

# Owning the CUSTOMER

*With the long road from R&D to the point of sale, pharmaceutical market research is integral in making the journey a success.*

**M**arket research impacts every intersection along the healthcare continuum. Data-driven insights impact a multitude of decisions from which drugs make it to the clinic to how those drugs are promoted in the marketplace.

Some analysts say while market research is very important, some pharmaceutical company executives still treat the function as an afterthought. In today's complex ecosystem, it is imperative that market researchers not only bring value to the organization but carve out a seat at the corporate table.

According to Amy Marta, a ZS Principal, the fact is that pharmaceutical products rarely sell themselves, and market research is essential to ensuring companies have the right strategies and tactics to develop and market their products.

"The need for better research comes against a backdrop of increasing pressure to perform while research budgets are squeezed," she says. "Pharmaceutical market research is both crucial to success yet sometimes underappreciated."

## Creating Value for the Organization

According to Dev Das, director, strategic insights and analytics, at Auxilium Pharmaceuticals, market researchers must gain a deeper understanding of the customer if they want to provide value back to the organization.

"By having a hand on the pulse of the customers, market researchers have the potential to be better versed on what drives customer behavior than anyone else within the organization," he says. "This along with an academic/objective bent of mind, provides them with the unique ability to see and tell it like it is — the good, bad, and the ugly. This perspective can pertain to assessing the potential of a new product or the effectiveness of a marketing strategy."

Mr. Das defines the customer as being the physician, the patient, or the payer.



**ELIZABETH JEFFORDS**  
Genentech

"Our primary focus as market researchers is the customer," he says. "Having a deeper understanding of these stakeholders gives us a very unique place within the organization. By being able to bring forth the voice of this customer, we can bring a lot of added value to every discussion."

Patricio Casillas, marketing manager at Johnson & Johnson Medical, believes that the customer view is so important that he suggests changing the name of the market research department to that of the customer insights department.

"This better reflects the important purpose of the work being conducted and would improve the brand image of the group," Mr. Casillas says.

Beyond improving the nomenclature, he says to increase the value of market research requires simplicity, relevance, and actionability.

"For instance, identifying the top drivers of

*"Market researchers have to move away from being analysts, and move toward being strategic consultants."*

## PMRG Coming Events

**Evolve and Thrive** — The New World of the Healthcare Marketing Researcher is the theme of the Pharmaceutical Market Research Group's (PMRG) upcoming annual meeting in March.

The content of the conference reflects the changing landscape in which market researchers find themselves professionally and organizationally.

According to Elizabeth Jeffords, president, of PMRG, and senior director, strategic pricing and contract management, Genentech, advancement — in career and craft — is one of PMRG's three main pillars: community, advancement, and advocacy.

"Transforming market researchers is a huge focus of PMRG's 2013 offerings, including the 2013 PMRG Institute October 20-22, 2013: Influence, Inspire, Ignite: Champions of the New Age," she says. "Training in areas such as advanced storytelling, insights generation, influence, etc. have been added to our traditional curriculum of methodology-based sessions to ensure we grow our community into consultants of the future."

*For a full list of PMRG events as well as more information about the association, visit [pmrg.org](http://pmrg.org).*

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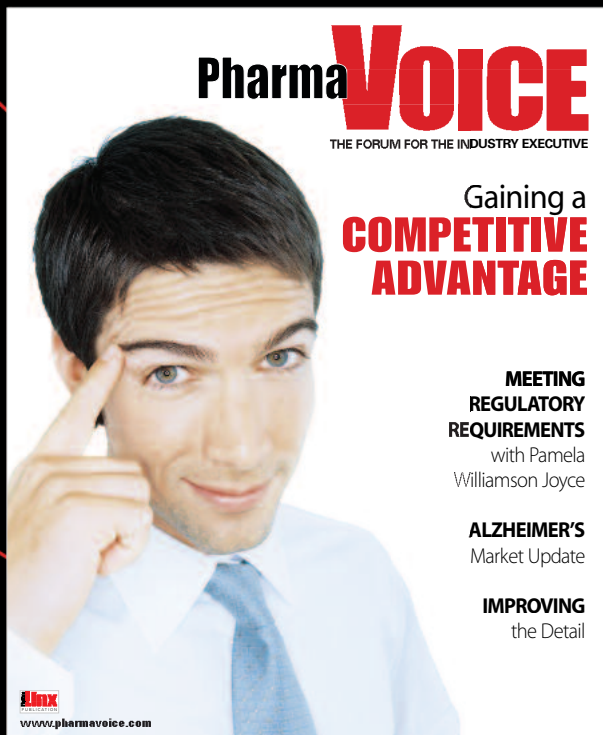
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**LISA RICHARDSON** Johnson & Johnson

