

Scaling GenAI

Lessons from successful
journeys – from strategy to
implementation

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How others are approaching GenAI at scale today

COMPANY A

Enterprise Cost Transformation

- **Top-down mandate** from the CEO
- Focused investments on a **portfolio of “GenAI Bold Plays”** across core functions
- **Each Bold Play is** treated as its own business case to realize value

COMPANY B

Customer Conversion & Retention

- Driven by **head of Commercial and the CMO**
- **Focused all investment** on three E2E commercial use cases
- Only customer conversion & retention were **evaluated as success metrics**

COMPANY C

Insight Driven Productivity

- CEO launched a “GenAI productivity Philosophy” focused on enabling employees to work better, faster, and smarter
- Each BU leader had autonomy
- Success based on efficiencies and optimize for baseline

Common GenAI Levers

DRIVE **COST**
TRANSFORMATION

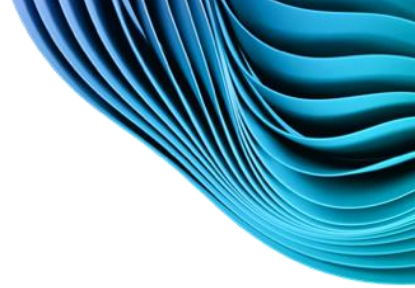
ACCELERATE **NEW**
PRODUCT LAUNCHES

REVITALIZE **R&D**

ENHANCE **CUSTOMER**
CONVERSION &
RETENTION

ACCELERATE
GROWTH

Top 5 biopharma company to activate and scale GenAI capabilities across the enterprise



PHASE 1: NO REGRET BETS

PHASE 2: SCALING

VISION

Board approved an enterprise **AI/GenAI strategy targeting billion in value**

Use cases targeted across **all business functions & markets**

CEO linked AI/GenAI impact to **C-Suite goals & compensation**

VALUE DELIVERED TO DATE

2 Novel Drug Targets Discovered
and approved for pre-clinical assessment and testing

22 Deployed Use Cases Driving >25%
average time savings, cycle time reduction, etc. across deployed use cases

\$900M
2-year value forecast

\$161M
value capture to date

55
Global markets served

Value already realized with these use cases

Estimated value at scale for these use cases

FUTURE

Double-down on **drug discovery, supply chain and manufacturing, & commercial** with 30+ additional use cases

Drive an additional **\$2B in value** by the end of 2027 from additional bold plays / use cases

Key building blocks to successfully scale AI



STRATEGIC BLUEPRINT

Define business ambition with clear short & long-term goals and investment commitments



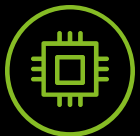
OPERATING STRUCTURE

Build a model to source, prioritise, govern and develop AI / GenAI capabilities



VALUE REALISATION

Stand up a value tracking mechanism to measure outcomes and optimise investments



CAPABILITIES Data & TECH

Create a technology and partner roadmap to enable AI / GenAI



WAYS OF WORKING

Build an enterprise AI fluency and optimise operating model to maximise adoption



RESPONSIBLE AI

Establish ground rules and promote accountable and ethical use of AI

Strategic framework your peers are leveraging to capture value from AI/GenAI

OUR FINDINGS

Est. peak value potential of GenAI/AI

\$5B to \$7B

~75% of Value from Commercial, R&D, & Supply Chain

~60% Cost Reduction
~40% Revenue Increase

WHERE TO PLAY

AI for Individuals

VALUE SOURCES

- Raise the **productivity of each colleague** by putting AI tools at their fingertips (ex. MSFT co-pilot)
- **Upskill employees, drive adoption, and develop an AI fluent workforce** through learning and development initiatives

0 – 1 year
Time to Value

AI for Business Units

- Solve **key business challenges** with **innovative AI-enabled solutions** and **change how work gets done**
- Embrace vertical **platforms offering** native AI capabilities to accelerate AI-led business transformation

