A leading Swiss pharmaceutical company leveraged Salesforce Health Cloud to drive accelerated and deeper patient engagement by creating an omni-channel, multi-stakeholder health ecosystem.

Creating a Platform to Drive Accelerated Patient Engagement

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Introduction

As a leading global pharmaceutical company headquartered in Basel, Switzerland, Novartis was seeking a solution to enable deeper and accelerated patient engagement. The Innovative Medicines division of Novartis had a strategic objective of reaching patients faster. Considerable thought was given to evaluating how patient services, which represented a key strategic pillar of this initiative, should evolve.

Novartis faced multiple challenges. First, the IT organization had operated for many years on a federated model, with individual countries implementing their own solutions and business processes. Existing processes required a lot of manual intervention and involved a lot of dependency on the technology team for even small levels of customization. The existing solutions only supported a small subset of capabilities needed to run the patient support services. The legacy CRM solution for the pilot country had been built eight years ago and was coming to the end of its life cycle. It was also out of maintenance and lacked certain modern capabilities, leading Novartis to consider other vendor options as it sought to replace this solution.

This situation triggered a technology churn and the search for a solution with more flexible, best-of-breed architecture that could help achieve strategic organizational goals. Novartis evaluated four vendor/platform offerings based on the following key criteria:

» **Capability coverage.** The company needed a solution that addressed its requirement to drive faster patient access.

» **Enterprise architectural fit.** Novartis required an enterprise-grade solution and platform capabilities aligned with its architecture and technology strategy.

» **Innovation.** Any solution needed a high level of available innovation to meet the company's diverse needs.

SOLUTION SNAPSHOT

ORGANIZATION:
Novartis, a Swiss-based multinational pharmaceutical company with revenues of $47.5 billion.

ORGANIZATIONAL CHALLENGE:
Dealing with legacy systems which were at the end of their cycle; the existing solution required significant customization and lacked modern architecture and capabilities to meet accelerated patient engagement goals.

SOLUTION:
Novartis implemented Salesforce Health Cloud to drive accelerated patient engagement.

PROJECT DURATION:
12 months

BENEFITS:
A highly configurable, multi-channel, multi-stakeholder, patient engagement platform, with integrated analytics and modern architecture that provides deep insights into the patient journey and enables ease of implementation of care programs.

» **Future proofing.** In evaluating vendors, Novartis assessed both its "here and now" capabilities, as well the degree to which its product roadmaps included a forward-thinking product strategy.

» **Cost.** Novartis aimed to balance comprehensive features with a cost-effective solution.

» **The level of partnership.** Novartis was seeking more than just a supplier of a solution; the company wanted a technology partner with expertise on market needs and trends, eager and committed to working together through the project life cycle to help Novartis accomplish its vision.

» **Interoperability and configurability.** Novartis prioritized the ability of a solution to minimize coding and maximize configurability.

» **Internal knowhow.** In terms of selecting a solution, Novartis wanted to capitalize on its internal expertise as much as possible rather than depend significantly on the expertise of a technology provider.

Key Differentiators

Novartis selected Salesforce Health Cloud with the following three evaluation criteria deemed as the main differentiators:

» **Enterprise architectural fit.** Novartis was already using Salesforce comprehensively. The company deployed multiple Salesforce products including the Salesforce Service Cloud, the Salesforce Marketing Cloud, Sales Cloud, Einstein, Customer 360, Mulesoft, myTrailhead, and AppExchange, among others. Consequently, Novartis could more effectively integrate Salesforce Health Cloud with its existing Salesforce systems.

» **Capability coverage.** Salesforce Health Cloud is a healthcare customer relationship management (CRM) system that integrates with legacy systems and incorporates apps. The result is a compliant, flexible platform that turns insights into action for a patient-centered approach to care. It provides a 360-degree view of patient data, helps create customized care plans, and enables real-time patient coordination and engagement. For Novartis, Salesforce Health Cloud provides an enriched view of the patient journey and enables proactive risk identification. In addition, the ease of configurability enabled Novartis to rapidly implement complex care management programs and played into Novartis' desire to establish faster patient access and a more patient-centric approach.

