

KOL Mapping: The GPS of Thought Leader Identification

Mapping charts the quickest route to finding the right KOLs.



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ith all of today's technology-driven data capture capabilities, there is a lot of thought leader information to be garnered, but all that knowledge is only as good as its relevance. KOL mapping serves as a guiding tool that cuts through the layers of information to get to what is really important for the effective marketing of a product: finding the right KOL for the job.

"There are more ways to engage through multiple channels and venues these days and more dimensions from which to gather information," says Robin Winter-Sperry, M.D., president of Scientific Advantage. "The more data gathered, the smarter the decision-making should be. Knowledge is power, but data are useless unless the appropriate filters and analytics are applied."

KOL mapping is a quantitative approach to identifying key KOLs on a local, regional, and national level. Mapping provides the ability to pinpoint leadership across the world, not only by category, but also by share of voice and influence within the physician population as well as by adoption behavior. The technology allows for going deeper into the levels of KOLs and identifying more than just the high decile docs.

Today's KOL mapping is no longer about identifying just the obvious national leaders but also finding those at a local level who provide influence among their own communities.

"KOL mapping is a very specific tool that can provide a database of KOLs who are the most listened to and most visible in the physician community," says Marite Talbergs, senior VP, GfK HealthCare. "The output is very

granular and provides an understanding of how valuable each particular voice is, relative to awareness and respect by other specialists."

According to Al Reichg, chief commercial officer at Qforma, this type of KOL mapping has become the trend, which make sense.

"In our own lives, we know how we are influenced by people, but until recently the methodology wasn't available to get to the information needed to make good decisions," Mr. Reichg says.

Other factors that have increased the use of the technology are regulatory changes and increased scrutiny on transparency.

"More pharma companies are looking locally to get their messages out," he says. "These two elements have increased the momentum of adopting today's KOL mapping."

Therefore, the benefits of KOL mapping go beyond its laser-like targeting ability. While the data allow companies to identify the best KOLs to speak at conferences, conduct seminars, or attend dinner meetings, other benefits include being able to monitor the activities and careers of KOLs who are important to the brand and continually update the information.

In the past, the thinking was the more prominent the KOL, the better. But today, specialist KOLs who could be very effective in terms of innovative treatment, may actually be flying under the radar of conventional mapping efforts.

"In some emerging categories of treatments or categories that are changing, forward-thinking individuals may not have reached a high level of visibility, but there is already a buzz around them," Ms. Talbergs says. "For example, in Alzheimer's the goal

might be not only to find a better treatment, but to also change the think-

ing about how the disease is diagnosed. The ability to identify the thought leaders — whether local, regional, national or international — early has influenced how pharma companies are addressing this need."

In some fast-changing categories, such as oncology, the KOL database needs to be updated at least every three to five years, Ms. Talbergs says.

"A database that is 10 years old could be missing many new, crucial thought leaders," she adds. "Pharma companies really need to keep their finger on the pulse of every category and to refresh their databases every few years. There is a big down side if companies do not frequently update the info around whose opinions are respected in the category."

The upside to KOL mapping is, of course, accurately identifying the most meaningful and respected speakers on behalf of the brand, which yield great results for a new product. Having the right KOL on board can create a lot of buzz around innovative products early on and help improve how patients are treated for the condition.

"Keeping tabs on KOL career changes will help companies better target and use KOLs,"



“ Knowledge is power, but data are useless unless the appropriate filters and analytics are applied. ”

DR. ROBIN WINTER-SPERRY
Scientific Advantage



“ Mapping preparation results in a more fruitful encounter with the KOL. ”

DAVID FISHMAN / Snowfish



“ There needs to be a layer of business intelligence around mapping to make the exercise pertinent. ”

BONNIE RISHELL / ROI2

says Elio Evangelista, research director, Cutting Edge Information. “There’s certainly a benefit to keeping track of KOL activities and KOL careers by using a mapping process. A local thought leader identified five years ago may have conducted important research since then and moved to a different facility.”

KOL mapping also provides the opportunity to become more familiar with a given KOL before approaching him or her for a first meeting or engagement.

