



Shaping the *Future of Healthcare*

Life Sciences Must Lead with
Integrated Solutions to Meet
HCP Demands

Capgemini  invent

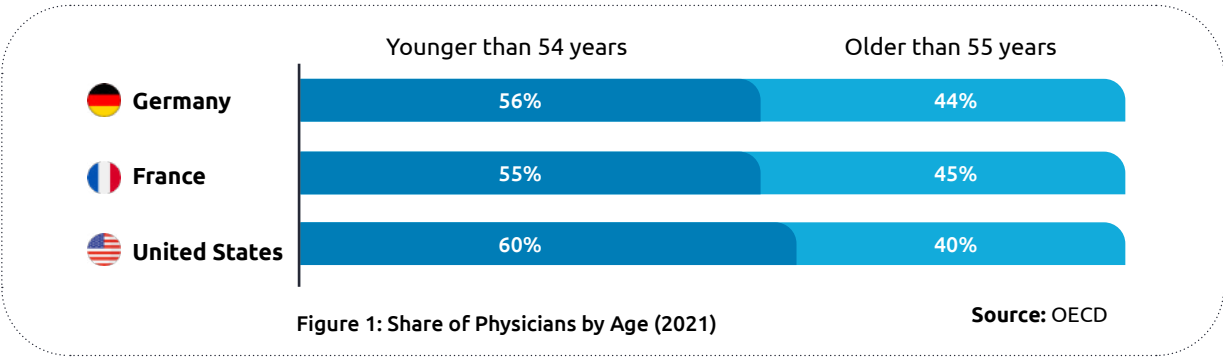


Healthcare is at a turning point, with professionals demanding seamless integration, better data availability, and innovative tools to enhance patient care. Our market study highlights the urgent need for Life Sciences companies to lead the charge in transforming healthcare systems to meet these evolving expectations.

Introduction:

A Transforming Healthcare Landscape

Healthcare is at a crossroads, driven by demographic shifts and evolving HCP and patient expectations that are reshaping how care is delivered. According to the World Health Organization, life expectancy has risen significantly, from 66.8 years in 2000 to 73.1 years in 2019.¹ This increase, coupled with declining fertility rates, has led to an aging population in developed countries where approximately 20% of the population is now over 65.^{2,3}



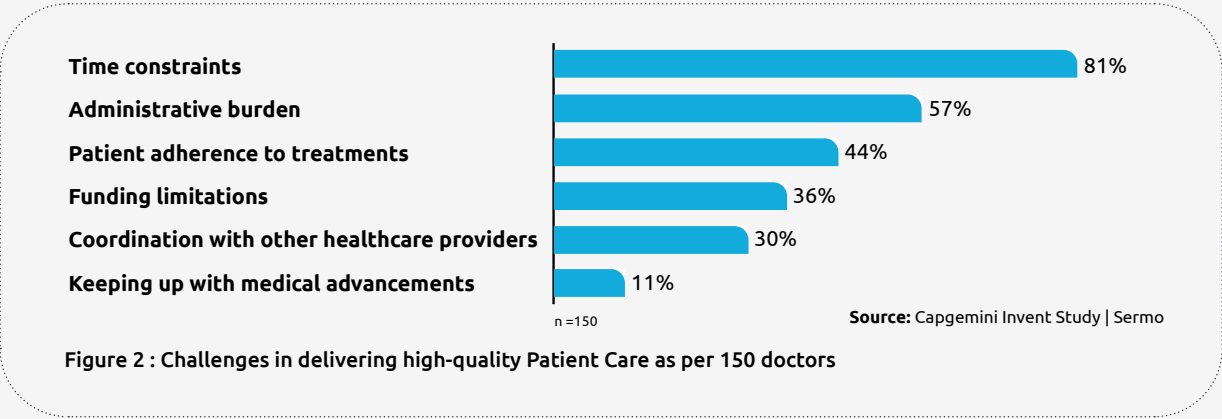
As populations age, chronic diseases such as diabetes, cardio vascular diseases, and cancer are on the rise, placing a growing burden on healthcare systems. The demand for medical care is increasing not just in quantity but in complexity, all while healthcare budgets struggle to keep pace. This financial strain is further exacerbated by a generational shift in the healthcare workforce. In Germany, France, and the USA, around 40% of physicians are over the age of 55, and many are approaching retirement⁴. This demographic shift is contributing to a critical shortage of healthcare providers, which is

