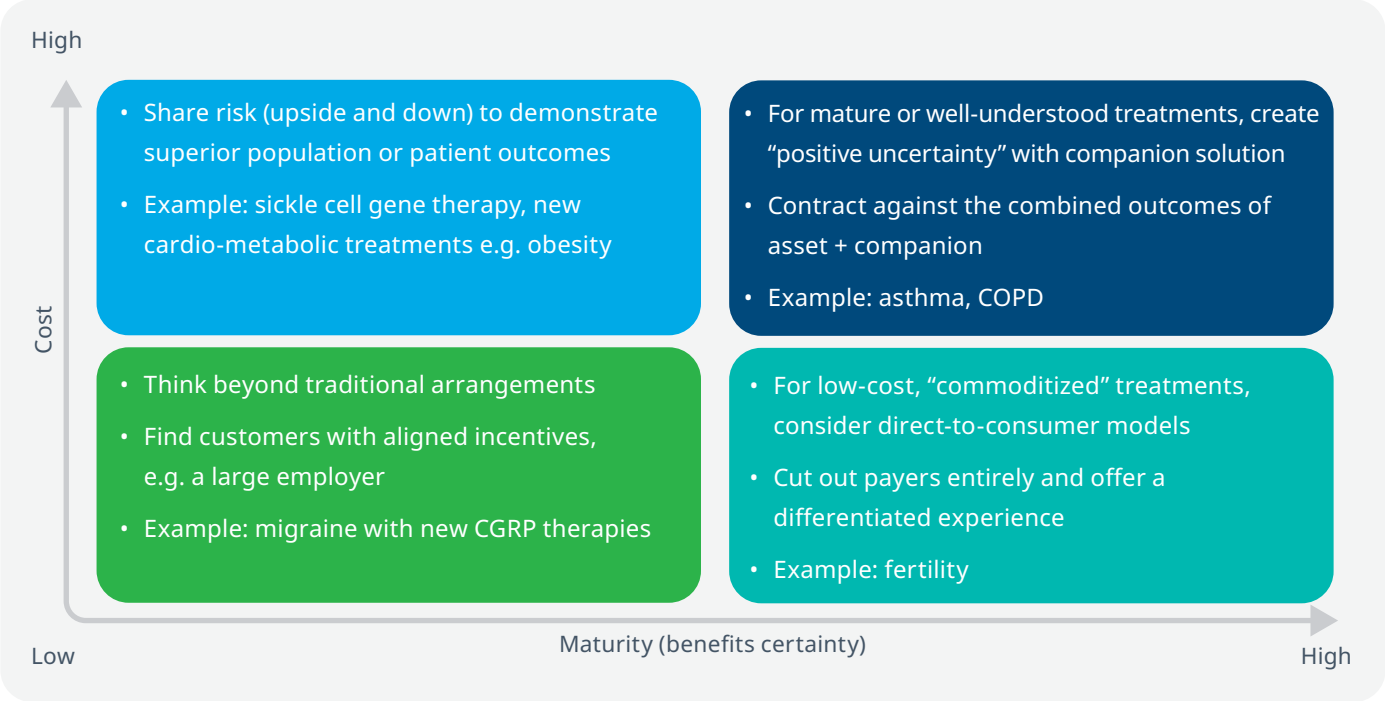
Re-think the customer partnership

Unlock shared value with novel collaborations

As policy changes converge with intensification of payer value scrutiny, the dynamics for access, evidence, and price are changing across major launch markets.[1] Will contracting models begin to diversify as a result?
The traditional commercial model based on promoting products at a flat fee coupled with promotion or big investments in bridging or affordability programs will see declining returns.

Instead, brand strategies will increasingly build on a foundation of shared value, creating a stimulus to develop new facets of the commercial model: health system partnership, digital health and patient support, implementation science, etc. are disciplines that cut across functional silos with potential to change contracting formats.

Targeted opportunities should be considered in cases where a treatment will be access-constrained and there is shared value to be unlocked. Companies must invest early and fully in the development of these new commercialisation strategies.



ADDITIONAL CONSIDERATIONS

- The urgent need to de-risk budget impact uncertainty for payers extends to new mass-market therapies with potentially sizeable target populations.[2]
- Include patients in the share of value by creating direct benefits (e.g., increased co-pay value) or reducing financial risk through reimbursement of out-of-pocket costs for non-responders.

