

In their words: Healthcare looking to the future

Amgen
Boots
Daiichi Sankyo
Elekta
GSK
Novartis
Pfizer
Piedmont Healthcare
Quest Diagnostics
Saudi German Health
SEHA



Siegel+Gale

Overview

“In our words,” Siegel+Gale’s ongoing Chief Marketing Officer study series, surveys marketing leaders across diverse industries with an eye to the many impacts and changes wrought by the Covid-19 pandemic. Our premier study looked across industries at reactions and agile moves in the earliest part of the pandemic, and our next publication specifically focused on enterprise technology firms, an industry at the forefront of facilitating pandemic-life driven changes and helping other brands navigate the crisis. These studies gave us a view of how leaders were both pivoting in the initial stages of Covid-19 sweeping across the globe, as well as beginning to turn toward looking further into the future as the dust began to settle.

In this next installment, we once again turn to our community of Chief Marketing Officers and brand leaders, this time from the healthcare industry. Navigating the pandemic to-date on the front lines, healthcare brands and business have arguably seen some of the most considerable changes, outside and in, over the past

nearly two years. Through our conversations, the profiled set of business leaders share insights on what has changed in the industry from their perspective, what will be transient vs. sustained, how critical marketing has been throughout this process, and what role brand purpose has played in facilitating the quick decision-making often needed.

Since 1969, Siegel+Gale has been working to help companies harness the transformative power of simplicity to battle complexity and build and amplify successful brands. We’ve had the privilege of partnering with some of the world’s leading B2B and B2C organizations across sectors, from technology and financial services to healthcare, consumer goods and beyond.

We hope that by sharing this research and story, we can demonstrate the resilience we have witnessed on display and highlight the shared optimism we have for the future. Mirroring our own values as an organization, let’s emerge together smarter, nicer, more unstoppable, and most importantly, more inclusive than ever.

11

Marketing leaders

5

Countries



30 - 45 minute interviews

Topics covered

Personal experiences

Impact on day-to-day work

Effects on marketing approach + planning

The role of brand

Lessons learned and future implications

Brand leaders

Amgen



Lisa Tollman
Head of Marketing
Operations & Innovation
(Former)

Boots



Pete Markey
Chief Marketing Officer

Daiichi Sankyo



Kim Wix
Executive Director
Corporate
Communications

Elekta



Grégory Trausch
Chief Marketing Officer

GSK



Kerry O'Callaghan
VP Corporate
Reputation and Brand
(Former)

Saudi German Health



Rami Zahran
Chief Marketing &
Communications Officer

Novartis



Maria Jobin
Executive Director,
Corporate Brand
Strategy

Pfizer



Deborah Scarano
Vice President,
Senior Launch Navigator

Piedmont Healthcare



Douwe Bergsma
Chief Marketing Officer

Quest Diagnostics



James Humphreys
VP & Chief Marketing
Officer

SEHA



Amer Aïdi
Group Marketing &
Communications Director

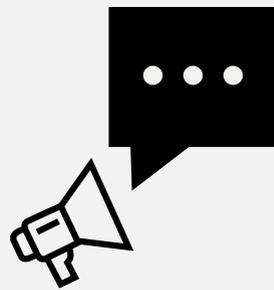
Themes



1.
**Renewed relevance for
healthcare brands across
the ecosystem**



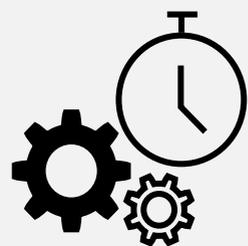
4.
**An end-to-end, individualized
and personalized future of
healthcare**



2.
**Technology facilitating
opportunities for increased
efficiency and innovation**



5.
**Disruption to previously
accepted ways of working**



3.
**The acute importance
of empathy and human
connection**

Renewed relevance for healthcare brands across the ecosystem.

Healthcare brands are demonstrating their value to society as needs become more salient. Brands who lead with purpose and tell their story will reap the rewards with customers.

