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Pharma 2024: A Look at the Latest Trends Shaping the Industry



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EXECUTIVE SUMMARY

To stay ahead in an ever-changing environment, pharma companies must be aware of the key areas that require attention and investment. According to the Pharma 2024 Trends Survey, which gathered insights from 298 industry experts, these areas include technological advancements like AI, as well as the strategic role that Medical Affairs should play in the industry this year. By understanding these pivotal areas, companies can better navigate the strategic landscape and make informed decisions to drive success.

WHERE SHOULD PHARMA INVEST IN 2024?

In 2024, the pharma industry should strategically invest in data & analytics, patient solutions, and digital & technology to navigate the evolving landscape. Data analytics takes center stage, with experts emphasizing its pivotal role in optimizing treatments, improving patient outcomes, and streamlining operations. Patient solutions emerge as a critical priority, reflecting a commitment to a patient-centric approach and an initiative to enhance overall experiences. The recurrent emphasis on digital & technology showcases the industry's consensus on the importance of staying at the forefront of technological innovation, covering a broad spectrum of applications from data analytics to innovative technologies.

WHERE IS PHARMA IN TERMS OF AI USE THIS YEAR?

AI integration emerges as a key driver of innovation. Our report reveals a nuanced perspective on AI adoption, with most organizations in an explorative stage, showcasing varied progress. While some are at immature or advanced stages, a smaller proportion isn't using AI, and fewer identify as industry leaders. As the industry prioritizes investments in digital & technology, including AI, there is a need to take a holistic approach to successfully implement this technology.

WHAT EMERGING TRENDS WILL IMPACT PHARMA?

Marketing & Commercial: The rise of a digitally adept younger generation of Healthcare Professionals (HCPs) is compelling the industry to view digital engagement not as an option but a necessity. This shift emphasizes the need for crafting personalized digital strategies while maintaining a human touch in interactions. Simultaneously, the changing dynamics of Key Account Managers (KAMs) and customer-facing roles are breaking down traditional silos, fostering cross-functional collaboration, and leading to a more centralized approach in managing accounts and customers. Lastly, the evolution of omnichannel approaches reflects a commitment to constant adaptation, the 'segment of one' concept, and the integration of human and technological capabilities, ensuring a patient-centric experience aligned with changing customer needs.

Medical Affairs: The integration of digital tools for customer engagement emphasizes omnichannel discussions, digitalization spanning predictive analytics to mental health, and the incorporation of AI insights. Medical Affairs is evolving into a strategic planning role, marked by initiatives to enhance communication, utilize advanced platforms for insight reporting, and develop talent with a strategic mindset. To define its role amidst organizational complexities, the industry is adopting ecosystem models, aligning asset planning processes, and integrating with various functions.

STRATEGIC INVESTMENT AVENUES FOR PHARMA IN 2024

Driven by technological advancements, data analytics, and evolving patient needs, the pharma industry is undergoing a shift to find the best solutions. In order to stay ahead in this dynamic landscape, companies must strategically allocate their resources. To understand the key areas of investment for this year, we asked industry experts their opinion of which key areas should pharma prioritize its investments to ensure sustained growth and innovation this year.

Data & analytics led investment priorities for 2024

Leading investment priorities for pharma in 2023-24 by share of respondents



REUTERS EVENTS™
Pharma 2024 Trends Survey

Data & analytics, patient solutions, and digital & technology were identified as the top three areas for investment prioritization by industry experts. The strategic importance of data analytics takes center stage, highlighting its pivotal role in shaping the future of the pharma industry.

Cyril Mandry, Senior Director Global Digital Marketing & Omnichannel Lead at MSD, supports this finding by sharing that at MSD “omnichannel approaches are evolving by leveraging digital platforms, personalized content, AI and data-driven insights to meet customers’ changing needs and

expectations more effectively and responsibly”.

Harnessing the power of data analytics, artificial intelligence (AI), and cutting-edge technologies holds the potential to revolutionize multiple facets of the industry. This includes not only optimizing treatment protocols and elevating patient outcomes but also playing a pivotal role in streamlining market access strategies.

