



Patient Recruitment Hindered by **TIME CONSTRAINTS**

Clinical research coordinators (CRCs) spend most of their time managing administrative, data, and regulatory requirements of studies. A survey of CRCs, conducted by BBK Healthcare Inc., reveals that CRCs devote only 13% of their day to finding patients — 8% to patient recruitment activities and 5% to searching medical records for potential study subjects.

The BBK survey was distributed in April 2003 via e-mail to a nationwide list of about 3,330 CRCs. In total, 353 CRCs completed the survey's 75 questions. "CRCs play a pivotal role in creating a strong investigative site," says Joan F. Bachenheimer, CEO of BBK. "But because CRCs must allocate their time to

multiple tasks necessary to fulfill their jobs, patient recruitment and outreach initiatives that are used to maximize study enrollment are not being given enough time and attention."

In addition, only 24% of the CRC respondents indicated that they had received any initial training relating to patient-outreach techniques. CRCs feel positively about their working relationships with principal investigators (PIs), level of job satisfaction, and employment turnover rates. When asked to reflect on the working relationship between themselves and PIs, 91% of CRCs said they enjoy an open and responsive relationship with the PIs and that they feel this relationship positively affects patient recruitment activities.

FOCUS ON CUSTOMERS Needed for Success

To succeed in the years ahead, pharmaceutical companies must forge stronger relationships and become more keenly focused on the needs of their customers — physicians, patients, and payers — by taking a new approach to marketing and sales. This is the finding of research done by Cap Gemini Ernst & Young in association with Insead, a business school.

The study found that an increasingly competitive industry landscape, a shrinking pipeline of new products, and a tougher regulatory climate have created an environment in which pharma companies must enhance their products with services (i.e., information, education, and administrative support) and tailor communications to connect with different customer segments.

The study found that while physicians remain pharmaceutical manufacturer's most important customers, more consumers are becoming proactive in their quest for information and interaction with pharmaceutical companies. In addition, payer influence — from managed-care organizations, employers, and government — on reimbursement caps and prescribing choices is growing.

The third annual CGE&Y/Insead global vision and reality study, Prescriptions for the Smart and Lean Pharmaceutical Company, was conducted from January to May 2003 among more than 5,500 individuals — 4,042 consumers, 1,421 physicians, 76 pharmaceutical executives, and 33 payer organizations — across 15 countries, including North America, France, United Kingdom, and Germany.

SALES REP VALUE TO PHYSICIANS Found to be Low

Accel Healthcare Communications has released The Accel Report — Through Our Customers' Eyes:

STRONGER CUSTOMER RELATIONSHIPS NEEDED

▶ **51%** of U.S. physicians surveyed say they still trust pharmaceutical companies; but **PHYSICIANS WANT AND NEED CHANGE**

▶ **38%** of physicians surveyed **HAVE CONSCIOUSLY DECIDED TO MAKE LESS TIME FOR PHARMA SALES REPS** than they did two years ago

▶ **65%** of physicians **WORRY THAT PHARMA COMPANIES DO NOT KEEP THEM ADEQUATELY INFORMED** about the messages they send to patients in consumer communications, i.e., direct-to-consumer advertising

▶ Rather than being "sold to," **DOCTORS WANT MORE DETAILED SCIENTIFIC AND MEDICAL INFORMATION** on drug side effects and interactions (without a marketing bias)

▶ **57%** of respondents would **MAKE MORE TIME FOR VISITS IF SALES REPS PROVIDED A VALUE-ADDED SERVICE**, such as educational materials for patients or practice management support (administration, training, etc.)

▶ **39%** of U.S. respondents **WANT MORE INTERACTION** with the pharmaceutical industry, more information in general (**68%**), or to find out about new medicines and treatments (**58%**)

▶ **35%** of U.S. consumers report **REQUESTING A SPECIFIC DRUG** from their physician, compared with **47%** in Germany and **26%** in the United Kingdom

▶ **THE TRADITIONALLY ADVERSARIAL RELATIONSHIP BETWEEN PHARMACEUTICAL COMPANIES AND PAYERS SHOULD CHANGE** to one of collaboration in an increasingly interdependent, networked world of healthcare

