

# IT'S TIME FOR MOBILE:

## Do You Know Where Your Consumers Are?

**T**

here are several very solid reasons why the industry should be using mobile technology in

its marketing efforts, but the one that stands out above all others is quite simple — mobile is where the consumers are. There are more smartphones than personal computers in the United States, and in the developed countries more people access the Web over mobile broadband than on desktop computers.

"It's not just patients and caregivers; physician smartphone adoption is double that of



For physicians, integration of mobile devices into their practices is becoming standard, Mr. Schultz says.

Tablets in particular are starting to replace patient folders and in-office computer terminals as more and more physicians make the move to electronic medical records or electronic health records (EMR/EHR).

Another motivating factor for physicians to use their mobile devices is the looming deadline for government enforcement of EMRs and EHRs. "Initially, at least, as the industry

**Physicians, patients, and even payers are using mobile technology to enhance healthcare —when is pharma going to join them?**

U.S. consumers," says Geoff McCleary, VP, group director, mobile innovation, Digitas Health. "They are prolific mobile adopters, integrating both smartphones and tablets into their practice, from EHR and billing management to the exam room itself."

According to Eric Schultz, chairman and CEO of QuantiaMD, 83% of QuantiaMD members own a device capable of downloading an app and 70% of physicians are using mobile devices — tablet or smartphone — to search for information and education as a routine part of their day. "Physicians have adopted mobile technology faster than the general population," he says.

Matt Noe, strategy director, imc<sup>2</sup> health & wellness, says these wired physicians represent an immediate mobile opportunity for the industry.

"If one looks at where the most immediate opportunity lies for pharma marketers, it's hard to argue against the mountains of data pointing to physicians as the ideal customer

### FAST FACT

**PHARMACEUTICAL MARKETING TEAMS ARE COMMITTING MORE MONEY AND STAFF TO BUILD MOBILE AND DIGITAL PATIENT ADHERENCE PROGRAMS, SIGNALING A STRONG ENDORSEMENT OF NEW CHANNELS.**

Source: Cutting Edge Information

for mobile marketing and engagement," he says. "Today's physicians use their smart devices for a myriad of reasons, from making informed decisions in diagnosing a condition to confirming potential adverse drug interactions, all with a few taps and swipes of a finger."

transitions more fully to EMR/EHR, the greatest uptake will be among clinicians at the point of care who are looking to improve treatment options and outcomes — at any time, from anywhere," says Stephanie Brown, interactive lead, FingerPaint Marketing.

"Physicians' use of mobile will only continue to expand across everything they do professionally."

Mr. Schultz says as the physician-patient connections continue to migrate to the online world, there will be a firm cementing of mobile across both parties defining a new paradigm of physician-patient interaction.

Several notable pharmaceutical companies have already sponsored medical apps for physicians. Mr. Noe cites the general medical resource app BlackBag by Janssen Pharmaceuticals Inc.; dosing calculators Exjade Dosing Calculator and GIST Calculator by Novartis Oncology; and disease-specific information apps such as BioOncology HD by Genentech as examples.



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Health tracking apps have also become popular with physicians when dealing with patient disease states or health problems, as well as increasing the exchange of health data between physician and patient.

"It is becoming more common for physicians to recommend a health-related app to a patient when prescribing treatment for certain disease states," Mr. McCleary says. "And why wouldn't they? It's hard for a practicing physician to turn down an opportunity to educate patients on how to better engage with their treatment and health outcomes, especially when that opportunity allows patients to share symptoms or progress data with their physicians."

Beyond the fact that physicians, patients, and now even payers are using mobile devices for healthcare functions, another strong driving force is that as a "digital laggard" — as one of our experts called it — the industry



**"Consumer expectations are changing at a pace we have not seen since the rise of the Internet."**

**MATT NOE** / imc<sup>2</sup> health & wellness

According to Demir Bingol, VP, commercial marketing, WellDoc, mobile integrated therapies represent disruptive innovation, which requires more time to sell up the management chain.

"The lead time for developing clinically validated mobile solutions is significant, although it is certainly shorter than traditional drug development programs and far less expensive," he says.

He adds that building a new mobile integrated therapy to manage chronic disease will

does not have time on its side, and time is what it takes to plan and develop effective strategies. The industry will have to factor in the lead time needed to learn how to intelligently implement these tools, which could bring the already-tardy industry very late to the mobile table.