Theme 1



Never has the provision of healthcare been so front of mind for so many. The pandemic has highlighted not only brands in the ecosystem most known and interacted with by consumers, but also the often-unknown work executed by organizations involved in other parts of the sphere of healthcare.

From pharmaceuticals and laboratories behind vaccine development and testing, to hospital systems, government health services, and dedicated Covid-19 testing centers, healthcare has become more visible and better understood. Although devastating to families and societies across the world, the Covid-19 virus has helped highlight the importance of organizations who support health and well-being, and have risen to the challenge to innovate for a global cause. Additionally, more than one business leader remarked on its impact of positive change in the spirit and morale of employees across functions.

Although many regional differences exist in healthcare brand deployment and consumer or societal relations, corporate pharmaceutical and diagnostics brands in many markets are

for the first time becoming household names. This presents an opportunity for a broader brand set, armed with a genuine purpose, to strategically drive decision-making and communicate positive impact to customers. While many brands are yet to take advantage (with understandably lots on the agenda over the last year or so), the importance of building a meaningful corporate brand is ever clearer.

The unfortunate flip side of the increased salience of healthcare is its parallel acceleration as a topic for misinformation and confusion. Covid-19 has facilitated self-diagnosis and gerrymandering to compound infection and death rates in a time of booming digital communication from audiences both expert and amateur. For us this elucidates a newfound level of responsibility that healthcare brands have to help customers access the most accurate information, the right services and treatments.



The pandemic has changed perception for the whole industry in a positive way in general, creating opportunities to connect on a deeper level with associates, customers and other stakeholders. Brand purpose has become more relevant than ever for us and even the tone of voice has changed, becoming more authentic and less corporate.

Maria Jobin

Novartis

We observed a rapid acceleration and broader understanding of the work we do in biopharmaceuticals, the good work for the health and wellness of society. And even though Pfizer has been bringing solutions for human health for more than 150 years, this situation was different, it brought the general population closer into what we do every day, our purpose as a company, and how we can deliver for them.

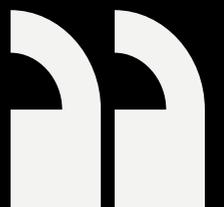
Deborah Scarano

Pfizer

I believe what it will mean moving forward is an increased expectation on information. I think self-diagnosis testing kits on many things will be key, and again, the way we've had pregnancy tests obviously for many years, and now Covid tests, we'll now see many others become available.

Kerry O'Callaghan

GSK (Former)





Cancer doesn't stop because of a pandemic. What's great is we had the right compass in the beginning. The world continues to be uncertain, but our people keep each other in mind, and the patient in mind. We have always had our core beliefs which helped make everything easier and made the business more resilient. Our crisis response team met nearly every day – Head of HR, Head of Comms, Head of Facilities and others. A really good and cross-collaborative team.

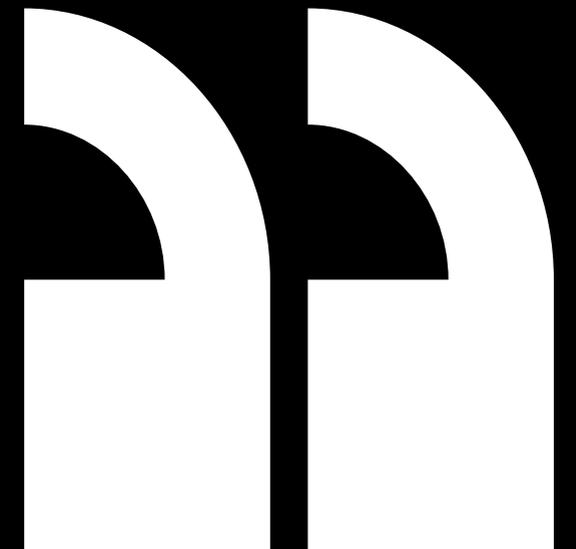
Kim Wix

Daiichi Sankyo

An important question for us has been, 'Can we articulate better how we contribute to the society?' Of course, we're running a business, and we generate revenues, but that's the nature of any business. It's not what matters here. What really matters is for people to understand why we're here and what we do. That might not have been so clear before.