Mark Morgan, President and Head of U.S. Operations at UCB, emphasizes the vital role of employing the right data sources to support market access. He highlights the importance of generating and integrating Real-World-Evidence (RWE) to substantiate the effectiveness, safety, and value of their offerings.

“At UCB, we support the use of real-world evidence as a supplement to randomized clinical trial data in regulatory decision-making to help expedite clinical development and patient access to new treatments and ensure that product labels more closely reflect clinical practice and the lived experience of the people impacted by these diseases.” he says.

Investment in patient solutions has also emerged as a critical priority, underscoring the industry’s commitment to a patient-centric approach. Carla Tardif, CEO at Family Reach, shares that “understanding and deepening our engagement with communities adversely affected by health-related social needs is one of our top business priorities”.

This strategic focus on patient solutions underscores a broader initiative to enhance overall patient experiences and outcomes. The industry acknowledges the shift towards a more holistic and personalized approach to healthcare, recognizing the crucial role of collaboration with peers and decision-makers to ensure the accessibility of patient solutions. “At the end of the day, medical innovation only matters if people can access their needed treatment. Every stakeholder within the

value chain has a role to play in ensuring access. As innovators, it is our responsibility to engage payers and decisionmakers early – where possible – to find ways to ensure our innovative treatments, once discovered and developed, are delivered in a way that is accessible for the right patients and sustainable for people impacted by severe diseases,” shares UCB’s Morgan.

The enhancement of patient solutions has been notably advanced through measurement improved by the application of data and analytics, revealing a noteworthy alignment in investment priorities. Tardif adds “Our measurement approach has shifted to include [data] insights gathered through patient, patient advocate, and hospital partner surveys, as well as focus groups and landscape analyses. Within these approaches, we’ve integrated new technology and monitoring systems that allow us to consistently evaluate how quickly and effectively we’re delivering financial support to patients. The data we’re gleaning fuels every decision we make.”

Morgan also highlights UCB’s approach to patient financial support integrating data and analytics. He explains, “We also incorporate patient-level insights and predictive analytics into creating our patient services programs so that resources connect with patient needs and experiences on a granular level. Part of that individualized support includes assistance with reviewing insurance coverage and potential financial assistance options, treatment tracking, ongoing treatment support, and always-available online tools.”

In addition to data & analytics and patient solutions, the industry’s ongoing investment in digital & technology reaffirms the shared commitment to prioritizing technological advancements. This all-encompassing approach extends from data analytics to cutting-edge technologies, underscoring a dedicated commitment to leading the way in technological innovation within the pharma industry.

“OMNICHANNEL APPROACHES ARE EVOLVING BY LEVERAGING DIGITAL PLATFORMS, PERSONALIZED CONTENT, AI AND DATA-DRIVEN INSIGHTS TO MEET CUSTOMERS’ CHANGING NEEDS AND EXPECTATIONS MORE EFFECTIVELY AND RESPONSIBLY.”

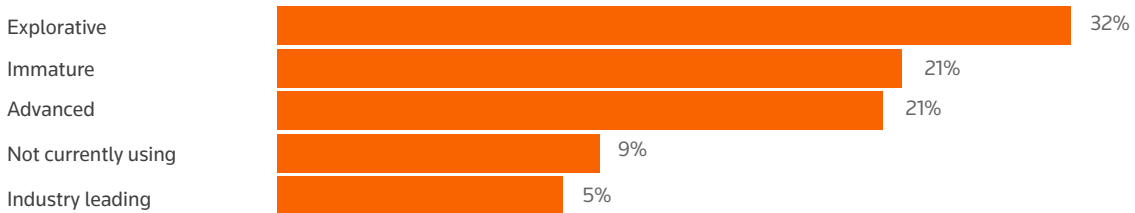
Cyril Mandry, Senior Director Global Digital Marketing & Omnichannel Lead, MSD

EXPLORING THE CURRENT LANDSCAPE OF AI ADOPTION

To navigate the evolving landscape of the pharma industry, it is essential to explore the integration of AI. See our latest report in how AI is shaping the promotional content management processes of pharma companies. We asked respondents to rate the maturity of their organization’s use of AI, providing valuable insights into the ways in which AI is being used to drive innovation. By examining the results, we can gain a better understanding of the current state of AI adoption within the industry and identify opportunities for future growth and development.