further compounded by the fact that the supply of new HCPs is insufficient to meet the growing demand for services, particularly in rural areas. Additionally, many younger HCPs prioritize work-life balance, with 36% in Germany working part-time, further reducing patient-facing hours⁵. These workforce challenges are exacerbating the strain on healthcare systems, making it increasingly difficult to deliver high-quality patient care and manage the rising burden of chronic diseases.

Capturing the Voice of HCPs:
Insights from Our Market Study with Sermo

Understanding these challenges from the perspective of healthcare professionals is crucial. To this end, Capgemini Invent partnered with Sermo, a fast, frictionless physician social platform and leader in healthcare insights with 1.5 million registered members, to conduct a comprehensive study. We engaged 150 physicians across the US, Germany and France to gather their insights on the current healthcare landscape, their challenges, and their expectations from Life Sciences companies and emerging technologies. Our study reveals pressing concerns that HCPs are currently grappling with time constraints and administrative burden.

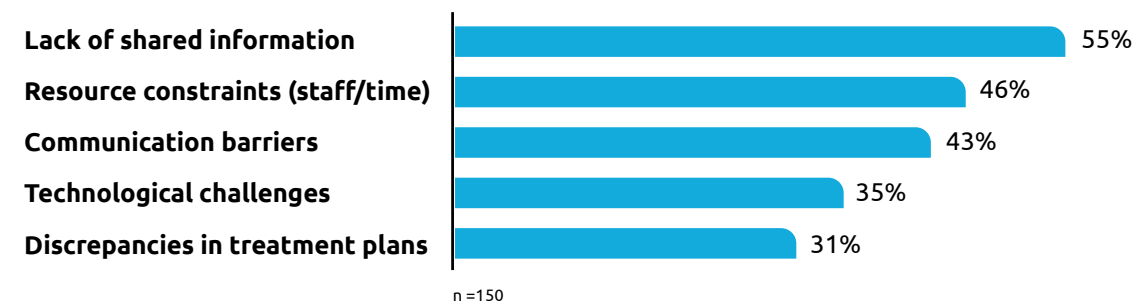
HCPs Strapped by Time and Administrative Burden



The survey results highlight the significant challenges healthcare professionals face today. Chief among these is time constraints, with 81% of respondents identifying this as a major hurdle in delivering high-quality patient care. Administrative burden is another critical issue, cited by 57% of respondents, consuming valuable time that could otherwise be spent on patient interactions.



Coordination and Communication Issues



Source: Capgemini Invent Study | Sermo

Figure 3: Challenges in coordinating high-quality Patient Care

Another major challenge is the lack of shared information, noted by 55% of respondents, which hampers effective collaboration and increases the risk of errors. Additionally, resource constraints, cited by 46% of the surveyed physicians, and communication barriers, reported by 43%, complicate the ability of healthcare professionals to provide seamless, coordinated care. These issues contribute to increased workloads, delays in care delivery, and growing patient dissatisfaction.



Healthcare professionals see a strong need for improvements that enhance the customer experience (CX) for both healthcare providers and patients