Grégory Trausch

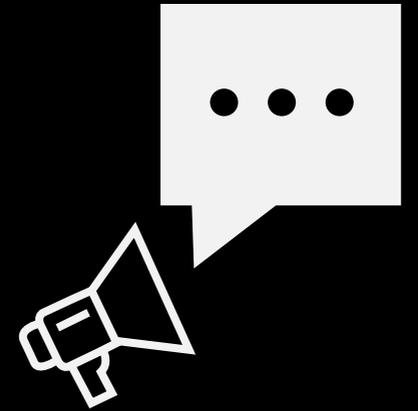
Elekta



Technology facilitating opportunities for increased efficiency and innovation.

From remote working to diagnosis and consultation, the importance of digital capabilities will accelerate further in a world beyond Covid-19.

Theme 2



Modern society cannot function without access to medicine. To ensure access throughout the pandemic, technology has been key in facilitating the significant and necessary changes in healthcare services. Online access to advice as well as delivery of medicines was quickly adopted by consumers. Many elderly or immunocompromised people avoided areas with potentially high Covid-19 infection rates, from hospital and medical settings to general retail spaces. A plethora of healthcare organizations understood that this new behavior presented novel opportunities to optimize workflows and offer services such as telehealth consultation.

From booking appointments to online treatment, digital transformation is further accelerating across the healthcare industry .

Technology is the catalyst to more seamless experience by removing pain points from the patient pathway. Ultimately, these changes help to create a transformation roadmap for progress around key metrics of efficiency and reduced time to treatment and resolution. This allows healthcare companies that create or distribute life-saving treatments more flexibility to focus on what drives innovation.

As the rate of digital transformation increases, and the nature of the pandemic itself continues to shift, the risk of “misses” in new platforms and products is high. To mitigate, companies should define fundamentally what being user-led means to them, as opposed to taking a technology-led approach to change programs.



It's [the broader healthcare ecosystem] definitely evolved in the last 18 months. I think for us, we've kept all of our stores open throughout the pandemic because we're an essential service. We've grown our dot com business by a huge percent in the last year, for obvious reasons. And so, we've seen it at both ends of a growing digital business.

Pete Markey

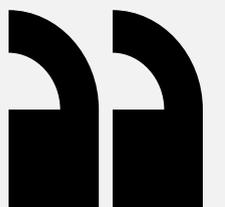
Boots

During the peak of the pandemic, when lockdowns were imposed, the availability of digital solutions was extremely important – for example as a healthcare group we had to almost overnight be one of the first to introduce telehealth consultations. It helped elderly and chronic patients receive the constant medical care they needed and remain unaffected by mobility restrictions and at the same time kept them safe from being exposed to Covid-19.

Telemedicine was something that we'd been talking about for years, but there was slow movement across the board due to market needs, however when the situation required it, many healthcare providers had to activate it overnight. Now that we've activated it and have realized that there's appetite for it both from our end and from patients, we want to expand it further. If there's a spike in demand, we need to meet it as an organization, as does any organization. The Covid-19 pandemic has definitely been a huge catalyst on this front.

Rami Zahran

Saudi German Health





Before the pandemic, we were working in our normal way, engaging with customers, doctors, payors, lots of face-to-face engagement. Overnight we went virtual. Technology made that happen.

Kim Wix

Daiichi Sankyo

It's not just the remote worker, but it's the remote patient and the remote physician, as distance enabling technology has come to the foreground. Another dynamic, more centred within marketing, is the rapid evolution that we've seen, in how we connect, communicate, and engage all customers through digital technology.

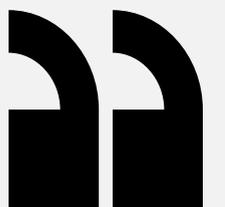
James Humphreys

Quest Diagnostics

A big theme for me is the role of technology in healthcare, whether that's through wearable tech, monitoring health, those sorts of things. The pandemic has accelerated the trend of people looking after their own health and well-being, whether it's mental or physical well-being. This is coupled with the use of big data and AI and how you can look at trends and use that data to help accelerate drug or medicines discovery in the future with clinical trials. So, I think that whole sense of how tech is being used, which again, was always there, has just shot forward.