Most respondents identify their organization in an explorative stage of AI usage

Organizations’ advancement use of AI for pharma by share of respondents



We found that most respondents say that their organization is at an explorative stage for their use of AI. Interestingly, a comparable number of respondents cited both immature and advanced stages, reflecting the industry's varied progress in AI implementation. A smaller proportion indicated that their organizations are not currently using AI, while the fewest respondents identified their organizations as industry leaders in AI integration. This nuanced perspective highlights both AI's potential and the diverse paths organizations are taking on their journeys.

As the pharma industry strategically prioritizes investments in data analytics, patient solutions, and digital & technology, including AI, it becomes increasingly evident that the successful implementation of these advancements requires a holistic integration within the organizational framework. Marc Boutin, Head of Global Patient Engagement at Novartis, reinforces that AI is only useful when used appropriately

by saying "AI and big data are useful tools, but if not structured or interpreted within the patient community [it] often leads to incorrect assumptions, e.g., AI can tell you the moment a child takes her wearable off and puts it on the dog, but it cannot tell you why."

The collaboration between commercial and medical affairs becomes instrumental in leveraging these investments effectively. The synthesis of data analytics, patient-centric solutions, and technological innovations necessitates seamless coordination between commercial & marketing and Medical Affairs departments. This integration is vital for translating strategies into actionable initiatives that resonate with evolving industry standards and healthcare practices.

Moving forward, we explore the key trends identified by industry leaders in commercial & marketing and medical affairs that are set to shape pharma strategies in the coming year.

"AI AND BIG DATA ARE USEFUL TOOLS, BUT IF NOT STRUCTURED OR INTERPRETED WITHIN THE PATIENT COMMUNITY [IT] OFTEN LEADS TO INCORRECT ASSUMPTIONS"

Marc Boutin, Head of Global Patient Engagement, Novartis



LATEST TRENDS SHAPING THE INDUSTRY

Pharma industry leaders are navigating a rapidly evolving landscape, with innovation and strategic adaptation key to staying ahead. In our analysis of the trends set to shape the sector this year, we explore the insights of top executives in commercial and marketing, as well as medical affairs. From technological advancements to patient-centric approaches, these leaders share their vision for the future of the industry.



MARKETING & COMMERCIAL

Understanding and adapting to emerging trends in the commercial function are imperative for sustained success. This report delves into three critical questions posed to industry participants, providing insights into the impact of a younger generation on digital engagement, the changing dynamics of Key Account Managers (KAMs) and customer-facing roles, and the strategic evolution of omnichannel approaches.

THE IMPACT OF A YOUNGER GENERATION ON DIGITAL ENGAGEMENT:

A transformative influence has emerged—the rise of a younger generation of Healthcare Professionals (HCPs). This demographic shift is reshaping digital engagement strategies within the sector. Insights from industry experts emphasize the need for a substantial reevaluation of engagement approaches to align with the preferences of digitally adept HCPs. As we explore these trends, it becomes apparent that the industry is undergoing a seismic shift, with digital becoming not just an option but a mandatory facet. Crafting personalized digital strategies and striking a balance between efficiency and human connection are key trends reflecting the industry's proactive stance toward embracing a future where digital engagement is optimized for meaningful connections with the HCPs of tomorrow.

KEY TRENDS:

Digital Becoming Mandatory: The consensus emerges that digital engagement is no longer optional but mandatory, no matter what the demographic is. This underscores a fundamental transformation in how pharma companies communicate and engage with HCPs.

Personalized Digital Strategies: The focus on advanced technology, personalized content, and interactive platforms emphasizes a move towards tailoring digital strategies to meet the unique preferences of the younger generation.

Human Touch in Digital Interaction: While the trends lean towards digitization, the importance of balancing digital engagement with human interaction is stressed. This signifies a strategic approach that integrates the efficiency of digital platforms with the authenticity of human touch points.

Q & A

How is the rise of a younger generation of HCPs impacting pharma's digitally centric customer engagement strategy?

"It is generating a need for more digital self service engagement capabilities, more scientific/medical content and omnichannel personalization approaches."