“This sort of preparation results in a more fruitful encounter with the KOL as the company representative is already aware of the key

KOL Mapping to Prioritize MSL Territories

A recent report from Cutting Edge showcases some of the ways life-sciences companies are using KOL mapping.

Below are two excerpts of case studies from the report, Best Practices in MSL Team Management, describing two different approaches. Instead of sizing territories based on target prescriber levels, MSL territories are being developed based on the target KOLs’ influence levels. The territories are typically also much larger than traditional sales force territories.

Territory Sizing

Territory sizing at Company 9 has developed through organic growth. After assessing the needs of KOLs across several regions within the United States, the company determines the number of KOLs it needs to allocate to a particular region. For example, only one MSL had been in charge of managing the entire West Coast region, until increasing KOL needs required that Company 9 send more MSLs to cover the territory. By and large, Company 9’s territory sizing process has been reactionary and subject to the opinion leaders’ workload demands.

Influence Mapping

A more formal process exists at Company 1. The company developed its MSL territories by

first creating a KOL influence map. The company is focused on only one therapeutic area, which has limited the team’s activities and priorities and is the primary means of support for the key opinion leaders, according to one interviewed executive. For many MSL teams, the primary focus is research; at Company 1, the MSLs’ key focus is opinion leader education. This distinction is important because although Company 1’s MSLs provide traditional support — such as engaging in conversations with physicians about the science behind the products — their role also goes beyond these typical activities.

When sizing its territories, Company 1’s MSL team developed an opinion leader influence map early on in its program’s existence. It sought to build a template that it could use to expand the team as it expanded its relationships with KOLs. The company initially determined its territory sizing needs for a small group of 10 MSLs with the plan of expanding. To better understand its opinion leader universe within the primary therapeutic area, the MSL team created an influence map. Within that disease state, the MSL team segmented the national, regional, and local opinion leaders. The team plotted the national and regional opinion leaders’ locations on a map and then began the territory mapping exercise.

Since developing the influence map, Company 1’s MSLs have used it as a tool to guide the team’s strategies and growth. With an initial team of 10 MSLs, Company 1 has begun its planned expansion. The team will grow to 22 MSLs, a target that the company based on the original opinion leader mapping and influence mapping exercises it conducted when the MSL team was established.

Source: Cutting Edge Information. For more information, visit cuttingedgeinfo.com.

SOUND BITES FROM THE FIELD ▶

Experts share their advice and best practices regarding the use of KOL mapping.



JONATHAN CHARLES CUNNINGHAM is Director at System Analytic Ltd., which helps global brand teams to identify, profile, and manage interactions with opinion leaders. For more information, visit systemanalytic.com.

“Emerging markets around Europe, which represent a significant opportunity for pharma, require a different mindset approach to KOL mapping. For example, the relationship between a KOL’s degree of influence and level of activity can break down quite dramatically. At the extreme, a KOL with significant power to impact a brand may not have published nor spoken at congresses in the past five years. Identifying such KOLs presents its own challenges; challenges that are eminently solvable using a variety of alternative methodologies and by laying aside preconceived ideas about how one identifies the most appropriate KOLs.”



PETER J. GOTCH is VP, Business Development and Marketing, at [insiteresearch](http://insiteresearch.net), a division of Advanced Health Media, which provides KOL, relationship management systems, identification, and influence mapping solutions, and more. For more information, visit insiteresearch.net or email pgotch@insiteresearch.net.

“There are many approaches available in the market today to identify and map the influence of KOLs. Over time, some of these approaches have been proven to be successful and are widely accepted across the industry. Bibliometric, patient diagnosis and referral, and sociometric data analysis top that list. Understanding which of these trusted approaches will best meet a company’s objectives is critical. For example, bibliometric analysis is best suited to identify top level KOLs; patient diagnosis and referral analysis is best suited to identify HCP to KOL patient referral relationships; and sociometric analysis encompasses the first two and reveals the KOL influence cascade from local to regional to national. A new intriguing approach to be on the lookout for is database-driven, on-demand KOL mapping.”

