



Social and Mobile Platforms: Why Should Life Sciences Companies Participate?



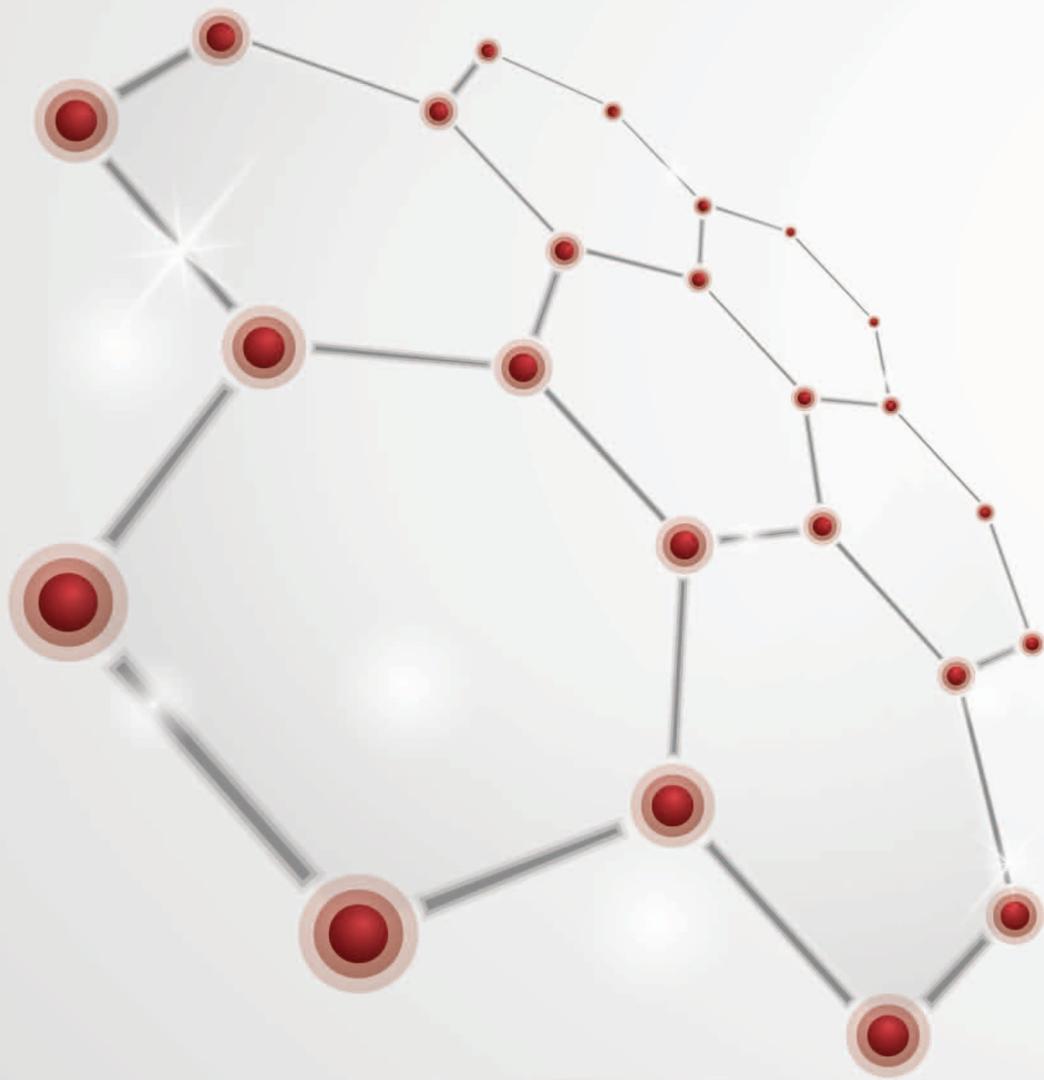


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Abstract



Social and mobile platforms are changing the way patients and physicians are interacting in healthcare. The rapid rise of social platforms is driving consumers to use the medium to engage in direct conversations with one another. The control of conversation has clearly shifted towards customers. Customers now have the power to define how, when and where they want to interact with companies, content and services. The challenge for Life Sciences companies is that despite accounting for significant volume of conversations on the social web, the industry activity continues to be low. Consequently, Life Sciences companies are missing a significant opportunity to connect and engage in conversations with their customers, resulting in a loss of critical information and insight into their patients' needs.