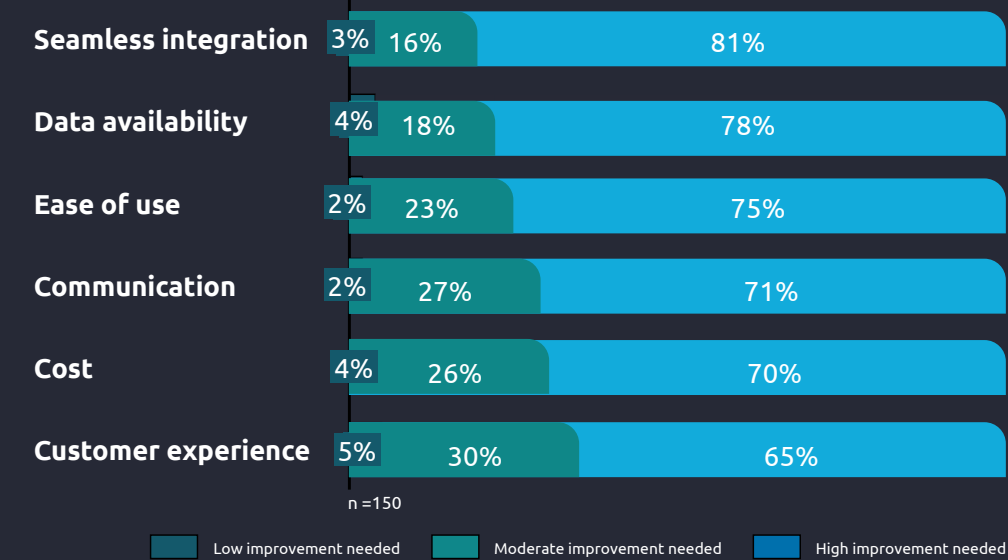


Figure 4: Improvement Priorities in Professional Tools and Systems

Source: Capgemini Invent Study | Sermo



Integration and Data Availability

A top priority for 81% of respondents is better integration of tools and systems. HCPs seek solutions that unify fragmented systems, enhance data availability, and reduce the complexity of their work environments.

Data availability is another critical area, with 78% of respondents highlighting the need for improvement. Comprehensive patient information is essential for informed decision-making and efficient care delivery. Additionally, 75% of healthcare professionals emphasize the need for more intuitive and seamless tools, closely tied to enhancing CX. User-friendly systems are vital for operational efficiency and ensuring a positive experience for both providers and patients.

Enhancing Coordination

Improved communication tools are highly sought after, with 71% of respondents emphasizing the importance of better coordination capabilities among healthcare teams and with patients. Addressing these needs can significantly improve the quality of care and the overall healthcare experience, directly impacting CX.



HCPs are seeking more than just effective pharmaceuticals and medical products from Life Sciences companies.

Life Science companies are expected to play a proactive role in leveraging technology to enhance CX and ultimately improve patient care and disease management. Our study reveals that the majority of HCPs believe Pharma and MedTech companies should take the lead in enabling collaboration across silos, enhancing patient engagement and education, and providing advanced technological solutions that support clinical decision-making.

Building a Connected Healthcare Ecosystem to Enhance Patient Care and Disease Management Through Technology

Enabling collaboration across silos (e.g., hospitals, patients)
Patient engagement and education (e.g., community building among patients / HCP's)
Digital offerings or solutions (e.g., a software application)
Providing innovative training methods and educational content
Enhancing connectivity (i.e. interoperability among systems and devices)
Delivering clinical decision support

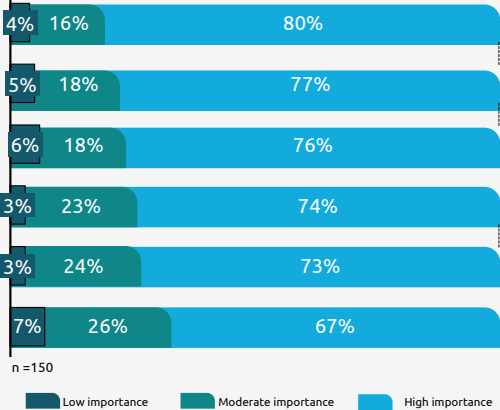


Figure 5: Importance of Pharma and MedTech Contributions beyond high-quality Products

Source: Capgemini Invent Study | Sermo

As our study showed the expectations from healthcare professionals are clear: 80% believe it is crucial for Pharma and MedTech companies to facilitate better cooperation among hospitals, general practitioners, patients, and caregivers. This reflects a broader need for integrated healthcare solutions that can bridge the gaps in the current fragmented system and enhance CX. Additionally, 77% of HCPs expect these companies to lead in patient engagement and education, fostering community building among patients and healthcare providers to improve adherence and outcomes.

