

The ABCs of Marketing — Advertising, Branding, and the CUSTOMER

Ten years ago, direct mail and print advertising were the primary marketing avenues available. Today, marketers have infinitely more options because of the Internet. Digital media and communications are reshaping how marketers are connecting with patients, consumers, physicians, and anybody else who is a stakeholder in the global business of health and wellness.



ith the introduction of DTC advertising, health information became ubiquitous, reaching consumers where they

live, work, and play.

"Enter technology, the Internet, place-based media, mobile devices, social media, and information now are literally available at one's fingertips," says Deborah Schnell, president of sales and strategic planning at Healthy Advice Networks, which provides health information to consumers and healthcare professionals. "This plethora of information, exacerbated by instant access, brings inherent challenges and, ultimately, more responsibility, as consumers seek to take greater control of their health. Now not only does the industry have to effectively use multiple channels, but it also has to communicate with this audience by delivering consumer-focused information that is timely, easy to understand, accurate, and actionable."

James Datin, executive VP and managing director of the Life Sciences Group at Safeguard Scientifics, which provides capital for life-sciences and technology companies, says the two major events in the last 10 years that created a shift in the life-sciences industry were the rise of consumer advertising and the Internet's effect on patients.

"Pharmaceutical companies have spent billions of dollars reaching out to consumers directly to advertise their products," he says. "The Internet has had a huge impact on patient consumerism. Patients now self-diagnose based on information available online, and they will even dictate their pharmaceutical and treatment wishes to physicians based on this research." ff Digital communications will change the way we talk to customers, and mobile will lead the way. **?**

CHARLENE PROUNIS / Flashpoint Medica



66 The industry has to address the consumer population across multiple channels with information that is timely, easy to understand, accurate, and actionable. **99**

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LIVING THE BRAND

DAVID CHAPMAN Managing Partner, Ogilvy CommonHealth Worldwide

THEN (2001): A brand can't be built unless it has consistency; consistency means living up to a promise. In fact, where we often fall short in our industry is in the blueprint as we move forward in creative development. What is the brand's promise to the customer? We struggle to get those words correct.

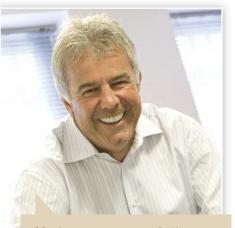
NOW: The interactive, on-demand, liquid media world we live in has changed the brand experience in every category. But I still stick to my premise that it is a consistency of experience that builds a brand and makes it what it is in our minds and hearts. It's just that now it's even harder to keep that focus on a brand's inner greatness, because of the explosion of channels and the resulting explosion of opportunities to let the brand experience waver.

As much as technology is changing the communications landscape, Ryan Abbate, president of Pacific Communications, a healthcare communications company, says in the next 10 years success in communications will be based on how well companies engage people.

"It won't be enough just to be pretty; we'll have to smart and athletic too," he says. "Successful communications in the future will have far less to do with form and much more to do with function. Not to diminish creative but communications will have to be enhanced beyond their static past."

When it comes to creativity, John Nosta, chief creative officer of Ogilvy Common-Health Medical Education, says there are two simple steps to encourage clients to embrace great creative thinking.

"The first is to instill a sense of trust and partnership," he says. "The freedom to create great creative shares a border with the freedom to conceptually fail. Clients have to share in the struggle for great creative thinking and be willing to take some risks. The second part of this equation is just as important: agencies need to hit home runs. We can't ask our



66 The integration of all available media has become a critical success factor in today's new marketing world. **J**

NEIL MATHESON / Huntsworth Health

clients to take risks without showing them, first hand, that swinging for the fence can pay off. While that may be a bit of circular logic, it's at the essence of great creative."

The other aspect of creativity that seems to be stuck in the 1980s, he says, is the flat, twodimensional presentation boards.

"The core graphic and headline that live on paper is what we sell as a creative concept," Mr. Nosta says. "I think that this style is dated and wrong for today's articulation of where and how creativity lives. It seems to me that a print ad or TV spot isn't the core idea, but just part of the rich, interactive brand story that lives in the customer's smartphone, convention kiosk, iPad, and, most importantly, their head."

Branding: A Multi-Channel Experience

This interactive brand story that Mr. Nosta describes is driving marketers to increasingly shift their focus from a brand focus to a consumer/customer focus.