a particular customer segment requires testing many different factors and isolating the few — one to three — that explain a significant amount of variance in customer behavior,” he says. “Market researchers run the risk of confusion by presenting too many variables that aren’t significantly relevant, i.e., highly correlated to customer behavior and ultimately revenue. Less is more. Often, market researchers can get lost in measuring a myriad of variables and confusing lots of activities and data with real insights. The insights and recommendations generated from market research should be actionable and easily implementable. Often there’s a disconnect between market research results and the specific actions required to address the gap. If the variables being tested or the customer are vague then the subsequent results will be vague and hard to action.”

Mr. Das agrees that insights are not of much value unless they can then help benefit the business in some way.

“Very often market researchers derive a lot of intellectual satisfaction from completing complex projects, but there is little value if the insights don’t have a business impact,” he says.

Lisa Richardson, senior manager, market research, global commercial strategy organization, Johnson & Johnson, concurs that there needs to be a clear purpose for doing any market research.

“The objectives need to be clearly articulated, so that the research answers the relevant business questions, clarifies a problem or situation, or uncovers an opportunity for the brand,” she says. “Market research is only valuable if it drives a business decision or choice.”

Mr. Casillas adds that market research can further increase its organizational value by being used as a visible, accountability tool.

*“Increasing the value of market research requires simplicity, relevance, and actionability.”*

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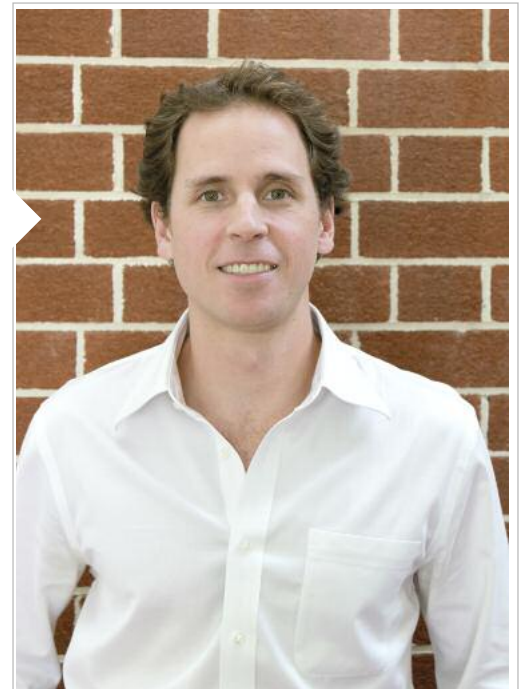
“Market researchers should over communicate to cross-functional partners,” he says. “Frequently publishing, for instance, via email or digital newsletter, insights and research results and tailoring the content for specific internal stakeholders would increase the visibility of the work and help hold people accountable, for example, if the data published is a diagnostic performance dashboard.”

### Solidifying a Seat at the Table

Certainly, accountability is one way to bring value to the role of market research and gain recognition throughout the organization; another is bringing value to the business.

“Market researchers can get a seat at the table by proactively providing relevant and actionable insights, in other words bringing value to the business,” Ms. Richardson says. “Everyone talks about deep market and customer insights, but uncovering a meaningful insight is difficult. Sometimes it is just one comment made by a respondent that is the true insight. Market researchers need to be able to sift through the noise and focus in on those learnings that will make a difference for the brand. This requires that market research be a full business partner, completely integrated and immersed into the brand team and business. If market researchers know what the challenges are, they will be able to identify those insights and bring value.”

According to Elizabeth Jeffords, senior director, strategic pricing and contract management at Genentech, and president of the Pharmaceutical Market Research Group, a nonprofit trade organization, market researchers have to move away from being analysts, and move toward being strategic consultants.



**PATRICIO CASILLAS**  
Johnson & Johnson

“Many of the best researchers bring that consulting approach to their work — they start with problem definition, they map out a hypothesis, work their proofs, and then tell a compelling story with the answer,” she explains. “Since not everyone starts their careers at a big three strategy consulting bootcamp, organizations such as PMRG, PBIRG, CASRO, or other relevant society meetings can provide a good alternative. Without having the broader consultant skill set, it’s easy to slip into the box of being a data monkey. Moving from analyst to consultant can be hard, but it’s possible by bringing value repeatedly until the broader team feels like it can’t make a move without market research. This doesn’t mean that senior-level executives will invite market researchers to the table the first time. But if every email and deck that is sent starts with problem definition, and ends with the ‘so what,’ they’ll start to need the market research function there. Once someone is part of the conversation, it’s a self-fulfilling prophecy to solidify that seat at the table.”

