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Emmanuelle Quilès, CEO of Janssen France, speaks about how she joined the American multinational with the ambition to bring digitalization and transform the organization from the inside. Quilès goes on to cover the operational specifics of the affiliate and shares her insights on the French pharma ecosystem.

Why did you decide to return to Big Pharma and what have been your priorities since taking over the reins at Janssen?

Before coming to Janssen I had been taking the time to run my own diabetology startup, Harmonium, so as to acquire new skills, fine-tune my abilities in an operational setting and see things from a different perspective. When I decided to re-join Big Pharma, I was keen to reevaluate how the interactions between the industry and healthcare players have developed in the face of digitalization – a rapidly evolving disruptor in the life sciences ecosystem. On taking over the reins of Janssen’s French affiliate, I started out by conducting an internal assessment of the local business structure. Being such a large organization with deep traditions behind it, I realized this configuration could actually pose a barrier to transformation. My initial challenge was to figure out how to modify the behaviour of our employees to better fit the world we are working in today.

For the first two years, I spent most of my time on transforming the company internally. I had to consider how digitalization impacts the way we should be working towards a customer-first approach and how we measure performance. Complacency is the enemy of success and, in order to continue being the best, we had to bring ourselves up to speed.

At the end of last year, I launched a project with a customer-focused mentality to inspect how digitalization influences the traditional face-to-face interactions with healthcare professionals who are delivering information. Therefore, through a volunteer approach, we reduced the size of our field forces in certain therapeutic areas and created fresh units in the Customer Strategy team. Our aim was to create a multichannel conversation with healthcare professionals and go beyond traditional visits by understanding their needs on a deeper level. This change has not only been new for Janssen but the industry as a whole. We have to be in line with the current expectations of doctors today.

How did you implement this change?

I took on this challenge from a bottom-up approach. We started by identifying seven technology areas that could be performance drivers within the organization and employees participated in workshops on a voluntary basis. These teams were then led by different profiles from within the organization, often working outside of their own area of expertise. For example, our Director of Pharmaceutical Affairs became the sponsor of the digital workstream. This was a very unique approach that gave us an opportunity to discover the underlying potential of our human capital and witness their ability to drive topics. Nearly 300 people, half of our team, were involved in these working groups.

How is Janssen embracing digitalization at the local level?

As I mentioned, the first step was to integrate digitalization internally. Two years ago, we began by making sure that our team had the newest tools available to them and also knew how to use them with the right mindset. This training process was driven by young professionals in the company - millennials - who are more inclined to use this technology naturally. This was done in a fun and casual way, like over coffee, or reverse-mentoring sessions for example, which made the workshops very well received by employees.

Reverse mentoring was vital to this transformation because, in order to be able to connect with patients via different channels, it is necessary for the entire organization to understand how they work. Once a uniform knowledge is achieved, we can question marketing strategies and consider how to reconfigure the way we interact with patients or with physicians.

Furthermore, we created new specialized teams to analyze the data we gather on a global level. Raw data is useless if it cannot be processed and comprehended. With the information available from the data lake we have created in Janssen, our analysts can take a closer look and suggest ideas on what aspects matter most to patients and doctors so that we can better meet their needs and serve as a partner in health.

What does patient centricity mean for Janssen and how does the company measure its performance in the area?

What is very important in the Janssen story is the change in the mindset of working with the patient rather than for the patient. With this approach, the first thing we did was look upstream at clinical research. It was decided that the clinical operations team would write new consent forms and involve patient groups to validate them, to better inform patients about the drugs they are taking.

Going downstream, we recognize that the caregivers are also playing an important role in the patient journey. For example, we have developed an app last year thanks to a hackathon to help caregivers support patients with a simple tool. The app allows all of those involved in the patient's care to communicate with each other in a centralized manner and share information about doctor's visits and other tasks involved in caring for the patient. At Janssen, we understand that at some point in our lives we will all be either a caregiver or a patient, so our focus with these initiatives is to make sure that no one involved ever has to go through the journey alone.

How would you assess the importance of the affiliate in relation to J&J's overall EMEA operations?

France is a crucial affiliate for Janssen internationally. Coming from a time where the market conditions in France were less favourable than in other countries, we have made positive strides and moved from seventh in the market to third. The progress of Janssen in France has been

impressive and for the second year in a row, we are growing by double digits.

This development for Janssen is being driven by our solid pipeline, innovation capacity, and of course, the tremendous team we have here in France. There is a high level of engagement from employees and we have numerous strong leaders within the organization who have the capability to inspire. Our team is motivated by the Janssen Credo and patient centricity is something that really matters to everyone in the company.