» **Future proofing.** Novartis observed a deep commitment towards the design partnership from Salesforce that will enable the company to innovate and develop future capabilities.

Implementation

It is important to note that when Novartis selected the Salesforce Health Cloud, the system was in an evolutionary stage of development. Novartis wanted to minimize the need of custom code development efforts and maximize product configurability to support the patient journey. Hence, Novartis teamed up with Salesforce on what became a major co-innovation and -development initiative. Novartis defined what capabilities it needed at which point in time to fulfill its needs in line with its deployment timelines. Novartis identified gaps in Health Cloud and outlined which features needed to be present in each product release, thus providing valuable intelligence to support Salesforce's product development strategy. Since Salesforce provided three product releases per year, delivering new features with each release, Novartis could also benefit from the possibility of prioritizing its product feature requirements with each release.

Thus, Salesforce benefited by partnering with Novartis, which had extensive experience in patient services, especially in Latin America (LATAM), which is quite mature in this area; Salesforce obtained valuable access to market needs. Novartis benefited from a sustainable, configurable, and continuously evolving business product, with minimal coding needs, in line with the agreed objective to avoid coding and to leverage configurability. The design partnership was thus deemed a win-win engagement where Salesforce benefited from Novartis' in-depth Patient Service expertise and know-how and Novartis benefited from Salesforce Health Cloud release prioritizations.

To this end, Novartis worked on implementing a design partnership with Salesforce. Novartis launched the PEACH (Patient Engagement and Care Hub) initiative for the implementation of Salesforce Health Cloud in LACAN (LATAM and Canada), starting with Mexico. Novartis chose to start its implementation with Mexico because an existing comprehensive patient services system was already in place. However, the existing system was a highly customized, inflexible set up, which required IT support for any customization. The intent was to build the product with an initial LACAN focus and then scale globally based on the need for a patient service fit. The project sponsor was the regional CFO, and the product manager was the Head of Patient Experience and Platform.

The deployment involved three months of process harmonization to ensure that a regional LACAN strategy was established, followed by nine months of product build and pilot deployment to Mexico. The implementation involved comprehensive data migration of historical data into the new environment from two sizeable legacy systems. An agile approach was used for the product build, allowing stakeholders across LACAN to continuously engage and iteratively experience the product evolving. The minimum viable product (MVP) was delivered at the end of nine months and went live successfully.

Some of the KPIs that were monitored, and the business goals accomplished, include the following:

» **Efficiency and speed.** Patient enrollment time was reduced by more than 20% with associated efficiency gains.

» **Patient reach and service portfolio extension.** Several new (additional) loyalty programs were set up and running, as compared to a single program in the past, enabled by the efficiency gains achieved for patient enrollment. These new programs allowed the team to extend the patient service portfolio without extra investment. No coding was needed, and all the programs were configurable by the business team. The new programs included not only access and loyalty, but also engagement and orientation.

» **Speed to set up new care plan templates.** Setting up these templates was done three-times faster directly by the patient experience and platform team.

» **Efficiency and digitalization.** Material savings on operational costs were accomplished by digitizing an engagement program, the team for which previously operated offline.

» **Territorial reach.** The territorial reach for this program was increased by 10%.

» **Compliance.** The new CRM helped increase traceability and reduce operational and adverse events reporting risks, which resulted in better compliance.

Thus, Salesforce Health Cloud helped operations become more cost efficient, and allowed Novartis to expand operations safely while ensuring compliance. Importantly, Mexico as pilot was able to accomplish its strategic goal of reaching patients faster and offering new digital services because of deploying Salesforce Health Cloud.

From Novartis' perspective, the PEACH journey so far is deemed a technology transformation lighthouse case of business value realization and collaboration across all parties. The project involved deep partnership, not only from an implementation standpoint, but from a design and consulting perspective. Support from a strong system integration partner, and the involvement of a strong internal Novartis team with the ability to comprehend what was possible and what made sense from an enterprise scalability and future proofing perspective were important. In addition, analytics capabilities were tightly integrated into the Salesforce Health Cloud.

While implementation required 12 months to establish the foundational Patient Engagement platform, including analytics, integrations, and business process harmonization. The PEACH journey continues with new releases to come and further deployments based on business needs.