1. For a detailed review of policy changes and shifting evidence requirements across major launch markets, see Journey Into the Whirlwind, IQVIA Whitepaper, 2023.
2. For the importance of payer reassurance in the commercial success of cardiometabolic innovation, see A renaissance for cardiometabolic innovation, IQVIA Whitepaper, 2023.

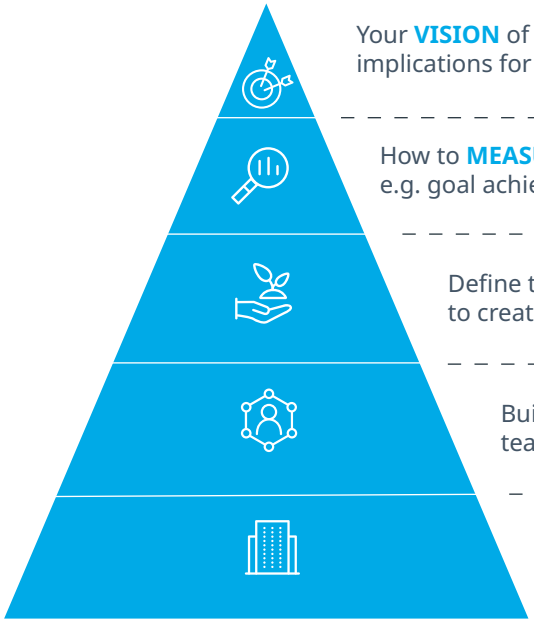
Evolve the go-to-market model

Embrace customer value as a guiding principle

The dichotomy between hypercompetitive and underdeveloped markets has been a first order principle informing go-to-market design. Volume-based approaches and measures of maximum coverage would apply to one end of the spectrum, while market-shaping approaches, such as early policy and health system engagement, complemented by strong functional leadership from medical affairs, would fit the other.

In a context of shifting portfolios, new economics, and an increasing expectation that pharma commits to impact, does this duality capture today's design criteria for growth and competitiveness? Recent corporate rebranding initiatives alongside high profile commercial model changes[1] suggest the importance of bringing customer value to the heart of the go-to-market model.

CUSTOMER VALUE FRAMEWORK



Your **VISION** of customer value: Define what customer value means, and derive implications for your customer interface and portfolio of solutions and services

How to **MEASURE** customer value: Set clear metrics and measures of success, e.g. goal achievement and quality of interaction

Define the **VALUE OFFERING**: Build the go-to-market strategy to create the desired impact

Build value-centric **FRONTLINE TEAMS**: Design customer-facing teams and integrated models to deliver the customer experience

ENABLE THE ORGANIZATION to deliver value: Unlock investments and consider the needed capabilities and platforms

EVOLUTION OR REVOLUTION?

The drivers of go-to-market model change can be plotted in a matrix covering brand and portfolio, greenfield design or more gradual adjustments:

- Expansion within existing TA or integrating a new asset into an existing portfolio
- Establishing presence in new TA or adapting the go-to-market model for changing realities

Designing vision, measurements, offering, frontline, and organizational enablers with a clear view of customer value offers a guiding principle fit for our times.

1. See Novartis follows Pfizer, GSK, J&J and Sanofi as it launches a fresh corporate rebranding | Fierce Pharma
The largest pharma company in Europe calls for interoperability - (pharmaphorum.com)
2. For an example of how this applies in the field of oncology, see Transcending the Traditional Focus of Oncology Commercialisation, IQVIA Whitepaper, 2023; and Achieving Oncology Launch Excellence, IQVIA Whitepaper, 2024.

