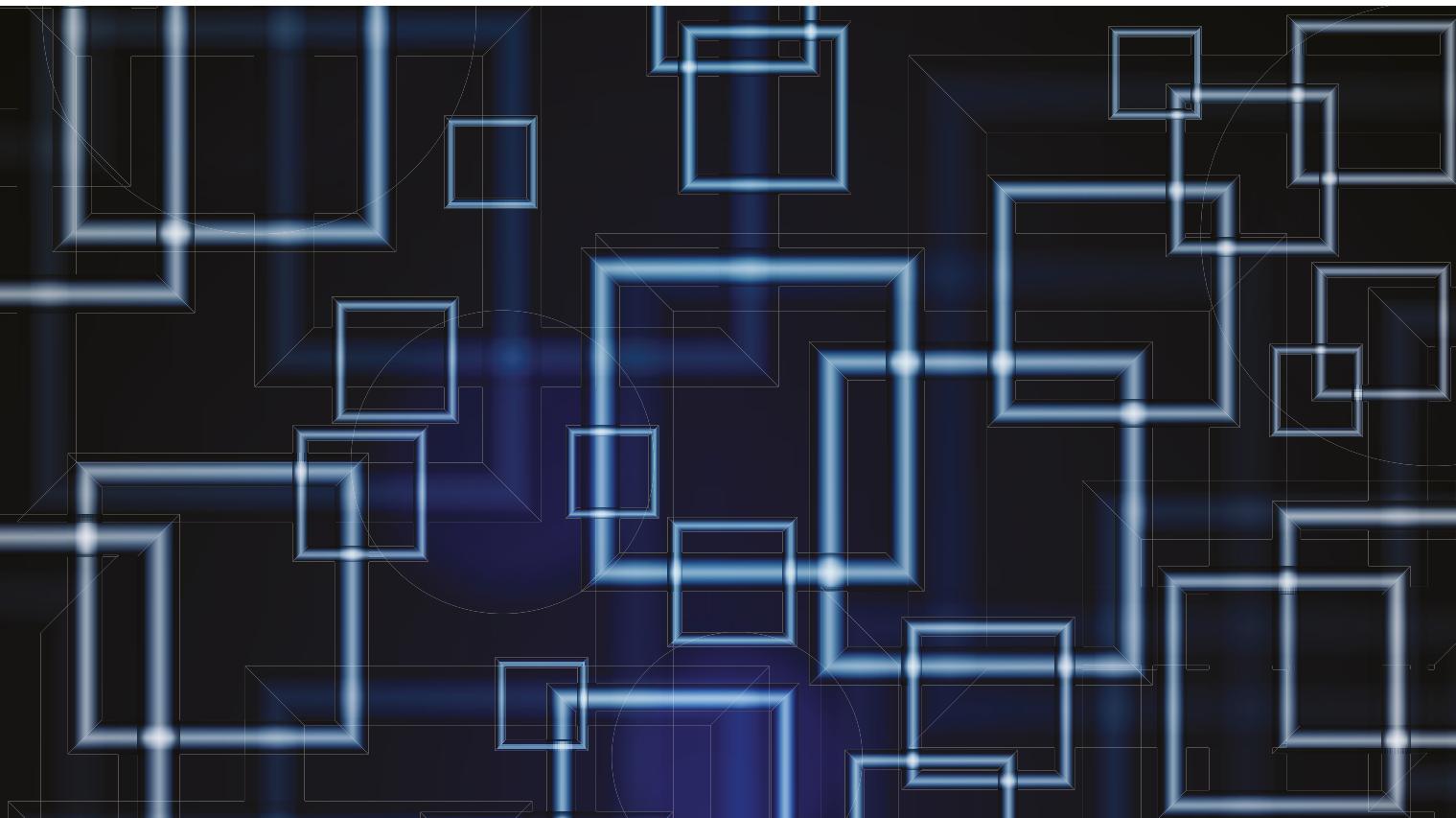




# Successful product launches depend upon market insights



Pharma and medical device companies use real-world insights and decision excellence to transform the product launch process

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## Executive summary

A revolution is taking place in global healthcare data, with an explosion of new, publicly available sources changing how healthcare organizations serve patients. This dramatically expands the pool of information available for meaningful business insights. For the pharma and medical device industry, major competitive advantage can be created by those companies that unlock the value hidden in this information, especially that contained within real-world data\*. In today's increasingly complex and competitive world, meaningful, actionable insights from harnessing global healthcare data will make the difference between average and excellent commercial outcomes. New technology now makes it possible for pharma and medical device companies to dramatically improve their approach to accessing, analyzing and deriving meaningful insights from big data, delivering the most important differentiator in this information age: robust decisions that drive better commercial results.

### **The three steps to achieving decision excellence from strategic market insights:**

#### **Step one: Combine and increase your access to data**

Incorporate external, public data into views of healthcare professionals (HCPs), healthcare organizations, and other elements of the healthcare system.