Furthermore, 73% of HCPs see the need for enhanced connectivity and interoperability among systems and devices, which are essential for a seamless flow of information across the healthcare ecosystem. Digital offerings and solutions, such as software applications and web portals, are also in high demand, with 76% of HCPs highlighting their importance in improving daily operations. Lastly, 67% of healthcare professionals emphasize the need for companies to support clinical decision-making by providing tools that aid in making informed, evidence-based choices in patient care.

Salesforce Life Sciences Cloud: A Foundation for Meeting HCP Expectations

To meet these evolving expectations, Salesforce Life Sciences Cloud offers a holistic platform that can help Life Sciences (Pharma & MedTech) companies to begin addressing these key challenges. It offers a comprehensive suite of tools designed to transform the way life sciences companies manage their operations, engage with stakeholders, and drive innovation. By leveraging the power of the Salesforce platform, this cloud solution enables organizations to streamline complex processes, enhance collaboration across teams, and improve patient outcomes through datadriven insights.

Integration and Interoperability: Salesforce Life Sciences Cloud – as industry solution built on the Salesforce platform - provides possibilities for integrating diverse healthcare systems. Through platforms like the Data Cloud and MuleSoft – the integration layer, it aims to support seamless data flow across various systems, which is essential for improving collaboration among stakeholders, enhancing patient care and a 360° Customer View.

Patient Engagement and Education: The platform currently offers tools that Life Sciences



companies can leverage to enhance patient engagement and HCP education. With AI-driven capabilities, Salesforce is laying the groundwork for more personalized and effective patient & HCP interactions. These tools are expected to evolve, allowing companies to better meet HCPs' expectations for proactive patient engagement and community building.

Optimizing regulatory compliance: Salesforce Life Sciences Cloud involves key components that help life sciences companies adhere to stringent industry regulations more efficiently and effectively. These components are a centralized Data Management where all regulatory-related data can be stored and managed, Automated Compliance Workflows such as document approval processes, audit trails, and reporting, and Regulatory Reporting and Documentation by automating data collection and report creation processes.

Supporting Clinical Decision-Making: The platform's offerings include AI-powered analytics that support informed decision-making for Sales reps & HCPs. As Salesforce continues to develop these tools, the platform is expected to increasingly aid HCPs in making evidence-based clinical decisions, providing more comprehensive support over time.

By establishing this foundation, Salesforce Life Sciences Cloud aims to position Pharma and MedTech companies to better align with healthcare professionals' expectations, setting the stage for continuous improvement and innovation in patient care and healthcare delivery.

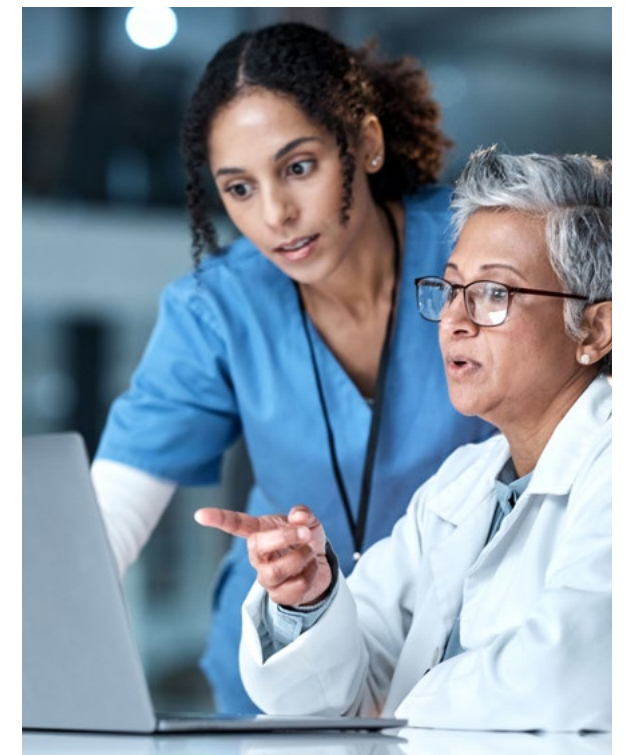
Capgemini Invent: Your Partner in Healthcare Transformation