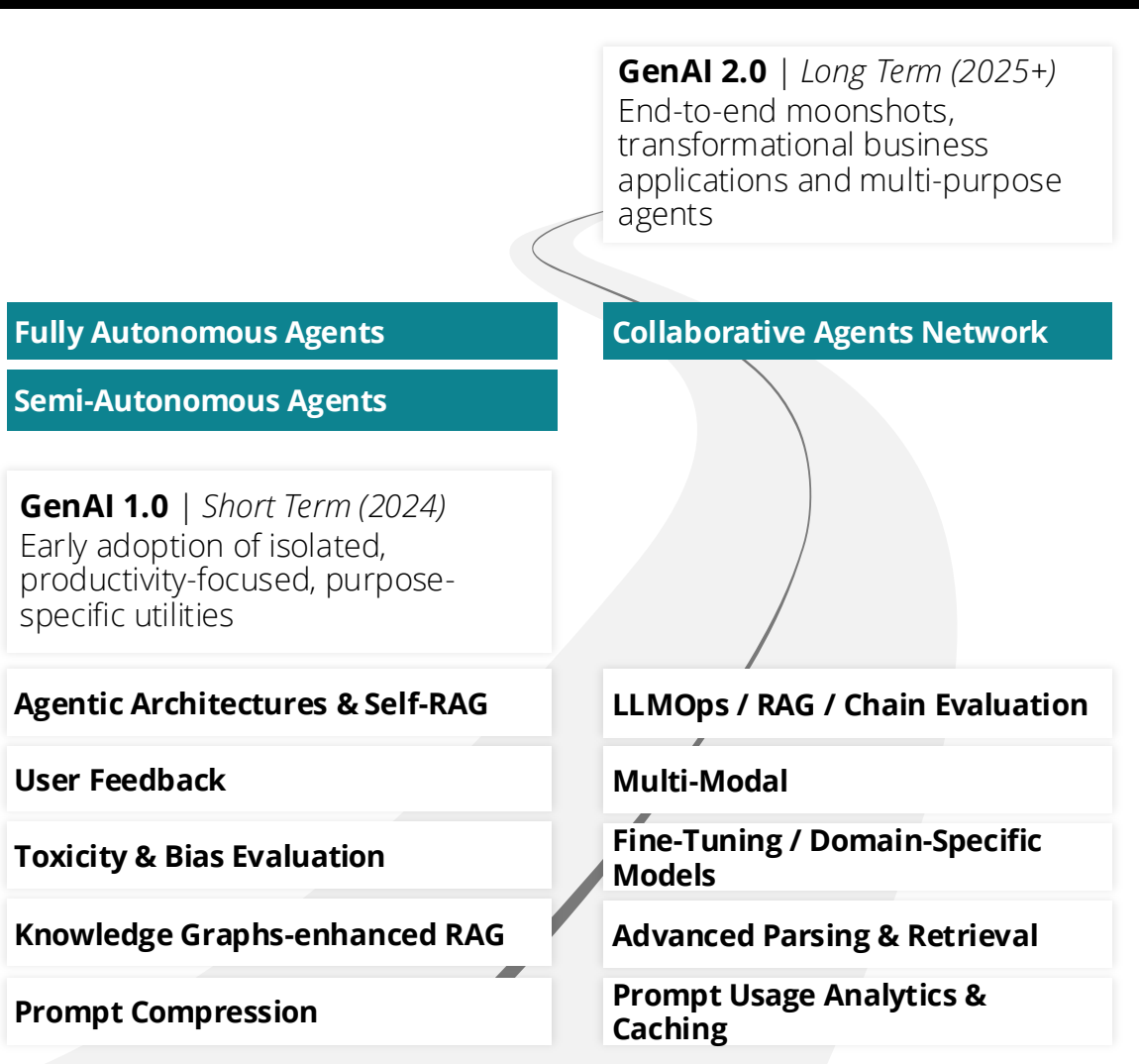
1 – 2 years
Time to Value

AI for the Reimagined Enterprise

- **Reimagine the business** by pursuing “string of pearls” opportunities that weave together multiple use cases and technologies to transform major business value streams

2+ years
Time to Value

The rapidly evolving GenAI capability landscape presents an innovator's dilemma for organizations



Waiting for GenAI 2.0 Maturity

- **Opportunity cost** of inaction
- Going through the **learning curve** with mature tech
- **Educating users** once new tech unlocks transformational cases
- **Waiting for solutions** that produce near perfect outcomes

Investing now in GenAI 1.0

- **Reaping efficiency** gains, now
- Building **organizational knowledge** & expertise, now
- **Raising awareness** and fostering adoption now
- **Improve outcomes iteratively** to foster trust & acceptance, now