Our research indicates that the impact of the rise of digital and social media on Life Sciences companies has been multi-fold:

- The level of online engagement varies greatly by therapeutic area
- Patient Opinion Leaders (POLs) are emerging as key players in online conversations
- The Medical community is looking for more specialized platforms
- There is a gap between Patient and Medical communities
- SoLoMo (Social-Local-Mobile) is yet to be fully leveraged and represents an untapped opportunity for mHealth
- While regulated, this environment has received very limited guidance on how to use social and mobile platforms

Capgemini Consulting believes that Life Sciences companies have an important role to play with Patients and Medical online communities and that the lack of guidance or potential for adverse events reporting should not be a reason for not engaging. We believe Life Sciences companies should consider integrating social media and mobile health platforms in a four-stage process that involve collaborating, listening, engaging and finally measuring. However, social media and mobile health strategies should not be developed in isolation – they should be integrated into the brand, franchise or company's overall strategy as one component of a company's multi-channel strategy. Companies should define what business goals are supported by the digital agenda and how digital fits into the broader channel mix and commercial model. Alignment of their digital agenda to the overall business is critical. Life Sciences companies should create a structured digital roadmap for the implementation of such efforts.

Why is Healthcare a unique playing field for social and mobile platforms?

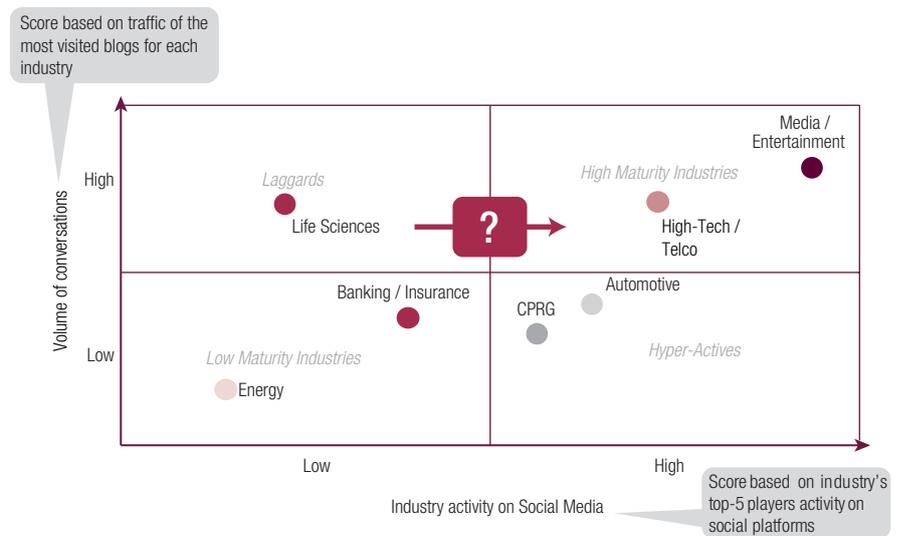
“ Life Sciences company participation lags other industries in social media, despite high volume of conversations ”

Advent of digital tools and proliferation of online media has resulted in a massive growth in volume of online conversation. For instance, Facebook has over 900 million users globally¹; over 72 hours of videos are uploaded on YouTube every minute²; Twitter is seeing over 200 million tweets a day¹; and Super Bowl XLVI generated over 17 million mentions³, likes or check-ins on social media during the event.

Companies realize that social media is more than a fad and impacts industries beyond consumer-based ones such as CPG and Media & Entertainment. Industries ranging from Energy to High-Tech have all started to embrace social media, while the Life Sciences industry continues to lag in adopting social media strategies (see Figure 1). The Life Sciences industry's traditionally conservative approach is further exacerbated by an increased regulatory focus on compliance, the current economic climate, and the loss of revenue from blockbuster drugs losing patent protection. All of these events contribute to making the industry more risk-averse in adapting to such innovative marketing approaches. As a result, Life Sciences organizations are missing a significant opportunity to connect and engage in conversations with their customers, resulting in a loss of critical information and insight into their patients' needs.

Advent of social media and digital tools are having a profound impact on the traditional patient-physician-representative dynamics. It is estimated that over 60% of physicians either use or are interested in participating in social networks⁴. More worryingly, over 87% of physician-rep conversations now last less than two minutes and only 10% of these conversations are later remembered by the prescriber⁵.

Figure 1: Comparative analysis of industries' activity on Social Media



Source: Capgemini Consulting

Online communities have grown ground-up in a rapid manner. For instance, Sermo, an online community exclusively for physicians today has over 125,000 physicians that interact with one another⁶. These shifts in behavior all indicate that social media has the potential to reach and influence physicians as sales reps' access to physicians decline.