Kerry O'Callaghan

GSK (Former)



If you were to look at the year ahead and think about a short-term versus long-term focus, where would you put yourself on that spectrum?



Thinking about the next couple of years - not necessarily about your own organization, but looking more broadly at the world - how confident do you feel in the future?



Where would you put yourself against the statement “we have a clear brand strategy going forward”?



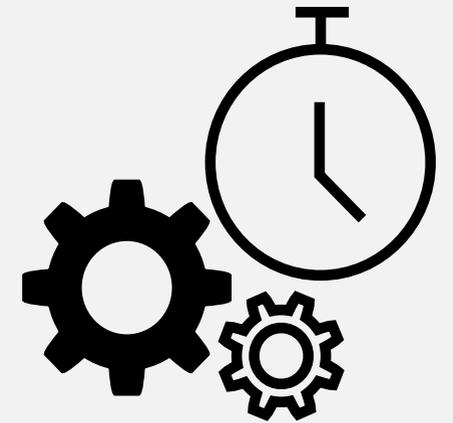
Where do you put a rating against the statement - we have a clear marketing strategy going forward?



The acute importance of empathy and human connection.

As consumer expectations evolve, so must the humanization of healthcare.

Theme 3



The pandemic has impacted the lives of everyone – personally, professionally, existentially. This has driven many brands to significantly shift the tonality of their communications – one of the most prominent messages we have heard over the past year speaking with diverse clients and other business leaders. Healthcare companies are no exception, but rather central to this update in expression of their brands.

With many families and individuals deprived of vital human contact during the crisis, expectations in healthcare services have shifted too. While medical and scientific expertise are as important as ever, so is a softer and more human-

centric approach, an appreciation of the emotional impact of what we've been living.

Often, pharmaceutical companies drive scientific enquiry, development and communication working off the assumption that the human benefit of their work is simply understood. Outsiders or newcomers to the industry sometimes better see this communication gap and the benefit of a care-first approach. It is likely emotion will continue to play a bigger part in healthcare services and the communications delivered by the brand.



We ran a hashtag through the last year-and-a-half, 'prescribe kindness,' which tonally felt like just where we wanted to go. Kindness was such a key word around; everyone was finding things hard in their own particular way.

Pete Markey

Boots

It was that person-to-person care and that showing of love and family care that people were able to express that was truly important. This human connection is what people need and want specifically from healthcare.

Rami Zahran

Saudi German Health

This is what we stand for, people, the human element, and I think this has come to life in how the management of the company has looked after our own workforce as well. Nobody has been laid off through the pandemic.

Grégory Trausch

Elekta

Being the backbone of the healthcare sector doesn't really say much, honestly. That element of putting the humanity in healthcare, that's always what's been missing. What I'm trying to change is exactly that, so when we talk about our patients and putting patients at the center of everything we do, what does that really mean?

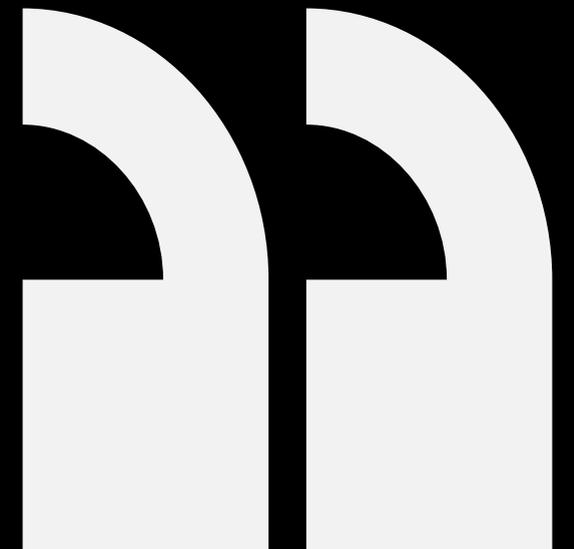
Amer Aidi

SEHA

When it comes to vaccination, we have seen family members devastated because of choices their loved one made and know that their severe illness or even death was something that could be prevented. So, we've become very direct in our communications, very person-to-person and with a higher sense of urgency than ever before. Now when we talk about ongoing health maintenance like flu shots and mammograms, we make sure to sustain the human element.

