

# WHEN **smaller** IS BETTER

As the industry turns its attention toward specialty products in the hopes of filling drying pipelines, **smaller pharma and biotech companies may find themselves in the driver's seat.**

Despite all of the hurdles facing the specialty industry — the FDA's slow down in new drug approvals and tightened safety requirements — brands that target smaller physician and consumer populations have a brighter future, our experts say.



Word on the street is that increased regulations are forcing companies to market more creatively and effectively. Following the trend to move marketing dollars online, the ability to be nimble and to execute targeted online campaigns is advantageous for specialty products. And perfecting the art of doing more with less should be the strategy of today. Read on to learn what more than a dozen industry experts identify as the trends, challenges, and solutions for marketing specialty products in the present environment.

## Doing more with less, better

*The business models and marketing strategies for specialty pharma companies and their products are predicated on the need to reach specific targets most efficiently. The lay of the land can be defined as doing more with less, only better, which includes identifying a smaller patient base, boost-*

*ing resources by establishing partnerships with other companies, collaborating with disease-state advocates and associations, and effectively using smaller salesforces.*

**MELLOY.** ENDO PHARMACEUTICALS. The specialty market is dynamic and a company needs to be able to make decisions quickly

and to move on those decisions — there's no vetting every decision up and down the corporate hierarchy. To be successful, specialty pharma needs to be more nimble than big pharma, and along with that flexibility comes a lot of accountability, which is great because a brand manager owns the product all the way through. What works well is a matrix type of environment, with one owner for a particular product and everything goes through that person. The reality for marketers is to keep it simple and be able to articulate the plan and the expected outcomes succinctly. If it is too complicated, it becomes too slow to execute and the product is sunk.

## Thought Leaders

**RISA BERNSTEIN.** Managing Partner, Flashpoint Medica, New York; Flashpoint Medica is a full-service professional healthcare advertising agency within the Omnicom Diversified Agency Services network. For more information, visit [flashpointmedica.com](http://flashpointmedica.com).

**CHERYL ANN BORNE.** Director, Pharmaceutical Marketing, Skyscape, Marlborough, Mass.; Skyscape provides medical information, by specialty, for desktop and mobile devices. For more information, visit [pharma.skyscape.com](http://pharma.skyscape.com).

**TIM CAMPBELL.** Senior VP, Director of Client Services, Concentric Pharma Advertising, New York; Concentric is an

independent advertising agency. For more information, visit [concentric-rx.com](http://concentric-rx.com).

**WILLIAM HUMPHRIES.** President, Stiefel Laboratories, Duluth, Ga.; Stiefel Laboratories is a specialty pharmaceutical company with a singular focus on advancing dermatology and skin care around the world. For more information, visit [stiefel.com](http://stiefel.com).

**RICK KEEFER.** Chief Operating Officer, Publicis Selling Solutions Group, Lawrenceville, N.J.; Publicis Selling Solutions is a provider of outsourced sales teams and support services. For more information, visit [psellingsolutions.com](http://psellingsolutions.com).

**CHERYL KERR.** Director of Marketing,

Betaseron, Bayer HealthCare, Wayne, N.J.; Bayer HealthCare, a subsidiary of Bayer AG, is one of the world's leading innovative companies in the healthcare and medical products industry. For more information, visit [bayerus.com](http://bayerus.com).

**KIM LEVY.** Senior VP, MicroMass Communications, Cary, N.C.; MicroMass Communications is a relationship marketing agency. For more information, visit [micromass.com](http://micromass.com).

**LAURA LYNNER.** Executive VP, Managing Director, Scientific Voice, Chicago; Scientific Voice specializes in the implementation of speaker bureau programs and handles all aspects of programming from speaker



More specialty pharma companies are turning to online marketing channels. A Web presence is a necessity, but the online communication plan has to be integrated with the rest of the brand initiatives.

**TRACY MORROW** Heartbeat Digital

**BORNE.** SKYSCAPE. The move to mobile and digital technologies has changed the way physicians gather information and how pharma companies can engage and communicate with specialty physicians. There are multiple reports showing the fastest-growing segment of physician access is between patient visits; physicians are on their PDAs multiple times per day every day for quick answers to support treatment decisions and on their computers at night for research. Marketers need to build meaningful, clinically relevant tactics into these spaces, thereby engaging the specialty physicians on their terms.