#### **Step two: Go beyond customer relationship management (CRM)**

Think beyond a multi-national CRM deployment to help the field force be more productive. You deliver more actionable information to them to make their time and meetings more productive and their conversations more engaging and useful to the customer.

#### **Step three: Make real-world data work for you**

Explore real-world data sources for more than epidemiology. Look for how data available in your market can help your commercial teams gain competitive advantage and actionable insights.

\*Data collected outside the constraints of controlled, randomized clinical trials to evaluate what is happening in normal clinical practice. Example sources: medical records, healthcare system records – practices, hospitals, networks, public health and epidemiology, claims, prescriptions, purchases, individuals (wearables, apps, phones).

# Data maturity underpins market insights, decision excellence and commercial success

The success of the critical commercial decisions made every day by pharma and medical device companies is measured by the results they deliver in the real world. The ability to look at the market, the competition, and patient outcomes, and identify the critical few things that will differentiate the brand from the competition in a relevant way is key to the success of a global product launch. It should be no surprise then that the level of real-world data available when making those decisions is a key determinant of success. In other words, data maturity provides those key market insights that inform decision excellence and consequent commercial success.

In this way, big data and real-world data are transforming the entire healthcare industry, as they are the principal means by which an outcomes-centered approach can be defined and measured. Prescribers and payers have tools to assess the true clinical and cost-effectiveness of treatments, and the drug or device manufacturer's resources can be aligned accordingly around those interventions that deliver real value.

The volume of real-world data is growing at a rapid pace; in the last three years more data has been created than all the data in the preceding years of recorded human history,<sup>1</sup> but collectively it represents a varied and wide-ranging collection of data in structure, breadth, and accuracy. While many health systems – national and regional – provide public access to such data, in reality real-world data can be difficult to find, navigate, and integrate into a company's business processes.

Today, such data requires the skills of analysts and data scientists, using advanced queries and manual manipulation, to make them readable and to extract their relevance. Furthermore, its presentation is typically oriented towards healthcare professionals (HCPs) and payers rather than leaders of global brand launches in pharma and medical device companies.

## Measuring data maturity

If the proliferation of data can be thought of as an ever-expanding landscape, then data maturity is perhaps best viewed as the peak of the highest mountain. Most life sciences companies are struggling to manage their own data: building an integrated data warehouse that combines, for example, internal information

### Data maturity and decision excellence

Life sciences companies are currently struggling to make sense of the enormous amount of data being generated in healthcare. The ability to identify, integrate, and interrogate such data to deliver business critical insights has become a key determinant of success and can deliver a unique competitive advantage.

**Data maturity** defines how advanced companies are in terms of the breadth of data sources available to them. It can be represented as an evolutionary curve, starting with internal data, before adding external vendor data and culminating in the most mature companies utilizing the ever-increasing mass of publicly-available real-world data, or big data.

**Market insights** are the unique output of the advanced and predictive analytics applied to global healthcare data. The more "data mature" a company is at collecting and connecting multiple data sources, the more sophisticated and significant its derived insights will be.

**Decision excellence** parallels the position of a company on the data maturity and market insights curve. By applying analytical technologies and healthcare expertise to the available data, better insights will be produced and better business decisions will be made. Decision excellence is therefore driven by data maturity.

These decisions will include more detailed segmentation of key stakeholders, greater influence with payers, and a more accurate portrayal of the local patient profile in any given disease, to provide just a few examples. As data maturity continually evolves, new data sources lead to new questions, new insights uncover additional market opportunities, and compelling demonstrations of value can be drawn from the evidence these new insights generate.

from different systems such as enterprise resource planning, customer relationship management (CRM) and market data, e.g. product sales and prescriptions.

<sup>1</sup>Schmidt (2010). Every 2 Days We Create As Much Information As We Did Up To 2003, <http://techcrunch.com/2010/08/04/schmidt-data> (accessed June 10, 2015).

## **“Big data + analytics could save the US healthcare industry \$300 billion or more”<sup>2</sup>**

The challenge of data analytics in this information age is causing senior industry leaders to reconsider the true core competencies needed within successful pharma and medical device companies.<sup>3</sup>

The organization of internal data can be seen as the first step up the slope of the data maturity curve, as illustrated in Figure 1. However, once companies have arrived at this point, they start to realize that what they thought was the top of the mountain – the completion of the traditional data warehousing concept – is just the foothills of what turns out to be a much taller peak. Reaching the summit requires embracing the true challenge of big data and real-world data – integrating often unstructured, but incredibly valuable, external data sources with existing internal information.

Assessing where your company is on the data maturity curve is an essential first step to planning how to achieve new heights – enhancing data maturity and decision excellence.

### **Stage 1: ‘Reactive’ data maturity**

Companies at the early, reactive stage of data maturity rely predominantly on internal information, gathered through their own resources, on which to base business decisions. These sources typically include:

- Prescriber feedback/market intelligence captured from sales forces through CRM systems
- Payer feedback from specialist market access teams
- Clinical trial data derived from the company’s own clinical trials

At this stage, decision excellence is extremely limited, as essential market insight and competitive intelligence is often missing.