Philippe Kirby, Global Head of Engagement Channels, MSD

"This reflects the general shift in society from a more 'traditional' to 'technological' mindset and an increasing appetite for digital consumption. In the spirit of meeting customers where they are, we are becoming more digitally sophisticated in terms of providing relevant and timely information. However, we need to balance digital engagement with human interaction through our customer-facing teams. Integrating both digital and human touch points is critical to elevate customer impact."

Phil Tennant, SVP, Head of Oncology Business Unit, Astellas

"These 'digital natives' are going to drive the interaction model to be more timely, virtual, and curated than ever before. Additionally, these are consumers of information via self-service online approaches, which will be new territory for some aspects of the pharmaceutical customer engagement process."

Jane Urban, Vice President Customer Engagement Operations, Otsuka

"In two primary ways: 1) channel mix strategy continues to shift in favor of digital, as younger HCPs tend to be digitally inclined, and 2) improves our ability to reach them and generate awareness in spaces where they otherwise would not expect to engage with our brands (e.g., NPI list match and retargeting through Connected TV and programmatic)."

Jennifer Tolley, Head, Omnichannel and Digital Marketing, UCB

"In the aftermath of Covid, pharmaceutical companies need to rethink their customer engagement strategies. The one-size-fits-all model is not enough for the new generation of HCPs. The pharma industry needs to look at their preferences, map their digital journeys and adapt its approach accordingly. I see the influence of these younger HCPs as an opportunity for pharma to add a human touch to digital interactions. Pharma needs to move away from generic approaches and embrace personalization that matches the preferences of these digital natives."

Alena Sohn, Commercial Operations Manager, Bayer AG

WHERE IS PHARMA IN TERMS OF PERSONALIZING CUSTOMER AND PATIENT ENGAGEMENT?

As we explored the impact of the younger generation of healthcare professionals (HCPs) on the pharma industry’s digital customer engagement strategy, a key focus emerged on the importance of personalization. Recognizing personalization as a critical aspect, we surveyed respondents to understand where they perceive their organization is at in terms of personalizing patient and customer engagement.

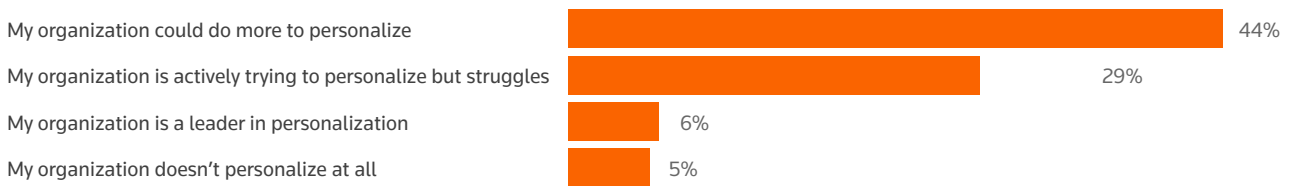
We discovered that a majority of respondents believe their organizations have room for improvement in terms of personalizing customer or patient engagement.

The second-largest group of respondents expressed that their organizations are actively attempting to personalize but face challenges in doing so. Notably, a smaller percentage of respondents indicated that their organizations are leaders in personalization or do not engage in personalization at all.

As we reflect on these insights, it’s evident that personalization remains a key focus area for organizations navigating the dynamic landscape of customer and patient engagement. The acknowledgment of the need for improvement, coupled with active efforts despite challenges, underscores the industry’s commitment to enhancing personalized experiences.

Most respondents feel as if their organization could do more to personalize

Organizations’ personalization of customer engagement and patient by share of respondents



CHANGING DYNAMICS OF KAMS AND CUSTOMER-FACING ROLES

A transformative wave is being ushered in by Key Account Managers (KAMs) and customer-facing roles. The responses gathered underscore a strategic shift towards collaboration, integration, and the dissolution of traditional silos. These trends reflect a collective endeavor to elevate the overall customer experience. As we navigate through these evolving patterns, it's evident that KAMs and customer-facing roles play pivotal roles in steering pharma companies towards a future where cross-functional collaboration becomes not just a goal but a fundamental driver of success.