Mr. Das agrees that great insights are of little value if they don’t get effectively communicated to the appropriate decision makers.

“Market researchers can sometimes be more analytical and introverted and less able to promote their work, this can sometimes result in others choosing to present their work, or worse, valuable learning doesn’t reach those who need to hear it,” he says. “Either way, this gets in the way of solidifying market re-



searchers' seats at the corporate table. One of the big things that companies can do is train members within the function to be better communicators."

To ensure a seat at the table, Mr. Casillas suggests that market researchers integrate with brand teams as much as possible.

"Market researchers need to be seen as integral team members and accountable for driving revenue and profit," he says. "This helps to change the perception from market research being a support function to it being a revenue driver or growth opportunity generator. Market researchers should try to build strong customer relationships to strengthen their expertise and credibility among senior leaders and to make their recommendations more practical and achievable. Researchers also should offer

their assistance in implementing some of the recommendations that would help tear down the corporate business silo mentality."

### Research Techniques: Tried, True, and New

Technology is impacting market research just as it is playing a part in other aspects of the industry. New market research techniques are being used to uncover new data alongside tried-and-true methods.

"New techniques are being developed and implemented all of the time," Ms. Richardson says. "A lot of focus lately has been on mining insights and data from social media sites, particularly patient-focused online communities. Tapping into the voice of the patient can pro-

vide insights that probably would not be uncovered in traditional market research. But there are patient privacy and compliance challenges that need to be fully addressed and understood related to social media type research."

Mr. Casillas is experimenting with simulations that mimic the customer environment.

"For instance, we can rent out a 'physician office' and hire actors to play the part of patients while the market researchers are observing closer to real-world behavior behind a glass panel," he says. "This provides a great alternative to the traditional technique of asking physicians how they behave in certain situations. There's no substitute to seeing them act it out. While a simulation isn't exactly the 'real world' it's much closer than the traditional alternative and provides cleaner insights minimizing inherent customer biases."

Mr. Das says the industry is using innovative new primary research methods such as respondent profiling and Webcam-assisted online research. Companies are also tapping into new secondary data sources such as social media, EMR, specialty pharmacy data, and so on.

"Within primary research, respondent profiling and using new technologies such as Webcams, make it very efficient to do research and get the maximum value for the investment," he says. "When working a tight budget, the Webcam is a win-win situation. A company can send out cameras to participants all over the country, which allows it to get a better, more nationally representative sample and reduce travel costs. The market researcher can thus watch from the comfort of his or her own office, without compromising on the quality of the research."

In terms of secondary data, he says there is a wealth of new data sources that's are now presenting themselves to researchers.

"We're all going up the learning curve in terms of understanding how to use these resources, including social media," he says. "There's just so much data available, the challenge is how to use it effectively. Nobody's figured out the magic bullet yet. From an analysis standpoint, it's very exciting because it presents so much potential."

From an information technology standpoint, Mr. Das says there are some interesting new platforms that can be leveraged to build libraries, to manage archive learnings, to search huge data sets, etc.

"Now, instead of repeating research, we can go back into the archives and efficiently look for learning that might already exist," he explains. "All of this is now more readily possible because of technology." **PV**

## BEST PRACTICES FOR COMMUNICATING COMPLEX DATA

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#### PATRICIO CASILLAS

Marketing Manager  
Johnson & Johnson Medical

Create a PowerPoint story board of the potential results before beginning a market research exercise. Visualize what the results could look like and shop it around to internal stakeholders to ensure there is alignment in terms of how the data will be presented. This extra work up front is worth the investment and ensures that the final market research data report will have the optimum impact.



#### DEV DAS

Director, Strategic Insights and Analytics  
Auxilium Pharmaceuticals

First, it's important to know your audience and communicate accordingly.

Next, have a concise summary of the key insights and selected detail slides that provide the basis for the insights. Some audiences prefer you start with the summary, some prefer you walk them through the basis before you

share the insights; everything else is best included in the appendix to be referenced in the future on an as needed basis.

In the summary of learning, pick a maximum of three key insights; if you have too many, they are probably not true insights.

Well-thought out visuals can also help in explaining complex ideas; however, there is always the risk of going too far here. Getting too cute can be distracting and can hurt the credibility of the presentation.