Companies at this stage are blind to important details about the healthcare landscape.

<sup>2</sup>McKinsey (2013). The big-data revolution in US health care: Accelerating value and innovation, [http://www.mckinsey.com/insights/health\\_systems\\_and\\_services/the\\_big-data\\_revolution\\_in\\_us\\_health\\_care](http://www.mckinsey.com/insights/health_systems_and_services/the_big-data_revolution_in_us_health_care) (accessed June 10, 2015).

<sup>3</sup>Forbes (2014). Data Analytics Has Big Pharma Rethinking Its Core Competencies, <http://www.forbes.com/sites/ey/2014/12/22/data-analytics-has-big-pharma-rethinking-its-core-competencies/> (accessed June 10, 2015).

### **Stage 2: ‘Proactive’ data maturity**

Many companies have advanced as far as the proactive stage on the data maturity curve, where they purchase external vendor data to provide a much broader view of the markets in which they operate, including: targeted information on prescribers and payers, disease area dynamics and unmet needs, positioning of competitor products, and the performance of their own products in the context of the overall market. The additional inputs at this stage typically include sources such as:

- Sales data (own and competitor products)
- Prescription data (own and competitor products)
- Prescriber and payer profiles/contact information
- Prescribing pathways
- Longitudinal treatment information
- Patient outcomes
- The structure of the healthcare system

While the decision excellence of companies at this stage has undoubtedly advanced, external vendor data can be expensive and often misses vital information when it comes to real-world data.

### **Stage 3: ‘Visionary’ data maturity**

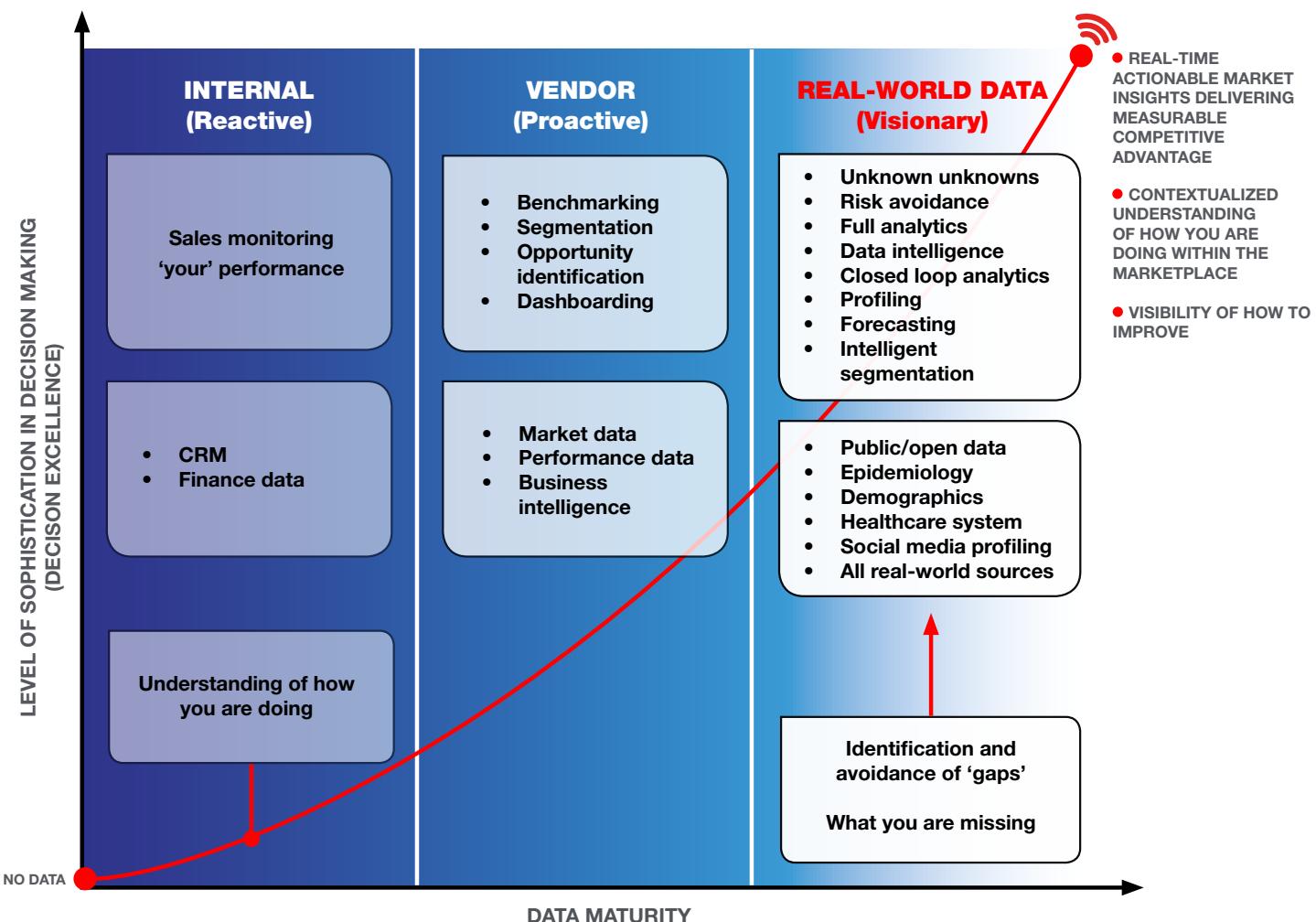
Those companies that are investing to advance to the visionary stage of the data maturity curve are gaining major competitive advantage. The innovators are executing more successful global product launches, as they complement internal and vendor data with highly insightful publicly-available real-world data, such as:

- Population demographics
- Epidemiology data
- Rich prescribing data
- Disease incidence and prevalence
- Treatment guidelines
- Outcomes from various care protocols
- National audit information

These data come most readily from integrated healthcare systems such as the UK’s National Health Service, but rich real-world data can be acquired in all markets, e.g. insurance companies and electronic health record vendors in the US. To illustrate the growth here, in 2013, 78% of office-based physicians in the US used an electronic health record system, up from 21% in 2004.<sup>4</sup>

<sup>4</sup>CDC (2014). Use and Characteristics of Electronic Health Record Systems Among Office-based Physician Practices: United States, 2001–2013, <http://www.cdc.gov/nchs/data/databriefs/db143.pdf> (accessed June 10, 2015).

Figure 1: The data maturity curve for pharmaceutical companies

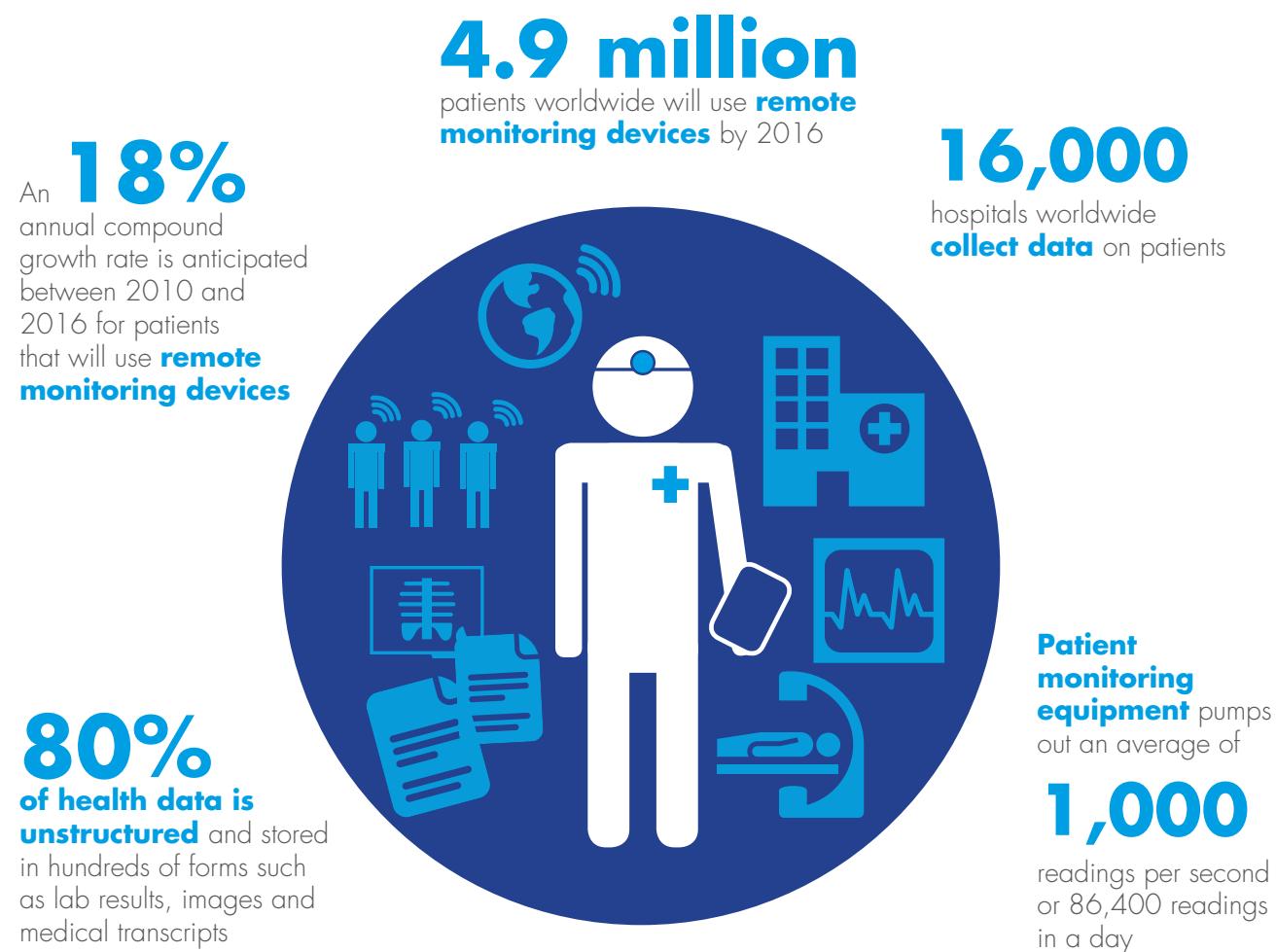


Looking at the publications space, MEDLINE analysis shows the growth in the volume of online manuscripts, including:

- 58% increase in annual diabetes-related publications, from 10,596 to 16,776 over 10 years (2004–13)
- 128% increase in annual obesity-related publications, from 5,087 to 11,589 over 10 years (2004–13)
- Average of 40,732 new publications being launched every year over the past five years (2009–13)

These sources are just the tip of the data iceberg available to those life sciences companies reaching visionary data maturity. The scale of the big data healthcare revolution is illustrated in Figure 2, where IBM studied the volume of patient information now being created, including a projected 4.9 million patients globally using remote monitoring devices by 2016.

Figure 2: The growth of patient-centric big data in healthcare<sup>5</sup>



## A peak of insights

The amount of publicly-accessible real-world data is staggering, but it cannot always be easily accessed due to the sheer volume of sources that must be sifted through and the unstructured nature of the data. In addition, where there are inconsistencies in the data, each data point must be matched to find the overlaps and create a single source of verifiable information.

While challenging, these obstacles can be overcome. To continue the mountain analogy, technology is now available to clean and link the many disparate sources of real-world data, acting like the essential climbing tool companies need to scale the data maturity slope towards this

visionary peak. The rewards are many for those companies ascending to such heights, including better customer engagement, improved market understanding and, critically, increased delivery of value from their products to the healthcare markets and patients they serve. Their perspective is formed at a level of data maturity providing trillions of data points pieced together to form a clear picture of the market, with the resultant decision excellence driving educated courses of action.

<sup>5</sup>IBM (2015). Big Data in Healthcare: Tapping New Insight to Save Lives, <http://www.ibmbigdatahub.com/infographic/big-data-healthcare-tapping-new-insight-save-lives> (accessed June 10, 2015).

### Deriving valuable insight from disparate data – a case study

As an example of the quantity of data available and how it can be combined to achieve unique insights, Zephyr Health developed a special edition of its insights platform, taking in a wide range of disparate data to present relevant learnings for a specific focus (launched June 3, 2015). In this case delivering top-line intelligence for one disease area in one country: diabetes in England.

#### Source websites:

- Office for National Statistics
- Health and Social Care Information Centre
- NHS England
- Data.gov.uk
- Public Health England
  - Subset of www.gov.uk
  - Public Health Outcomes Framework



**14,000**

Excel/spreadsheet files



**623,000**

Web pages



**19,034**

PDFs



**220+**

Statistical publications annually

#### Total data analyzed:

Zephyr Health surveyed over 200MB-worth of spreadsheet data

For 2014 alone

**17GB**

of prescription data tables  
were analyzed



**121 million**

rows of data

Covering over

**1 billion**

items prescribed by general  
practitioners (GPs) in 2014

**350**

different products across

**114**

brands/generics

#### Number of records created:

**21**

data points about **211**  
Clinical Commissioning Groups  
aggregated from all websites

Addresses and locations mapped  
of all GPs (**7,954 practices**),  
hospitals (**192**) and Clinical  
Commissioning Groups (**221**)

**7**

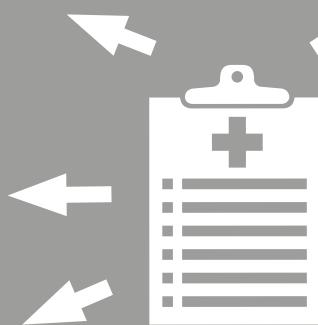
data points about  
diabetes in **192** hospitals

**3.45 million**

patients with diabetes  
recorded, with counts shown  
for **1,956** postcode districts

**2**

data points about **7,955**  
GP practices



### Insights made available from data

- Geographic patterns, clusters and trends in prescribing patterns.
- Costs by drug type and company by location, i.e. Clinical Commissioning Group.



### Sample insights from the platform:

In the latter half of 2014, some 51 million items were prescribed for diabetes patients, with a net ingredient cost of 372 million GBP.

#### In 2013/14 in the UK:

Patients with diabetes have a

**400%** additional risk of being admitted to hospital to have a major amputation\*

For minor amputations (below the ankle), this increases to

**827%**

Across England, patients with

diabetes have a **64%** additional risk of having a stroke\*

University medical practices are among the lowest prevalence; most below



**262** practices (3.3% out of 7,955) have >10% prevalence. Cities with the largest number of high prevalence practices are:

- London = 59
- Birmingham = 47
- Leicester = 23
- Bradford = 15

Among GPs the worst diabetes prevalence is

**18.5%**

Diabetes prevalence ranged from

**3.5 to 9.2%** across **221** Clinical Commissioning Groups

Every month in 2014, **100 million** tablets of metformin (500 mg) were prescribed, with a total weight of 50 metric tonnes

The special edition Zephyr Health solution analyzes diabetes in England, bringing together otherwise disparate data to enable insights to be simply and easily realized. It is capable of going even further pulling in additional data such as social media, publication data, sales data, cost of care, detailed prescription information, CRM data and much more, with each additional data set increasing the complexity and breadth of decision excellence which can be achieved.

