

Using Data Smarter to Understand Customers Better: Novartis's Approach



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Context

In September 2023, I-COM Data Storytelling Council Chair, Sam Knowles, held a fireside chat with Beyza Klein, Novartis' Global Patient Engagement Director, Insights & Measurement.

They discussed Novartis' approach to using data smarter to understand patient needs better and in this way to reimagine medicine.

This one-pager captures the main themes of their discussion.

Principles

The journey taken by Novartis' Patient Engagement (PE) function over the past four years has led to the creation and roll-out of a pioneering, effective methodology for surfacing and articulating patient insights: the i4i Patient Insights Discovery™ process (i4i is short for 'Insights for Innovation'). As well as creating a process for incorporating patient insights into decision-making – a process with real and measurable impact – developing and running the process has revealed six core principles that companies seeking to go on a similar journey will find helpful.

EMBRACE THE
CUSTOMER
PERSPECTIVE

SET THE BAR
ON INSIGHT
REALLY HIGH

ACHIEVE
MORE WITH
LESS

TAILOR BEST
PRACTICE FOR
YOUR NEEDS

ROAD-TEST,
RINSE, REPEAT;
ROAD-TEST ...

SHARE
GENEROUSLY,
EXTERNALLY

1. Embrace the customer perspective

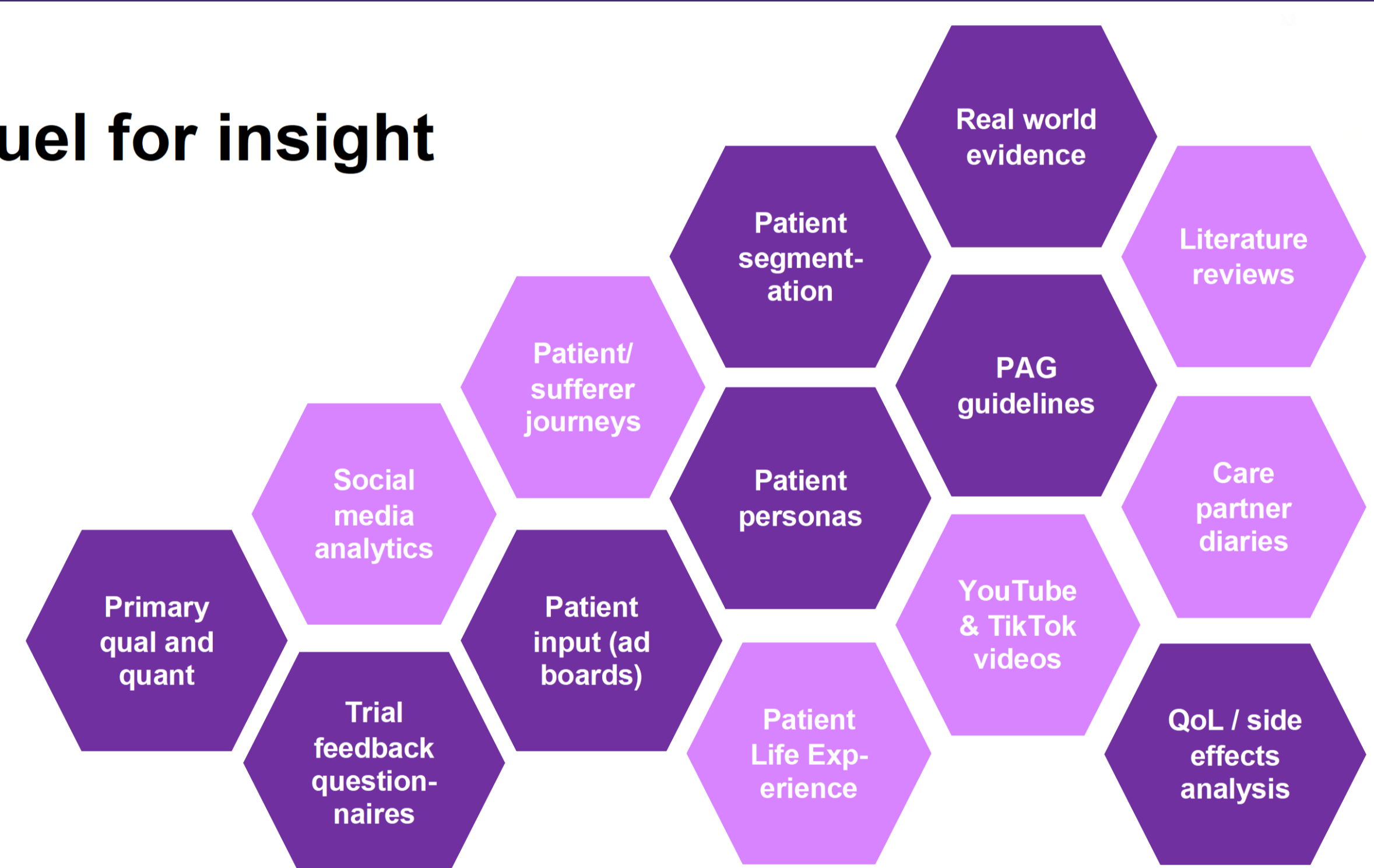
In 2019, Novartis' leadership determined that, to develop medicines that meet patient needs, the company needed to become ever-more patient-centric. It needed to incorporate the voice of the patient and the patient reality into its evidence-based decision-making. Co-designing drugs, apps, means of delivery with patients and patients' attitudes front-of-mind makes them more successful.