#### LISA RICHARDSON

Senior Manager, Market Research  
Global Commercial Strategy  
Organization

Johnson & Johnson

Focus on the things that are most important to the audience. What is it that they need to know? What information will help them with their business issue? What key questions was the research designed to address? Communicate those key takeaways first, and what the implications are for the business. Then follow with more detailed data and analysis. I try to keep in mind that the audience is likely seeing the information for the first time, while I have been working on the project for weeks or months. I try to step back and see the findings with fresh eyes, and from the audience's perspective. What is it that they really need to know, with enough detail, but not too much? This is my approach.



VIEWPOINTS



**CHARU CHATURVEDI**  
Senior VP, Client Services  
Affinova Life Sciences

**Behavioral Economics**

The old science of asking is out; behavioral economics (BE) is in.

Monadics and focus groups often deliver biased outcomes and are not well correlated to actual decision making. BE uncovers the complex and irrational nature of customers. Heuristics and evolutionary algorithms (EAs) are BE-inspired approaches that latently identify motivators and create optimal campaigns proven to maximize success. Just as Pandora and Google have transformed how we enjoy music and the Web, heuristics and EAs are transforming how brand teams go to market.



**TIM EDBROOKE**  
President  
Healogix

**Uncovering Blind Spots**

Historically, marketers have assumed that a rational, deliberative process underlies medical decisions. Behavioral economics informs us otherwise: many decisions are made quickly using heuristics or mental habit without any trade-offs between pros and cons.

Uncovering blind spots and identifying situations where habits drive decisions in favor of speed and ease allows interventions to be developed that can change barriers to habit-based decisions and improve the opportunity for success.



**HEATHER ALBA**  
Engagement Manager, IMS  
Health

**Optimizing the Spend**

Anonymized, patient-level

behavior has advanced to the point where patients and their prescription activity can be aligned to media markets — and even linked to de-identified lists of media consumers — revealing where an advertiser's target audience is most concentrated and of value to a brand. With such breakdowns of behavior across categories

and brands, pharmaceutical companies can allocate their advertising dollars in a particular geographic area across most media channels to better optimize their spend.

**Marking Changes in Behavior**

The same anonymized patient-level data can be used to measure changes in patient behavior after exposure to a campaign while comparing it with a control group. Positive results have been seen as a result of reaching the right audience through targeted promotion. Different types of analyses can show new patients acquired as a result of the promotion as well as compliant patients remaining on therapy.



**BRAD DAVIDSON**  
General Manager, Ogilvy  
CommonHealth Behavioral  
Insights — part of Ogilvy  
CommonHealth Worldwide

**A Seat at the Table**

Market researchers have to strive to answer the bigger marketing or business question that led to the research in the first place. They need to make sure their findings are grounded in the specific research question; the process of defining research deliverables is necessary but can create distance from the original driver of the work. It is incumbent upon the researcher to provide answers that can be used by the larger team.



**IYIOLA OBAYOMI**  
Senior Director of Analytics,  
Ogilvy Healthworld — part  
of Ogilvy CommonHealth  
Worldwide

**Communicating Complex  
Data for Impact**

Some best practices to communicating complex market research data for maximum impact include setting clear expectations, using message-oriented graphics, and drawing business implications.

Market researchers need to start with the key business questions to secure interest and frame their storyline.

Another best practice is to use simple

graphics that illustrate the key message, not the abundance of data at one's disposal; complex charts belong in the appendix, copious notes in footnotes. Lastly, hone-in on business implications to make complex research data relevant, memorable, actionable, and impactful.



**LAURA QUINN**  
President  
PJ Quinn Inc.

**Honesty is the Best  
Policy**

It's important to remember that you can be brutally honest without brutality. To solidify your seat at the table, don't fear being honest with clients about bad news as well as good; in addition, don't sugarcoat the downside or overhype the upside. Imagine you are a personal stakeholder in your client's business.

Tell the complete story in a fair and balanced way, because that is what you would want to hear if you were making critical business decisions based on the data.



**JIM O'DEA**  
President  
Rx EDGE Pharmacy Networks,  
a business unit of  
LeveragePoint Media

**Quantitative Analytics**

When it comes to marketing activities, the use of quantitative analytics helps pharmaceutical companies refine their plans, validate their decisions, and be more accountable for marketing investments. And I would emphasize the word "quantitative" because that is where marketers are going to get the most value. Every major effort in the marketing portfolio should be approached with the end-result in mind, namely: did it have a measurable impact on what really matters — prescription volume, patient behavior, and outcomes.

The key is to have a plan in place up-front so that strategies and tactics are linked with an appropriate measurement device. Applying this kind of analytical rigor will support future decisions and help brands achieve a higher return on investment.

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**Laura Quinn  
President**

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