

Beyond the Pill

Has pharma finally 'got' social media?

Wikipedia is a Public Health Issue

So let's fix it...

Advanced Social Intelligence

Five ways it can guide pharma strategy

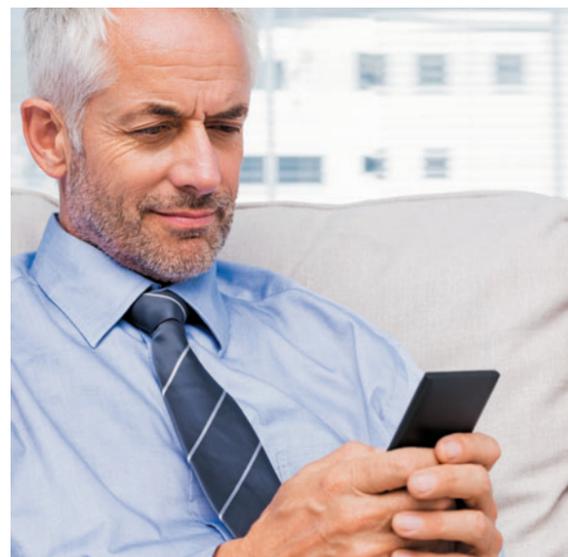


Crisis Preparedness

in an 'always on' digital world

Events

Upcoming pharma conferences from around the world



Will CEOs Warm to Social Media in 2014?

New research suggests now is the time



Genpact and AstraZeneca Extend Finance and Accounting Services Agreement

Multi-year agreement continues strong partnership that has helped transform pharmaceutical leader's finance operations and address industry challenges.

Genpact, a global leader in transforming business processes and operations, has agreed a multi-year contract extension to provide finance and accounting services for AstraZeneca.

Through its unique Smart Enterprise Processes (SEPSM) methodology for improving the effectiveness of business processes, combined with analytical insights, technology, and global delivery excellence, Genpact has helped AstraZeneca achieve a number of key business outcomes, including increased global compliance through the standardization and harmonization of finance processes.

The contract extension encompasses transactional finance operations covering

procure-to-pay (P2P), travel and expense (T&E), record-to-report (R2R), sales order-to-cash (SOTC) and support for AstraZeneca's Global Transactional Finance transformation program.

In addition, AstraZeneca has been engaged with Genpact's IT business to deploy a global Travel and Expense platform and more recently began a three-year engagement with Genpact's Akritiv OTC business process as a service (BPaaS) platform to implement the solution globally. The Akritiv BPaaS platform will leverage AstraZeneca's existing ERP investments to accelerate cash conversions, compress dispute resolution cycle time, increase visibility, and automate collection strategies.

"Genpact is extremely proud of

the partnership we have built with AstraZeneca and how we have applied our Lean and Six Sigma-driven process expertise and operational excellence to make their financial operations significantly more effective and streamlined," said Balkrishan 'BK' Kalra, senior vice president, Life Sciences, CPG and Retail, Genpact. "The life sciences industry continues to be a priority investment market for Genpact. We look forward to continuing our expanding partnership with AstraZeneca and allowing the company to focus on its strategic growth objectives and its core business of innovative drug development."

For further information, contact **Genpact**.

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Will Pharma CEOs Do Social Media in 2014?

As many as seven out of 10 CEOs are still to be convinced of the usefulness of social media...

CEOs are still skeptical of social media, but there's an increasing amount of research that says they're missing out on a strategically useful tool. Peter Houston reports.

Depending who you listen to, as many as seven out of 10 CEOs are still to be convinced

of the usefulness of social media. August's 2013 **Social CEO report**, from Domo and CEO.com, showed CEOs

at Fortune 500 companies have been slow to embrace social technologies. A November study from influence marketing software specialists Augure shows that only **30% of NASDAQ 100 executive directors** are present and active on social networks; 70% have no presence on online platforms.

There is some growth, but it's slow. The CEO.com study found almost 28 percent of CEOs surveyed using LinkedIn — the CEO's social platform of choice. Although still ahead of general usage (20 percent according to Pew



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Internet), the increase is just 2 percent since last year. CEO Twitter usage still lags way behind the general population (18% according to Pew) at 5.6 percent, and again that's a paltry 2 percent increase over 2012. Facebook at 7.6 percent and Google Plus at 1 percent are pretty much flat.