In this paper, Capgemini Consulting explores the growing role of social media and its impact on Life Sciences companies. We also take a brief look at the regulatory challenges that surround social and mobile media, and how organizations can leverage such platforms to reach their goals. We conclude the paper with a set of actionable recommendations on how Life Sciences companies should create a digital roadmap.

“ Health Care Professionals and patient behaviors are fundamentally changing ”

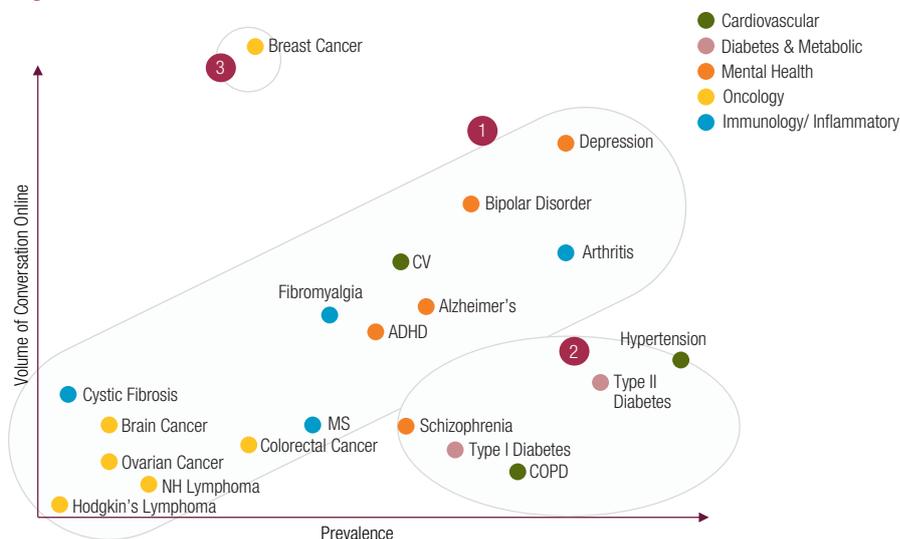
“ The Internet is the #1 source of health information for patients... ”

The Internet is the #1 source of health information for patients in the US, with physician consultations coming in second. Even after a physician visit, 50% of Americans leave a physician's office unsure of the information they just received. Therefore, it should not be surprising that 61% of Americans go online to research health information⁷. This phenomenon is not restricted to the US. In Germany, 30% of patients consult the Internet before visiting their physician and 40% use the Internet post-visit⁸.

When researching health information, 60% of adults online look for the experience of “someone like me”. However, the percentage that is actively engaged is significantly lower: only 5% of those have posted health thoughts on a blog and only 6% post comments or questions about health or medical matters in an online discussion or group forum. The Life Sciences industry's critical role is to ensure patients receive accurate and helpful health and product information when they need it.

Capgemini Consulting conducted an analysis of the volume of online conversation relative to the prevalence of a disease (see Figure 2). Our analysis demonstrated that there is a correlation between disease prevalence and the volume of online conversation for a majority of the therapeutic areas. However, our findings indicate that some disease states fall outside of this correlation. Most of those have a lower-than- expected volume of conversation relative to their disease prevalence, but one disease shows the opposite result: Breast Cancer generates a significantly greater than expected volume of online conversation based strictly on its disease prevalence. Capgemini Consulting has defined the three trends as linear, under-represented, and highly engaged.

Figure 2: Relative Volume of Patient Conversations Online



Source: Capgemini Consulting*

1 Linear

Volume of conversation for these disease states is correlated with the prevalence of the disease.

2 Under-Represented

Volume of conversation for these disease states is lower than expected.

3 Highly Engaged

The volume of conversation related to Breast Cancer is much higher than its disease prevalence.

Social media engagement by the Highly Engaged breast cancer community should be viewed by Life Sciences companies as an aspirational standard. Life Sciences companies targeting disease states in the Linear group have the opportunity to boost online conversation to the Highly Engaged level. Learning from Breast Cancer outreach efforts, they can implement targeted online and mobile strategies, including opportunities to partner with patient advocacy groups to increase overall disease awareness. Social media has the potential to increase patient engagement in Under-Represented disease areas to be in line

with the Linear group – or potentially leapfrog this group to move directly to Highly Engaged.