PAUL MEADE is President of Thought Leader Select, which serves the biopharmaceutical and healthcare industries, as well as the medical community at large, by



assessing the skills and experiences of medical experts within a host of therapeutic areas. For more information visit, thoughtleaderselect.com or email pmeade@thoughtleaderselect.com.

“The issue is not whether key opinion leaders can influence the prescribing habits of other physicians, but more about what impact thought leaders can have in the medical community in creating awareness and adoption of new treatment options. With the Sunshine Act fast approaching, it will be important for companies working with thought leaders to have complete transparency, not just in terms of remunerations for services provided, but also in the way they work with them. Companies should select physicians for consultative roles based on their skills and experiences, not because they influence the prescribing habits of other physicians.”



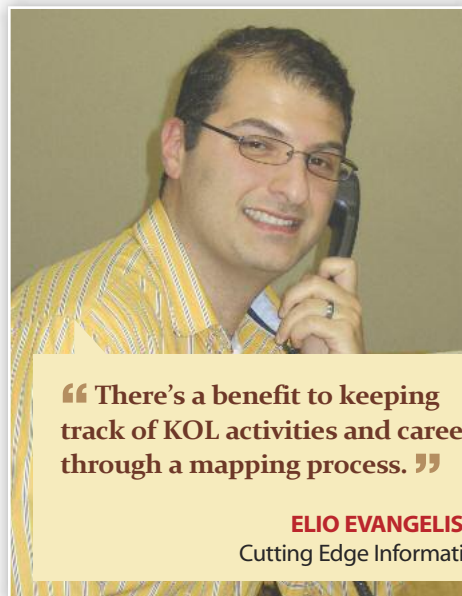
NICK MOWAT is Director of Clinical Expert Management Ltd., which provides systematic and objective analyses of the KOLs in a therapy area to gain extra insights about the dynamics of the therapy area using proprietary techniques. For more information, visit pharma-kol.com.

“Internationally, healthcare is delivered in a variety of structures and the one consistent factor is the influence exerted by physicians. KOLs still exert huge influence in the development of prescription guidelines and formularies. Any KOL identification methodology must be able to demonstrate a KOL’s influence using facts rather than personal opinions that are open to bias. A solution that delivers true and useable intelligence of the KOLs should be selected rather than leaving the end-user with mountains of data and consequently overloaded with possibilities. A comprehensive and quality assured data source should underpin any selection process.”



“ KOL mapping delivers insights into why and how a physician behaves when treating a patient. ”

DAVE ESCALANTE
Cegedim Relationship Management



“ There’s a benefit to keeping track of KOL activities and careers through a mapping process. ”

ELIO EVANGELISTA
Cutting Edge Information

strengths and what type of relationship can be cultivated,” says David Fishman, president of Snowfish. “KOL mapping also allows for the sizing and distribution of key regional personnel, including MSLS.”

Additionally, Mr. Fishman says if the KOL mapping is well-executed, it allows a company to more efficiently use its resources.

Dave Escalante, VP and general manager, SK&A and OneKey, Cegedim Relationship

Management, says mapping is especially critical in tracking behaviors.

“Besides targeting for a variety of tactics, for example, advisory boards, speaker programs, clinical trials, if done correctly, KOL mapping delivers insight into why and how a physician behaves when treating a patient, in addition to identifying the who and the where,” Mr. Escalante says.

That knowledge is important because adoption behaviors are more relevant than a prominent profile in the industry. KOL mapping must involve combining all of the right data sources with influence and network analytics to get the best results, because the trusted community has more influence in driving adoption than data sets may imply.

“Just because someone is recognized national or globally as a thought leader for his or

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her clinical trial studies or published articles, won't necessarily translate into a peer leadership role that creates an adoption pattern among local communities and physicians," says Bonnie Rishell, founder and CEO of ROI2. "All of the behaviors that relate to product adoption come from multiple types of linkages and data perspectives, which have to be evaluated."