2. Set the bar on insight really high

Too often, businesses find it hard to articulate what an insight is; many don't know how to articulate an insight, often tolerating a low-bar definition of the very term "insight". Many organizations accept single data points or casual observations as insights. This is never sufficient.

Accordingly, the team developing i4i set and was guided by this, high-bar definition of insight: **"A profound and useful understanding of our customers' attitudes, behaviors, or beliefs that enables us to reimagine actions that establishes a deeper connection and relevance between us and their lives."** It's profound because it answers the question "So what?" – "What do the data mean?" And it's useful because it enables us to address the more interesting question "Now what?" – "What should we do as a result?" Genuine insights inspire data-driven decision-making, moving associates from data to insight and on to strategic implementation.

Fuel for insight



3. Achieve more with less

Novartis had no shortage of sources of information, data, and research outputs from projects undertaken with patients to inform decision-making (see graphic). There were two main challenges: (i) research projects tended to be one-time consumables whose impact was only felt at delivery; and, (ii) PE colleagues were not routinely joining the dots between different research outputs. By triangulating data sets and joining the dots between them, cross-disciplinary teams have more opportunity to surface and articulate genuine insights. At Novartis, this is made more straightforward through the creation and widespread usage of the internal data repository and search engine called PIN: Patient Insights Navigator.

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Three further core principles for turning data into insight, insight into strategy

4. Tailor best practice to suit your needs

The team developing i4i sought inspiration from many different approaches and methodologies used to generate insights and make the most of research data, to inspire creativity and move from insight to action. These included:

- Design Thinking (Stanford's d-school / IDEO)
- Edward De Bono (Six Thinking Hats)
- Allan et al.'s ?WhatIf! Principles

The team also explored and deployed a wide range of other convergent and divergent thinking techniques, such as the root cause analysis and the [STEP Prism of Insight™](#).

The team included the insight and analytics leads from many different therapeutic areas inside Novartis. To gain real traction within Novartis, this home-grown process needed to blend the best of external best practice with home-grown realities and pragmatism. To effect sustainable change in how PE associates surface and articulate insights, it needed to be by-Novartis, for-Novartis.



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How Novartis deploys a new model of creativity to understand patients better

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New model of creativity

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Abstract

Purpose – To better understand the reality of living with the diseases and conditions that its drugs and therapies are developed to treat, the Novartis leadership determined a need for more meaningful insights into patients' lives. They sought to develop a systematic, creative methodology – informed by the psychology of insightful rather than analytical thinking – to properly integrate and deploy the research commissioned into its day-to-day business decision-making. For it is well established that better understanding of the patient reality drives both compliance and adherence “beyond the pill”.

Design/methodology/approach – A core team of Insight and Analytics and Patient Engagement leads from various therapeutic areas worked in partnership with a psychologist and practitioner in the field of insightful thinking, to develop an effective methodology that could reliably surface and articulate genuine patient insights. This methodology – the i4i Insights Discovery™ process – was developed, piloted, refined and codified in 2020 and implemented across the company in 2021–2022. It uses a combination of convergent and divergent thinking techniques – human rather than artificial intelligence, combining diverse research outputs – to understand patients' lives better. With enhanced understanding, the insights then shape educational and behavioral strategies to drive adherence and compliance.

Findings – At a time of tightening budgets and demands to deliver enhanced impact from research budgets, i4i Insights Discovery™ has enabled Novartis teams to turn existing research outputs into profound and useful understandings of what it means to live with specific diseases and develop evidence-based patient engagement strategies; insight-driven decision-making around the lifecycle of any compound. i4i Insights Discovery™ has been applied across Novartis's diverse areas of expertise, from heart disease to cancer, from organ transplantation to dermatology, from food allergy to ophthalmology.

Practical implications – The i4i Insights Discovery™ process enables Novartis teams to gain deeper understanding of patients' lives without the need to commission additional research; to do more with less. These insights enable cross-functional Novartis teams to develop better-informed strategies that better address the needs of patients and their care partners, of health-care professionals and health-care systems. The team creating the process is looking to make the i4i Insights Discovery™ approach a gold standard of insight discovery, both for pharma and health care and in other categories, too.

Originality/value – The i4i Insights Discovery™ process is a practical, novel application of well-established principles in the psychology of insightful thinking to address a clear business imperative. By repurposing and reinterpreting existing research outputs using creative verbal and visual exercises, it



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5. Road-test, rinse repeat; road-test ...

The i4i process was created and piloted working with real, cross-functional teams inside Novartis, driven by PE. It was then refined and codified based on the feedback of PE associates who had been immerse in the pilots. From the start, they had ‘skin in the game’.

Every year, the PE Center of Excellence (CoE) at Novartis reviews i4i, refines it, and makes sure it is ever-more fit-for-purpose, using the experience of associates who have recently worked through the process. High-impact action plans generated by i4i are included in brands' annual Integrated Product Strategies, and in this way patient insights fuel PE outreach., turning insight into strategy.

6. Share generously, externally

The CoE has an ongoing program of outreach for i4i, sharing the methodology and impact of the process with the outside business world, both pharma and more broadly, as an example of best practice.

In 2023, this has included:

- (a) presentation on the global stage at the annual ephmra conference;
- (b) entering / winning the [PFMD “Made for Patients” award](#) (see below left); and,
- (c) publication in the peer-reviewed [International Journal of Pharmaceutical & Healthcare Marketing](#) (see above left, right).

It is only by sharing best practice outside the business that processes such as i4i can become industry standards, both inside and outside of pharma. This approach is designed to ensure everyone who wants to benefit from a tried-and-test methodology can do so.