"The design partnership is almost two years old," says Franz Bernhart, Head of the Salesforce Center of Excellence at Novartis. As a result of the design partnership with Salesforce, PEACH established an 88% configuration rate versus 12% coding, which for a technology platform was quite a remarkable achievement.

Salesforce is one of the enterprise platforms at Novartis, with a strong footprint around customer and patient engagement. To ensure internal ownership and a professional and continuous evolution of the Salesforce ecosystem, Novartis established the Salesforce CoE with an internal team of Salesforce professionals acting as delivery and architectural governance backbone supported by strategic system implementation partners.

Challenges and Lessons Learned

A key challenge Novartis faced during the deployment was the change of a strategic usage of a data object midway during the process.

As a part of the implementation plan for PEACH, a data object strategy was defined by PEACH. During the partnership, Salesforce changed the data object strategy because personnel realized that the initial data object strategy did not stand for all the relationships that it needed to support. However, this changed the relationship of the object with different personas. Salesforce missed sharing the change in the data object strategy with Novartis. The change in strategy resulted in a deadlock situation right before go-live. This created a very challenging situation. However, Salesforce was very responsive and went out of its way to provide Novartis with an out-of-release cycle, which enabled Novartis to go-live on time.

While Salesforce was prioritizing Novartis' requirements, configurations that were being developed were new. To minimize risk, Novartis recommends anticipating for the possibility of the sudden changes that are typical with being an early adopter of any technology. To plan for such changes, Novartis also recommends

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establishing close alignment among all parties involved. In Novartis' case, a key lesson learned was to have a closer alignment with the Salesforce team to ensure that data object user strategy was integrated more effectively into the product roadmap.

Another important takeaway: plan ahead and configure the Salesforce Health Cloud at an enterprise level, otherwise progress throughout an organization as large and dispersed as Novartis would be significantly impeded.

In addition, Novartis recommends having a strong internal team that really understands Salesforce and can provide guidance, and consulting expertise to help design processes that optimally leverage the capabilities of the solution. The fact that Novartis had a strong internal team that could oversee and guide system integrators and ensure that standards are being met was an asset.

How Salesforce Enabled Accelerated Patient Engagement

The Salesforce Health Cloud provided faster, deeper patient engagement for Novartis. Among the benefits and capabilities Novartis has realized are the following:

» While the legacy systems were single-channel solutions, Salesforce Health Cloud offered modern architecture, and multi-channel, personalized patient engagement.

» Salesforce Health Cloud provides a "patient-centric" approach, providing a 360-degree view of patient data with the ability to understand the patient journey, supporting follow-up capabilities including the ability to help recommend next-best actions.

» The solution facilitates interactions among multiple stakeholders including patients, healthcare providers, and pharma within the care network on a single CRM platform.

» Novartis accomplished a very high level of configurability, with 88% configurability and 12% customization/coding (counting interface developments to integrate Salesforce Health Cloud with external partners and other systems). The level of complexity that Novartis' care programs have were not supported by the legacy systems, which required extensive coding and hence IT support. The ease of configuration provided the patient services team with significantly more agility and autonomy, allowing team members to set up and configure highly complex patient care programs themselves, without depending on IT support. This resulted in high levels of customer satisfaction.

» The advanced analytics capability allowed business users to configure their own analytics reports.

The design expertise brought to the table by Salesforce through the deeply integrated, two-year design partnership has set the stage for future system enhancements. For example, other features such as call governance and sentiment analysis for larger provider organizations are still under development.

Methodology

The project and company information contained in this document was obtained from multiple sources, including information supplied by Salesforce, and questions posed by IDC directly to the Novartis Head of the Salesforce CoE, Franz Bernhart.

About the Analyst

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Dr. Nimita Limaye is a Research VP with IDC Health Insights and provides research-based advisory and consulting services, as well as market analysis on key topics related to R&D Strategy and Technology in the life sciences industry. She addresses aspects such as the role of digital transformation in discovery research, e-clinical ecosystems, the role of NLP, AI, ML, DL, RPA, in transforming drug development, precision medicine, pharma R&D execution and strategic outsourcing models.

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