## SOUND BITES FROM THE FIELD ►

**Thought leaders share their advice on how the industry can get up to speed on integrating mobile technologies into its commercial efforts.**



**ADAM BUDISH** is Senior VP, Sales, Epocrates, a physician platform for clinical content, practice tools, and health industry engagement. For more information, visit [epocrates.com](http://epocrates.com).

**"Most pharma companies have already taken the first step with mobile. What will take them to the next level is an understanding of how mobile can achieve the greatest benefits with the highest ROI. Physicians are consumers, so the same rules apply. First, keep it short. Second, target the message. And third, make it actionable. Pharma companies need to recognize mobile isn't the old-school cast-a-wide-net marketing approach. Rather it's a chance to effectively speak directly to their audience. Mobile also provides rich analytics, which inform campaigns and provide measurable results."**



**PETER HARBIN** is Practice Leader, Business Intelligence and Information Management, IMS Health, a healthcare information, services, and technology company. For more information, visit [imshealth.com](http://imshealth.com).

**"The first step is to engage with experts to capitalize on the technology. Mobile technology is another tool for improving message delivery**

and increasing the reach and frequency of contact, but it has the potential to do much more. It allows us to capture key data about customer interactions on the spot. And with just a glance, sales representatives can spot opportunities, prepare for sales calls, and monitor their own performance — anytime and anywhere. One company reports that 80% of sales reps use their iPads to access reports and other key information every day. That adoption rate is unheard of with other technologies."



**ANDREW IBBOTSON** is CEO, Digital Assent, a healthcare media and marketing company that helps patients make more educated and informed decisions at the point of care. For more information, visit [digitalassent.com](http://digitalassent.com).

**"Putting mobile technology into a clinician's hand isn't always the best place to start. Today's consumers are eager to use self-service technology when it provides a better experience, so why not start there? When looking to leverage mobile technology, companies need to start by determining what business problem they want to solve. Does the organization want to eliminate paper? Streamline patient intake? Educate patients while they wait? Companies need to look for uses of mobile technology that enhance their**

business operations and advance their business goals. They shouldn't just implement mobile technology for technology's sake."



**JIM ZUFFOLETTI** is President, OpenQ, a provider of solutions to enable compliant collaboration with medical networks. For more information, visit [openq.com](http://openq.com).

**"Pharmaceutical, biotechnology, and medical device companies are adopting mobile technologies such as iPads and phones for social collaboration, but compliance and legal teams remain wary due to potential risk of exposure. Despite the risks involved, internal social platforms create tremendous opportunities for collaboration and efficiencies, while external social media can improve patient access and help overcome decreasing access to HCPs, leading to better patient outcomes. Companies can overcome risk in social collaboration and unlock high value opportunities by implementing a governance process and using a technology solution that enforces compliance. Planning carefully, defining employee roles and responsibilities, implementing controls, and using technology that controls compliance risk are first steps the industry can take to embracing mobile tools and social media platforms."**



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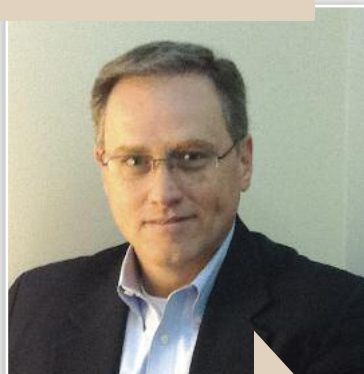
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**“ Mobile devices are changing people’s habits, and pharma needs to adapt to these shifts.”**

**ERIC SCHULTZ** / QuantiaMD



**“ Building new mobile integrated therapies to manage chronic disease will require the industry to think very differently.”**

**DEMIR BINGOL** / WellDoc



**“ Pharma must participate in the mobile movement because patients, doctors, nurses, providers, and payers deserve valuable information.”**

**JIM DAYTON** / Intouch Solutions

require the industry to think differently about how it can improve the condition of patients and include solutions that are not directly related to a manufacturer’s own drugs.

Before launching into mobile, the industry should consider the changing landscape within which it will soon be playing and view the use of mobile not so much as a tactic, but rather as part of the larger vision of the future. The industry is headed toward a next-generation commercial model that will majorly impact current marketing strategies.