In the next section, we take a look at the growth of some key digital tools and their impact on Life Sciences companies

“ While patients' use of social media is on the rise, certain disease states drive more online activity than others ”

“ Over 35,000 mobile health apps are listed in the Apple and Android marketplace... ”

Life sciences companies have begun to sense that while the advent of social media and digital tools brings challenges, there are several opportunities that they can latch on to. Life sciences companies need to understand the impact of niche communities, key digital tools and trends in social-local-mobile in order to address these opportunities in a holistic manner.

The growth of niche communities among patients and physicians

Patients' needs are unique to each disease area. This allows Life Sciences companies to create specialized patient and physician communities. Currently, patients share personal stories about their disease treatments on websites such as ihadcancer.com or diabeticconnect.com, while physicians connect on specialist sites such as ACG GI Circle.

We believe there is currently a growing gap between patient and physician communities, and improving and increasing communications between these two groups is critical. There is a major opportunity for Life Sciences companies and social media to bring Healthcare Providers (HCPs) and patients together, allowing them to increase their shared knowledge about the therapeutic area, particularly in the absence of patient advocacy groups.

Digital Tools are having a Multi-Faceted Impact

Social platforms continue to grow with new offerings but most new technology innovations are seen in mobile devices, remote monitoring, and diagnosis devices. In the Life Sciences industry, innovation in mobile devices is occurring for multiple audiences: the sales force, physicians, and patients.

For sales, the rise of iPads and other tablets is changing their interactions with physicians. Sales Force Automation and Customer Relationship

Management tools providers are trying to rapidly adapt their offerings with solutions for tablets, such as including features that incorporate Closed Loop Marketing capabilities. Combined with better analytics, Life Sciences companies now have the opportunity to customize their interactions with their targeted physicians.

With patients and HCPs, the rapid growth of smart mobile devices with access to the Internet or apps is a clear indicator that the interaction paradigm has changed. Indeed, it is estimated that by 2015 more US Internet users will access the Internet through mobile devices than through PCs⁹.

Over 35,000 mobile health apps are listed in the Apple and Android marketplace, with a wide range of services such as monitoring, diagnosis, health management, and adherence. The challenge for Life Sciences companies is to develop and offer apps which address customers' unmet needs and align to their company's strategic goals.

Social-Local-Mobile Present Potential Opportunities

The rapid spread of advanced mobile devices has a significant impact on how Life Sciences companies interact with their key stakeholders. Increasingly they will have to rethink their approach and incorporate Social-Local-Mobile (SoLoMo) trends into their thinking process. While companies are familiar with the integration of Social and Mobile, they have not yet considered the "Local" aspect of SoLoMo (i.e., using social mobile technology services leveraging a user's location). Benchmarking against other industries can help Life Sciences companies better grasp the value proposition associated with SoLoMo services and define which aspects they want to focus on.

For example, Groupon and Foursquare are good illustrations of how to associate customized offers based on an individual's location. In the Life Sciences industry, mobile applications could be developed to remind people to refill their prescriptions or offer co-pay cards when in close proximity to a pharmacy.

While there are significant impacts of these trends on Life Sciences companies, however, they should avoid launching apps to just have a presence in mobile or social media. By doing so, their apps miss run the risk of missing their target because their objectives were not clearly defined. As discussed above, therapeutic areas have different levels of engagement. Life Sciences companies should monitor the disease state, define value-add services which fit with their overall brand strategies, and leverage partnerships with existing players in the market as an alternative to independently developing applications.

In the next section, we take a look at some of the regulatory challenges facing usage of social media and other digital tools by Life Sciences companies.

The Rise of Patient Opinion Leaders

“78% of people trust consumer recommendations vs. 14% for ads”

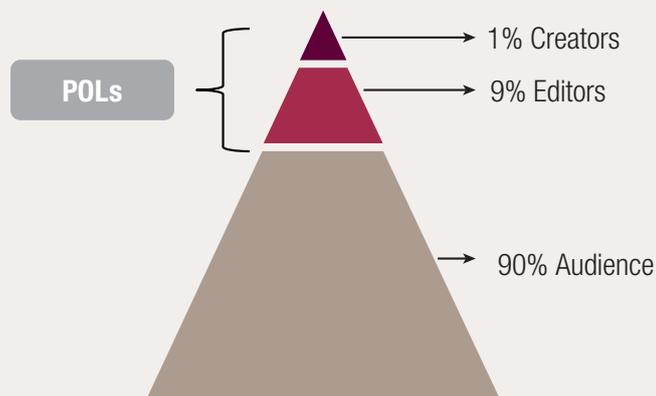
An interesting observation with most of the online conversations – blog posts, podcasts, and articles – is that they are generated by a small number of individuals, groups or companies. Wego Health estimates that only 10% of the online population is actually creating or editing content online (see Figure 3), giving rise to a category termed Patient Opinion Leaders.