\*National Diabetes Audit 2012/2013.

# Insights for commercial success

## Achieving data maturity

Over the next five years, life sciences companies that can systematically identify, integrate, and analyze the volume of big data and real-world data available to them – those who have developed fully-fledged data maturity – will be distinguished by their new levels of global product launch success. Healthcare systems today are more and more driven by outcome data, and are creating rich and publicly-available datasets. These datasets will provide infinitely more context to life sciences companies as they plan, execute, and make complex product decisions quickly in response to market condition.

Unsurprisingly, working with real-world data presents challenges due to the sheer volume of data available and its inherent lack of structure, the difficulties in connecting disparate sources, and the varied levels of completeness and accuracy of the data. Despite the availability of significant public data, the biggest obstacle remains the extraction of the full wealth of meaningful insights from this growing asset. An innovative approach is required to unlock this value and drive widespread adoption of less resource-intensive tools.

## Data storage

While pharma and medical device companies have highly skilled scientists and analysts qualified to identify and assess big data, they tend to operate outside the IT function, and lack the expertise and resources to build large data warehouses. Equally, the IT organizations have the skills to build traditional data warehouses, but not those needed to create the agile systems that are required to create insights from real-world data. In fact, data storage programs in themselves often become multi-year projects, frustrating business users and falling far behind the rapid pace of change in healthcare markets and data.

## Data transformation and integration

Even with the right storage capabilities, mapping the plethora of real-world data sources and creating a target data model useful for analysis is a lengthy project. Analysts may recognize the potential for new data sources to drive insightful decisions, but their hands are tied in how effectively they can manipulate the data in its raw form. Seemingly simple tasks such as analyzing a single spreadsheet

## Achieving decision excellence: three key benefits

- 1** Launching new drugs into the markets is improved through faster market access, adoption and patient benefit.
- 2** Faster and more strategic responses to new competitor entrants in the market.
- 3** Internal efficacy improves, especially within commercial and medical teams; measured in time used productively, revenue per commercial headcount, and output per medical staff member.

and integrating it with internal data to answer a single business-critical question can be incredibly time-consuming.

## Systematic data access

Another avoidable source of inefficiency is the logistical challenge of accessing the data systematically rather than in an *ad-hoc* fashion. Often, data is accessed piecemeal for isolated queries, leading to duplication of effort and expense across the numerous users in the business. An alternative is for companies to work with consultants, who carry out more coordinated projects in a particular functional or business area. In either scenario though, the company is not systematically incorporating real-world data into its data and decisions to routinely benefit from insights and a common ‘version of the truth’.

The net result of these challenges is that many companies only intermittently advance beyond the proactive stage of data maturity, dipping into limited sources of real-world data in an *ad-hoc* and haphazard way to address critical product and market questions.

In doing so, there is no broader evolution along the maturity curve and no overall advancement toward decision excellence. This approach is time-consuming, expensive and highly risky when making sizable business decisions, such as the

markets and disease areas in which to invest.

To improve the chances of success in global product launches, market planning needs to be coordinated across the business, and companies need to have all of the necessary data and the tools to deliver meaningful insights where and when they are needed by business users.

It is often the ‘unknown unknowns’ that pose the greatest opportunity for upside in enhancing the commercial success of the brand.

### **Technology is driving data maturity**

It can pose a challenge for existing data warehousing and business intelligence groups to grasp the potential impact of new technology. This is not necessarily because the technologies are radically new or different from what they are used to, but because the approach to global healthcare analytics needs to be so different. The ‘traditional’ approach to data warehousing involves long cycles of

#### **Real-world data in key opinion leader targeting and segmentation**

The rate of change in the opinion leader landscape is evident from a simple analysis conducted by Zephyr Health that involved taking a list of the top 100 opinion leaders in various therapeutic categories before and after adding in publication data from the past couple of years.<sup>5</sup> On average, it was discovered that 12.8 new contenders had entered the top 100 list and more than half of the top 100 had moved more than ten ranks when more recent information was added. Internal data on experts can be augmented by public data regarding HCPs, healthcare institutions and competitors.

A typical analysis feeding into this process includes:

Sifting through an average of 2.3 million source records across multiple diseases, where each record relates to a data point of relevant information on the HCP. This data covers HCP involvement in publications, conference attendance, advisory boards, editorial boards and clinical trials.

Matching these source records to each HCP by evaluating 6 trillion potential matches (a figure that is constantly rising).

Augmenting each HCP profile to contain data from an average of 18 separate source records, with some having as many as 1,400 source records.