**MATHEWS.** BAYER. Specialty marketing

recruitment to logistics and analysis.

For more information, visit [publicishealthcare.com](http://publicishealthcare.com).

**MIKE MATHEWS.** General Manager Hemophilia, VP Marketing Specialty Medicine, Bayer HealthCare, Berkeley, Calif.; Bayer HealthCare, a subsidiary of Bayer AG, is one of the world's leading innovative companies in the healthcare and medical products industry. For more information, visit [bayerus.com](http://bayerus.com).

**DEANNE MELLOY.** Executive Director, Marketing, Endo Pharmaceuticals, Chadds Ford, Pa.; Endo Pharmaceuticals is a specialty pharmaceutical company with market leadership in pain management. For more information, visit [endo.com](http://endo.com).



There are many differences in specialty marketing compared with PCP marketing.

**RISA BERNSTEIN** Flashpoint Medica

focuses on lifetime disease management. This approach is different from large pharma companies in a number of ways, but most importantly, specialty pharma looks to be an active member in the community versus being purely a competitive player in the industry. Specialty companies often offer more than just products by providing added value in terms of services and programs that support the community, the patient, and the customer in areas beyond the drug. A good example would be clinical trials designed to understand the disease and create new science for treating the disease versus a competitive advantage against another drug or company. The real key to success is not just about understanding unmet medical needs but fully understanding and fulfilling patient and customer life needs. This is how we shape our programs and work to change people's lives for the better.

**TRACY ANN MORROW.** Group Account Director, Heartbeat Digital, New York; Heartbeat Digital is an interactive marketing and software company specializing in sales and marketing solutions for the pharmaceutical, consumer products, and financial services industries. For more information, visit [heartbeatdigital.com](http://heartbeatdigital.com).

**JOSEPH PODOLSKI.** President, CEO, Repros Therapeutics, The Woodlands, Texas; Repros Therapeutics focuses on the development of oral small-molecule drugs for major unmet medical needs that treat male and female reproductive disorders. For more information, visit [reprosrx.com](http://reprosrx.com).

**STEPHEN SIMES.** CEO, BioSante, Lincolnshire,

**HUMPHRIES.** STIEFEL LABORATORIES. There is a lot of competition from entrepreneurial start-up companies as well as big pharma companies with their excellent expertise and world-class marketing skills. Big pharma companies are moving away from salesforce restructuring and, in my view, the CEOs of these companies are exploring a more specialty focus. The biggest challenge is that sometimes the market is just not big enough for everybody, or to sustain investment and entry.

**KEEFER.** PUBLICIS. The specialist physician is going to become even more important in the future as the industry and as the United States, as a healthcare nation, become more and more focused on targeted therapies. Primary care physicians (PCPs) will continue to be the gatekeepers of the healthcare system but more treatment specialists will deliver modalities and these physicians will be more focused on the medicines they deliver and how they deliver them.

**BERNSTEIN.** FLASHPOINT MEDICA. There are many differences in specialty marketing compared with PCP marketing. One difference is that specialists require a higher level of communications, scientific-based marketing materials, conversations around mechanisms

Ill.; BioSante is a specialty pharmaceutical company focused on developing products for female sexual health, menopause, contraception, and male hypogonadism. For more information, visit [biosantepharmaceutical.com](http://biosantepharmaceutical.com).

**DAVID STERN.** Executive VP, Endocrinology, EMD Serono, Rockland, Mass.; EMD Serono specializes in several therapeutic areas, including reproductive health, neurology, and metabolic endocrinology. For more information, visit [emdserono.com](http://emdserono.com).

**WENDY WHITE.** President, Siren Interactive, Oak Park, Ill.; Siren Interactive is focused on delivering effective e-marketing for specialty pharma companies treating niche diseases. For more information, visit [sireninteractive.com](http://sireninteractive.com).



Health educators who work with patients are an important part of the specialty marketing process today.

**RICK KEEFER** Publicis Selling Solutions



Specialty pharma needs to address fewer channels. In this business, there's a lot of risk and a lot of reward.