This quote from Rupert Soames, UK-based CEO of FTSE 100 mobile power-plant company Aggreko, sums up CEO skepticism perfectly: "I think my first question as chairman, if I found the CEO regularly tweeting, would be what else could you be doing?"

But there are successful CEOs using social media. Maybe they don't care what the board thinks, or maybe they have spotted an opportunity that less socialized bosses have missed.

T-mobile CEO **John Legere** certainly gets it.

AT&T customer **Jay Rooney took to Twitter** to wonder why he was still with AT&T when competitor T-Mobile could offer him free

international roaming. Lisa A from T-Mobile's comms team quickly responded with encouragement to switch. AT&T responded with questions on T-Mobile's reliability, T-mobile countered with the cost saving gambit. Then T-Mobile's secret weapon appeared – John Legere tweeted "... bet @ATT's CEO isn't going to join the convo. Come join the #WirelessRevolution!" Game, set and match; Jay Rooney is apparently now a T-Mobile customer.

Winning one customer away from a competitor is a big deal for a rep, but small potatoes for a company CEO. That's not the point. The Next Web article that reported the spat between T-Mobile and AT&T has racked up almost 6,000 social shares. That's a pretty decent ROI on 140 characters.

Customers are just one reason for CEOs to get social.

BrandFog recently released its second annual CEO, Social Media and Leadership survey, trying to understand C-suite

social media strategy. The survey reports responses, not from CEOs, but from their employees, 800 across a range of US and UK businesses from start-ups to Fortune 1000 players.

It's interesting to think that, if your employees are anything like those surveyed, 71 percent of the them will think social media engagement would make you a better communicator. Conversely, almost 60 percent of them will believe that if you don't engage on social media you are missing an opportunity to be a more effective leader. Most worrying, more than 40 percent will be concerned that you risk becoming less relevant in the digital age if you don't get yourself on social media.

Risk aversion is still up there as the biggest reason employees think their CEOs are avoiding social media. If you're part of the 70 percent of CEOs invisible on the social networks, but don't like the idea of being thought of as a scaredy cat,

the **anti-social CEO's guide to social media** from Forbes might help. It has links to beginners guide on platforms from LinkedIn to Instagram, Pinterest to Google Plus.

Or you could just have a look at what other CEOs are doing. This list of **CEOs on Twitter** created by World of CEOs will inspire you and make you cringe in equal measure. Just don't spend too much time looking for your fellow pharma leaders on the list. Maybe next year.

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Beyond the Pill — Has Pharma Finally Figured Out Social Media?

Forget the drug. It's about education.

And, pharma marketers believe the timing couldn't be better,, given the onset of Obamacare...

The radical shift currently taking place in pharma marketing is all about partnering with patients rather than talking at them, writes Marylyn Donahue.



For years, tightly-regulated pharma companies have been tip-toeing across the social media landscape as if it was a minefield ready to blow them to smithereens. They were not being overly cautious. To activate the slew of rules and regulations governing when drug companies can directly mention their products and how they interact with possible patients has serious repercussions, indeed, like jail-time.

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Part of the problem has been the foot-dragging and infuriating lack of guidance from the FDA in creating firm rules, and addressing new developments in direct-to-consumer (DTC) advertising, such as online promotions and the rapidly changing world of social media marketing.

Another is the nature of the beast — drugs are drugs and they don't lend themselves to the same casual chatter on Twitter or other social media sites as does Miley Cyrus, Kim Kardashian and celebrity marriages.

So, how does an industry like pharma, which suffers from an image problem (only 56% as of this year of consumers trust drug companies, according to Edelman), take advantage of a vital marketing tool such as social media and its extraordinary capabilities for connecting with customers and creating a brand presence?

The answer? Forget the drug. It's about education,

stupid. And, pharma marketers believe the timing couldn't be better given the onset of Obamacare and the immediate need of consumers for information and guidance when it comes to their personal healthcare.

“The era of Big Pharma and the marketing of the magic pill is gone,” Kate Cronin of Ogilvy CommonHealth recently told Adweek. “Now, pharma brands are about everything that surrounds the pill” — Issues such as prevention, services, disease awareness, adherence.

Or in market-speak: “It's not about the pill. It's about partnership,” as stated on the MerckEngage YouTube . The other catch phrase is patient-centric and at a time when patients are more involved with treatment decisions it behooves drug companies to start relating directly with their “partners” on a corporate level.