POLs are patients or caregivers who share their experience and knowledge about a disease. POLs range in their approach, from acting as another source of support for patients to sharing their views about the disease and personal treatment challenges.

They may also guide patients and caregivers through treatment options, including feedback on side effects and reimbursement and even, at times, coming close to providing disease or treatment recommendations. By sharing past experiences and information, POLs can gain the trust of other patients and can emerge as key sources of information and influence by helping to cut through the massive volume of online medical information.

POLs are a new opportunity for Life Sciences companies. POLs provide a different channel to understand patients and their perceptions of brands, disseminate information, and influence others. Leveraging social media platforms can help Life Sciences companies identify these key influencers, increase engagement and advocacy, and improve adherence for both POLs and other patients.

Figure 3



Source: Wego Health

“Leveraging social media platforms can help Life Sciences companies identify key influencers, increase engagement and advocacy, and improve adherence for both POLs and other patients”

Understanding The Regulatory Challenge

“ In a study analyzing 250,000+ social media posts, the actual rate of adverse events came to 0.3% ”

The heavily regulated nature of the industry is causing some Life Sciences companies to wait for explicit guidance from their respective regulators on social media. In the USA, the regulator Food and Drug Administration (FDA) released its first draft guidance limited to “Responding to Unsolicited Requests for Off-Label Information About Prescription Drugs and Medical Device”. This guidance is a first step by the FDA to address the use of social media – even though social media is not mentioned in the title – but it leaves open questions for Life Sciences companies, including how to proceed with potential adverse events notifications on Social Platforms. In the UK, the Prescription Medicines Code of Practice Authority (PMCPA) issued guidance on how digital communications already comes under the ambit of the UK pharmaceutical industry’s code of self-regulations. The PMCPA has put together a Q&A document to explain how digital communication fits into its existing regulations¹⁰.

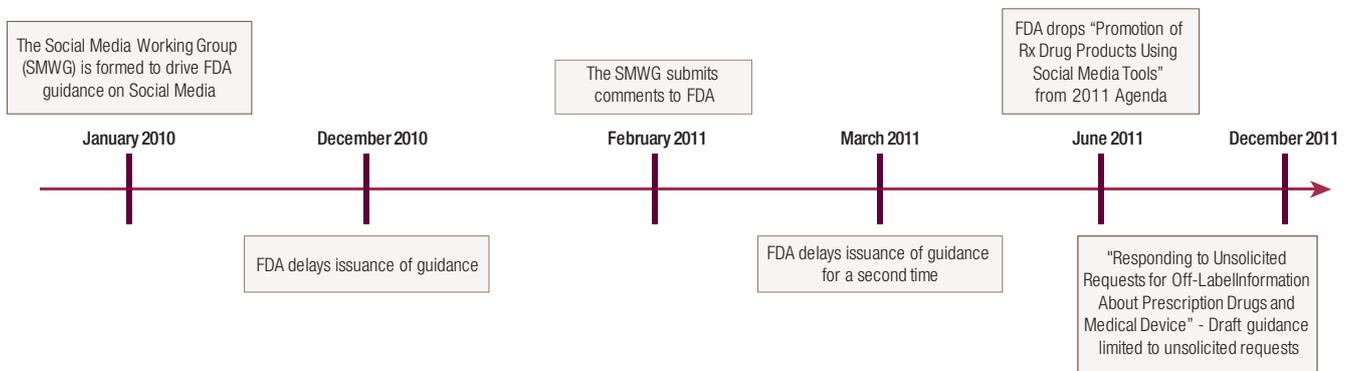
We believe Life Sciences companies should not wait for federal rules or regulation on social media promotion to act or they may never really grasp the potential of social platforms. As the case of USA shows, the timelines of regulator intervention are too spaced out for them to have any meaningful impact, given the rapid pace of development of social and mobile platforms (see Figure 4)

The lack of understanding around the impact of social media conversations on Adverse Events (AE) and lack of clear process for reporting them has kept companies cautious about engaging with their customers via this channel. However, in a study conducted by Visible over 30 days, analyzing 250,000+ social media posts across 224 major pharmaceutical brands, “the actual rate of AEs in the overall data set is 0.3 percent”¹¹. By increasing their understanding and comfort with these emerging platforms, Life Sciences companies can gain more insight into customer behaviors to drive their strategies and enhance their overall business.

