

LEO Innovation Lab

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Chief Medical Officer

Future mega trends of health care 2025



Consumer Health

Patients and caregivers will become consumers



New Technologies

New real-time data will support analysis of data and patient sub-groups, optimizing care.



Payer Pressure

Rising healthcare expenditures and real world evidence will drive treatment decisions



Demographic Changes

Middle class in emerging markets will grow significantly and increase their buying power. Globally ageing population will demand care



Digital Disruption

Digital health is disrupting healthcare systems

New synergies and players in health care - a new future

Reasons for why digital is moving so slow in health care

- 1. Legal constraint factors**
- 2. Lack of financial incentives**
- 3. Lack of recognition by regulatory organs**
- 4. Cultural aspects among patients, caregivers, Health Care Providers**

LEO Pharma: more than 100 years



- Founded in 1908 by the two pharmacists Antons and Kongsted, sold to Abildgaard in 1940 who established the LEO foundation in 1984 to ensure independence
- From humble beginnings in the basement of the Copenhagen pharmacy, LEO Pharma has grown into a truly global concern, helping people all over the world to help people achieve healthy skin



Anton Antons



August Kongsted



Knud Abildgaard

Source LEO Pharma

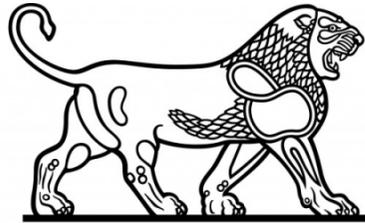


LEO FONDET

EST. 1984



Owned by the LEO Foundation

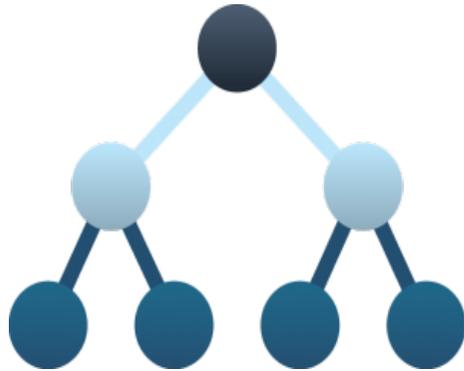


LEO FONDET

EST. 1984



Built as an independent unit



Innovating to
improve life for people
living with a skin condition



LEO
Innovation Lab

With an international focus



LEO innovation Lab

Focus on pains and potentials in the patient journey

Ideation Framework

Multiple gates to help us kill darlings!



Discovery: Conceptualization

Uncover concepts, define the experience

Incubation: Experimentation

Create and validates the product

Acceleration

Commercialize/scale

Stages & Actions

Naked idea

- Customer problem
- Idea assumptions

Interpretation

- Hypotheses
- Description of domain and challenge
- Gather research and inspiration

Detailed MVP

- Concept description
- MVP features
- Technical requirements
- **Success criteria**

Build and find users

- Engage with target users
- Build MVP
- Test refine & tests
- Suggested KPIs

Acquire real users

- Functional MVP
- Build-measure-Learn
- Team evaluation
- **Explore bus. model**

Growing Solution

- V1 solution
- Grow users
- Test growth model
- Plan V2
- Geo-expand
- Team evaluation