KEY TRENDS:

Silos to Collaboration: The prevailing trend is a departure from traditional silos, with an increasing emphasis on collaboration. KAMs are identified as key orchestrators, aligning diverse internal functions towards common goals.

Integrated Customer Experience: The integration of customer-facing roles and KAMs is portrayed as a catalyst for a more dynamic, integrated experience. This signifies a shift towards holistic and synchronized engagement strategies.

Cross-Functional Collaboration: The breaking down of silos is not limited to internal functions; it extends to fostering cross-functional collaborations that lead to new revenue streams and data sharing for informed decision-making.



Q & A

How is the configuration of KAMs and customer-facing roles changing the way silos interact with each other and HCPs?

“KAMs and customer-facing roles are changing pharma, forcing silos to collaborate or become obsolete, and reshaping interactions with HCPs into a more dynamic, integrated experience.”

Cyrl Mandry, Senior Director Global Digital Marketing & Omnichannel Lead, MSD

“KAMs are breaking down silos and bringing customers together in ways not seen in the past resulting in cross functional collaborations, resulting in new revenue streams and sharing of data to make better decisions.”

Michael Fronstin, Global Head of Client Partnerships and Commercialization, Oracle Life Sciences

“The transformation in how KAMs and customer-facing roles interact with each other and with HCPs is significant. Our adoption of cross-functional squads within agile methodologies, such as our ‘play’ method, fosters collaboration and breaks down traditional silos.”

Gemma Malla, Head of Digital Medicines Iberia
Angelini Pharma

“The dynamics between silos and healthcare professionals (HCPs) are changing with the configuration of customer-facing roles and key account managers (KAMs). Traditionally, organizational silos have operated independently, often resulting in fragmented communications and disjointed strategies. However, the integration of customer-facing roles and KAMs has emerged as a bridge that fosters collaboration and synergy between these silos. KAMs are equipped with a deep understanding of customer needs and market dynamics and act as orchestrators, aligning diverse internal functions towards a common goal. This collaborative approach transcends departmental boundaries, breaking down silos that have hindered the seamless flow of information.”

Alena Sohn, Commercial Operations Manager, Bayer AG

“KAMs and field-based employees are working in a more integrated approach. Restructuring of these teams has created a more centralized approach to managing accounts and customers, ensuring that there is full transparency between functions.”

Allison Coyle, Cardiorenal Marketing, Bayer

EVOLUTION OF OMNICHANNEL APPROACHES

The pharma industry is witnessing a significant evolution in omnichannel strategies, driven by a strategic response to meet changing customer needs and expectations. Examining the insights provided by industry professionals, a clear commitment emerges towards leveraging technology, data-driven insights, and personalized content. This commitment goes beyond adaptation, signaling a dedicated effort to create a seamless, patient-centric experience aligned with the evolving demands of the healthcare landscape. The gathered responses portray the omnichannel evolution as more than just a trend – it represents a fundamental restructuring, positioning pharma companies at the forefront of customer-centric innovation.

KEY TRENDS:

Commitment to Constant Evolution: Omnichannel strategies are recognized as dynamic and constantly evolving. This acknowledgment emphasizes the industry's commitment to adaptability and responsiveness in a rapidly changing landscape.

Segment of One: The emergence of the 'segment of one' concept highlights a shift towards tailoring communications to meet the unique needs of individual customers. This represents a move away from generic approaches to more personalized and targeted engagement.

Human and Technological Integration: The integration of AI and Machine Learning with human capabilities signifies a holistic approach. The goal is to orchestrate channel content and sequencing that reflects the unique needs and priorities of customers.

The trends observed within the pharma industry's commercial function reveal a landscape in flux, marked by adaptability, collaboration, and a keen focus on meeting the evolving needs of customers. As pharma companies navigate this transformative terrain, the integration of digital technologies, collaborative internal structures, and omnichannel approaches position the industry at the forefront of innovation, ensuring a customer-centric and patient-focused future.





How is your organization evolving omnichannel to meet customers where they are in regard to changing customer needs/expectations?