Future-proof capabilities

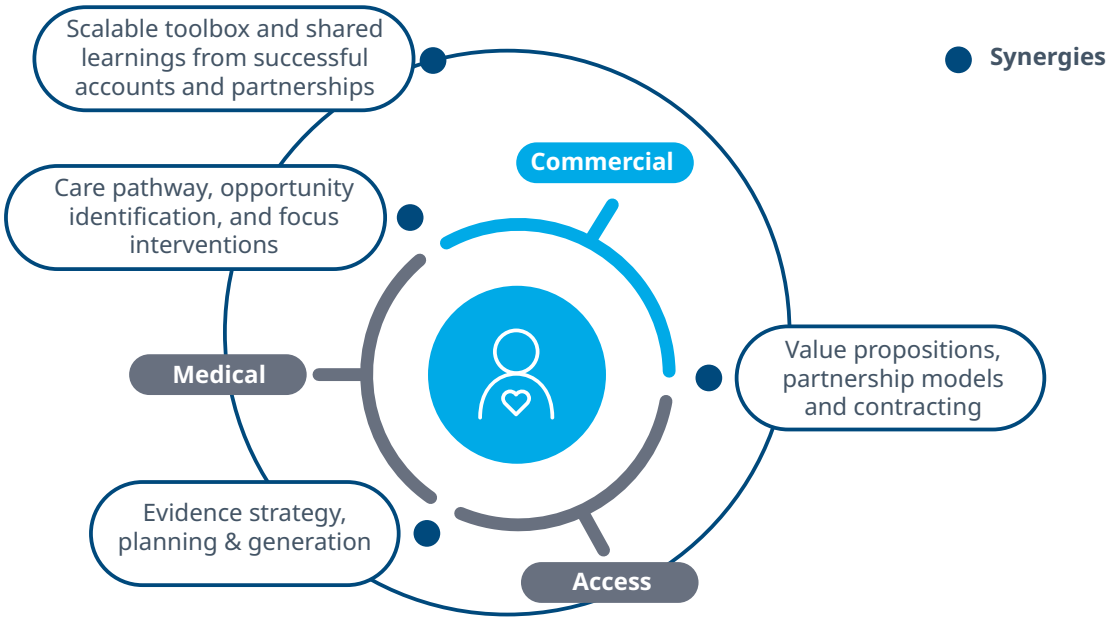
Close gaps between commercial, medical and access

Portfolio shifts along with changes in the market environment require the functions involved in commercialisation to rethink their strategies and core capabilities.

The transition to specialty care and increasingly complex therapies, changing stakeholder landscape, higher evidence burden, and increasing proliferation of healthcare data, drives a significant evolution in the role of medical affairs and commercial functions. New stakeholder-centric rules of engagement set the stage for a redefinition of functional priorities, teaming, and measures of success.[1]

Medical, access, and commercial functions need to develop a 'living' capability that constantly adapts to bring value. Such capability requires much closer functional integration than seen in the past.[2]

GAP-CLOSING IMPERATIVES



To fully capture the synergies, there are three imperatives which all have cross-functional implications:

- Establish **strong portfolio focus, or "multi-disease mindset"**
- Transform **customer model** to be fit for future portfolio needs
- Excel in **early, continuous market shaping, leveraging policy and patient voice**

1. Their Finest Hour: Medical Affairs in a Disrupted World, IQVIA Whitepaper, 2022.
2. In the Thick of it: Medical Affairs, Strategic Partner to Other Functions, IQVIA Whitepaper, 2023; Novartis' Netflix moment? Big Pharma launches on-demand hub (fiercepharma.com)