**DEANNE MELLOY** Endo Pharmaceuticals

of action, the pathophysiology, or the new science behind the product. The sales call is no longer a simple rundown of risks and benefits and a sample drop. The detail involves a dialogue, perhaps with an MSL, which requires a highly trained person functioning at a whole different level. Physician specialists don't want to be sold; they want to be engaged in clinical conversations. Therefore the materials created may need to look altogether different, more clinical than promotional, for example. The other big issue is, in general, that specialty physicians often have more power in making brand prescribing decisions versus primary-care docs who are at times more constrained by managed-care decision-makers and formularies. Another major difference is the value of the patient. Chronic therapies tend to be more expensive and a lifetime value of a patient becomes very important. Patients who take typically higher-priced products, often longer term for chronic conditions, may warrant a greater per-patient spend in education. Pharmaceutical manufacturers would be wise to spend more time and care on creating educational materials that engage patients and, as a result, motivate them and make them more compliant.

### Marketing big vs. marketing small

*Our experts discuss tactics and strategies that have helped their specialty products become big winners.*

**MATHEWS.** BAYER. In specialty pharma versus a consumer product field, marketing is not focused on TV advertisements or reaching consumers enmass but rather on creating relationships one at a time. Since the patient and physician base is much smaller in these categories, sometimes as few as only several thousand patients worldwide, marketing in this space is

much more about partnerships. A good example would be getting input from advisory boards. We have relationships with a number of different boards of physicians, nurses, patients, and researchers. This helps us better shape and define the direction of a new development long before we go into the clinic or to market. These advisory boards also play a key role in providing the data and information we use to develop our added-value programs.

**STERN.** EMD SERONO. We've done a lot of e-details and sales calls online and we have found online is an effective tool to get our message to physicians — not in place of sales rep efforts but as a supplement. In addition, we use traditional direct mail to supplement the salesforce. We also support advocates within patient organizations, and they in turn help us with mailing direct to patients or reaching out to physicians who are working with them on disease education.

**MELLOY.** ENDO PHARMACEUTICALS. Specialty marketers have to constantly reinvent themselves to stay in line with the evolving and changing market. Being reactive is not helpful; marketers need to be proactive, which is very difficult to do. Most pharmaceutical companies have been doing sales for a long time in just one way, which has taken almost all of the business acumen out of the sales representative job. The challenge is to get sales representatives back to being business owners and thinking more like buyers and not like the sellers. The marketplace is too crowded for just a sample drop. To be successful these days, marketers have to leverage every aspect of an educational program and not just create the same old dinner program, but develop a program in multiple ways, such as Webinars and live programs. The goal is not so much about reaching new customers as much as getting to customers in ways they will respond to.

**PODOLSKI.** REPROS. If a product is not differentiated from other products in its class, then there's no magic bullet for marketing. If it is, marketing is much easier. For example,





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Mass marketing doesn't make economic sense. It's expensive and not effective in this market. Specialty pharma needs to take a new approach by creating value, using the Internet as the core of their model.

**WENDY WHITE**  
Siren Interactive



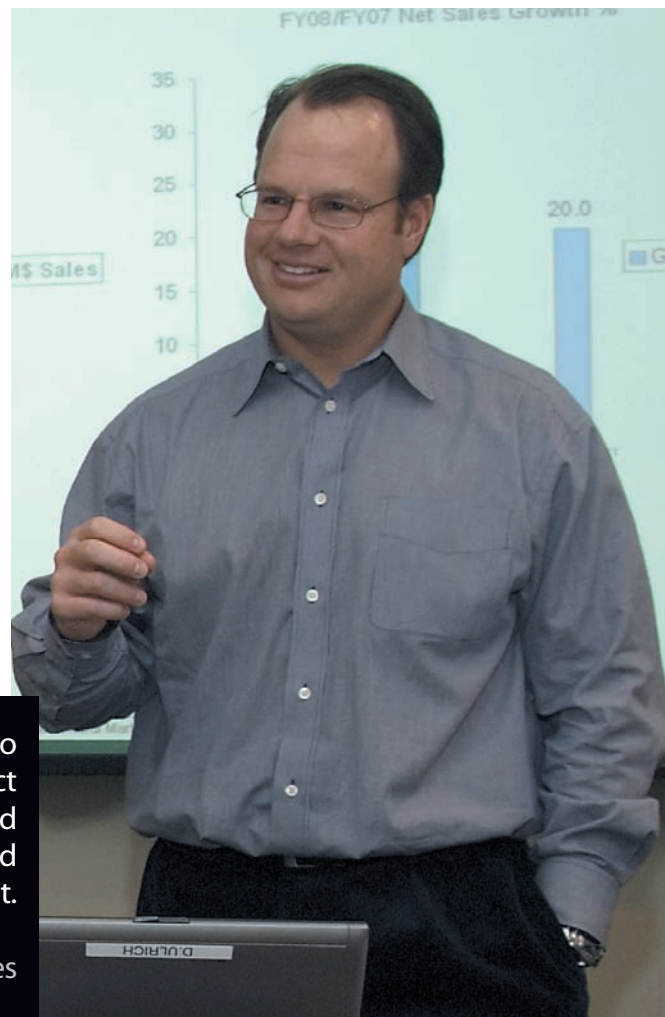
prelaunch sales representatives can be prepped with scientific literature and publication data so when they are doing their rounds, specialists will become aware that a new drug is coming soon. But even before that, investigators at sites can be recruited to become opinion leaders so that when the time comes for publication and presentation, they are on board. This is important, because during the clinical study they've seen how the drug works. Again, sales representatives can use the results to present valuable clinical information and alert doctors that a new drug is on the horizon. This makes market entry easier.