"Customer-centricity will continue to be a key to successful value creation," says Julian Parreño, senior account director at Datacore Marketing, which combines data-driven intelligence with one-to-one marketing. "In the not-too-distant past, the biopharma approach had been one message for all. For example, oneto-many communications vs. true one-to-one relevant dialogues. Moving forward, there will be less reliance on mass marketing to create demand, as technology continues to shift the consumer's journey to purchase. The role of mass media will continue to be valuable in the creation of brand health and awareness generation, while digital technologies will enable stronger,

\succ) BACK TO THE FUTURE

IT'S THE CREATIVITY, **STUPID**

JOHN NOSTA Chief Creative Officer, **Ogilvy CommonHealth Medical Education**



THEN (2001): Creative, that magical stuff that takes a molecule and makes it into a brand. That stuff that sticks to the roof of your customers' brains. And interestingly, it's really one of the only things that pharmaceutical companies haven't been able to create for themselves. Creativity is what an advertising agency should provide to its clients and instill in its clients. It's the magic, the fun, and the excitement. And, by the way, it's one of the key ingredients to selling brands.

NOW: Things are exactly the same and very different. Creativity is still at the very heart of what we do. And in fact, the magic is exactly the same as it has always been. Finding a resonant insight and crafting a story that captures the audiences' imagination is the job at hand. The difference is that we now live in a world where the 'control of the message' has been evolved to the 'influence of the story.' The digital communication ecosphere provides tremendous amplification to a brand story — for better or for worse and the resultant communication can be very different than the old-fashioned message in a print ad or visual aid. We have to work very hard to influence and shape that story.

relevant dialogues directly with target audiences based on wants, needs, and preferences."

A huge game-changer has evolved around the role of the influencer, he maintains.

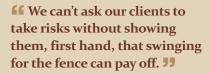
"Within biopharma, the influencer pool is expanding rapidly," Mr. Parreño says. "No longer is it sufficient to detail physicians and hope that new prescriptions are generated as a result. Now there are multiple influencers in the equation from managed care executives to social media, to HCPs, to customer reviews, blogs, peer communications, support groups, editorials, etc. Future success will depend on

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JOHN NOSTA / Ogilvy CommonHealth

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LIVING THE BRAND

CHARLENE PROUNIS Managing Partner, Flashpoint Medica

> THEN (2001): The real opportunity is to be able to truly have a prelaunch campaign evolve into the launch campaign. To make this happen, companies have to push themselves early to think about what the campaign could be.

NOW: The regulatory environment has shifted quite a bit in the last 10 years, and no longer would we have a prelaunch campaign evolve into a launch campaign. Disease education and branded messaging must be completely separated — different colors and imagery from the brand. The value of prelaunch conditioning remains, and this is especially true in oncology and specialty brands. Helping physicians understand the lay of the land from the pathogenesis of a disease, the importance of new pathways, unmet needs, limitations of current therapies, or patient identification/risk assessment all help frame the context for the market opportunity.

achieving a true 'multi-logue:' the integration of conversations across multiple influencers and the consumer/patient. Additionally, the demonstration of positive patient outcomes will become important to persuade payers to include specific brands on their formularies."

Vince Parry, chief branding officer at Y Brand, which works to create impactful brand identities, says over the

last decade, healthcare clients have gone beyond limiting themselves to focusing just on a launching brand.

"Branding is about owning ideas on behalf of products, services, and companies," Mr. Parry says. "They are branding their scientific assets, such as MOA and class name as early as Phase II; their programs and services for the brand; and also actively examining rebranding efforts as mature brands face patent expiry. Agencies need to see themselves as brand champions — first asking what is best for the brand over time — rather than just focusing on the latest campaign they are creating."

Successful client/agency partnerships have recognized these issues and moved aggressively toward fully integrated programs that "keep the faith" and control the multichannel marketing strategy and mix, says David Chapman, managing partner of Ogilvy CommonHealth Worldwide, a communications network.

"For those who honestly remember the past, healthcare agencies adopted product briefs and blueprints from the consumer agency world," he says. "But those consumer agencies haven't let that process stall, as I believe many in our industry have. They've been evolving and improving processes that create amazing dimensionality around a brand by moving it from the inside out — a brand experience — to the outside in — a user experience. The tools, insights, and analysis are light years beyond what I've seen in my 30-plus years in pharma."