It is also important to bear in mind that the continuing and rapid evolution of the social environment makes regulation difficult. Regulators in most geographies will likely refrain from establishing platform-specific rules (e.g., Facebook or Twitter) as these platforms continue to update their services and new competitors continue to emerge. While it is likely that regulators will continue to look at social media with caution, Life Sciences companies should proactively look at ways to leverage the potential of social platforms and should move forward with their social media strategy.

In the next section, we talk of how Life Sciences companies can effectively leverage social and mobile platforms to meet their goals.

Figure 4



Source: PharmaMarketer, 2010, "A Pharma 'Social Media Working Group' Submits Comments to FDA"; FDA.gov, 2011: "Revised 2011 Guidance Agenda"

How can Life Sciences companies unleash the power of social media and mobile platforms?

“Listening is a passive low-risk approach to social media with clear results”

We believe Life Sciences companies should consider integrating social media and mobile health platforms in four stages that involve collaborating and internal information, listening, engaging and finally measuring and repeating (see Figure 5). Organizations will find themselves at more than one stage, depending on the maturity profile of their brands, franchises or company.

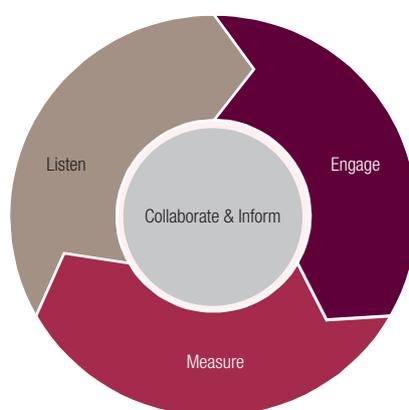
Collaborate and Inform to Derive Internal Benefits

The first stage is to use social media to foster internal collaboration and information-sharing. By launching social media internally and limiting external exposure to partners, companies can minimize risk and maximize experimentation with digital transformation tools. Benefits include accelerated decision-making, increased productivity and promotion of internal change.

Social media collaboration tools have helped Life Sciences companies rethink innovation, both internally and with selected partners. For instance, Roche Diagnostics conducted a social media experiment using selective crowdsourcing to identify new R&D solutions, both within its internal R&D network and externally with scientists in partnership with InnoCentive¹².

Crowdsourced innovation is an emerging topic for companies trying to foster innovation in their ecosystem. Vendors such as Spigit are offering platforms to manage the innovation process and leverage “the crowd” not only in the ideation stage, but also throughout the selection process. Spigit adds incentives for participation – the gamification and idea-market features allow employees to redeem

Figure 5: Capgemini Consulting’s Social and Mobile Engagement Framework



Source: Capgemini Consulting, 2012

their points for rewards or invest them in the idea stock market to demonstrate their commitment to a particular idea.

Enabling more effective collaboration across product launches is another opportunity to leverage social media internally. Bringing together large teams, sharing diverse information, and making decisions often require considerable time and effort. Social media tools can help eliminate meetings and increase productivity. Cisco has been developing an enterprise social media tool called Quad, which has been used to combine content, information, communications and collaboration into an integrated workspace. The benefits are significant. Cisco reported that leveraging Quad helped cut the launch time in half for one of their releases – and increased productivity by 12%¹³.

Listen to Define Actionable Steps

The next stage is to listen to what your stakeholders are saying about you, your product, and your competitors. Life sciences companies can obtain market insights throughout the lifecycle of a product to improve their customers’ experiences. Many Life Sciences companies have tools to track sentiment trends, although they may be hesitant to use that information to refine their products’ messaging or other parameters. The value of effective listening is to make that information actionable by using it to target the right customers, obtain new ideas or identify unmet customer needs, and improve a product’s trajectory across its lifecycle. Listening is a key stage in understanding the value of social platforms and getting used to this “new” media.

This passive approach to social media is low risk – but is likely to generate clear benefits. For instance, Bio-pharma company UCB partnered with PatientsLikeMe to sponsor its epilepsy community. Through such an arrangement, the company gains credibility in this therapeutic area and improves its understanding of patients with the disease, in advance of a product on market. Patients benefit by having a robust community to share treatment and connect with others while being able to provide outcomes data through surveys. PatientsLikeMe also has incorporated a drug safety program that reports AEs. Using this approach could alleviate Life Sciences companies’ concerns about managing AE reporting online¹⁴.