“Our focus lies in delivering seamless and personalized experiences across various touchpoints. To achieve this, we harness the power of data and analytics to gain insights into the communication preferences of our customers and the trends they’re following most closely. Our ultimate goal is to create a customer and patient-centric experience, where we deliver the necessary support and resources for informed decisions and improved patient care. Omnichannel targeting and messaging continues to be a priority for our portfolio and brands across our different lines of businesses.”

Moreno Perugini, President of Active & Medical Nutrition, U.S. & President of Global Pharmaceutical Therapies, Nestlé Health Science

“Omnichannel is always evolving - the minute you think you’ve “gotten it right,” you gain access to new data or a new targeting opportunity. The nature of the data and technology that fuels Omnichannel forces a constant state of change and evolution. At UCB, we’re taking a fresh look at all things Omni - nonpersonal plans, CRM, NBA and Dynamic Targeting, data and measurement, etc. - and evaluating whether what we’re currently doing, and how we’re doing it, still delivers the value HCPs need to have the best experience with our brands, or whether they should evolve. And we’re using data to inform how/where we should evolve and how/where we should remain consistent.”

Jennifer Tolley, Head, Omnichannel and Digital Marketing, UCB

“The idea of a ‘segment of one’ is emerging in the digital world as we face an increasing need to tailor our communications across a range of channels to meet the needs of individual customers. However, the fundamental ‘engine’ at the center of this omnichannel world is human. While we leverage AI and Machine Learning to anticipate customer needs/actions and use advanced analytics to decipher the best forms/frequency of interaction, we are also building the capabilities of our customer-facing staff at the center. Our goal is to enable them to orchestrate channel content and sequencing that reflects the unique needs and priorities of their customers. Only when we effectively bring human and technological capabilities together can we get close to the ambition of consistently delivering the right information to the right customer at the right time.”

Phil Tennant, SVP, Head of Oncology Business Unit, Astellas

“We’re evolving our omnichannel approach by harnessing modern technology to meet changing customer needs. We stay closely aligned with business and customer requirements, leveraging innovative solutions that were not available 20 years ago. This approach enhances efficiency, adapts to evolving needs, and provides more customer-centric experiences.”

Gemma Malla, Head of Digital Medicines Iberia Angelini Pharma

MEDICAL AFFAIRS

Adapting to trends in Medical Affairs is crucial for success. This report addresses key questions, exploring the impact of digital tools, the strategic evolution of Medical Affairs, and challenges in defining its role amidst organizational complexities. Unveiling insights from industry leaders, the report navigates through the critical aspects of Medical Affairs, elucidating its role in shaping customer engagement, strategic planning, and organizational positioning within the industry.

INTEGRATION OF DIGITAL TOOLS IN MEDICAL AFFAIRS FOR CUSTOMER ENGAGEMENT

The integration of digital tools within Medical Affairs for customer engagement is witnessing a trend towards omnichannel discussions and unified strategies. Companies are initiating discussions that involve various channels, aligning plans within Medical Affairs and extending across the organization. Notably, the adoption of digital online tools has become integral to the resource toolbox within Medical Affairs. The overarching goal is to streamline customer engagement by leveraging digital dashboards, tools, and new tracking processes. This includes the incorporation of AI in analytics, predictive analytics, and the exploration of AI insights associated with standard CRM systems. The industry is progressively moving towards a comprehensive digital framework that spans from practitioners to patients, incorporating various aspects like predictive analytics, preventive healthcare, personalized medicine, and mental health.

KEY TRENDS:

Omnichannel Engagement: Pharma companies are initiating omnichannel discussions within Medical Affairs, integrating digital tools such as online platforms like PsychU and NephU, aiming for a unified strategy across functions.

Digitalization of Customer Engagement: The use of digital tools spans from collecting ePRO to AI analytics, predictive analytics, and preventive healthcare. Focus areas include treatment adherence, patient engagement, personalized medicine, and mental health.

Data-driven Insights: Emphasis on understanding business processes, prioritizing digitalization, and using AI insights with CRM systems. The trend involves predictive analytics and decentralized ad boards tailored to local needs.

Q & A

How do you integrate digital tools in Medical Affairs to leverage customer engagement?

"We are beginning to initiate our omnichannel discussion, alignment and plans within Medical Affairs. Without Field Medical Affairs team, we have digital online tools (PsychU and NephU) that were started 10 years ago that are an integral part of our resource toolbox within Med Affairs and across the company."