Communications: A Digital Revolution

The obvious seismic innovation in com-



⁶⁶ The growth of digital chamels dramatically expands how we are able to ommunicate disease state and treatment information to healthcare professionals and patients. ⁹⁹

RICK KEEFER / Publicis Touchpoint Solutions



GENE GUSELLI / InfoMedics

munications over the last 10 years is the use of interactive and digital tactics.

"Our fundamentals have completely changed," Mr. Abbate says. "The benchmark for success 10 years ago had mostly to do with how well we broke through the clutter and create big branding and creative that made people stop and notice. Now it has less to do with drawing people in and more to do with how well we engage people when they find us."

Mr. Nosta says the digital explosion has allowed innovation and technique to mask true "advertising creativity."

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ff It won't be enough just to be
pretty; we'll have to be smart
and athletic too. ""

RYAN ABBATE / Pacific Communications



ff The real shift, when viewed retrospectively, has been the diversity of channel adoption across demographics, and the overall speed of their adoption. **J**

WILL REESE / Cadient Group



ff Customer-centricity will continue to be a key to successful value creation. **J**

> JULIAN PARREÑO Datacore Marketing

"Splash pages, music, and other 'tricks' have created a sense of awe, but the underlying creative — creativity that sells and not just entertains — is still lacking in many instances," he says. "Cool is replacing smart."

Despite digital's impact on the creative product, a multitude of healthcare advertising experts agree that e-health has been the biggest game changer in terms of communications.

"Digital communications, the Web, and smartphones have changed the way we diagnose, treat, and manage patients," says Jay Bolling, president and CEO of Roska Healthcare Advertising, a full-service ad agency. "Health information is the No. 1 destination on the Web; Google is the new health encyclopedia; the use of smartphones and access to video content has exploded; computers are now part of the treatment room experience; social media is the new source of advice; EMR creates a mobile medical home; augmented reality is poised to replace in-office medical/patient education; and QR (2D) codes provide easy access to health information whenever and wherever it's needed. Today's marketing communications must fully integrate both traditional and digital channels to fully maximize their success."

Digital has given rise to the informed, empowered patient.

"Consumers no longer have to take their physician's word or prescription at face value," says Wendy Blackburn, executive VP of Intouch Solutions, a digital healthcare agency. "Instead, at their fingertips is a powerful resource that keeps getting deeper. Consumers and professionals easily find information when they need it, with constant connectivity to peers. This has come despite dramatic swings in the regulatory environment."

The industry, like all aspects of modern life, has been shaped by the development and availability of advanced communications technology that permeates our everyday lives.

"Now 70% of the world's population owns a mobile phone, and 51% of adults use the Internet to find health related information," says Kristie Zinselmeier, director of marketing, BioPharma Solutions, a business unit of Baxter Healthcare, which partners with pharmaceutical companies to support their commercialization objectives. "The life-sciences industry has recognized and acted upon what could be called a steward-

ship responsibility for accurate information and sought to increase the direct knowledge needed by patients and caregivers."

Mr. Parry says without question, the influ-

ence of digital media on how healthcare professionals and patients access information and brands has been profound.

"Brands have become more empowered to create robust customer experiences online that deliver brand value in new and fulfilling ways," he says. "From mobile apps to gaming to social media and other virtual worlds, how brands behave today is vastly richer and different from their less dimensional selves 10 years ago."

From a marketing perspective, the rise of the mobile channel will affect marketing similar to way the Internet did, Ms. Blackburn says.

"Customers will expect on-demand information wherever they are," she adds. "Consumers and professionals will want and expect to be able to connect with companies on-thego and on their terms. The control of the conversation will continue to shift in their favor, and the industry must adapt."

The future is on-demand, two-way, and customized healthcare communications to what patients want to hear — when and where they want it, says Charlene Prounis, managing partner of Flashpoint Medica, a healthcare advertising agency.

Nancy Lurker, CEO of PDI, a provider of



44 Branding is about owning ideas on behalf of products, services, and companies. **99**

VINCE PARRY / Y Brand



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To find out more about visit baxterbiopharmasoluti **44** The life-sciences industry has recognized and acted upon what could be called a stewardship responsibility for accurate information and sought to increase the direct knowledge needed by patients and caregivers. **33**

KRISTIE ZINSELMEIER / Baxter Healthcare



44 Digital communications, the Web, and smartphones have changed the way we diagnose, treat, and manage patients. **33**

JAY BOLLING / Roska Healthcare Advertising

integrated multichannel promotion outsource services, agrees that meeting the needs of the physician and patient with information when, where, and how they want it will be paramount to the industry's success, leading to more diversity in the communication channels.