The GenAI technology market is still maturing pushing clients to invest in enabling their own “Platform-as-product”

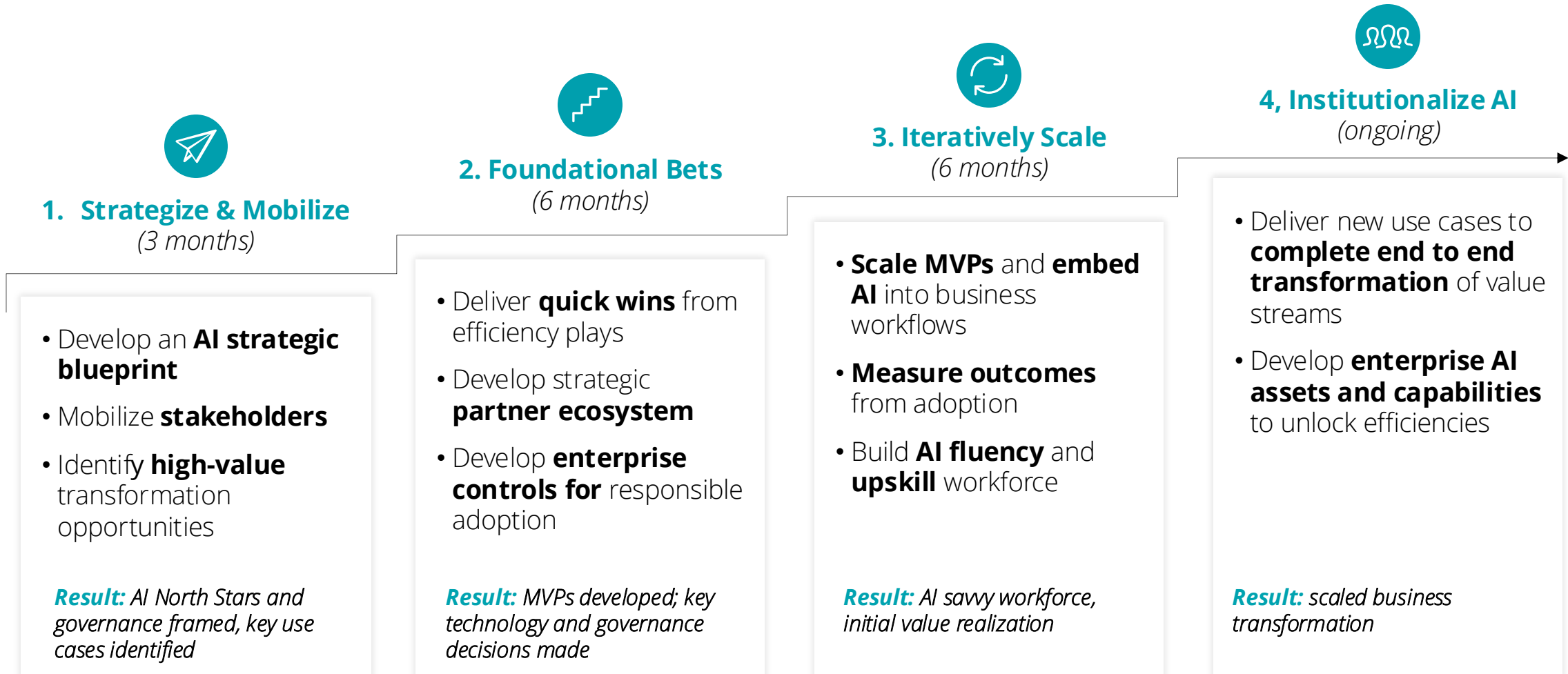
WHAT ENTERPRISES ARE ASKING FOR

- **Enable abstracted, simplified business self-service UXs** and control their evolution without being locked into a vendor / hyperscaler tool
- **Enable optionality for business users to try different capabilities** without being locked into / out of any specific vendor(s)
- **Control proliferation of PoC tech stacks** for standard solution patterns that would be throw-away technical debt if not consolidated on a common platform
- **Provide engineering teams with “low-code” capabilities** and building blocks (APIs, frameworks/SDKs, workflow components, micro-frontends etc.) to accelerate development of advanced use cases
- **Strong desire to create contextual business experiences** beyond what a single platform can provide
- **Accelerate seeding business self-service capabilities** and support L&D initiatives for upskilling workforce for future ways of working