Originates from 1 person/group

1-2 people / 2 weeks

1-3 people / 3-4 weeks

3-5 people / 100 days

3-5 people / 1-2 quarters

FTE to be scaled / 1 year

Deliverables

User trends identified

User/market research & facts
Country proposal

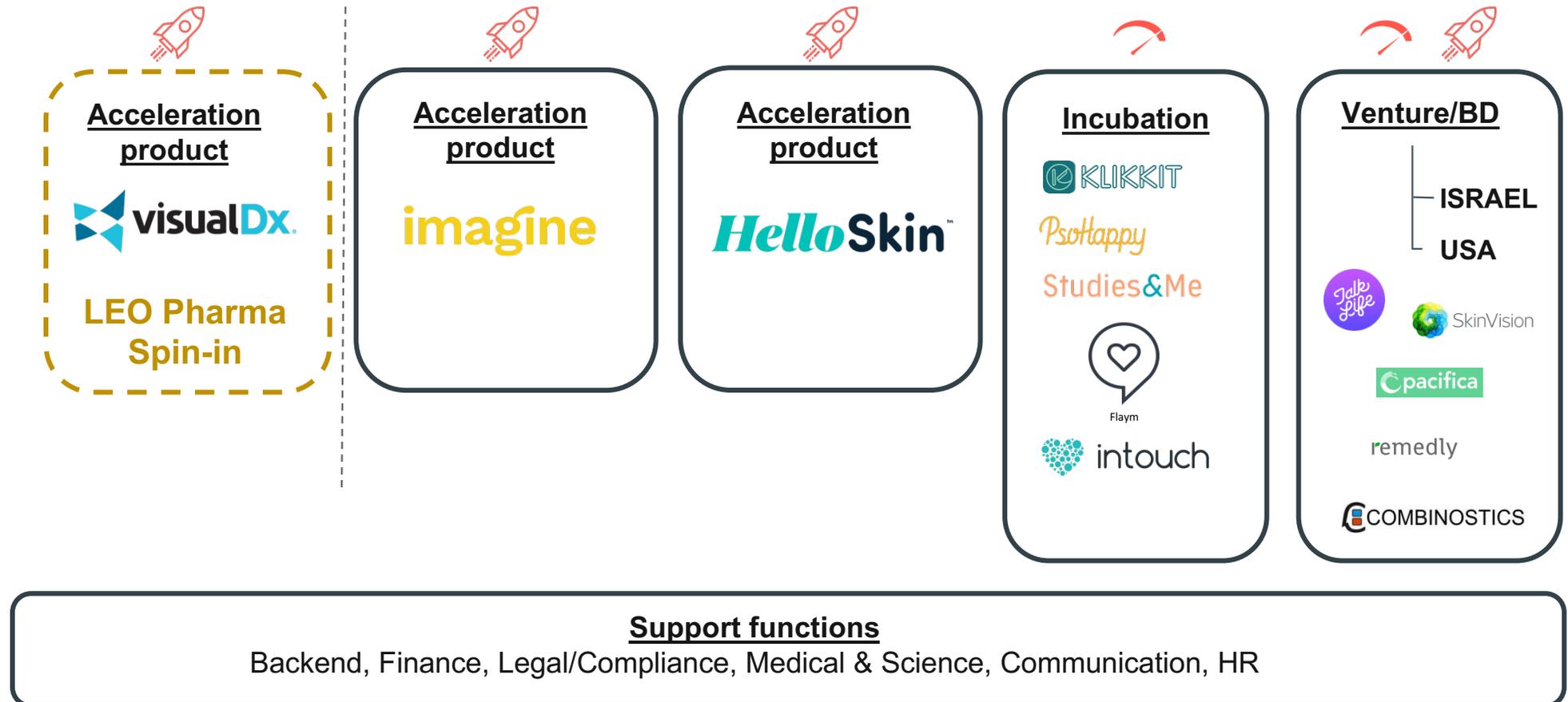
Mock-ups / prototype (sprint)
Market Testing
Country selection

User validation
Clear KPIs, e.g. retention rates

KPIs reached or re-evaluated
Growth model at smaller scale

KPIs reached
Functional V1
Validated growth model

LEO Innovation Lab - focus areas



PsoHappy

PsoHappy World 2017

Official global Psoriasis
Happiness Index

Currently 150,000+ survey
answers from 100+ countries

Recently launched similar
study within Eczema in UK,
US and Canada 5,000+
surveys

People with psoriasis are:

- 12% less happy in DK
- 24% less happy in UK
- 20% less happy in US

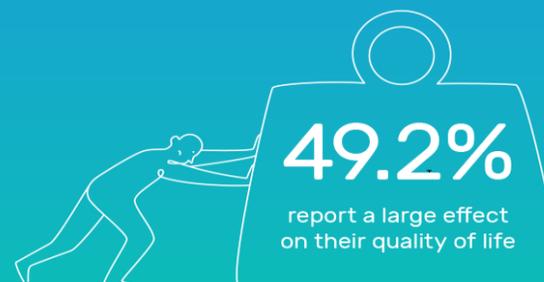


Developed by:

HAPPINESS RESEARCH
INSTITUTE

 LEO
Innovation Lab

The negative impact of Psoriasis



People living with psoriasis experience these levels of impact on their lives



Key learnings



Technologies are just tools (e.g. app)

Solutions must solve a SIMPLE problem (reframing)

Create a unique consumer centric experience

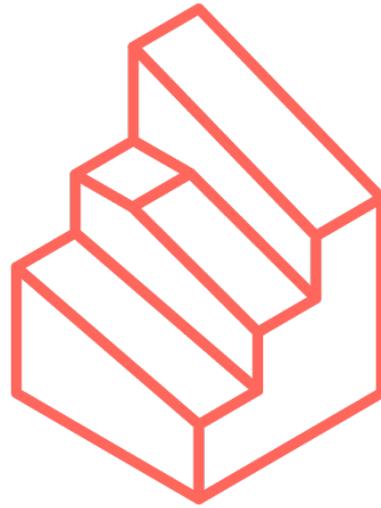
Aim for behavioral change



Leading to improvement in disease



Resulting in potential cure



LEO Innovation Lab

We learn from patients and build the business from there.