Douwe Bergsma

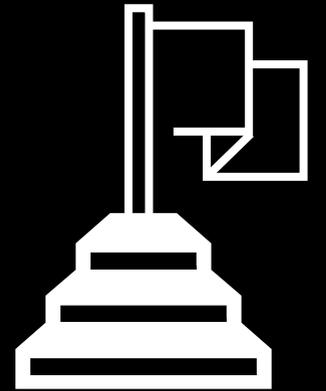
Piedmont Healthcare



An end-to-end, individualized and personalized future of healthcare.

With a fully integrated ecosystem, an end-to-end personalized journey focuses on prevention and then treatment.

Theme 4



During the pandemic we've seen the transition of many services to the digital world. In that time, we have also seen healthcare services expand beyond hospitals and reach further into communities, reducing barriers to access and increasing safety for consumers and providers alike.

The pandemic has also provided valuable insight into the importance of a single ecosystem built around patient well-being. This allows for quicker diagnosis and recovery times, and overall, easier access to the necessary care. As preventative care becomes a higher priority, consumer expectations will continue to shift towards this more integrated model, both vertically and horizontally. For brands this means a need to adapt to the changing landscape, driven by the needs of patients and consumers in the healthcare ecology.



Health care has become more seamless, more integrated. You have easier access, it's hassle-free, and the reasons to believe that are some of the technology tools that we have. At the same time, our goal is to have an enhanced physical presence. We're expanding the communities in Georgia that we serve as well as growing technology that allows us to serve regardless of footprint, like telemedicine.

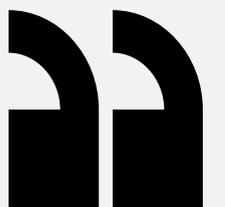
Douwe Bergsma

Piedmont Healthcare

I'm sure a lot of people realized during the Covid-19 pandemic, that when you keep a patient within the same ecosystem, they are able to get the care they need more quickly, thus a quicker recovery. Today, Saudi German Health is much more than a hospitals group, we are a healthcare group, and that's in line with modern trends and best practices happening across the world. We have created an ecosystem built around our core offering, which is medical care, and it's supported by hospitals, clinics, pharmacies and an academy. This is how we have progressed from a hospitals group to a healthcare group.

Rami Zahran

Saudi German Health



Customers are also learning to operate in this new world. It will be constant change moving forward. We live, we learn, and we adjust, and the problem is it's not just on our side, the other parties we are interacting with are adjusting too, so we are going to have to make what we do compatible with moving targets and interdependencies.

Grégory Trausch

Elekta

I would offer that in amongst all this digital information, it can be easy to lose sight of the specifics of who your customer is. I still maintain that customer engagement, truly understanding customer need, at times co-creating with your customer, is a critical adjunct to all that great digital information. Healthcare should not be seduced by the opportunity of technology and digital information, notwithstanding how critically important that is. I think the win is in delivering to customers in a holistic way - leveraging technology to understand the basics of when and on what the individual engages in a personal way, supplemented by deep understanding of what is most valuable to the customer achieved through observed or live interaction.

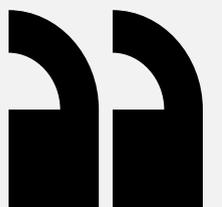
Lisa Tollman

Amgen (Former)

For customers, a more well-rounded omnichannel environment and engagement opportunity for healthcare has become very real now, and very possible. That is inspiring. Pfizer is focused on making this beneficial for all our customers, to improve and enhance their experience, and to pivot our own organization to respond. We see an even greater expectation to get the relevant information to the customers who need it, in the right way to help them make timely decisions about their healthcare, and that's what we want to do. They'll have the content they need, when they need it, where they need it, how they need it, and in a way they can understand it, better and faster than before.