Which areas of operation are driving Janssen in France?

Haematology and oncology are becoming increasingly prevalent for Janssen France. These areas currently account for 60 percent of sales within the market. Within the oncology pipeline, Zytiga®, Darzalex®, and Imbruvica® are key drivers which are constantly coming out with new indications. These products are well received and even taken in combination with drugs from other pharmaceutical companies.

What role does manufacturing play for Janssen in France?

The product site is not only for Janssen pharmaceuticals, but it also manufactures consumer goods products for Johnson & Johnson. The facility in France creates packaging solutions for Europe and the US and has recently gained FDA approval. The quality of personnel and innovation capacity on the mechanical level tips the scales in favour of France as an attractive key location for Janssen's production activities.

Furthermore, the personal commitment of the government and stakeholders like President Macron and Minister of Health and Solidarity Buzyn to rekindle France's prowess in innovation renders the country more attractive for industrial investment. This openness and willingness is something that is not seen by any other country in Europe at the moment. Additionally, the level of science and connection to R&D players is very high. The overall stability and ability to reward innovation create a positive narrative for the country going forward.

What are the R&D capabilities of the affiliate?

In France, we have 100 people working on research and development, 50 of which are working for Janssen R&D. Our main areas of research are in oncology and anti-infective. Janssen's second European industrial research centre of excellence in Val de Reuil not only performs research but has discovered three drugs as well.

In Janssen, we place high importance on connecting internal research with external partners. The affiliate has set up a Fund named Janssen Horizon. Our goal is to be well linked in all our areas of research from both the medical side and social science side. We have 25 projects in diverse areas like artificial intelligence, genetic recombination, and patient pathways already funded.

Moving forward, aside from digitalization, we want to be very present in the artificial intelligence space and the therapeutic areas of haematology, oncology, and psychiatry. We also want to assume an active role in France's Healthcare Data Hub, a national initiative to which we want to contribute. I am committed to placing Janssen at the forefront of these sorts of innovative projects.

Where does competition locally come from and how does Janssen differentiate itself?

Coming from a scientific background, I see that in the areas in which we are competing is not strictly a marketing and sales concept. My emphasis is on making sure that patients are being given the right drug at the right moment. By focusing on patients, the competition takes care of itself. At the end of the day, the patient associations and physicians are deciding on which are the best drugs to give patients and in what combination. Therefore, we strive to deliver the best message we can about our products and their value.

In many areas, drugs are typically developed at the same speed which creates a lack of comparative data. Often, because we are so confident in our products, we collaborate with other players in the market to study the impact two drugs can have together rather than one versus the other. I believe it is imperative to make sure that our drugs will be used long term and are the most efficient as possible.

How do you assess the market access condition of France?

Janssen is one of the handful of truly innovative pharmaceutical companies in France and we recognize that the conditions are tough. Although there is a temporary authorization of use (ATU) system in place, it has evolved into a mechanism that creates distortions and that can hold back

the ability to go faster with other access schemes. Also, the initial level of data required to bring these innovations to patients is inappropriate when compared to European Union standards. The ATU is a good start but needs to be transformed into an accelerator, and France has still not found a way to do this yet.

In the context of the 8th Strategic Council of Health Industries (CSIS), the administration has seemingly addressed the issue of market access and within the industry, we are hoping for the change to be realized. We recognize the ambition that exists to create a fairer playing ground in the ecosystem, but the question of implementation remains mostly unanswered.

What changes do you see as most necessary within the French market?

The most important development we need to see is growth. Without baseline growth, you are not going to see many multinationals placing big-ticket investments in France when there are more appealing adjacent markets around.

Also, the ATU system must be reformed. It was a positive step to allow more than one indication of a product to be registered through the system... However, it has become a complex system difficult for many pharma players to navigate and to understand because of its lack of clarity and predictability. Moreover, the ATU ends the ability to negotiate pricing with the government, which constitutes an unfair condition when the uncertainty is so elevated.

What final message do you have about the French ecosystem and Janssen's role within it?

It is very important that people start looking at France in a different way. The effort that the government is putting into areas such as innovation and the direct involvement of President Macron himself into healthcare related topics, demonstrates the new mindset the country has adopted. We have seen the changes and investments coming to France and there is a recognition that the commitments made to France spur conversation and collaboration with the government.

As an advocate for France, I am very proud of what Janssen's presence is bringing to patients here. We have seen changes in diseases like Multiple Myeloma where the scope of treatment has expanded into not only survival but maybe even a cure in the near future. Our outlook is to think further about what we can deliver for health as we move forward.

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