**SIMES.** BIOSANTE. Marketing tactics come in all varieties. First, one must look at a big pharma entry not as competition but as adding potential for expanding a given market. Then, the best competitive marketing tactic would be to have a unique product entry that has limited, if any, big pharma or other competition, with little chance of generic competition for a sustained period. The best tactic is a competitive advantage.

**LEVY.** MICROMASS. Relationship marketing has been used for a long time, but in most cases, the information is still pushed out and personalization is limited. The promise of great relationship marketing is to engage and have dialogues with individual customers by understanding specific behavioral drivers and barriers. The goal is to move customers from point A to point B in a way that motivates, rather than manipulates, the customer. Sales and marketing teams are hungry for new and more personalized ways to engage customers.

Today's environment requires companies to be excellent marketers. Getting a product approved takes longer, and marketing efforts will require good life-cycle management.

**BILL HUMPHRIES** Stiefel Laboratories



Specialty pharma companies have the added challenge of smaller — and in some cases more complex — markets. Behavioral insights can ensure that the right information gets to the right doctors in a way that will motivate to get the desired action.

**WHITE.** SIREN. There has been a change over the last 10 years as to how people get their information and this change is because of the rise of the Internet. Information is becoming fractionated and people want to find the answer they are looking for fast. Specialty pharma products will continue to grow as a percentage of the marketplace, given the number of orphan drugs in the research pipeline. I predict companies in this space will need to use more and more search engine strategies to attract and engage their audience as the volume of information grows and becomes more complicated.

**LYNNER.** SCIENTIFIC VOICE. One tactic that I find fascinating is the prelaunch market conditioning campaign and making it work while remaining compliant with disease-state education. Premarket conditioning for a pre-commercial launch is critical for drug utilization on a wide-scale basis, which comes from

education and hearing success stories from peers. While traditional education methods through public relations can do a lot for pre-market conditions and help a broader audience understand the category or disease state, putting the product into the hands of local thought leaders starts to drive confidence in the product's utilization. I think there is going to be a very dynamic uptake in the approvals of specialty drugs, which often have complex scientific stories, and that is going to require clients to start to seek highly customized and strategic ways to use thought leader tactics, such as speaker bureau programming.

**KEEFER.** PUBLICIS. Companies that field specialty sales reps spend a lot of time training them on the specialty product and how it operates and what makes the specialist physician tick and how or where the drug therapy falls into the continuum of patient care. Specialty reps are delivering more therapeutic, higher-science messages and specialty physicians find value in that. I also expect that there will be growth in the use of virtual reps, which allows the physician to learn about the drug when it is most convenient for him or her.