“ Engagement with POLs and enabling collaboration between patients and physicians are important opportunities ”

Based on the benefits detailed above and its low risk profile, many Life Sciences companies choose to remain at this stage and miss the opportunity to fully capture the value of social platforms and mobile devices.

Engage to Shape Market Opinion

Engaging with your stakeholders is the third stage in social media and mobile health – and doing it through Opinion Leaders, whether they are HCPs or patients, can help Life Sciences companies shape the market effectively and efficiently while limiting exposure and regulatory risk. Focusing on KOLs is a traditional strategy for most brands and social media can accelerate identification and communication with them. We believe engagement with POLs and enabling collaboration between patients and physicians are important opportunities for Life Sciences companies. As an example of the latter, the Mayo Clinic and POLs partnered to recruit patients for an exploratory study on an uncommon disease – spontaneous coronary artery dissection. Initial recruitment was completed in one week, and all participants completed the study¹⁵. Active participation by Life Sciences companies would allow them to capture this knowledge, track early reactions from patients and HCPs in advance of real-time sales data, and build stakeholder input to accelerate the product life cycle.

Mobile health tools can also keep stakeholders engaged. Examples include the classic Physicians' Desk Reference, available as mobilePDR, and Epocrates for simple and quick access to key medical information. Epocrates has also partnered with Life Sciences companies to push updates on new indications or other critical drug information to both physicians and pharmacists.

Measure Actions to Ensure Effectiveness

The final stage is to measure, integrate, and adapt successful social media strategies throughout the company.

The measurement phase is not limited to the measure of an initiative's return on investment (ROI). The determination of “hard” ROI numbers for specific social media campaigns is likely to be difficult, but its impact on patient compliance or adoption rates can still be significant. Life Sciences companies need to measure adoption of social media as a channel by tying campaign success to core business metrics such as impact on customer perception, number of new prescriptions, refill rates, or overall market penetration. However, social media and mobile health strategies should not be developed in isolation – they should be integrated into the brand, franchise or company's overall strategy as one component of a company's multi-channel strategy.

Life sciences companies need to build and organize their capabilities on social platform to capture and disseminate key lessons learned. Developing Centers of Excellence on social media or multi- channel management helps companies organize their processes for faster update. Companies that include social media and mobile health in their marketing strategies will find that it provides value for their stakeholders.

In the next and concluding section, we propose an implementation roadmap for how Life Sciences organizations need to rollout digital initiatives.

Our Recommended Guiding Principles and Approach to Strategy and Execution

“ Social media and mobile health strategies should not be developed in isolation ”

Before developing a social media and mobile devices strategy, Life Sciences companies need to acknowledge the potential disruption created by the rise of those technologies and assess their impact on current and future business.

The classic one-way interaction paradigm is dying. Going forward, stakeholders – whether they are patients or HCPs – will talk about a company whether it is participating or not. The nature of those stakeholder conversations is also changing. Patients – primarily through Patient Opinion Leaders – now have a seat at the table and are asking for a real dialogue with Life Sciences companies and HCPs. Companies need to be an integral part of that dialogue.

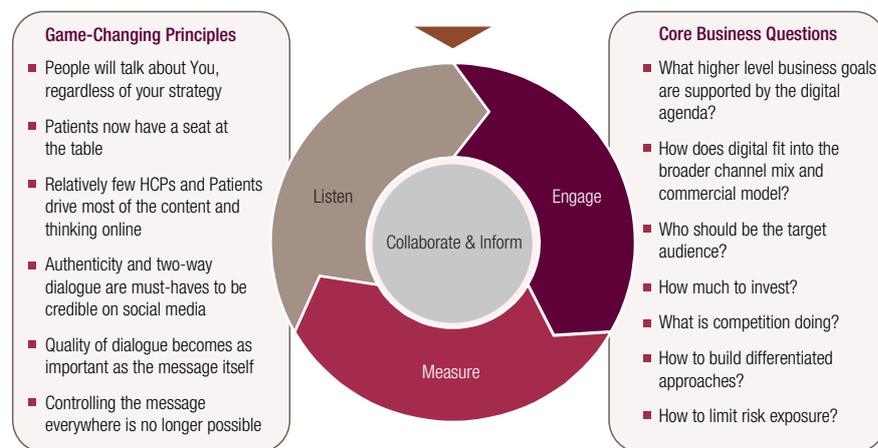
Life Sciences companies need to act upon this changing paradigm. They need to define what business goals are supported by the digital agenda and how digital fits into the broader channel mix and commercial model. Alignment of their digital agenda to the overall business is critical. Social platforms and mobile devices are key tactics that Life Sciences companies need to manage and should not be treated separately from other channels and initiatives.