KOL identification and mapping strategy help companies incorporate business intelligence around thought leaders and their peer networks into their overall product commercialization plans and tactics. Ms. Rishell says mapping can identify those influential thought leaders who can create a buzz through peer discussion long before a product reaches the market. A brand team seeking to establish its advisory boards, speaker bureau, account planning, and test brand positioning may look at a KOL mapping study to identify those forward-thinking specialists early in their commercialization planning phase.

"However, there is longer-term value to use business intelligence and analytics to track their sales, marketing, and medical activity to measure penetration and response of those networks to determine a return on investment," she adds.

"It's not just about identifying speakers, but rather using KOL resources to provide innovative thinking needed for unmet needs," Ms. Talbergs says. "For example, mapping can be used to discover thought leaders who can come up with the questions that haven't been asked or answered yet and who can address any barriers and concerns about the nature of available therapies or future therapies. All of this information is helpful for taking the pulse upstream in any particular therapeutic category."

Risks Are Few With Mapping

Although KOL mapping has been around for years, companies are still evolving the process at different stages. With the increase in data available for analysis and the number of different ways to collect the information,



“ KOL identification should not be based just on hearsay, but on a rigorous quantitative approach. ”

MARITE TALBERGS / GfK HealthCare



“ Regulatory changes and increased scrutiny on transparency have increased the momentum of KOL mapping. ”

AL REICHEG / QForma

there is no one-size-fits-all formula. The biggest risk to KOL mapping, our experts say, is if it is not thorough enough to be accurate.

For example, often clinical trial and publication data are collected and analyzed, but in the end the information has no long-term value or shelf life, Ms. Rishell says.

"Without appropriate relevance, the data are just statistics that do not hold value over time," she says. "I have seen some mapping results that do no more than deliver data that six months later do not reflect recent changes in the therapeutic category."

Ms. Rishell encourages pharma companies to look toward other industries that have successfully used network analytics to understand and to penetrate the market through thought

leadership. Those more experienced with these types of analytics know to examine all factors before making assumptions.

"There needs to be a layer of business intelligence around mapping in order to make the data pertinent," she says. **PV**

WHITE PAPER
KOL IDENTIFICATION AND MAPPING
 Presented by: Snowfish

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EXPERTS



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Advantage offers full-time and part-time contract solutions for medical affairs and MSLs. For more information, visit scientificadvantage.com.

Industry Embraces KOL Mapping

There is no one-size-fits-all approach to KOL identification and mapping.

In today's world, there are many factors that influence physician prescribing habits, such as limited physician interactions, managed care control, and patient requests, which make the task of correctly and efficiently identifying KOLs more critical than ever. Our experts tell us that every company is doing some form of KOL mapping, and they are all doing it differently.

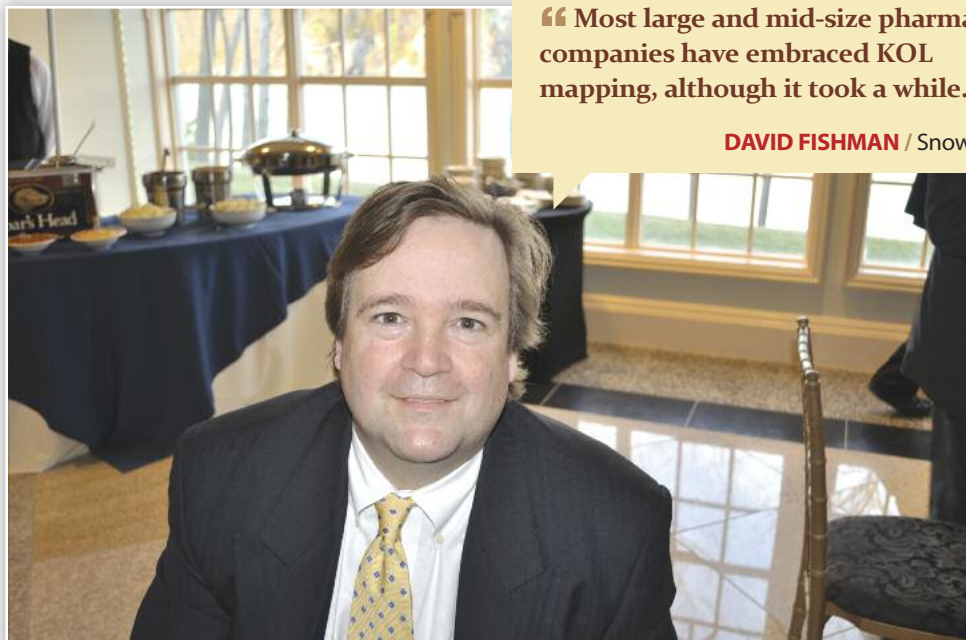
"Most companies are participating in KOL identification and mapping studies," says Dave Escalante, VP and general manager, SK&A and OneKey, Cegecim Relationship Management. "KOL mapping has a placeholder in the marketing plan once the drug has reached Phase III of its life cycle."