“The question, to me, is not really about mobile, but rather, the criticality for pharma to develop the next-generation commercial model that will require both new marketing expertise and regulatory support,” Mr. Schultz says. “The important point is that people’s habits are changing as a result of these mobile devices, and pharma needs to adapt to these shifts. To do this in a successful, customer-focused way, pharma companies, I believe, need to think outside of the box — well beyond what is being done today.”

## Mobile: Where the Consumers Are

Beyond these wider-ranging aspects, another strong argument for mobile interaction are the demands of today’s — and tomorrow’s — consumers.

“Mobile accessibility is simply a customer expectation,” says Jim Dayton, senior director, emerging media, Intouch Solutions. “Pharma companies must participate in the mobile movement because patients, doctors,

nurses, providers, and payers deserve the valuable information that only they can provide. The last thing the pharmaceutical industry needs is the perpetuation of its questionable reputation due to fear and reluctance in embracing a new communications channel.”

Google estimates that in 2011, 26% of pharma prescription searches were done on mobile devices, and this number is growing every day, according to Katie Mihelich, VP, account services, Siren Interactive.

“Unless pharmaceutical companies want to ignore this segment of their audience, marketers need to recognize the opportunity and expand now into mobile technology,” Ms. Mihelich says.

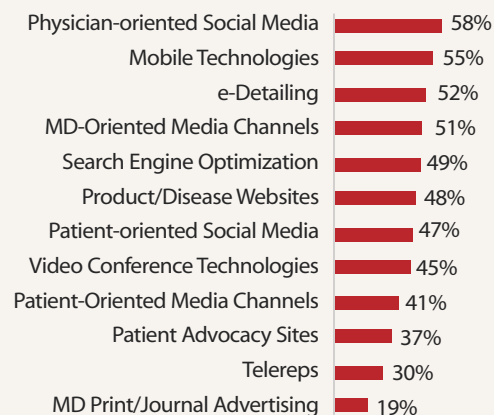
And the mobile environment extends far beyond health tracking apps to Web search and third-screen compatibility.

“Currently, the functional focus of smartphones and tablets is search and websites, so

## Social, Mobile, and E-Detailing Predicted to Grow

Booz & Company and National Analysts Worldwide collaborated on The Pharmaceutical Marketing and Sales Survey 2011, designed to take the industry temperature with respect to current challenges and how industry leaders plan to overcome them. One course of action is an increase in spending in social media, mobile platforms, and e-detailing; even patient-focused social media — uncharted territory for the industry — is slated for investment, according to the report.

### Percent of respondents planning to increase spending on listed channels



Source: Booz & Company/National Analysts Worldwide. For more information, visit [booz.com](http://booz.com).



## FAST FACT

MORE THAN HALF OF 150 PHARMACEUTICAL EXECUTIVES SURVEYED SAY THEY PLAN TO INCREASE SPENDING ON SOCIAL MEDIA, MOBILE TECHNOLOGIES, AND E-DETAILING IN 2012, EVIDENCE THAT THE INDUSTRY HAS MOVED BEYOND EXPERIMENTATION AND IS MORE FULLY EMBRACING MOBILE TECHNOLOGIES.

Source: Booz & Company

pharmaceutical brands should have their paid search ads appear on mobile devices and ensure that the websites are mobile friendly," she says. "Mobile engagement should also be considered when recruiting for clinical trials."

Mobile plays an even larger role in developing countries, where people are bypassing the use of a desktop or laptop and accessing the



**“ Mobile uptake is strongest among clinicians at the point of care who are looking to improve treatment options and outcomes — at any time, from anywhere.”**

**STEPHANIE BROWN** / FingerPaint Marketing

Web via a mobile device instead, Ms. Mihelich adds. This trend is expected to continue as costs come down and networks expand.

“With the larger health and wellness companies in the industry already moving to accommodate growing demand and interest in mobile tools and resources, pharma companies must recognize that consumer expectations are changing at a pace that we have not seen since the rise of the Internet,” Mr. Noe says. “Other countries are already recognizing the value of mobile in positively impacting patient outcomes. It’s been reported that the



**“ Consumers today expect a brand to engage with them on their mobile device.”**

**MICHAEL SMALLWOOD** / Ignite Health

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“For brands to remain relevant, they must establish a presence where audiences are engaged, and that opportunity lies in mobile.”

**GEOFF MCCLEARY** / Digitas Health



“At least 26% of pharma prescription searches were done from mobile devices; I don’t think pharma wants to ignore this segment of its audience.”