Reza Moghadam, US FMA Lead, Otsuka

"We use digital tools in collecting ePRO, AI in analytics and to identify patients and preparing for gen AI in communication."

Michael Zaiac, Head of Medical Oncology EUCAN

"We have it all integrated at Takeda Oncology, from CRM to KOLs management and engagement. Medical Affairs is not out of consideration for any system, except those directly related to commercial transactions."

Abner Lobao, VP Medical Affairs Oncology US, Takeda

"Have a deep understanding of business processes to prioritize those that benefit from digitalization, develop pilots for them and scale up if successful."

Andreas Gerloff, Global Head of Medical Customer Excellence, Bayer

"Digital tools are either dedicated to practitioners to help in their daily practice or to patients to help in their daily life facing the disease and its related burden. Most of these digital tools are either self available applications or available via the MSL. Digital tools consider predictive analytics and preventive healthcare, personalized medicine, share decision making, treatment adherence, patient engagement, education or mental health."

Philippe Pinton, Senior Vice President and Global Head, Clinical and Translational Sciences, Ferring Pharmaceuticals

EVOLUTION OF MEDICAL AFFAIRS INTO A STRATEGIC-PLANNING ROLE

The industry recognizes the need for Medical Affairs to take initiative, communicate more effectively, and adopt advanced platforms for insight reporting to become strategic partners within the organization. A pivotal aspect of this evolution involves the development of talent with a strategic mindset, business acumen, and a future focus, emphasizing ownership, leadership, and transformation impact measurement. Business acumen, cross-functional cooperation, and effective communication are identified as critical capabilities for Medical Affairs to play a strategic role. This shift underscores a paradigm shift in perceiving Medical Affairs, positioning it not merely as a supportive function but as an integral, strategic component contributing to informed decision-making and improved organizational performance.

KEY TRENDS:

Strategic Role for Medical Affairs: The evolution from a supportive role to a strategic one involves taking initiative, enhancing communication, and adopting better platforms for insight reporting. Business acumen, cross-functional cooperation, and effective communication are identified as crucial capabilities.

Talent Development: The industry recognizes the need for talent with a strategic mindset, business acumen, and future focus to lead Medical Affairs in a strategic planning capacity.



Q & A

What capability does Medical Affairs need to evolve from a supportive role to a strategic-planning role within the organization?

“Business acumen, cross-functional cooperation & effective communication.”

Mussa Arvani, Head of Medical Science Liaison, Sanofi

“Medical, across the industry, needs to have compelling engagement strategies and show how its unique content and engagements result in impacts internal and external to the company. The impacts need to inform strategic decision making to position the company for improved performance towards its mission and position their stakeholders to make the most informed decisions.”

Nikolas Karkanias, VP Medical Content and Channel Solutions, Pfizer

“Have the right talent willing to step up: strategic mindset, business acumen and future-focus, willing to step out of the comfort zone and seeing the big picture.”

Andreas Gerloff, Global Head of Medical Customer Excellence, Bayer

“Take more initiative with the organization, communicate better, add better platforms for insight reporting, be part of the omnichannel planning.”

Reza Moghadam, US FMA Lead, Otsuka

“Ownership and Leadership, Business Acumen, strategic planning.”