The real value of a KOL mapping project comes when life-sciences companies use the full scope of analysis that can be obtained, he says. In addition to gaining insight on a physician's participation in speaking engagements, advisory boards, and clinical trials, pharmaceutical companies can learn from secondary data, using a peer-to-peer approach to acquire qualitative insight with a quantitative method.

"Most companies are engaged in some type of mapping," says Elio Evangelista, research director, Cutting Edge Information. "It's probably not an identical process everywhere, and some companies may be holding on to some older techniques as well. But for the most part, most companies identify their KOL targets by starting with academic centers and branching out from there."

Definitely the more forward-thinking companies are using KOL mapping, especially those on the leading edge of their field and focused on emerging therapeutic categories, says Marite Talbergs, senior VP, GfK HealthCare.

"Alzheimer's and diagnostics are areas that



“Most large and mid-size pharma companies have embraced KOL mapping, although it took a while.”

DAVID FISHMAN / Snowfish

we are hearing a lot about in terms of KOL mapping,” she says. “There is also a lot of demand for mapping related to heart failure and ways to proactively predict ischemic events.”

The more experienced companies are using a combination of both traditional and newer methods of KOL mapping, says Al Reichg, chief commercial officer at Qforma.

“There’s certainly a place for both,” he says. “The nomination process works well on a national level but this can leave a hole in the marketing campaign unless someone highly respected from a local level can be brought in.”

Mr. Reichg explains it this way: A KOL database is like a pyramid, and the national KOLs occupy the top eighth of the pyramid and local KOLs make up the remainder seven-eighths.

Local KOLs are community opinion lead-

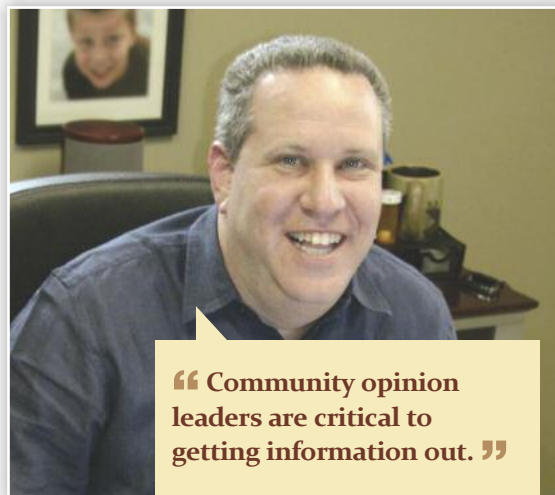
ers and they are critical in getting information out,” he says.

It is important to understand on a local level who is influencing who on treatment for any given disease and to what extent, Mr. Reichg says. This understanding allows for programming and marketing programs that can capitalize on these local KOLs.

There are still areas where KOL mapping is not being used as effectively as possible, such as in the orphan drug space, where there is a limited number of physicians who treat or focus on these specialty conditions, and in the medical device area.

However, Dr. Winter-Sperry says there is some movement toward expanding mapping in the medical device space.

“In these tougher economic times and with increasing competition, tools like KOL mapping can save time, provide greater



“Community opinion leaders are critical to getting information out.”

AL REICHEG / Qforma

focus, although in general, it hasn't evolved in the device realm as much as it has in the pharma sector," she says. "The relationship between the device manufacturer and the end user is often more direct with quicker cycle times. This also can have implications on the mapping process and application of the results."