**KATIE MIHELICH** / Siren Interactive

U.K. health minister asked GPs to recommend apps that are free or cheap for their patients to use, in an attempt to give patients more power and reduce visits to doctors.”

As consumers take ownership of their health outcomes, they want to leverage their mobile devices to track and manage their own data, and this should be seen as an open door for pharma to connect with them in a meaningful way.

“This proactive, preventive mindset is a prime opportunity for pharma companies to

authentically engage and provide added value, whether by offering true ‘pills plus’ programs, including mobile resources or creating mobile optimized content or tools,” Mr. Noe says.

For the first time, mobile devices allow for true behavioral integration of digital into an individual’s daily work and life flow. Consumers expect a brand to engage with them while also bringing added value on their mobile device within the context of their daily lives.

“The impact to the value exchange is an increased expectation that a brand will find

ways to streamline the consumer’s workflow/lifeflow,” says Michael Smallwood, VP, technology and mobile divisions, Ignite Health. “Brands that fail to do so will not be as highly valued and risk not being behaviorally integrated. Otherwise, they will be left in the digital dust. As the marketplace gets more competitive, the battle for share of voice will shift to a battle for share of value-based behavioral integration. So the question becomes, how will your brand justify its pixels on the home screen?”

There’s no question in Mr. McCleary’s opinion that the time has come for pharma to fully embrace mobile.

“Marketing has changed for good; there is no going back,” he says. “If brands are to remain relevant moving forward, they have to understand their patient, caregiver, physician, and payer audiences and establish a presence in the places where those audiences are willing to engage with the brand. For many brands, both now and in the foreseeable future, that opportunity lies in mobile.”

Craig DeLarge, director, healthcare professional relationship marketing, Novo Nordisk U.S., summed up his opinion in one short sentence: “Mobile is important to the industry because the customer is there — enough said.” **PV**

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## EXPERTS



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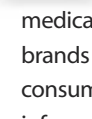
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pharmaceutical, bioscience, and medical-device companies to help their brands develop connections with healthcare consumers and professionals. For more information, visit [digitashealth.com](http://digitashealth.com).



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**ERIC SCHULTZ.** Chairman and CEO, QuantiaMD, a medical learning network accessible on a full range of mobile devices, including smartphones, tablets, and PCs. For more information, visit [quantiamd.com](http://quantiamd.com).



**MICHAEL SMALLWOOD.** VP, Technology and Mobile Divisions, Ignite Health, an inVentiv Health company, which offers a broad range of best practices and digital competencies across the continuum of a brand’s life cycle. For more information, visit [ignitehealth.com](http://ignitehealth.com).



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# Pharma Inches *Near* the MOBILE Tipping Point

According to a recent Booz & Company study, more than half of 150 pharmaceutical executives surveyed say they plan to increase spending on social media, mobile technologies, and e-detailing in 2012, evidence that the industry has moved beyond experimentation and is more fully embracing mobile technologies.

**M**obile tools untether the exchange of information among physicians, patients, and payers and improve communications, speed the exchange of information, and as an end result, create the possibility of better patient outcomes. And pharma has not failed to notice.

Many industry thought leaders say it has become impossible for the industry to ignore this channel of communication any longer.

"The drivers are technology advances in digital content and devices that are sweeping society, which has implications for work and play, education, and entertainment," says Craig DeLarge, director, healthcare professional relationship marketing, Novo Nordisk. "Additionally, government mandates around use of EMR is a key driver among physicians.

Pharma might not quite be at its tipping point, but it's getting closer, experts say.

Katie Mihelich, VP, account services, Siren Interactive, says the true tipping point will have arrived when marketers stop talking about it and start implementing it.

"I think a milestone will be reached once mobile marketing is an integrated part of the overall marketing plan, and we stop calling it mobile marketing," she says.

Mr. DeLarge agrees with Ms. Mihelich.

"When we stop talking about mobile as mobile and see it as just good customer marketing, we'll be at the tipping point," he says. "The industry is still in pre-tip mode. But all of this depends on the definition of tipping point. If media presence is part of the definition, it has already tipped. If customer usage is in the definition, it has already tipped. If ubiquitous pharma deployment is in the definition, it is still pre-tip."

Geoff McCleary, VP, group director, mobile innovation, Digitas Health, says pharma is significantly lagging, but consumers have gone beyond the tipping point.