"Sales reps will become more specialized and focused on providing value and digital communications will continue to evolve and grow because of the dual qualities of immediacy and relevancy in information delivery," she says.

A major game changer has been the explosion of the Web and its transformation from brochure-ware to an interactive and engaging experience, says Becky Chidester, president of Wunderman World Health, a digital healthcare agency. "Web 2.0 and the emergence of social media communities have given the consumer a voice and a power that has completely overturned all the old advertising paradigms of 'controlled' communications — the implications of this social revolution are impacting every industry, not just pharma," she says. "Everyone is struggling with how to harness the power of word of mouth and participate in consumer discussions in a meaningful, relevant way that adds value and helps to inform their decisions. Now the trick is to connect with consumers well beyond product features and benefits, in an experience that entertains, educates, and illuminates."

Pharmaceutical companies will likely find the need to partner even more closely with HCPs to provide patients with services designed to improve long-term health outcomes," Ms. Chidester says.

"Mobile phones have reached the critical saturation point where they will be the channel of choice in reaching and engaging various constituents," she says "Compliance programs particularly for chronic conditions, such as diabetes will shift from their current defectionprevention static state to become dynamic interventions between patients and HCPs, facilitated by the pharmaceutical companies. It will be a win-win for all involved, with patients feeling like they are being listened to, doctors feeling they can actively guide and advise patients, and pharma companies creating new services that allow them to fulfill their aspiration to become customer-centric."

According to Rick Keefer, president and CEO of Publicis Touchpoint Solutions, a

ff The new healthcare
environment places greater
demands on patient/physician
communication. ""

JOE GATTUSO / Ogilvy CommonHealth

provider of multichannel message delivery solutions, without some of the more recent digital innovations, many of the newer communication channels would quite simply not be possible.

"Channels such as live video detailing, interactive iPad visual aids, social media sites, and medical smartphone apps have transformed how we communicate with all our customers," he says. "It's also exciting to realize that this is just the beginning. The growth of digital channels dramatically expands how we are able to communicate disease state and treatment information to healthcare professionals and patients."

The integration of all available media has become a critical success factor in today's new marketing world, says Neil Matheson, CEO of Huntsworth Health, a provider of consulting and communications services.

"The opportunity now exists to tailor communication to large groups, small groups, and individuals based on an understanding of communication preferences," he says. "This trend will continue to revolutionize healthcare communications; the options continue to grow faster than brand managers can understand and can adopt new approaches."

The instantaneous nature of information has been incredibly beneficial for disease-state awareness, community building, and patient empowerment, Mr. Chapman adds.

"The physician's world has been equally affected — from the rise of online journals and the corresponding fall of print, to the revolution of mobile technology, and the Web, to the new world of eKOLS emerging via social networks of true influence," he says.

Rob Likoff, co-CEO of Group DCA, an interactive agency, says while the Internet is the





biggest game changer, the paradigm shift is the industry finally embracing technology.

"Ten years ago I was asked if physicians even used the Internet," he says. "Today, usage of the Internet has exploded exponentially and created connections between pharma, physicians, and patients, providing them access to information when and where they want it. We can now create databases and store information in the cloud, customize information delivery based on customer preferences and demographics, and provide 24-hour access to content — all unheard of a short decade ago."

According to Will Reese, chief innovation officer at Cadient Group, an interactive marketing company, despite the paradigm shift toward digital diversification, from a tactical perspective, much of the industry's conversation about digital still focuses on a single channel or a handful of customer behaviors.

"The real shift, when viewed retrospectively, has been the diversity of channel adoption across demographics, and the overall speed of their adoption," he says. "This dynamic has created a more agile, more independent set of customers and has forced an evolution to a more agile marketing approach.

"The discipline and confidence to focus will be the biggest market shaper in the next 10 years," Mr. Reese continues. "Communication, marketing, and information access will continue to be more complex. Going forward, it will be the marketer's responsibility to rise above the chaos. Success will be found with those who have the discipline and focus to be truly customercentric and simultaneously brand relevant. The most effective marketers will use that discipline as a filter to guide decisions regarding program design, content generation, and channel mix."