Often medical device sales reps have more of an engineering background and therefore the healthcare professional may have a more direct role in influencing the usage of the device.

"The relationship between the device manufacturer and the end user is often more direct," Dr. Winter-Sperry says. "This can impact the mapping process in the sense of the utility of the data gathered and how quickly the information can be applied."

Adoption of the mapping process is increasing, says Dave Fishman, president of Snowfish, because over time companies have realized that having a database of KOLs identified via various sources makes them more knowledgeable and therefore, more efficient.

"It is encouraging to see that most large and midsize pharmaceutical companies have been embracing KOL mapping, though it took a while," he says. "The argument used to be: 'we know all of the KOLs.'"

The trend toward influence marketing has also increased the uptake of this marketing strategy, says Bonnie Rishell, founder and president, ROI2.

"More innovative organizations are starting to adopt this method because influence marketing is proven and the old business model no longer works in this highly regulated environment," she says. "There is a lot of evidence out of Harvard, Johns Hopkins, and other business schools that prove mapping works. The challenge is to get the process right, however.

"Many companies believe they already know how to do KOL identification and mapping, but I would caution them to make sure they truly understand community networks, market thought leadership, know how to make sure those networks are the right ones for their needs," Ms. Rishell adds. "Companies need to incorporate multiple data points against perspectives and use measures that align with their goal. There are some companies that are still incorporating KOL referrals from sales reps, and there is no validation that those people are KOLs. Just because someone is hired as a KOL, and labeled as one, doesn't make them one."

Driving the Uptake of KOL Mapping

KOL mapping has been around for years, but the advent of data-driven technology is shaping how KOLs are identified and targeted. Mapping has been a strong component of many KOL development strategies. Key opinion leaders were identified through their affiliation with hospitals and research institutions, their speaking engagements, and the publication of their findings. Now, with more ways to collect information and more places to collect it from, mapping has turned into more of a science than an art.

According to Mr. Evangelista, the accessibility of KOLs' information has changed the process.

"With social media in everybody's face, it's easier for KOLs to broadcast their accomplishments and it's easier for life-sciences companies to identify them as thought leaders," Mr. Evangelista says. "The way that mapping fits into this landscape is that companies now have new tools to identify and place these KOL targets into their strategic frameworks."

KOL mapping of today brings much more data to the table, and therefore, companies are able to determine the level of influence each KOL carries to a very refined point. Today's more sophisticated KOL mapping offers the benefit of incorporating multiple factors simultaneously into the identification process, providing the ability to target KOLs who offer well-rounded experience and expertise in a given area, as well as have multiple connections within a given community, Mr. Fishman says.

"Using various sources of information, both objective and subjective, creates an opportunity to uncover those well-connected individuals who are valuable to target but would otherwise fall under the radar," he says.

Mr. Escalante agrees, adding KOL mapping has opened the door for more healthcare professionals to have a real impact on how a pharmaceutical company creates and delivers medicine to patients.

"Before KOL mapping, healthcare companies relied on a few well-known physicians to help fill the KOL role, which limited the amount of knowledge received from the front lines," he says.

The industry is moving toward more map-

ping because of the increased use of influence marketing and the tightening of regulations for sales reps. The environment is no longer conducive to the traditional sales model of dropping samples and making office visits. Physicians are expecting more of a consultative selling approach that includes addressing and understanding the needs of the patient, as well as the doctor.

"Pharma companies need to focus on using other methods that allow them to be customer-centric and have better alignment with their accounts and targets," Mr. Rishell says. "They need to spend time extracting directional knowledge from the KOLs regarding what patients need. They also have to reach out to research institutions and academia to understand decision processes, insights, and scientific thought leadership versus those KOLs who are more suited as market drivers. This is a brand new model — it's consultative selling."

And the mapping process is not limited to targeting KOLs. According to Ms. Rishell, there are many other opportunities to determine influence, such as message mapping, organizational mapping, and impact alignment by managed market account strategies and tactics.