"Consumer mobile marketing passed the tipping point when mobile went from being 'that tactic' to being fully integrated into the marketing mix," he says. "Now, in many cases, mobile efforts come before all other channels because observant marketers have taken note of where the audience is."

More proof that the industry is starting to focus on mobile capabilities is the increasing availability of mHealth apps. According to Matt Noe, strategy director, imc<sup>2</sup> health & wellness, the industry is beginning to recognize that mobile may be a way of providing value beyond the pill. He cites Sanofi's apps as good examples.

"From the company's GoMeals suite of mobile apps, to its recent FDA approval of the iBGStar blood glucose monitoring device for iPhone and iPod Touch devices, Sanofi represents a best-in-class approach to expanded product, health management, and support mobile offerings," he says.

"To me, the best indicator of mobile's power was the point when developers started discussing responsive design, or building websites and tools that identify what types of devices are being used and then automatically present the information in an appropriate platform to the user — whether it be mobile, desktop, or tablet," says Jim Dayton, senior director, emerging media, Intouch Solutions. "This says to me that mobile technology is moving faster than the speed of marketing, and we are searching for solutions to accommodate the needs of consumers. In addition, consumers are using multiple platforms, or screens, simultaneously."

For pharmaceutical marketers, smartphones and tablets have fast become a non-differentiated means of communicating product features and benefits. Many companies use these devices to do the same things they have always done — for example, sales brochures and advertisements — but in an electronic, convenient, and more efficient way, says

Demir Bingol, VP, commercial marketing, WellDoc.

"The true tipping point will occur when the market moves beyond basic product apps to more sophisticated and intelligent systems that impart a true clinical benefit," he says.

Eric Schultz, chairman and CEO, QuantiaMD, says the mHealth trend of new tools and solutions designed to help patients, physicians, and other stakeholders better engage and manage health and disease is particularly strong in areas such as diabetes, cardiology, and radiology.

"This trend will only accelerate, given overall lifestyle, technology and economic forces, and we will soon find ourselves in a new world," he says. "Pharma has a lot of catching up to do. Pharma companies today are just dipping their toes in the water. The mobile revolution is happening whether they like it or not and the time has come for them to find their meaningful place in this new world."

While users are beginning to expect a seamless multiscreen experience that allows them to move freely between the devices that are most appropriate in the context of their workflow/lifeflow, pharma is missing an opportunity by not heeding these behaviors.

"A day in the life of a consumer will show that device preference changes as people move through their day, encountering different tasks and needs," says Michael Smallwood, VP, technology and mobile divisions, Ignite Health. "Marketers who understand and leverage these concepts in designing their brand engagement are positioned to develop deeper relationships with their customers."

## Payers Join the Mobile Movement

Payers are now joining patients and physicians as critical users of mobile tools and are beginning to develop mobile sites as customer in-



## INDUSTRY EXPERTS IDENTIFY MOBILE LEADERS AND INNOVATORS ➔

Our experts share their opinions on who are a few of the major players in the industry that have implemented mobile technology in an innovative way.



**STEPHANIE BROWN** is Interactive Lead, FingerPaint Marketing Inc., an employee-owned integrated marketing and advertising agency. For more information, visit [fingerpaintmarketing.com](http://fingerpaintmarketing.com).

“Today the most interesting advancements in mobile marketing are being driven by electronic medical records (EMR) and electronic health records (EHR) solutions companies — organizations that are mobilizing their Web-based applications for in-field use by the professional community. MeridianEMR, the market leader in EHR for urology, has developed an iPhone app to help urologists streamline workflow and improve patient care. The app lets them move seamlessly among the hospital or clinic, office, home, and beyond while maintaining comprehensive, convenient, and HIPAA-compliant access to their most current EHR data. They can also access patient pharmacy information, medication refill alerts, patient photos, billing information, and more.

Airstrip Technologies, another EHR provider, is achieving meaningful mobility in healthcare with its OB and cardiology solutions, which build on native mobile technology to improve clinical decision-making at the point of care through data transformation and visually compelling intelligence.”



**CRAIG DELARGE** is Director, Healthcare Professional Relationship Marketing, at Novo Nordisk U.S., a healthcare company and a world leader in diabetes care. For more information, visit [novonordisk.com](http://novonordisk.com).