This includes offering mobile apps and web-based tools to help patients and doctors manage and track chronic diseases, and help patients

adhere to their medication. A game called Fantasy Diabetes (like fantasy baseball) and Spoonful.com developed by Disney and Eli Lilly help younger people manage their Type 1 Diabetes. Aside from diabetes, the other two big targets for educating consumers is obesity and heart disease, **according to Joan Voight** in her Brandweek report on November 11, 2013.

And in reaching those “partners,” next-gen pharma marketing shelled out more than \$2.7 billion last year, and we're not talking about DTC television ads either. Indeed, the \$2.7 billion was after cuts in television and sale reps. According to Ogilvy CommonHealth survey, consumer and business-to-business spend was around \$11 billion.

Data gathering **MerckEngage.com**, a website in the same vein as Livestrong.com , and LillyDiabetes.com, offer diet planners, exercise tips, lifestyle choices, calorie

trackers, blood sugar monitors and so forth. In doing so, the digital outreach of the sites has the potential to collect data and reach consumers in ways that were once impossible. Since the launch of MerckEngage in 2010, it has attracted 8.2 million visitors. Since April of this year, the mobile site has been visited 102,000 times.

“This is the biggest disruption in healthcare we've ever seen, and every company in the industry is looking to reinvent itself,” Stig Albinus, chair of global healthcare at branding consultancy Association of Public Safety Communications Officials (APCO) International, told Adweek.

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Wikipedia is a Public Health Issue. Let's Fix It.

Many consumers trust their medical professionals without question, and believe that everything they read online is fact.

Beth Bengston believes it's time to stop sticking our head inside and take accountability for addressing the accuracy of medical information on Wikipedia.

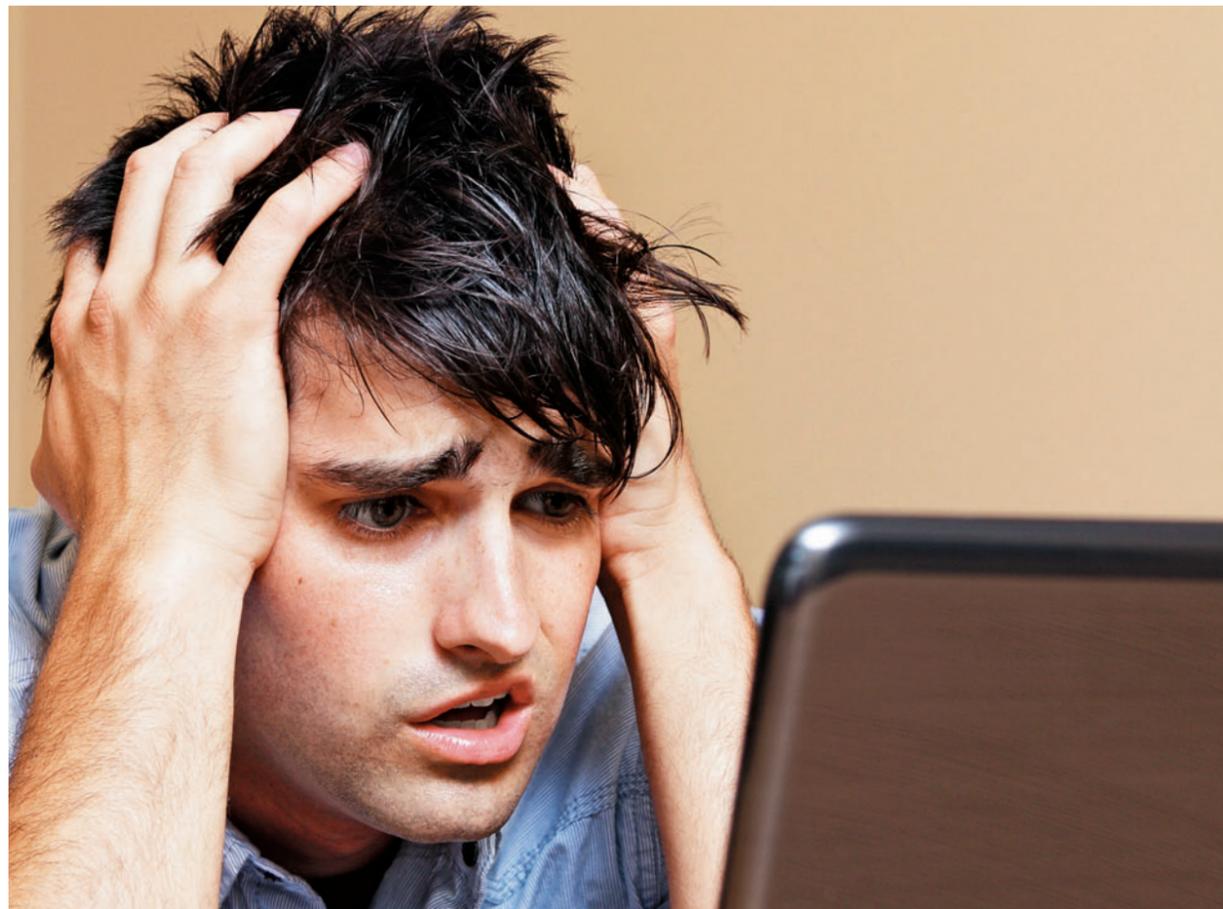
Medical articles on Wikipedia receive about 150 million page views per month, and

