



Transformative Go-to-Market and Data Strategies in the Italian Healthcare Industry

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Today, pharmaceutical and consumer health companies are reflecting on how to adopt a more customer-centric approach and gain insights from the market to make data-informed decisions.

In fact, both are commonly recognized as key drivers of growth and innovation. We have investigated how Italy-based and Italian affiliates of multinational pharma and

consumer health companies shape their organizations to manage these two domains at best and to positively impact their businesses.

Key Reflection Questions for Industry Leaders

One-to-one conversations with leaders from selected companies have been crucial to reflect on key questions, including:

- How to develop a data-first mindset and ensure that data is used as a central element in decision-making, by democratizing access to high-quality, actionable data?
- Where to find credible and real-time data to understand the market and to make commercial and marketing actions more clearly measurable?
- How to develop an innovative go-to-market model to boost customer orientation capabilities, prioritizing the customer experience, understanding their needs, and delivering tailored solutions through personalized, omnichannel strategies?
- How to create deeper connections with your audience while optimizing outreach and engagement methods to boost both acquisition and retention?

Different Approaches to Organizational and Structural Transformations

The comparative analysis we structured based on these conversations revealed that most companies have implemented, or are about to implement, an organizational and structural transformation to become more data-driven and customer-centric.

However, companies greatly differ in their approaches, and there is no single best-practice model. Not surprisingly, consumer health businesses are more advanced in implementing these transformations, while traditional pharma is still lagging behind.

In both cases, marketing teams or dedicated centers of excellence are responsible for managing day-to-day marketing activities and digital transformation initiatives, while leading also more strategic efforts; yet there is often a tendency to lose sight of the broader strategic picture. This gap creates a need to rethink and more radically redesign companies' strategic go-to-market vision.

Part of this redesign involves also creating partnerships with key stakeholders in the ecosystem such as pharmacy chains and hospitals. Consumer health and pharma must further expand the network of partnerships to collect and make use of more data for marketing and business intelligence purposes. The Italian market represents a fertile ground for implementing creative partnerships with stakeholders that have traditionally been overlooked, even though as of now these endeavors are not yet part of a broader strategy. This is due to a number of causes, including a limited number of pharmacies chains on the territory, and the lack of capabilities within the companies to make the most out of these data.

This point relates closely to another critical topic: the ability to gather reliable, relevant data from the market and use it effectively to analyze trends, forecast sales, and conduct business intelligence. Responsibility for these functions typically falls to the Marketing department or, if it is present, to the Commercial Excellence team. However, there is an emerging trend in the industry toward hiring or promoting strong data leaders at higher levels within organizations.

Future Leadership Competencies and Partnerships

As of today, the integration of different data sources into a coherent structure that can generate more accurate forecasting figures is not a market reality in neither Health or in Consumer

Health companies; achieving this will require a combination of external talent and a strong strategic push from companies' leadership. Similarly, the creation of strategic alliances with non-traditional stakeholders (such as hospitals and insurance companies) would be a "market first" effort, to be led by a joint effort from the current sales leaders and new strategic roles.

Looking forward, pharmaceutical companies have an opportunity to build new competencies linked to media management, omnichannel strategy, and sales force excellence that are currently more consolidated in consumer health companies.

While building their own path to excellence, to make the most out of existing external best practices, pharmaceutical and consumer health companies might also rethink the type of leaders they attract. To get up to speed with existing best practices in marketing and go-to-market in a relatively short amount of time, and to reach new standards in terms of data strategy, quantitative intelligence, and strategic alliances, companies need bold and ambitious leaders that are fully engaged and committed to implement visionary organizational and cultural changes.

In general, both pharmaceutical and consumer health companies could benefit from the injection of competencies from different industries, which are already at a more advanced step of this transformation, to both improve in gaining insights from the market, in adopting more customer-centric go-to-market models and in implementing advanced digital strategies.

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