MARKET LANDSCAPE

- **Productivity tools such as Microsoft Copilot** are still maturing (M365 vs Copilot Studio, fabric etc.)
- **Product vendors** (DataIKU, ServiceNow, Salesforce etc.) have been slow in their development cycles and have not yet delivered on tangible self-service GenAI capabilities
- **As GenAI tech wars escalate, hyperscalers are enabling “exclusivity” on specific LLMs** with preference towards proprietary investments and partnerships
- **Most product vendors are creating opinionated experiences** that clients can't modify or control
- **Vendors don't have the scale to support clients** on adoption, and have not yet GA-ed capabilities and enabled SIs to scale

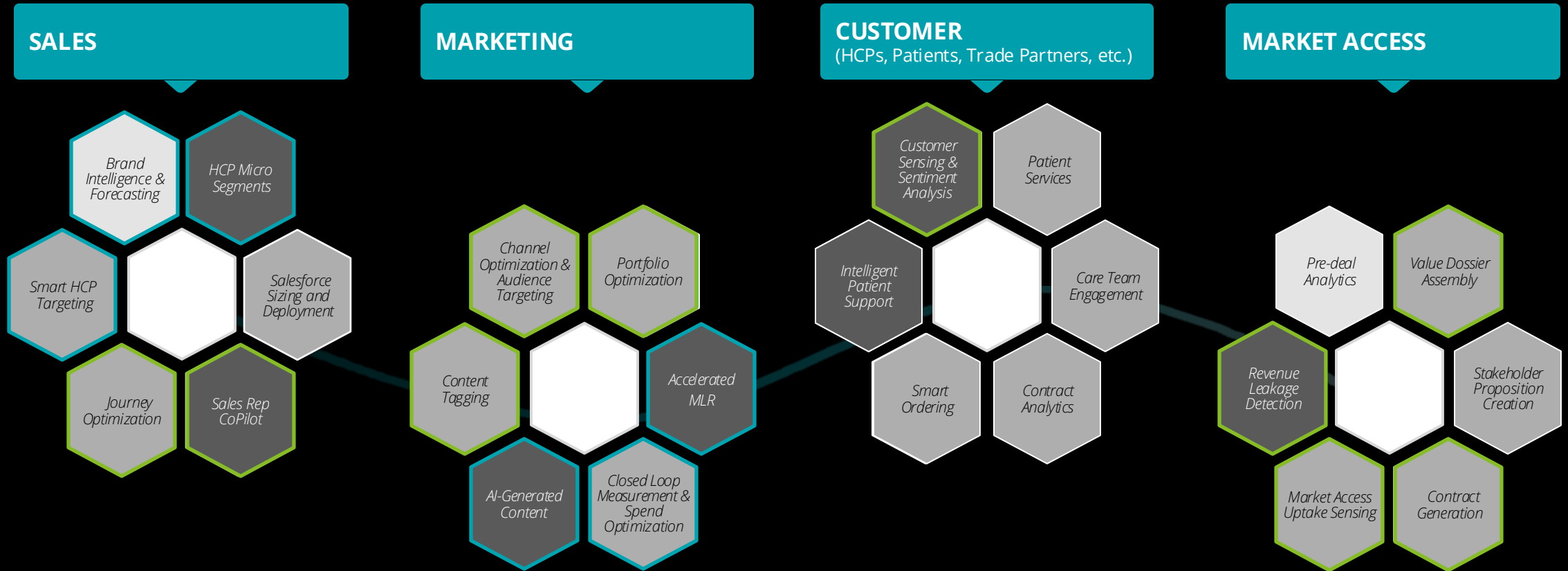
The ~18 month journey to driving value & scale



String of Pearls – Approach to value realization



Commercial "String of Pearls"



Example ambition from peers:

- AI content generation to create \$200M to \$500M saving per annum
- Revenue leakage detection to optimize billions in commercial rebate payments
- Product launch: to accelerate launch timelines by 10% to 25%

Deloitte perspective on value potential in 5 years



LOW: <\$10M



MED: \$10M-\$100M



HIGH: \$100M+

Use cases Deloitte has done



POC or MVP ongoing



Production (incl. MVP in production)