<sup>5</sup>How fresh are your KOL lists?, <https://zephyrhealth.com/how-fresh-are-your-kol-lists/>, Feb 2015.

requirements gathering, data modeling, and report design. The defining element of the latest wave of technology is that it comes with a revolutionary agile approach to solution delivery.

Despite these challenges, technology has now advanced to a stage where the value of big data and real-world data can be unlocked in a systematic and efficient way, avoiding the pitfalls of fragmented and manually intensive approaches.

This technology is now providing pharma and medical device companies with the tools required to advance their data maturity, and is driving decision excellence in a number of areas, as shown in the following examples.

#### **Building the product business case**

The economics of disease are complex, but market insights created from real-world data are fast becoming essential in what can perhaps best be described as product positioning warfare in life sciences. These insights give pharma and medical device companies the knowledge they need to drive informed scientific discussion with payers and prescribers about their products, not only in terms of the needs and priorities of local populations but also in terms of differentiating versus competitive offerings.

For example, when a competitor product is brought to a market, its manufacturer will be looking for evidence to support the fact that, although it is twice as expensive as what is on market, it is more effective, and therefore better for the healthcare system as well as patient care. While creating this evidence, the maker of the incumbent product may often be doing research to create a new form of their drug to mitigate that competitive advantage even while it is honing its pricing strategy.

Some countries, particularly those in the socialized systems in Europe, have a wealth of health information going back many years. This means those companies can measure outcomes using electronic health records or quality-of-life studies to see how specific patient populations have responded to certain treatments in the past. This provides the answers to key questions of product positioning and, ultimately, launch success, such as:

- How many patients have been admitted for emergency treatments in hospitals?
- How many are well managed in the community?
- What are the genuine unmet needs in the real world?



Armed with such information, a company can derive powerful insights that feed into new product positioning, e.g. understanding how a particular region may be treating a disease and experiencing fewer emergency admissions – due to using a treatment with a higher initial cost but which reduces a common downstream need for hospitalization or further intervention.

### Securing market access

Moving further along the product lifecycle, market access has become a key determinant of product success both at launch and beyond, as health systems move towards continually assessing the value of different interventions. Payers at both the national and local level are under increasing pressure to justify spend, with pharma and medical device products falling under the spotlight.

The critical point for life sciences companies is that the arguments they build to influence formulary decisions and treatment guidelines – at a national and local level – are increasingly dependent on knowing in great detail the specific geographically-aligned priorities, treatment protocols, and patient demographics.

It is no good using studies of diabetes patients in Florida in the US to attempt to influence a payer in a

local commissioning group in Munich, Germany, to adopt a new insulin solution.

Companies can utilize real-world data to examine the scale and dimensions of epidemiology, finding the location of patients that need to be treated, their propensity to stay on treatment, the level of typical co-morbidities and other detail that can be useful in dialogue with payers.

This can augment answers to questions such as:

- What are the economics of treatment, both from the perspective of the cost of a medicine and the cost of delaying therapy?
- What are the advantages of delaying treatment versus early intervention?
- And how much does it cost if an untreated patient is later hospitalized with a more severe form of the disease?

For the payers working within these geographies, their focus is firmly on the local, public data and they are increasingly well versed in what it is telling them.

For life sciences companies launching products in multiple regions, advancing data maturity is a crucial way to have an equally in-depth understanding of numerous global markets.

### **Meeting and maximizing market potential: key opinion leader targeting and segmentation**

The identity and role of key opinion leaders or therapeutic area experts is changing. Payers are becoming more influential, as budget holders take more control over prescribing decisions.

Conversely, some experts are becoming involved in payer decision-making processes and a new breed of experts is emerging – those who are digitally savvy and using online channels to build their reputation as much as traditional publications or congresses. At the same time, patients are taking a stronger and more involved role in their treatment and their health, with patient opinion leaders also emerging as an influential force.

Identification and segmentation of this diverse and fast-changing landscape of opinion leaders, experts and new influencers has therefore become vitally important for life sciences companies. The good news is that there is a wealth of information from real-world data sources to assist in this process. By identifying and analyzing this data a clear view of the expert landscape can emerge that answers questions such as:

- Who are the people influencing formularies and guidelines?
- Where are they publishing and presenting?
- What congresses are they attending?
- What are their research interests?
- What information are they interested in seeing?

By including these broader datasets, a more informed view can be attained of not only who to engage with, but exactly when, where and how to engage with them. In addition, as opinion leaders face increasing time pressures and new transparency regulations on physician engagement come into force, pharma and medical device companies are finding it harder and harder to secure time with the leading experts.

Market insights from real-world data can help solve this problem by identifying the ‘up-and-coming’ next tier of influencers, who are the opinion leaders of the future, allowing early engagement, before they are identified by competitors.

With the right level of market insights, informed by data maturity, life sciences companies can make key decisions around who the best targets are for clinical trials, congress planning, advisory boards, promotional outreach and more. They will also know exactly how to engage with these experts when the opportunity arises.