Deborah Scarano

Pfizer



Disruption to previously accepted ways of working

Traditional timeframes challenged, speed to market increasing, industry boundaries blurring, and collaboration more important than ever.

Theme 5



The pandemic has hugely disrupted traditional ways of working. The stories and learnings of remote work and collaboration come as no surprise anymore in today's discourse. In impacts on go-to-market, for pharmaceuticals in particular lead times to develop medicines are being re-evaluated, and these lessons learned will pollinate other areas of the healthcare ecosystem. Often, drivers of digital transformation are out-of-sector challengers to an industry. Healthcare, like many other spaces, is now seeing disruptors in the market challenging the foundations of an industry that has typically been isolated from drastic change.

As healthcare competitive sets expand, new market entrants are demonstrating their value within a period of crisis and change, winning share from traditional players. While smaller organizations present a robust challenge, huge organizations such as Google – providing healthcare advice and support – and Amazon Care – providing a full-service network – present a real challenge to traditional brands.

Going forward, it is critical for organizations to think beyond immediate competitors and learn from new entrants. One way to stay relevant – look to a future of greater collaboration among healthcare providers and partners, in both volume and variety.



With Covid the balance of power has shifted a little. 'The future is here and it's going to continue to evolve in an increasingly integrated way.' If we don't have a razor lens on the integrated future, and how we play within it, then we're in trouble.

Lisa Tollman

Amgen (Former)

Our drive to bring breakthroughs that change patients' lives is our constant, and has grown even deeper now. Our heightened focus to pursue all the appropriate ways to deliver on this as rapidly as possible will endure. We will learn (are learning) from what we've done with the vaccine, to be able to do that with other lifesaving or critical medicines.

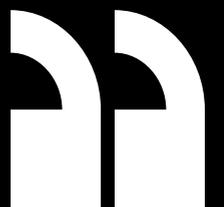
Deborah Scarano

Pfizer

I think that the pandemic has taught us that the way that things have been running for the past 17 years [since the organization was founded] needs to be drastically improved, just put it that way.

Amer Aidi

SEHA



Another very positive change we have seen was a great collaboration across the industry to help find solutions. Companies opened their libraries of compounds, shared knowledge, expertise, tools, production sites, etc. this was quite inspiring. It has shown that collaboration and partnerships make a real difference to accelerate innovation for the good of society. I really hope we will see more of these cooperations in the future.

Maria Jobin

Novartis

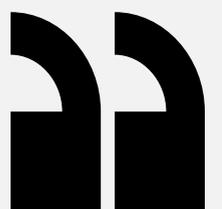
Consumers in healthcare used to be patients who would come into a waiting room, sign a paper sign-in sheet; pick up a magazine to read, and would just expect to tolerate long waits to see a clinician. That's been changed radically with digital technology, and it has only increased through the pandemic.

James Humphreys

Quest Diagnostics

In summary, in our third instalment of 'In their words,' a diverse set of healthcare brand leaders has given rich color to extraordinary times in their industry, broadly – from vaccine development to diagnostics to consumer healthcare and retail. The story for healthcare brands – while certainly dynamic, but perhaps more accurately, frenetic – is one of renewed relevance and opportunity to express the best of who they are and what they offer to society.

This sector is certainly looking to the future, propelled by the forces of people, their needs as customers, and their tech and tools, to play an ever-more-crucial role in human advancement.



Thank **you.**

We are grateful to these 11 CMOs for being so generous with their time, experiences and insights, especially given the challenge of the current situation.

About

We believe in the power of simplicity. At Siegel+Gale, we own it, defend it and live by it.

We're a global brand strategy, design and experience firm. With unlimited imagination and a dedication to the facts, we build brands that cut through the clutter—and unlock success for our clients.

We are committed to keeping our community engaged through our virtual roundtables, practitioner-led webinars and thought leadership content.

If you would like to join an upcoming conversation, visit events.siegelgale.com

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