Innovate the enterprise launch engine

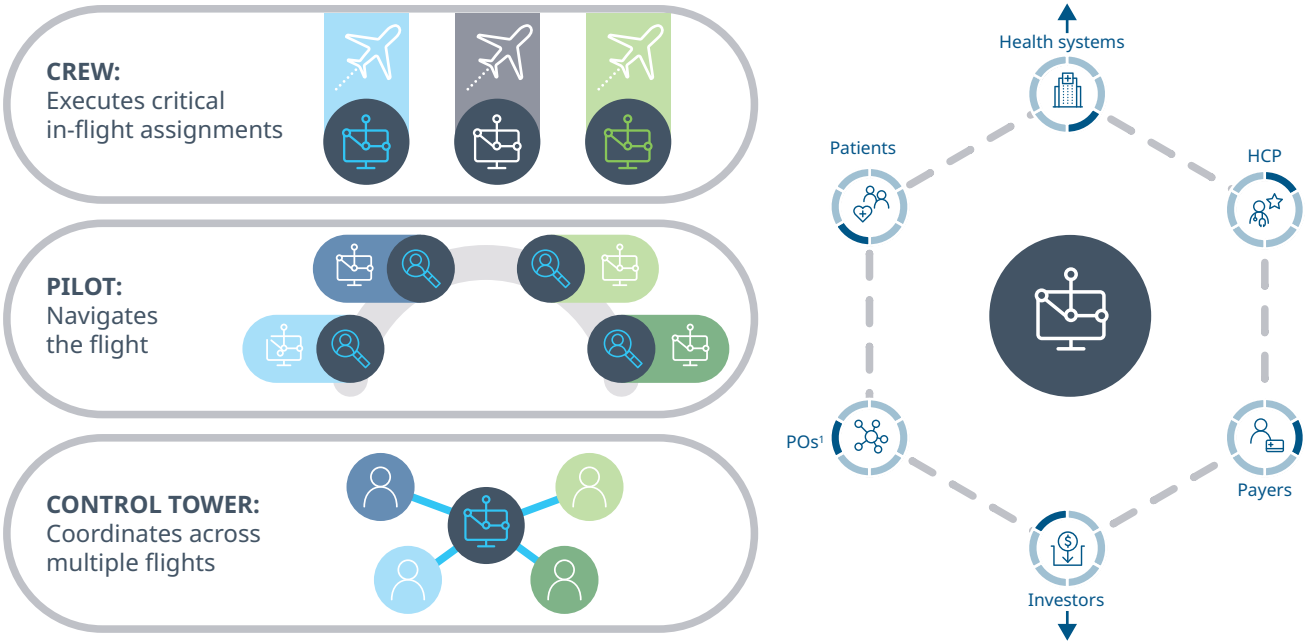
From playbook to cockpit

For many companies, managing a portfolio of parallel launches in an environment of higher complexity and competitiveness are the norm.[1] Yet frequently the enterprise launch capability has not evolved and remains largely analog and activity-focused: a sum of discrete functional plans.

Enterprise launch may be re-imagined using the analogy of flying. Pilots, crews and control tower keep a fleet in the air using instruments and analytics that power early visibility, course correction, modelling, and prediction.

Launch excellence requires an engine that is data-driven, outcomes-focused and agile at its core, so companies and teams can make fast decisions and adjust course based on early signal sensing and augmented scenario modelling.

TOMORROW'S ENTERPRISE LAUNCH CAPABILITY[2]



As companies innovate their next generation enterprise launch engine, they will need to go beyond playbook-based approaches:

- **Launch cockpit** for rapid organizational learning cycle with visibility to impact
- **Cross-functional collaboration** with fit for purpose governance
- **Team empowerment** with outcomes focus versus adherence to procedure
- **Operational agility** with fast turnaround and focus on critical path
- **Augmented insights** for evidence-based decision making

1. Source: Launch Excellence VIII, IQVIA Whitepaper, 2023. Launch Excellence: Escaping the complexity trap, IQVIA Whitepaper, 2021.
2. For more inspiration on the capabilities required by an up-to-date enterprise launch capability listen to IQVIAs Launch Excellence Podcast series: Episode 3: Agile launch planning and performance management

Step-change speed and value

Leverage new commercial technology, analytics, and applied AI

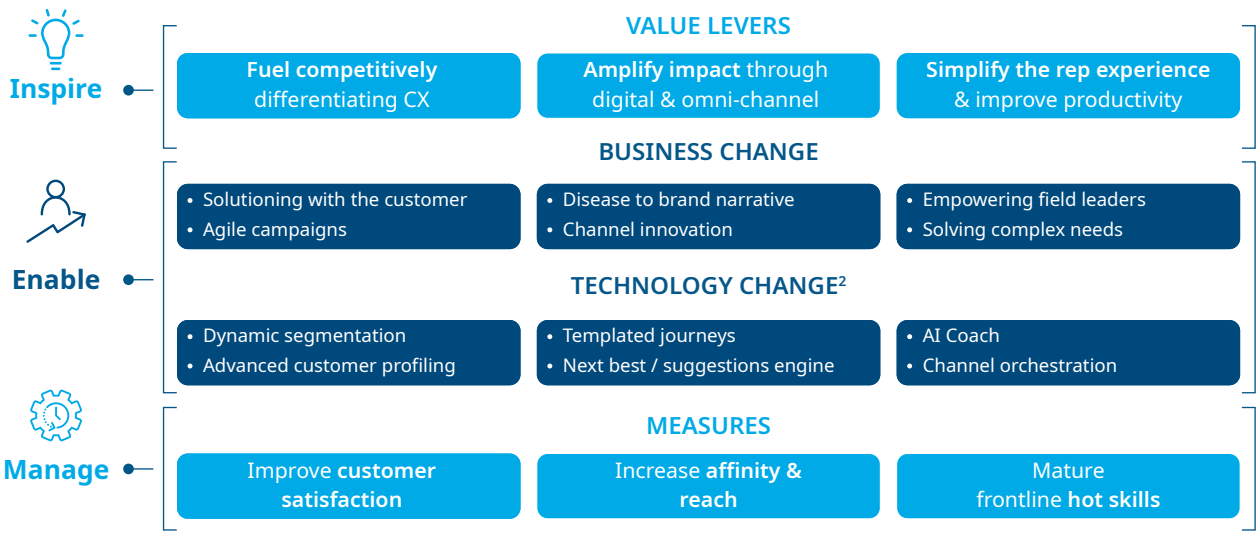
Today most companies have distinct functions in place to incubate digital, data and advanced analytics capabilities. Yet digital is everywhere and should be incorporated into the core value streams of commercialisation.