As healthcare evolves rapidly, the need for integrated systems, enhanced patient engagement, and innovative solutions has never been greater. Capgemini Invent stands at the forefront of this transformation, offering unparalleled expertise in CX strategy, AI, and digital transformation. Our deep understanding of the challenges facing the Life Sciences, MedTech, and Pharma industries positions us uniquely to guide companies through this complex landscape.

By leveraging platforms like Salesforce Life Sciences Cloud, we empower organizations to enhance system integration, improve data availability, streamline workflows, and facilitate better communication. These advancements are not just about technology—they are about creating a more patient-centric, efficient, and effective healthcare ecosystem.

Seize the Opportunity to Lead Healthcare Transformation and Meet HCP Expectations with Evolving Expectations

As healthcare continues to evolve, it's crucial for Life Sciences companies to step up and lead with innovative strategies and tools that enhance HCP and Patient Experience. The aging population, workforce challenges, and the need for technological integration present an opportunity for companies to play a pivotal role in driving positive change. By leveraging platforms like Salesforce Life Sciences Cloud and partnering with Capgemini Invent, Pharma and MedTech companies can enhance system integration, improve data availability, streamline workflows, and facilitate better communication. This proactive alignment with healthcare professionals' evolving expectations will not only support better patient outcomes but also position these companies as indispensable leaders in the healthcare ecosystem.



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Sermo is a fast, frictionless physician-first platform providing the healthcare industry with real-time business insights and authentic physician engagements through our global community of 1.5M healthcare professionals and state-of-the-art technology. For over 20 years, Sermo has been turning physician experience, expertise, and observations into actionable insights that benefit pharmaceutical companies, healthcare partners, and the medical community at large.

To learn more, visit www.sermo.com

Key Takeaways: Navigating Healthcare Transformation

Demographic Shifts and Workforce Challenges:

The aging population and impending doctor shortages require innovative solutions to meet growing healthcare demands.

Technological Integration: There is a critical need for better integration of tools and systems to enhance data flow and reduce complexity.

Enhanced Communication: Improved communication tools are essential for better coordination among healthcare teams and with patients.

Expanding Role of Life Sciences Companies:

HCPs expect Pharma and MedTech companies to facilitate collaboration, enhance patient engagement, and lead in providing advanced technological solutions.

Salesforce Life Sciences Cloud: This platform meets the evolving expectations of healthcare professionals by offering robust integration, patient engagement tools, and support for clinical decision-making.

Capgemini Invent: As a key partner in healthcare transformation, Capgemini Invent offers essential consulting and technology transformation services to drive innovation and optimize strategies.

Sources

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About Capgemini Invent

As the digital innovation, design and transformation brand of the Capgemini Group, Capgemini Invent enables CxOs to envision and shape the future of their businesses. Located in over 30 studios and more than 60 offices around the world, it comprises a 12,500+ strong team of strategists, data scientists, product and experience designers, brand experts and technologists who develop new digital services, products, experiences and business models for sustainable growth.

Capgemini Invent is an integral part of Capgemini, a global business and technology transformation partner, helping organizations to accelerate their dual transition to a digital and sustainable world, while creating tangible impact for enterprises and society. It is a responsible and diverse group of 340,000 team members in more than 50 countries. With its strong over 55-year heritage, Capgemini is trusted by its clients to unlock the value of technology to address the entire breadth of their business needs. It delivers end-to-end services and solutions leveraging strengths from strategy and design to engineering, all fueled by its market leading capabilities in AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2023 global revenues of €22.5 billion.

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