nearly 50% of practicing physicians use Wikipedia as an information source for providing medical care. And

while Wikipedia itself has disclaimers that information included on its site may be inaccurate, that doesn't stop consumers and medical professionals alike from using it as a health source that they consider credible.

Many consumers trust their medical professionals without question, and believe that everything they read online is fact, especially from such a popular site as Wikipedia — never realizing that the information might be inaccurate and sometimes downright dangerous.

Those in the healthcare



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industry, especially drug manufacturers and the FDA, have a public health responsibility to play a role in helping to fix the inaccuracies and incomplete information on Wikipedia. Sure, there are some challenges — like the perception that the drug manufacturers have a conflict of interest or that getting anywhere near user-generated content will result in a visit from the FDA — but we should work toward common sense solutions.

Drug manufacturers should document and notify Wikipedia when content is inaccurate or incomplete. Each Wikipedia article has a discussion area where a company rep could post the suggested changes or additions, leaving the broader community to determine if it should or shouldn't be included.

No, this isn't a perfect solution, but at least the manufacturers would be doing their part. And the FDA should either establish

clear guidelines around user-generated content, or let manufacturers do what's right in trying to correct inaccurate information, without fear of repercussions.

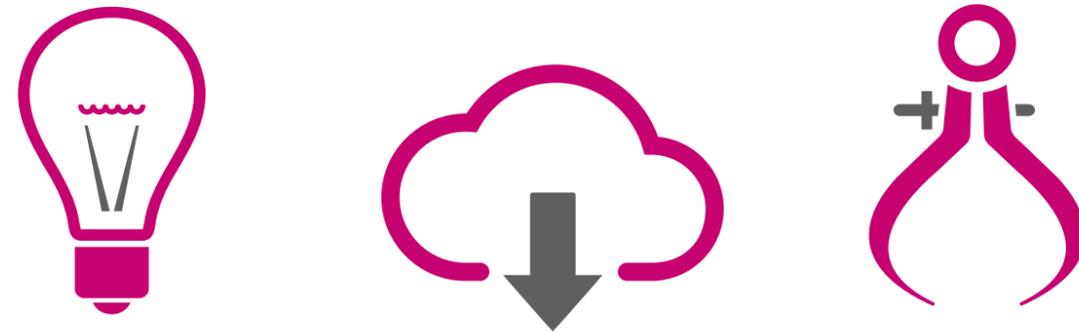
Wikipedia has a role to play as well — it needs to embrace drug manufacturers and assume they have the right intent in ensuring accurate information is available to the public. Some might argue that drug manufacturers in the past have been caught trying to game the system by removing damaging information about their products. But the beauty of Wikipedia is that the community will find and fix those self-serving changes. The sins of a few shouldn't punish everyone else's access to accurate and complete health information.

So let's step up and make some real and meaningful changes soon. The public's health depends on it.

Beth Bengtson is principal at **Hale Advisors**.



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Guiding Pharma Strategy with Advanced Social Intelligence

Social intelligence has advanced well beyond cursory “buzz” via narrow keyword monitoring.

Mark Langsfeld looks at five ways pharma companies are currently leveraging advanced social intelligence to drive strategic decisions.

Several leading pharmaceutical companies are already using Big Data solutions to

extract insights from the social realm. Applying these insights across a number of business functions empowers

their decision-making with strategic understanding that digs deeper than ever before possible.

Today, social intelligence has advanced well beyond cursory “buzz” via narrow keyword monitoring. The tandem of Big Data processing and complex concept modeling delivers powerful views into markets, patients, brands and competitors.

Below are five ways pharma companies are currently leveraging advanced social intelligence to drive strategic decisions.