The applications are diverse, including (i) securing novel/faster insight (ii) creation of faster, more compelling, personalized content (iii) integrated models for omni-channel customer engagement.[1]

Now is the moment to realize value from nascent 'digital-first' capabilities[2] alongside continued investment in new SaaS platforms and micro services. Achieving speed and value at scale requires more agile ways of working, closer medical and commercial integration, acting fast on insights, and tuning planning cycles.

In short, business and technology change go hand in hand.

HOW TO REALIZE VALUE FROM NOVEL TECHNOLOGY



Realising value from novel technology requires a business-led approach with equal focus on inspiring, enabling, and managing value to deliver the desired returns.

- **Inspire** the organization by clearly defining the value levers justifying digital investment, so the organization (BU, function, market etc.) sees meaningful opportunity
- **Enable** the organization to deliver value by breaking key levers into distinct business and technology change drivers
- **Manage** the value case and metrics, owning the plan rolling up to franchise, function, and region-level business plans

1. Medical Affairs' Next Frontier: Unlocking Omnichannel Engagement, IQVIA Whitepaper, 2022; At the Cutting Edge: The rise of AI and Technology-enhanced Customer Engagement in the Life Sciences Industry, IQVIA Whitepaper, 2023; The future of HCP engagement impact, EPG Health, IQVIA, 2023.
2. Technology in broadest sense of the term covering 'human–technology interface'.

Time to unlock your growth?

Sample engagements

1. Next generation enterprise launch: establishing the case for change and supporting the transformation to future-proof specialty launches for Biopharma leader
2. Portfolio archetyping and go-to-market model design for Global Onco leader
3. End-to-end support for blockbuster launch, from opportunity sizing and GTM strategy to launch resourcing and execution
4. Powering asset acquisitions in new TAs with go-to-market and OPEX considerations
5. Rebalancing existing investments across the oncology portfolio to accommodate a low ceiling asset launch
6. Set-up of a centralized capability to enable successful launch in ultra rare disease
7. Cutting through the noise to reach clarity in product strategy via a Disease Management Map enabling priority and impact modelling
8. Commercial strategy for combined medicinal asset & diagnostic
9. Blueprint and transformation program to fuel healthcare systems change enabling RLT therapy success
10. Scenario-based commercial strategy defining the path to market in rare disease
11. Critical path to launch and go-to-market strategy for a leading neurology asset
12. Data-driven OPEX modelling to strengthen investment decisions for early & late-stage assets
13. Vision and strategy for next generation frontline customer model for bio-pharma leader
14. Strategy for new hi-profile mass market entry and go-to-market model
15. Go-to-market and resourcing implications from Top Global Pharma portfolio shift to be fit for future
16. Commercialisation strategy for CAR-T therapy
17. Global commercial pharmacy strategy for RX medications
18. Future medical frontline capability blueprint for large Global Pharma
19. Portfolio-wide Key Account Management strategy & transformation for Top Pharma
20. Enterprise launch capability to navigate multiple parallel launches outside of legacy

It’s Time to Hit The Ground Growing

For more information, please contact your IQVIA team, or

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