### **Productive physician engagement**

The HCP landscape is similar to the opinion leader landscape, providing life sciences companies with publicly-available information about prescribers and referrers in the markets of interest. The challenge is that the data sources are seemingly unlimited: there are always more conferences, sites, scientific journals, sources of funding, and information about them. Advancing data maturity is the only way to stay on top of this fast-moving landscape; to access the relevant information about HCPs – where the data is, what format it takes – and to incorporate it into the rest of the information that companies have. Building a more comprehensive picture of the HCP and thought-leader landscape, and deriving insights on how that landscape aligns with business objectives, to inform customer engagement is akin to opinion leader engagement:

- Greater market insight equals more intelligence on the customer, allowing more targeted conversations. Typically, life sciences companies segment physicians based on prescribing volume, but additional data augment this, for example by understanding volume of patients treated and how favorable the physicians are towards particular products.
- Integrating new sources of information unlocks the ability to pinpoint if HCPs are research- or patient-oriented, the topics they are presenting on, and whether they have been involved in a competitor’s clinical trial. If the latter, a company knows it has to clearly articulate its differentiation and value proposition compared with that competitor in any communication.

Market insights from real-world data make it possible to identify, score and rank targets based on these new attributes. Companies can then understand patterns and act upon opportunities in the market, highlighting connections between

patients, HCPs, institutions and treatments. Using these insights helps reveal market trends, highlight anomalies, drill down to the street level for more focused planning, and provide strategic analysis on accounts, HCPs, and field teams. These examples represent just a high-level overview of some of the areas in which advanced market insights, from advanced data maturity, allow the ability to unlock

publicly-available data to accelerate competitive advantage.

Scaling these examples, and other areas, across portfolios, disease areas and geographies highlights the degree to which better insights, and better data maturity can differentiate a pharma or medical device company and dramatically improve product launch success.

## Conclusion

Highly competitive and fast-changing healthcare markets require a new level of agility on the part of pharma and medical device companies, to provide the comprehensive insights needed to make informed decisions with precision and confidence. Advanced market insights will drive better product positioning and customer engagement, delivering critical competitive advantage at a time when optimal return on investment from product pipelines is essential.

Data maturity underpins these market insights, with those life sciences companies able to steer a course to the visionary end of this curve reaping the rewards, including:

- A clearer picture of the market landscape, including key customers (patients, prescribers, experts, payers, and other influencers) and competitor activity
- Better product positioning and market access
- More effective segmentation of customer groups and allocation of resource
- Deeper and more meaningful engagement with all customers

Accessing the enormous volume of publicly-available real-world data is the key to data maturity but, by virtue of its volume, diversity, lack of structure and differential level of accuracy, life sciences companies must adopt a new strategy to unlock its value.

New technologies are giving life sciences companies the ability to implement scalable, long-term solutions that integrate this public, big data with existing internal and vendor data, driving competitive advantage in today's connected, value-driven healthcare markets.

The prize on offer for advancing data maturity in this way is a panoramic view of the rapidly shifting dynamics of healthcare from a vantage point of the highest peaks in the mountain range. Those peaks will continue to grow as more data enters the public domain, enabling the view to become more detailed and the decisions to be taken more robust.

The most successful companies in 2016 and beyond will undoubtedly be those who have achieved data maturity and who, by consequence, have harnessed its power and are using market insights to power their brand success.

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Christian has spent the past 20 years bringing innovative big data and analytics technologies to market. Early in his career, that focus was in bioinformatics and the challenges posed by the human genome project and the vast data volumes being produced for scientific research at LION bioscience. Prior to joining Zephyr Health, Marcazzo led sales and business development for Spotfire's data visualization and analytics efforts and expanded the business from scientific research into clinical trials, commercial, and into new industry verticals.



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Robin is currently focused on enhancing Zephyr Health's capabilities to take advantage of the wealth of available public health data to drive better evidence and outcomes for life science businesses. Robin has 20 years of experience in bioinformatics and medical informatics. He has led teams to develop genomics software solutions, specializing in Translational Medicine for both pharmaceutical and healthcare scientists. Prior to Zephyr Health he worked for software vendors LION bioscience and InforSense. He also served as a Director at IDBS where he led the Translational Science team.

## About Zephyr Health

Founded in 2011 by William King, Zephyr Health is the leading insights-as-a-service company harnessing the power of global healthcare data for precise and confident product lifecycle performance for biopharmaceutical and medical device companies. From clinical trials to market strategy and sales, our solutions connect data from thousands of sources across the global healthcare ecosystem to produce deep, predictive insights that our customers can use to better connect their therapies to the people who need them the most. Zephyr Health is a privately-held company headquartered in San Francisco with offices in London, UK and Pune, India. Zephyr Health is venture backed by Kleiner Perkins Caufield & Byers and Icon Ventures.

*“With Zephyr Health we were able to create a simplified, strategic and ‘customizable’ assessment – and a strategic approach – to a huge variety of complex data that is continually refreshed throughout the lifecycle of our launch.”*

**Therapeutic Area Lead, Top 50 Biopharma Company**

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