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Patient Personification

Social intelligence allows pharma to segment and personify patients at multidimensional levels to enhance a brand's reach, messaging and education for increased awareness, compliance and ultimately, outcomes. Using these tools, comprehensive patient personas can be constructed to personify patients, leading to a better understanding of patient needs, their decision-making process and their actions.

Patient Journey

The concept of the patient journey has received growing attention in recent years. But social intelligence has transformed the patient journey from concept to reality by constructing the actual path patients take based on their own symptoms, diagnosis, treatment, decisions and experiences. This offers pharmaceutical and health providers a detailed understanding of crucial

decision points for patients.

Competitive Insight

Advanced social intelligence is that pharma can be leveraged to gain insights on competing products to better understand the attitudes, behaviors, decisions, and actions patients have related to the competition.

Comparative analysis is also commonly conducted to reveal the drivers and decisions behind patient switching to and from a provider's treatment and a competing brand.

Launch Tracking

An increasing number of pharmaceutical companies are conducting 'milestone monitoring' for treatment launches in preparation for, during and after the brand's launch. This real-time launch tracking focuses on the discussions about a new drug and its competitors by a variety of segments, including patients and caregivers, healthcare providers, financial

markets, media, influencers, regulators and competitors.

Influencer Analysis

Several pharmaceuticals are focusing on understanding the motivation, tactics and impact influencers have on their patients, markets, and specifically their brands. These companies are turning to advanced social intelligence to map out the apparent and hidden networks and relationships of these influencers to strategically plan how to engage or counter their initiatives.

An Intelligent Impact

It's never been more critical for the healthcare industry to personify and understand patients on multidimensional levels with respect to their needs, concerns, decisions, behaviors, attitudes, activities and compliance issues. Today, pharmaceutical and healthcare companies are realizing that achieving this is possible on an immediate and actionable level with

advanced social insight by extracting the powerful knowledge held within billions of daily comments from tens of millions of individuals across millions of social sources.

The key is identifying a tool that approaches social discussions with a Big Data solution rather than one with samples of the social universe. This approach allows providers to get a rich, holistic view of their patients, their caregivers and healthcare providers, as well as the influencers, analysts, media and competitors impacting their markets and brands.

Mark Langsfeld is Co-Founder & Chief Strategy Officer, ListenLogic Health.

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Pharmaceutical Executive
Global Digest