The Customer: Power to the Patient

One of the key paradigm shifts affecting the life-sciences industry has been the increasing empowerment of the patient.

"Previously patients followed their doctor's advice without the resources to evaluate the treatment recommendations or the confidence to discuss treatment with their physician," says Gene Guselli, president and CEO of InfoMedics, a provider of patient feedback solutions for pharmaceutical companies. "Over the course of the past decade, pharma marketers invested heavily in DTC advertising to stimulate consumer demand and brand preference for their treatment needs. Patients turned in droves to branded and unbranded websites and contributed to patient social networking sites



BACK TO THE FUTURE

IMPROVING PHYSICIAN/PATIENT COMMUNICATIONS

JOE GATTUSO Executive VP, Chief Strategic Officer, Ogilvy

CommonHealth Worldwide

THEN (2001): Using the efficacy of language and narrative can help build brand identity and enhance health. There is overwhelming evidence that miscommunication in the doctor's office is causing missed opportunities for healing every day.

NOW: We have made improvements but have not created a paradigm shift. We have greater understanding of the complexity of patient/physician engagement based on the motivation and skill of patients and physicians. But we must do more.

to learn more about their condition or try to manage their health. As a result, there is now a broad platform of general healthcare information available to doctors, patients, service providers, and pharmaceutical companies."

Mr. Guselli says the coming decade will allow companies to build upon that platform of information available by creating a more personalized exchange of information between all parties, establishing better relationships, and ultimately driving better health outcomes.

"Recent healthcare reform changes now demand that we support a more personalized medium for patient engagement that better connects patients to their providers and measures the progress of their health journey in real time," he says. "The industry has an opportunity to deliver meaningful support to the success of this new patient-centric model, not through DTP programs, but by providing a platform for the essential communications needed between all providers serving the patient."

Looking forward, patients and providers will be more accountable for care, with physicians required to ensure patients are following prescribed therapies.

"Health plans and employers are seeking



Web 2.0 and the emergence of social media communities have given the consumer a voice and a power that has completely overturned all the old advertising paradigms of 'controlled' communications. "

BECKY CHIDESTER / Wunderman World Health



66 Applications that dovetail the physician and patient communication tools will thrive. **99**

CHRIS CRESSWELL / DrFirst

industry support in the development of tools that allow the physician and the patient to interact on a more frequent basis to enable measurable outcomes between visits," says Chris Cresswell, general manager of patient innovations at DrFirst, a provider of stand-alone e-prescribing solutions. "As a result, there will continue to be a surge in biometric devices and connectivity to the physician. In addition, tools enabling patients to stay more adherent to therapies will continue to evolve with mobile and other techniques. Applications that dovetail

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WENDY BLACKBURN / Intouch Solutions

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CUSTOMER RELATIONSHIP MANAGEMENT: CONNECTING THE DOTS



JULIAN PARREÑO Senior Account Director, Datacore Marketing

- THEN (2001) The power of CRM lies in the amazing new technology that allows one-to-one integration across multiple audiences and touchpoints. By personalizing communications, CRM allows companies to have relevant and ongoing conversations with individuals over time.
- NOW: I wasn't too far off nine years ago. The major challenge or critical success factor to ensure successful CRM or true one-to-one integration across multiple audiences and touchpoints is senior management's commitment to make this effort a critical corporate-wide initiative. This entails a strategic vision that is broadcast throughout the organization, along with a roadmap to get there, and dedicated resources and funding to make it come to life.

the physician and patient communication tools will thrive, increasingly closing the gap between health disparities while ensuring better care for patients and their families."

Joe Gattuso, executive VP, chief strategic officer, at Ogilvy CommonHealth, a healthcare communications network, says agencies must go beyond helping patients understand basic medical terminology and improve their conceptual understanding of their health condition and treatment.

"We must provide greater support in the practical application of information," he adds. "And we must commit to proving the efficacy of improved communication, as with any medical intervention. The new healthcare environment places greater demands on patient/physician communication and greater innovation."

Whether it's the efforts of advocacy groups on behalf of patients, or community organizations around a particular disease state, patients are more involved than ever in healthcare decisions, says Sharon Callahan, CEO of LLNS, a

healthcare advertising communications agency.

"The Internet has played a key role in supporting patient empowerment, making information available to all and allowing patients to take a greater role in decision-making, she says.