Maja Beilmann-Schramm, Global Field Excellence at Merck KGaA

DEFINING MEDICAL AFFAIRS AMIDST ORGANIZATIONAL COMPLEXITY

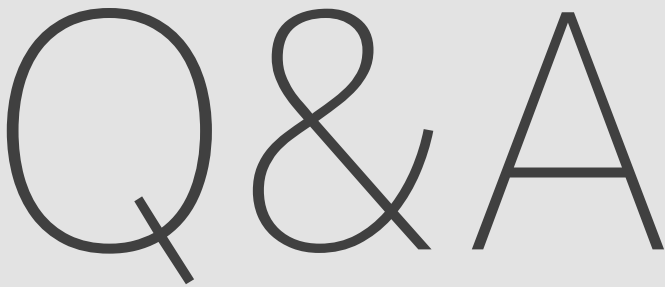
Companies are increasingly adopting ecosystem models in the field, integrating with Integrated Brand Teams, and aligning asset planning processes. This approach helps overcome difficulties in defining Medical Affairs by creating a more integrated structure. Matrix structures that integrate Medical Affairs with Marketing, Commercial, R&D, and Regulatory Affairs are suggested, focusing on extended leadership teams and stakeholder management tailored to customer needs. The industry acknowledges the importance of focusing on core competencies, emphasizing insight generation, late-stage evidence, and effective communication. Furthermore, having a clear vision for the brand, understanding stakeholders, and stimulating provocative thinking are identified as crucial aspects for Medical Affairs to position itself effectively amidst organizational complexity.

KEY TRENDS:

Evolving Ecosystem Models: The industry is shifting towards ecosystem models, integrating Medical Affairs with Integrated Brand Teams and emphasizing asset planning processes.

Stakeholder Alignment: Efficient structures, aligned to the company values, are recommended to integrate Medical Affairs with Marketing, Commercial, R&D, and Regulatory Affairs, emphasizing stakeholder management and competency alignment.





Often we see Medical Affairs face difficulties to define itself due to an unclear matrix and various structures in different organizations. How does medical respond to different stakeholders and adjust functions to accomplish their expectations?

“Matrix should be structured as to integrate Medical Affairs, Marketing and Commercial, R&D, Regulatory Affairs in an Extended Leadership Team and stakeholders management should be defined as per customers matters and related needed competencies.”

Philippe Pinton, Senior Vice President and Global Head, Clinical and Translational Sciences, Ferring Pharmaceuticals

“Medical Affairs across the industry generally aligns to Commercial structures or goals and often is part of the Commercial organization. The expectations of Medical from others is to align to those Commercial goals either explicitly or implicitly. This can lead to the expectation that the ‘unique activities’ of Medical and associated measurements should parallel Commercial measures. Medical faces difficulties to define itself due to an unclear value proposition and measurement paradigm. One result is that Medical is seen as an instrument to amplify the intentions of other teams. Depending on the needs during that era of the company Medical is plugged into different operating models. Medical will continue to face difficulties without sufficient funding, unique deliverables, and non-promotional measures.”

Nikolas Karkanias, VP Medical Content and Channel Solutions, Pfizer

“We have evolved to an ecosystem model in the field so that has helped. The role of Med Affairs has continuously expanded over the years with this model. We also integrated our asset planning process which has helped significantly.”

Reza Moghadam, US FMA Lead, Otsuka

“Identify and develop capabilities needed for effective strategic planning “from the field to the office”, to verify that corporate strategy continues to resonate with HCP- and patient-needs and underline the urgency to define, communicate and constantly apply medical insights and valid metrics to demonstrate impact as facilitators and strategic partners with our commercial counterparts.”

Mussa Arvani, Head of Medical Science Liaison, Sanofi

“Functional setup should not matter that much. It is about gathering the right people/experts across organization with the right skills to co-create solutions for better customer outcome.”

Andreas Gerloff, Global Head of Medical Customer Excellence, Bayer

FINAL THOUGHTS:

The pharma industry's strategic investments in 2024 seem to be centred around data & analytics, patient solutions, and digital & technology, reflecting a commitment to innovation and adaptation to the evolving landscape. The emphasis on data analytics underscores its pivotal role in shaping treatments, improving patient outcomes, and enhancing operational efficiency.

The industry recognizes the significance of a patient-centric approach through investments in patient solutions, aiming to elevate overall experiences. In parallel, the integration of digital tools, including AI, emerges as a key driver of innovation, with organizations navigating various stages of adoption. The marketing & commercial front sees a transformative shift with a digitally adept younger generation shaping the necessity of personalized digital strategies and cross-functional collaboration.

Simultaneously, in Medical Affairs, a strategic evolution is evident, marked by the integration of digital tools, talent development, and the adoption of ecosystem models to navigate organizational complexities. These emerging trends collectively position the pharma industry at the forefront of technological innovation, patient-centricity, and strategic planning, ensuring its resilience and effectiveness in the dynamic healthcare landscape.

ABOUT REUTERS EVENTS

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