Comprehensive Global Coverage

*interpreting
dynamic
industry
challenges.*

Pharmaceutical Executive

CBI



reach

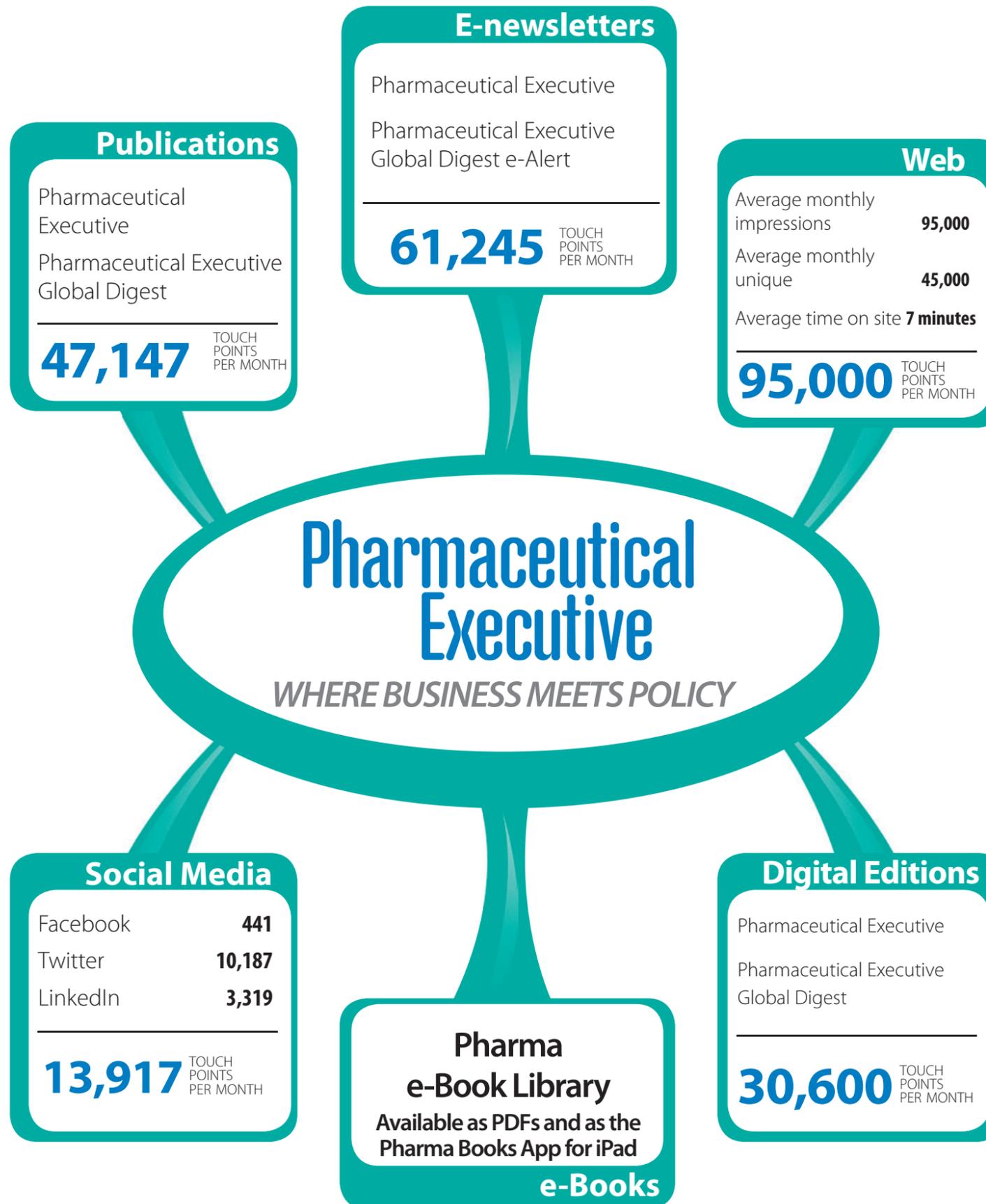
Meet your customers where they are in the format they can consume information – in print, online, through e-newsletters, global digest, or e-books. Pharmaceutical Executive is the global publication that probes the intersection between business and policy.

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- 2007** Neal Award finalist for Best Issue, May 2007,
- 2005** Neal Award finalist for Best Issue
- 2003** Neal Award winner for Best Issue
- 2002** Grand Neal Award, cover story on the convergence of diagnostics and pharmaceuticals

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| BUSINESS DIMENSION | QTY |
|--|---------------|
| Pharmaceutical | 54,782 |
| Biopharmaceuticals | 22,950 |
| Contract Services | 10,236 |
| Consultant | 5,825 |
| Marketing Communications <i>(including advertising & PR agencies)</i> | 4,498 |
| TOTAL UNIQUE SUBSCRIBERS | 90,929 |

| FUNCTION DIMENSION | QTY |
|---------------------------------|---------------|
| Business Development | 3,797 |
| Consultant | 3,197 |
| Corporate Management | 26,711 |
| Finance | 1,403 |
| HR | 815 |
| IT | 1,851 |
| Managed Care | 2,920 |
| Market Research | 1,218 |
| Marketing | 12,913 |
| Media Planning | 1,375 |
| Medical Affairs | 4,860 |
| QA/QC | 7,201 |
| R&D | 16,386 |
| Regulatory Affairs | 2,651 |
| Sales management | 7,771 |
| TOTAL UNIQUE SUBSCRIBERS | 90,929 |

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Crisis Preparedness in an 'Always On' Digital World

Thanks to social media, bad news travels fast — a crisis can manifest itself and go viral in a matter of minutes.

The first 120 minutes of a crisis can determine the public's perception of an organization. And in today's digital world, companies are more at risk than ever to viral attacks from unexpected sources, write Laura Schoen and Stacey Bernstein.



For the pharmaceutical industry, in particular, where adverse events, pricing issues, supply disruptions or quality concerns can lead quickly to an online attack, being prepared to respond and shape the conversation around your brand and company is critical. Research indicates that 63% of an organization's market value is attributed to reputation, and protecting that reputation is no longer limited to shaping the traditional media environment.

Thanks to social media, bad news travels fast — a crisis can manifest itself and go viral in a matter of minutes. The days of crises being driven by one or two traditional news cycles are gone — social channels can perpetuate crises, come in multiple waves, and last online

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for significant periods of time. More important, online crisis preparedness is now paramount to protecting a company's reputation and its ability to compete in the marketplace.