The coming wave of empowered patients will dramatically change healthcare in the next decade, Mr. Keefer says. "Digital innovation has certainly en-

abled this trend as websites, social media, blogs, and smart phones have paved the way for patients to both obtain and share medical information," he adds. "If we can harness the passion of the empowered patient and combine that with truly effective adherence and retention programs, we will see substantial improvements in health outcomes."

Ms. Prounis agrees that one of the leading changes in the business over the last decade has been the changing focus of the key customer from the doctor alone to the doctor, patient, and payer.

"While it started with DTC in the 1990s, the movement has increased dramatically as everyone now has a computer and high-speed access," she says. "As Dr. Janet Woodcock from the FDA stated, healthcare begins at search, and patients now know more and ask more of their doctors. Payers have a huge voice in terms of which drugs get on formularies; which ones are used first, second, or third, and how much they'll pay for them."

Bob Norris, president and CEO of Complete Healthcare Communications, a health-

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CUSTOMER RELATIONSHIP MANAGEMENT: CONNECTING THE DOTS

BECKY CHIDESTER



President, Wunderman World Health

THEN (2001): Relationship marketing is based on the premise of a two-way dialogue. It's not just getting the patient to opt into a database; it's about constantly talking to the patients over their lifetime.

NOW: Pharmaceutical companies and their agency partners have not been as effective over the last several years in creating two-way dialogues with patients as is now possible through data- and technologyenabled programs. But it's not for lack of trying. The industry faces enormous regulatory challenges around patient information and privacy and is severely limited in making claims or suggestions to consumers who are either considering or are already on therapy.

care agency that specializes in publication planning, says clinicians are still key, but consumers have only one patient to be concerned about — themselves.

CRM: Improving Communications

Over the last decade, the majority of patient-support programs have been designed as static, one-way communications; today a twoway dialogue is imperative.

"Active engagement with the patient be it through open fields online, social media sites or by phone — has been approached with considerable trepidation, given the fears of encouraging the reporting of adverse events," Ms. Chidester of Wunderman says. "So a sense of dialogue and community has been created through preapproved messaging boards and carefully vetted Q&A. Unlike in other categories, spontaneous engagement with customers is filled with endless minefields and mostly downside consequences for pharma-





G Biopharma CRM is advanced in a few areas and fledgling in others. There is room for lots of improvement. **33**

CHRIS BOGAN / Best Practices

ceutical companies. Or, at least until now, this has been the case.

"Best practices for creating a meaningful relationship-marketing program remain the same: provide consumers and patients with relevant and timely information that speaks to their unsolved problems and needs," Ms. Chidester continues. "Marketers must be customer-centric, rather than product-centric. Marketing communications must offer authentic value and complete transparency in improving patient quality of life; the educated consumer will accept nothing less."

Chris Bogan, CEO of Best Practices, a research and consulting firm, says CRM reminds him of Dickens' famous line: "It was the best of times and the worst of times."

"Biopharma CRM is advanced in a few areas and fledgling in others," he explains. "There is room for lots of improvement. Biopharma companies serve three or four core customer groups — physicians, patients, private payers, and public payers. Historically, companies have been advanced in serving physicians with segmentation systems, thought leader programs, and sophisticated relationship and CRM strategies. In contrast, CRM for patients and payers has been less sophisticated. A few have launched customer-focused initiatives, but none have transformed their old business models along these lines."

To make CRM successful, Datacore's Mr. Parreño says every function in the organiza-

tion needs to not only embrace the vision of CRM, but also detail its contribution in driving that success.

"Activities within key departments such as marketing, IT, and sales need to be coordinated to ensure successful implementation, and a corresponding infrastructure needs to be built that can support effective multichannel integration," he says. "Having a common vision and CRM mindset, shared across the enterprise, will speed the breaking down of silos organically within that organization. How well an individual company embraces this commitment will determine how successful it will be in creating a holistic approach that drives value for customers while driving efficiencies and value to the organization."

Mr. Parreño says future success will hinge on focusing on achieving a true "multi-logue" between manufacturers, influencers, and end users.

"The industry needs to connect the brand and the patient with multiple influencers under one CRM strategy," he explains. "This will enable the end consumers — patients — to have meaningful conversations with their healthcare professional while the technology will enable manufacturers to connect the dots."



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