“The mobile program I most admire on the patient side is Text4Baby, which provides support and information for pregnant and new moms and is sponsored by Johnson & Johnson. Now the National Alliance on Mental Illness (NAMI) in North Carolina has launched a program, Text4Teens.”



**GEOFF MCCLEARY** is VP, Group Director, Mobile Innovation, at Digitas Health, which works with pharmaceutical, bioscience, and medical-device companies to help their brands develop connections with healthcare consumers and professionals. For more information, visit [digitashealth.com](http://digitashealth.com).

“Doximity is an HCP professional networking app. Styled as the LinkedIn for physicians, it has HIPAA-compliant text and email collaboration tools for physicians who want to confer on cases. As Doximity’s network continues to grow, it is developing a number of innovative features that may

influence how brands interact with physicians for the better. From the mobile media channel, there are a number of companies that use their networks to target users when they are on their mobile devices, but few are like The Weather Channel (second to only Angry Birds as the most downloaded app on iOS), that can target anywhere in the United States within 100 meters at a time. Want to send a coupon to identified allergy sufferers when they are within 100 meters of a pharmacy on Third Ave. next to the park? Now it’s possible.

It’s not just new companies that are providing the innovation either. Nike has been an innovator in providing its Plus (+) line of fitness gear to support runners and fitness buffs who want a better understanding of their performance and its impact on their health. With its new Nike+ Fuelband, the company has a connected activity tracking device that appeals to a much broader consumer audience. Nike recently released the API to software companies at SXSW to use to leverage the tracking capability of the Fuelband for broader healthcare apps. From the pharma side, there are a number of innovative efforts that have been recently launched, as well as some early innovators that continue to stand out.

We are fortunate to work with Shire, where the Vyvanse marketing team continues to create innovative, integrated mobile programs that target their core audience of young adults with ADHD. Strategic mobile media efforts have included a custom Pandora channel connecting print ads to mobile with QR codes, and the company’s “Own it” campaign drove awareness and education in a very mobile-forward audience.

Allergan and the Lap-Band brand team have been very mobile-forward as well over the past year. From creating mobile apps to qualify and acquire new patients eligible for the Lap-Band procedure, Allergan thinks mobile first when it comes to brand marketing, because that is where their audience is.

J&J’s Black Bag is a great example of an early mobile effort that was truly innovative and has remained valuable to its target user base — U.S. physicians — ever since.

Merck and Novartis have both been active in the app space as well with the release of two of the only branded apps in the iOS app store for Temodar and Exjade, respectively. Both apps allow U.S. healthcare practitioners the ability to identify patient types and determine the correct dosage for the mentioned brands.

AstraZeneca established itself as an early leader

in delivering relevant brand experiences to its mobile Web users. The company has continued to deliver highly usable, class-leading mobile experiences with the launch of the first branded HCP mobile websites for Symbicort and Nexium.”



**KATIE MIHELICH** is VP, Account Services, Siren Interactive, a relationship marketing agency focused on understanding the behaviors of patients, caregivers and physicians dealing with chronic rare diseases. For more information, visit [sireninteractive.com](http://sireninteractive.com).

“I like Janssen’s psoriasis app, which includes a patient impact questionnaire and a psoriasis area severity index (PASI) calculator. As of last year there were more than 15,000 downloads of the application. These are tools that bring value to the patient community and clearly serve a need.”



**MATT NOE** is Strategy Director, imc<sup>2</sup> health & wellness, which serves health and wellness clients on a variety of initiatives, including medical content and health-centered tools to create connections with patients, physicians, managed care groups, and more. For more information, visit [imc2healthandwellness.com](http://imc2healthandwellness.com).

“Looking within the pharma industry, many of the top brands have expanded their HCP efforts to include mobile components, from arming their salesforces with robust e-detail apps, to dedicated mobile sites geared to the core needs of specialists prescribing info, dosing calculators, and delivering key safety data. We see examples of this in the psoriasis category where several of the top brands, including Humira, have dedicated HCP and/or consumer mobile websites.

On the consumer side, only a handful of brands have begun to leverage mobile via mobile-friendly websites and apps. A couple of the key players that many in the industry point to are Sanofi in diabetes and Johnson & Johnson through its BabyCenter brand. While not a prescription brand, BabyCenter’s founding partnership with the Text4Baby initiative is a nice example of what can be done through SMS-based education, adherence, and support programs. Programs like these have yielded positive patient outcomes around the world, attracting the attention of the U.S. Department of Health and Human Services, which recently established similar programs for smoking cessation through the larger Text4Health Task Force initiative.”