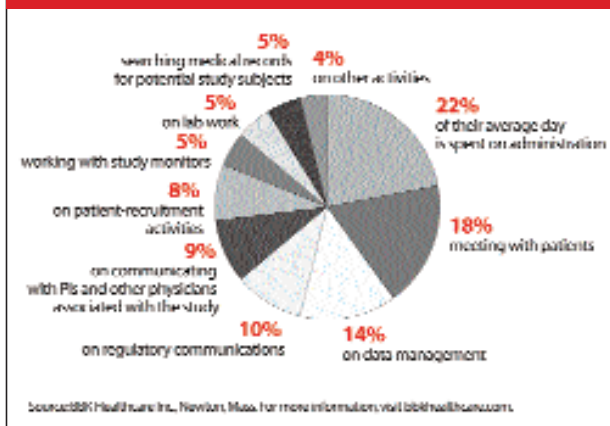
▶ **PHARMACEUTICAL COMPANIES SHOULD ASSUME GREATER INVOLVEMENT IN MARKET DEVELOPMENT** programs as well as disease-management and population health-management programs, despite previous pitfalls

Source: Cap Gemini Ernst & Young, New York. For more information, visit cgey.com.

The Physician Speaks Out. The report is the result of an analysis of 125 primary-care physicians' interactions with pharmaceutical sales representatives.

The results were obtained through a quantitative and qualitative online survey conducted by Accel, which targeted primary-care physicians across the United States.

CRC'S DAILY ACTIVITIES



PHYSICIANS SPEAK OUT

43% of the 85,000 sales representatives in the United States **DON'T GET PAST THE RECEPTIONIST'S DESK**

Of those who get to see the doctor, the average time spent is **TWO MINUTES TO THREE MINUTES**

About **60%** of doctors **FELT THE REPRESENTATIVES WERE YOUNGER AND MORE AGGRESSIVE** than in the past

About **20%** of doctors thought the representatives were **LESS INFORMED AND MORE RUSHED**

92% of doctors said they **SEE REPRESENTATIVES ONLY TO GET SAMPLES**

Most doctors indicated that **WITHOUT SAMPLES THEY WOULD ONLY SEE 10%** of representatives, as opposed to the current **57%**

62% of doctors indicated they **WANT TO RECEIVE BALANCED INFORMATION** that they can trust, but only **6%** said that they received such information from sales representatives

Most doctors want **NEW, PERTINENT, RELIABLE, TIMELY, AND UNBIASED INFORMATION** about products and the medical industry but felt that **LESS THAN 50%** of representatives provide this data to them

78% of doctors **PREFER LEARNING FROM PEERS OR FORUMS** rather than from sales representatives

The majority of doctors **APPROVE OF RECEIVING E-MAIL UPDATES** of important or new information

58.4% of physicians **DO NOT BELIEVE SALES REPS PROVIDE USEFUL INDUSTRY INFORMATION**

Source: Accel Healthcare Communications LLC, New York. For more information, visit accelhealth.com.

The survey found that half of reps are turned away and those who did make it to see the doctor are not given much time. Doctors also don't have a positive perception about sales reps. In fact, respondents say reps have gone from being collegial to having purely a sales orientation.

Use of SMOs Can SPEED CLINICAL DEVELOPMENT

A recent Fast Track Systems study reveals that clinical trials conducted through site management organizations (SMOs) finish an average of

three weeks faster than those conducted through non-SMO sites.

Fast Track Systems' findings reflect the market's growing awareness of the economic benefits of using SMOs. The study also found even faster times to completion for studies when SMOs have a high share of sites or patients within a trial, and still faster times when a single SMO is used to manage all or most patients and sites for a trial.

"My extensive study of industry benchmarking data shows that more and more sponsors are using SMOs to accelerate trials; along with solid protocol design and a better, more accurate budget, these

companies can ultimately bring new drugs to market faster and at a lower cost," says Ariel Fishman, a Columbia Business School Ph.D. candidate who undertook the study.

Data used in the study included information from about 3,000 clinical trials using SMOs and non-SMO sites between 1993 and 2001. The data were provided by Fast Track Systems from a library of industry clinical-trials contract data.

The library is part of Fast Track's TrialSpace Grants Manager, a benchmarking and budgeting application that allows contract professionals to predict, manage, and negotiate investigator costs and budgets for trials.

Follow up

ACCEL HEALTHCARE

COMMUNICATIONS LLC, New York, is a healthcare advertising agency whose mission is to provide creative, strategically sound, and scientifically rigorous executions. For more information, visit accelhealth.com.

BBK HEALTHCARE INC., Newton, Mass., is a full-service patient-recruitment consulting firm. Services provided include strategic consultation, investigative site recruitment,

and patient recruitment. For more information, visit bbkhealthcare.com.

CAP GEMINI ERNST & YOUNG GROUP, New York, provides consulting, technology, and outsourcing services. For more information, visit cgey.com.

FAST TRACK SYSTEMS, San Mateo, Calif., a clinical-development optimization company, offers a data-driven systems approach to expediting clinical-trial design, setup, and execution. For more information, visit fast-track.com.