Being prepared enables identification of internal and external challenges before any of these issues actually becomes a crisis and if one does break through, to move forward at a pace which mirrors that of the crisis itself. This means creating a social media issues management structure that is supported by your unique brand style and leadership priorities, as well as a credible message perspective that allows a company or organization to speak with one voice.

Recently interviewed, chief executives of major international companies agreed that: "Leaders will be judged not on the nature of the crisis but their response to it." The formula for effective crisis communications, they found, should include: "Rapid response, concern

for those impacted, accepting responsibility and taking action."

Even more significant, in a recent industry-wide study, two Oxford University researchers demonstrated the extent to which effective and ineffective response affects a company's enterprise value: Companies that mishandled a crisis saw their stock price go down an average of 10 percent in the first weeks and continue to slide for a year. On the other hand, companies with effective crisis response saw their stock fall about half that, recover quickly and remain above their pre-price thereafter.

Which leads us to the question — how do you effectively prepare for social crises? As pharmaceutical companies continue to experiment in the social sphere, teams of digital communicators have taken control of the channels and strategy. But as the reach of social media continues to blur the lines between traditional and digital communications,

companies must unite the two disciplines to develop crisis preparedness plans that stretch across the entire organization, with a clear understanding of the social landscape.

Traditional communications practitioners, legal and regulatory teams and even senior level executives with limited insights into the inner workings of the digital world must learn to be comfortable in the space. The onus is on the communications teams to help the entire organization understand a new landscape, the unique intricacies of communications in the social sphere, and the different approaches required to manage a social crisis, rather than wait for an attack to happen.

Looking beyond the traditional methods of crisis preparation and response, a Social Crisis Simulator (SCS), such as FireBell, that mimics the experience of being under attack on Twitter, Facebook, and other social

media channels in real time can provide a unique social media crisis training experience for real-life teams in a secure off-the-internet environment, enabling them to forge a process, team and behavior for any crisis in a real-crisis situation.

A simulation experience provides executives the adrenaline-pumping experience of a somersault with all safety nets. It is the perception of indifference that often becomes the single largest contributor to any negative impact in the aftermath of a crisis.

Experts agree that whether a company survives a crisis with its reputation, operations and financial condition intact is determined less by the severity of the crisis itself than by the timeliness and quality of its response.

Laura Schoen is President Global Healthcare, and Stacey Bernstein is SVP, Director of US Digital Health, both at **Weber Shandwick**.

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Time to Rethink Operating Models for the Life Sciences Industry's Support Functions

With industry profits and revenue growth under sustained pressure, pharmaceutical companies are exploring disruptive new strategies through non-traditional business models.



Global Business Services (GBS), an evolution of shared services with a larger global footprint serving multiple functions that streamline processes under a unified operating entity, can enable better decision making and nimbler pursuit of growth and adaptation to market contraction.

Leapfrog the typical maturity curve

GBS implementation typically follows three phases (see Figure 1), with focus and achievements shifting over time from foundational activities to more strategic ones. However, forward-looking organizations have successfully shortened the path to return on investment (ROI) with a well-defined target operating model, strategy, and execution roadmap.

Scientific process improvement

frameworks like Genpact's Smart Enterprise Processes (SEPSM) are helping organizations measure and improve business processes — in turn, enabling their operation at world-class levels of performance.

Higher-touch operations

Early efforts to commoditize, standardize, and outsource business processes focused on routine, repetitive, back-office services such as payroll processing, help desk operations, and accounts payable tasks. Later, routine but low-touch promotional, budgeting, reporting, and information technology front-office services were added to these efforts. Now, the life sciences industry has already outsourced key components of critical R&D processes like clinical data management,

biostatistics, statistical programming, and pharmacovigilance — in particular, single-case processing, aggregate reporting, and medical writing.

Leading organizations have started incorporating these non-commodity functions of strategic importance with customer contact, including high-touch services like regulatory affairs, commercial and pricing analytics, reimbursement support, legal counseling, supplier negotiations, and vendor evaluations.