Content supply breakdown

Objectives	Capabilities	GenAI	Machine Learning	Descriptive Analytics	Data	Ecosystems, Integrations, and Engineering
1 Generate the creative brief for a given campaign based on customer insights, online perceptions, and market intelligence	Creative Brief Generation	Content authoring, sentiment analysis	HCP microsegmentation, content affinity, campaign performance analytics, sentiment analysis	Trend analysis, statistical analysis	Claims, campaigns, NPI lists, social media	Web scraping (social media)
2 Generate and manage claims from trusted academic publications	Claim Management	Summarization, content authoring, classification	Content affinity, A/B testing		Scientific medical journals, claims, NPI / HCP lists, campaigns	Academic journal feeds, Claim library / repos, HCP programmatic identity
3 Automate generation of elements of content (e.g., title key message, graphics etc.)	Content Generation	Novel content generation, classification	Content affinity, A/B testing		Claims, NPI / HCP lists, campaigns, brand guidelines	Content illustrator apps, content libraries, content management system
4 Integrate various elements into a cohesive and compliant content artifact	Content Assembly	Novel content generation, classification			Content elements, MLR rules	Content management system, MLR rules repo
5 Tailor content for local market preferences, language, internal policies, and regulations	Content Localization	Novel content generation, translation, classification	Content affinity, A/B testing		Claims, NPI / HCP lists, campaigns, MLR rules	Content management system, MLR rules repo
6 Highlight potential risk areas based on internal rules, policies, and regulations	Automated MLR Review	Classification			MLR rules	Content management system, MLR rules repo

String of pearls: interconnection of multiple use cases, which collectively enhance or accelerate an E2E process (value is compounded)

Imagine a World...

where GenAI Copilots augment commercial teams across their end-to-end content supply

BRAND TEAMS

01 Insights Copilot

Synthesis and summarization of complex analytical models to equip content teams with a richer understanding of markets, brands, and customers to **increase engagement by 25%**

CREATIVE TEAMS

02 Creative Brief Copilot

AI authoring of creative briefs that are anchored in granular understanding of customer needs to **increase insight utilization in ops by 3X**

CREATIVE TEAMS

03 Content Generation Copilot

Hyper-personalized content generation at scale and speed to **reduce agency vendor spend by 25%**

CREATIVE TEAMS

04 Content assembly Copilot

AI-assisted assembly of creative and copy elements of contents to **increase content reuse by 10X**

CREATIVE TEAMS

05 Content Localization Copilot

Automated customization of personalized content to meet the cultural and regulatory needs to **increase global content utilization by 50%**

COMPLIANCE TEAMS

06 MLR Copilot

Frictionless reviews of new content generated with regulatory and internal policies in mind to **reduce review cycles by 75%**

VALUE POTENTIAL

COST REDUCTION

- ✓ **40-50%** reduction in content creation costs
- ✓ **\$400M+** in annual savings

REVENUE GENERATION

- ✓ **10-20%** Increase in customer acquisition rate
- ✓ **\$100M+** in revenues from new customers

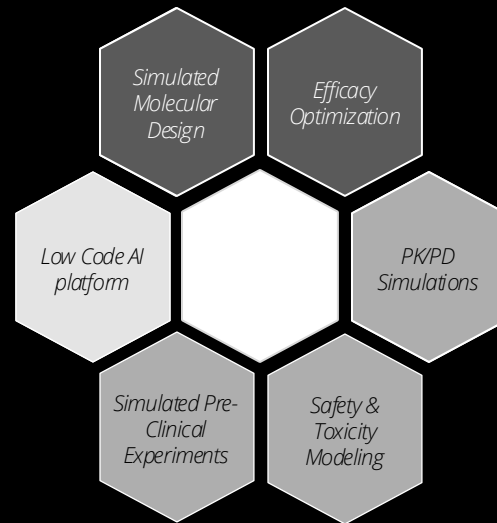
1 Based on observed GenAI impact. Assumptions based on an average biopharma company size (e.g., average spend on content vendors, average revenue per customer etc.)