## Mobile Marketing

terface tools, as well as looking toward the future at mobile platforms that can track claims data and monitor patient outcomes.

"Mobile health is a radical transformation to the entire industry," Mr. Smallwood says. "There will not be one part of the industry left untouched."

Patients were the first stakeholders to gain widespread adoption of the smartphone as a device to be used to improve and monitor their health, and then physicians caught on and surpassed consumer use.

According to Mr. Dayton, numerous studies and reports state that anywhere from 50% to 80% of doctors are using smartphones and half of all doctors worldwide will be using medical apps by the end of 2012. According to Float Mobile Learning, 40% of doctors believe that using mobile health technologies can reduce the number of office visits needed by patients, Mr. Dayton adds. The forward traction by both physicians and patients is not going to slow anytime soon.

"Consumers are not only driving adoption of mobile health information, but adopting new technologies that allow them to use their mobile devices to better track and manage their healthcare in general," Mr. McCleary says.

So it follows that payers, such as Aetna, for example, would soon be getting into the game. Aetna offers consumer-facing utility apps to help members gain access to their plan information, find a doctor, and more. The Aetna Mobile app presents a streamlined view of Aetna.com, where consumers can buy health insurance or access tools directly from their mobile phone's Web browser. Thought leaders predict that soon payers will move be-

yond service-focused apps and implement tools to aggregate patient data that can be used to study what behaviors and what influences create the most positive health outcomes for their member patients.

"Payers will be the first group to analyze the impact of a diet and exercise app on the reduction of healthcare costs for the patient diagnosed with a condition like type 2 diabetes, as well as the improvement of overall health outcomes," Mr. McCleary says. "This analysis has the potential to shift our entire industry."

"For the first time, payers will be able to go beyond their claims database and dig deep into longitudinal utilization data, as reported by patients themselves," Mr. Bingol says.

In Mr. McCleary's vision of the future, major payers could require a pre-diabetic patient to complete six weeks of diet and exercise using an approved app before covering the prescription of an oral insulin, or paid health apps could be added to the approved formulary list for reimbursement.

As clinical evidence continues to demonstrate better health outcomes through the use of mobile integrated therapies, payers will begin to engage in the use of these medical devices, Mr. Bingol says.

"For example, WellDoc's DiabetesManager has demonstrated in two randomized controlled trials that a mobile integrated therapy can achieve better outcomes than a patient's usual care alone," he says. "This kind of scientific data will drive third-party reimbursement of mobile integrated therapies, fundamentally changing the management of chronic diseases."

As companies begin to appreciate the full impact of creating reimbursable, patient-cen-

tric mobile therapies, there will be an accelerated shift to mobile health — either to complement existing pharmacologic products, or to develop a presence in a tangential therapeutic category.

"Physicians and patients are driving this change as they are already on mobile en masse and accessing multiple health-related apps for a variety of reasons," Mr. Schultz says. "As a result, provider institutions and payers realize that they need to get with the times and engage, leverage, and enable key functionality through these mobile channels. For provider institutions and payers, especially in the current healthcare milieu, these mobile channels represent opportunities to engage large groups of both physicians and patients in a way that was never possible for them in the past. Everyone is working feverishly toward building new and innovative mobile-accessible solutions — everything from EMR to patient disease management and intervention."

According to Mr. McCleary, consumers are increasingly using connected devices, like Nike+ Fuelband or Fitbit's sleep tracker, to generate personal health data that can then be analyzed and interpreted online to make better health decisions. The ability to accumulate such tremendously valuable data from mobile interactions has not gone unnoticed by the healthcare industry. Mr. McCleary adds that large hospital systems like Kaiser Permanente have already integrated mobile tools into their infrastructure at almost every point.

"The company gives patients round-the-clock mobile access to their secure personal health records and allows them to email doctors, schedule appointments, refill prescriptions, and locate medical facilities," he says. **PV**

## EXPERTS ►



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patients and enhancing health outcomes by providing patients and their healthcare providers with real-time, actionable information. For more information, visit [welldoc.com](http://welldoc.com).



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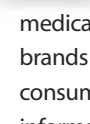
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of best practices and digital competencies across the continuum of a brand's life cycle. For more information, visit [ignitehealth.com](http://ignitehealth.com).



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