Towards a viable operating model

Scientific understanding of business processes — such as SEPSM — has significantly increased, allowing organizations to correctly estimate the end-to-end business impact of target

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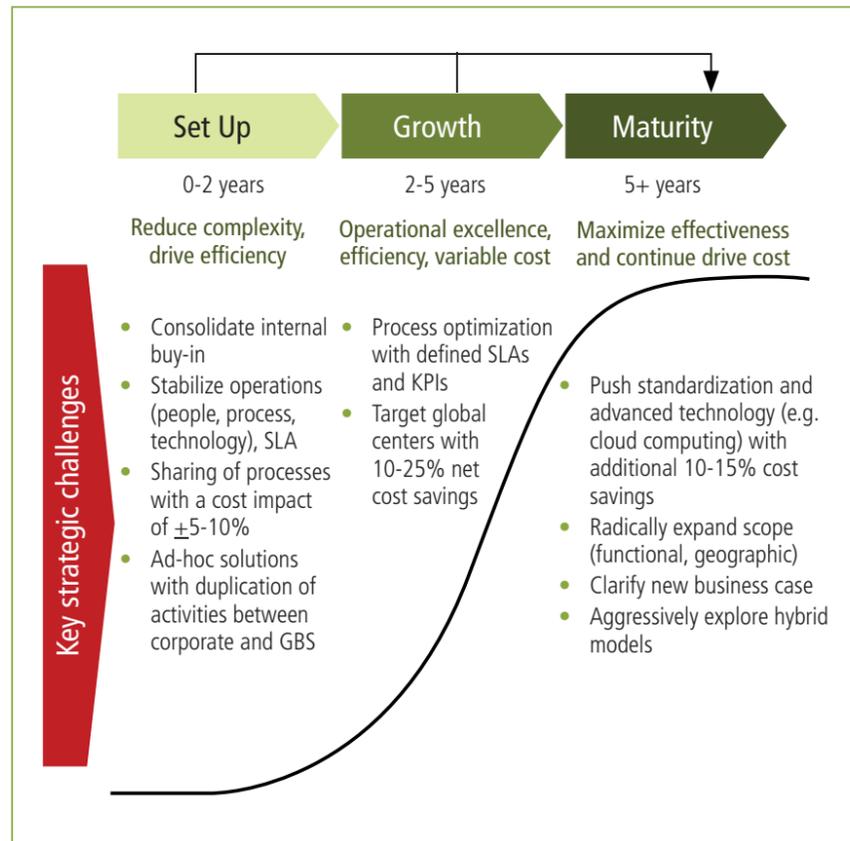



Figure 1: The full benefits of GBS are realized after the foundational stages are completed.

operating model choices, hence facilitating effective design. Still, some have discovered that building out GBS capabilities can be more difficult than anticipated.

Empirical experience and significant level of granularity helps craft the right strategy for a target-operating model. Genpact recommends a structured approach:

- Review as-is state and rationale. Understand the current state of performance, identify candidates for improvement, and review the process and sub-process practices.
- Identify top improvement opportunities. Use best-practice metrics and frameworks to benchmark key areas, identify areas for improvement, assess feasibility and risk of options, and conduct a preliminary analysis of benefits.
- Identify delivery alternatives. Assess options for consolidating processes into internal global shared operations, externally sourced operations, or a combination.
- Determine change implications. Outline both financial and risk-related implications for each location and structuring option (e.g. various types of risk).
- Build business case for each alternative. Compile a high-level business case encompassing process improvement, organizational structuring options, location choices, change implications.
- Develop detailed roll-out plan to reach targeted operating model by process and by location.
- Build the Final Business Case. Identify emerging options for each process and develop financial and implementation plans.

Conclusion

For organizations looking to redefine their operating models, much specialized knowledge is needed to navigate the continuum of design choices. In such a

focused field, strategy must leverage the experience curve of large organizations' journeys over the past decade.

While life sciences companies' operations do present challenges unique to their industry, they benefit from the knowledge accumulated in industries in which the transformation began earlier. Combining this experience with a clear understanding of an organization's strategic needs, capabilities and industry context can help craft the right strategy for a target-operating model.

To learn more about the ways to defining a future path or identifying custom solutions to optimize an existing strategy, visit www.genpact.com or e-mail Balkrishan Kalra, Senior Vice President & Business Leader —Life Sciences, at balkrishan.kalra1@genpact.com

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REAL WORLD EVIDENCE

January 28–29, 2014: Philadelphia, PA



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Real world data is quickly becoming a necessary component of evidence that must be gathered to demonstrate a products' effectiveness to payers, regulatory agencies, physicians and patients. This event will examine the Big Data explosion and the role of new healthcare delivery models and shifting stakeholder demands, and understand how payer motivations are driving requests for value-based outcomes data.

For further information, visit [HTTP://WWW.CBINET.COM/CONFERENCE/PC14040](http://www.cbinet.com/conference/pc14040)

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