R&D “String of Pearls”

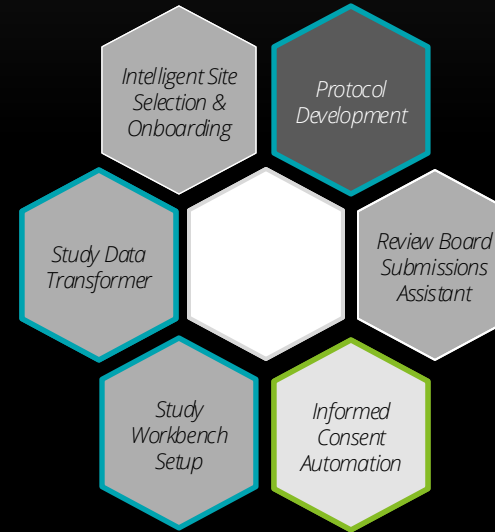
RESEARCH



DRUG DESIGN



STUDY DESIGN



STUDY OPERATIONS



Example ambition from peers:

- Protocol development to drive \$100M to \$120M annual savings across trials
- Scientific literature summarization to create 20%+ more high potential targets
- Competitive intelligence to improve R&D finance capital allocation

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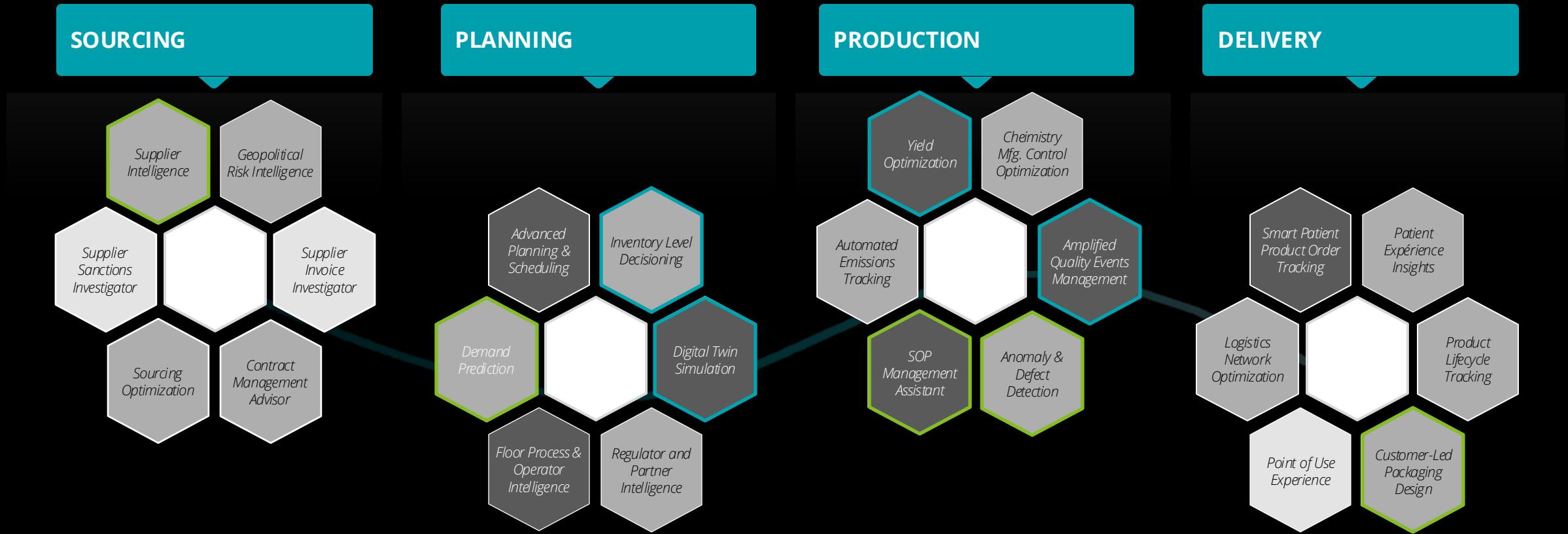


POC or MVP ongoing



Production (incl. MVP in production)

Supply & Manufacturing "String of Pearls"



Example ambition from peers:

- Yield improvement to drive 3-5% optimization, driving margin growth
- Demand prediction to enable 5-10% lost revenue recovery, 10% cost savings
- Quality Events Mgmt to reduce product hold times by 66%

Deloitte perspective on value potential in 5 years



LOW: <\$10M



MED: \$10M-\$100M



HIGH: \$100M+

Use cases Deloitte has done



POC or MVP ongoing



Production (incl. MVP in production)

Thank you!



General Anatomy of a GenAI Platform (As of July 2024)