We believe a digital roadmap is contingent on five key areas.

Develop a “Business-Centric” Social Media and Mobile Health Strategy

Some companies are responding to the urgency of social media and mobile health by unintentionally rushing to participate without a thoughtful approach. Rather than taking the time to define a formal strategy and align it to a brand or company’s overall business

Figure 6: Social Media and Mobile Health Guiding Principles and Core Business Questions



Source: Capgemini Consulting, 2012

goal, they launch Facebook pages or mobile applications before defining their overall approach. As a result, those companies hardly see any return or, in the worst cases, receive negative feedback from their target audience. A robust social media and mobile health strategy should be designed to align with – and contribute to – the overall corporate goals and strategy. Even with a pilot project, Life Sciences companies should define how the project will support the overall strategy and how it links with other initiatives.

Design and Launch Unique Online Opinion Leader Programs

Once the social media and mobile health approach is defined, POL or KOL online engagement initiatives are excellent ways to listen and engage with your key stakeholders. These social media strategies should be integrated with existing engagement programs.

The goals of an online Opinion Leader Program can potentially include initiating communications with key POLs/KOLs for a therapeutic area to evaluate their understanding of a disease, leverage them and/or their influence network for message testing or clinical trial recruitment, or raise overall product awareness in the patient community through the diffusion of appropriate product information.

Turn Social Insights into Action

Life Sciences companies need to develop or partner with companies that offer solution with the ability to go beyond sensitivity trends by conducting sentiment analysis on social media sites and integrating it with an organization’s existing CRM and BI systems. Such deep analyses can help a company respond to feedback in real-time, identify sales opportunities and threats, and improve their customers’ experience. Key objectives

“ Sentiment analysis on social media sites can help life sciences companies respond to feedback in real-time, identify sales opportunities and threats, and improve their customers’ experience ”

from any such initiative should include getting a holistic view of stakeholders’ sentiments, assessing the level of social maturity of the stakeholders, identifying customers’ unmet needs, identifying opportunities, threats, and key influencers and finally, allowing an ability to create real-time response decision plans.

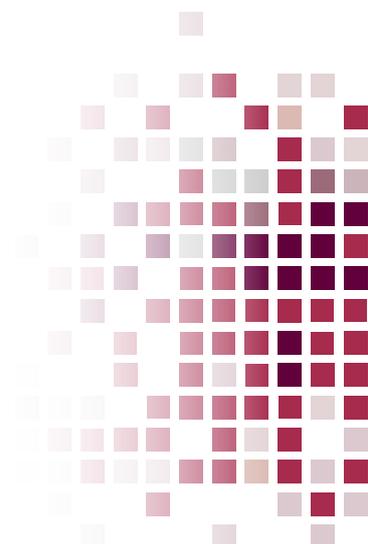
Foster Internal Collaboration

As organizations become more geographically-dispersed, have remote staff, and grow on to multiple levels of complexity, Life Sciences companies will need to promote internal connections and engagement. Digital technologies are well-suited to fill this gap, especially for coordination-heavy projects such as product launches. Organizations will need to perform an assessment of internal digital needs (e.g., blogs, wikis, discussion forums, etc.) and accordingly design and implement solutions. The end-objective from such an exercise should be improved connections, interactions, and knowledge-sharing between teams that will in-turn enable faster information dissemination, promote collaborative problem-solving, and leverage real-time decision-making.

Increase Mobile and Tech Adoption

The rapid pace of development of technology in the social and mobile areas can leave many an employee confounded. Organizations will need to ensure that they proactively train their employees of the benefits of such technologies and in the process drive their adoption too. They should support such adoption through employee-friendly initiatives that will help break down any initial resistance that they might encounter to such technology advances.

In summary, successful social or mobile platforms support franchise and/or corporate overarching strategic goals. As access to physicians through the traditional channels becomes more limited, social media will become more important as a means for connecting with them. With the growing decision-making power of patients, Life Sciences companies must also develop a way to engage with them. Leveraging social media and advanced digital tools is a key way for Life Sciences companies to remain competitive in this changing environment.



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