"The entire intersection of influence goes beyond national and regional targeting and gets to the heart of what is transpiring within the local influence networks to drive adoption," she says. "The trusted community network is crucial, because peers and patients reach out to who they know, and it's usually not the national KOLs, but rather the ones who are more influential in their own community. These are the leaders who will make the needle move on adoption behaviors."

The industry is beginning to use KOL mapping in areas that are very fast changing and forward thinking, such as oncology and Alzheimer's disease, where the science sur-

KOL Mapping

rounding the category changes day by day.

“These seem to be primary areas where a lot of KOL mapping work is emerging,” Ms. Talbergs says.

Fundamentally, KOL mapping changes the selection process because pharma companies can begin to clearly understand and identify thought leaders on the international level as well as the local level.

“It is important to identify who has the share of voice in a therapeutic category, and who has international preeminence, but also who the oncologist or neurologist thought leaders are in the local setting,” Ms. Talbergs says.

This information provides a context on which to build communication strategies very early in product development.

“It’s really a way to get a look at what is happening upstream and to understand opinions about what will happen down the road and to harness the people who are the most well-respected and most knowledgeable,” she says. “Ultimately, this supports improved and innovative therapies for patients in the future.”

Addressing the Challenges

Some companies have not changed their mapping strategies to align with the times, Mr. Reicheg says.

There are certain methodologies that have not changed despite the advance of technology.

For example, surveys are sent out to several thousand people who report back on who they look to nationally or locally for thought leadership. This method works well in identifying national thought leaders in any therapeutic category but the newer approaches use commercially available secondary data sets and

identify the physicians who are highly networked on local levels. This is effective in understanding the physicians who are most influential and allows for programming and marketing programs to capitalize on the findings. Companies should be careful not to ignore the value of local influencers.

One of the challenges is ensuring the surveys are appropriate and ask the right questions for the goal,” Ms. Rishell says. “For example, leading questions or questions that are contextually wrong will compromise the data. A KOL who doesn’t have the right product experience, or if he or she is aligned too closely with the pharma company, could be a drawback.”

Dr. Winter-Sperry says accurate results require keeping both the beginning and end goals in mind.

“Keeping the audience and the goal in mind are important when creating the primary survey questions,” she says. “It’s one thing to track sales data and find high-volume prescribers, but it’s not as easy to figure out who is influencing whom on the patient-treatment, and that is why adding an extra layer of interviews and personal conversations is so valuable.”

Besides ending up with the wrong KOL, another risk is relying on the “usual suspects,” Mr. Fishman says.

“Spending the time up front to understand the nuances of the product and the disease state, as well as how the company plans to engage the KOLs who are identified, reduces that risk,” he says. “Additionally, basing the analysis on multiple objective sources of data, not just surveys, will help to ensure that individuals who are very active in a given area, though not top of mind, are not missed.”

Dr. Winter-Sperry adds it is very important that the thought leader must match up with the product or device lifecycle stage.

“A thought leader who may be important to a product in stage III and who is a good investigator may not be the same person who is important to the product or compound in later stages of development,” she says.

Overall, experts say KOL selection should include both quantitative and qualitative analysis to get the most accurate and successful results.

“A strong mapping strategy will include a quantitative sample of physicians who have been asked who they look up to and who they want to hear from about a given topic,” Ms. Talbergs says. “There are different tools and means to address the KOL research issue and some are more qualitative in nature and more anecdotal; the data should not be based just on hearsay, but on a very rigorous quantitative approach as well.”

Dr. Winter-Sperry says it is a good idea to play Sherlock Holmes with KOL mapping results.

“During the analytic process, investigators need to be willing to step back at times to look at the big picture and evaluate if there are some unanticipated patterns that emerge that could lead to new new insights,” she says. “The person who is conducting the assessment hopefully has the skill set to make sound judgments. Ideally, different functional areas should seek input from other stakeholders to ensure maximum value. It’s about having a well-thought out integrated plan. At the end of the day, effective KOL mapping can serve a multitude of purposes, creating it with the right input and insight from the outset of the project can help to ensure its value to the organization.” **PV**

EXPERTS



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