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**BORNE.** SKYSCAPE. One solution to promote an under-promoted, non-rep-supported specialty product in an unmet medical need might be to combine a PDA channel with another online channel to create an integrated

multiwave, multichannel campaign to educate and market to a small subspecialty physician segment. Clinical information on the disease can be sent to point-of-care via the PDA channel. This approach can also be used to drive

physicians to additional learning activities online after hours. By knowing the audience segment — where and when physicians are going for information and the influence of these media on their prescribing decisions —

## BAYER AND CONCENTRIC FACE CHALLENGES OF A CROWDED MARKETPLACE

### A FOCUSED, INTEGRATED CAMPAIGN ADDS LIFE TO AN OLDER SPECIALTY DRUG



Tim Campbell of Concentric and Cheryl Kerr of Bayer team up to reposition the specialty product Betaseron.

**A**fter more than 15 years on the market, Betaseron — Bayer's treatment for multiple sclerosis — was facing challenges because of increased competition and a fatigued campaign. Tim Campbell, senior VP, director of client services, at Concentric Pharma Advertising and Cheryl Kerr, director of marketing, Betaseron, discuss the campaign that turned things around.

The answer to a successful product campaign, even in the specialty market, is to differentiate the brand from the competition and to portray the message in a way that physicians can grasp quickly.

"At the time, the Betaseron campaign visual didn't communicate urgency or entice physicians to take action," Mr. Campbell says. "We wanted to create a more shocking image that would remind physicians that MS is a disease that needs to be treated early and aggressively."

Ms. Kerr says the key to a successful campaign for a specialty drug is to be very

focused and to define very targeted physician segments; for Betaseron, the target market is neurologists and neuroscience professionals.

"A brand can't be all things to all people, but by focusing efforts on where the business is, we are going in the right direction," she says.

The core branding image for the relaunch campaign is the axon bomb, which illustrates the damage to the nerve endings caused by the disease. This image reminds physicians how devastating MS progression can be. According to Concentric, physicians overwhelmingly felt the image depicted the disease exactly as it looks.

"The journal ad delivered a simple and focused message — urgency," Mr. Campbell says.

The trend had been for physicians to take a wait-and-see approach — they would not start therapy until a patient met more stringent diagnostic criteria. But within the scientific community there is growing awareness of the importance of treating MS patients early — right from the first event.

To address this shift in thinking, Concentric and Bayer created a campaign that would hopefully change how physicians approached treatment, while differentiating Betaseron from the competition by focusing on its efficacy.

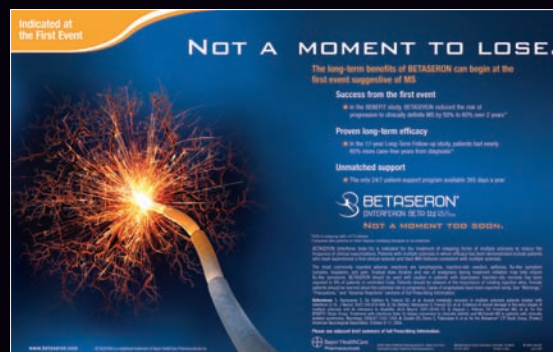
Additionally, new clinical data as well as a new indication for early intervention provided a great opportunity to relaunch the

brand and set the stage for the new message, Mr. Campbell says.

Since the relaunch, physicians have begun to change their behaviors and are treating patients earlier, Ms. Kerr says. Message recall dramatically improved and campaign tracking results demonstrated the best performance since competitors entered the market in 1996. Betaseron is now ranked No. 1 as the preferred treatment for use at the first event of MS.

Along with the journal advertising, Bayer integrated Concentric's sales rep training tool, RepRace, to pull the same sense of urgency created with the new campaign through to the field and get the sales staff up to speed with the new messaging. Betaseron reps often meet physicians in clinics and conduct several sales calls in one place.

"Sometimes a rep has to prepare for different physician discussion scenarios for one sales stop, and with RepRace, they are equipped to customize each detail to the doctor," Ms. Kerr says.



The relaunched Betaseron campaign conveys a simple and focused message — urgency.

Source: Interviews with Concentric Pharma Advertising's Tim Campbell and Bayer's Cheryl Kerr.





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Specialty products are the most interesting products to market — they really do need and therefore justify prelaunch conditioning.

**LAURA LYNNER** Scientific Voice

marketers can cherry-pick the best marketing tactics to increase the specialty physicians' knowledge of the condition and treatments, build physician relationships in absentia of a salesforce, and create loyalty for the brand.

**MORROW.** HEARTBEAT DIGITAL. Any online tactic can be measured; it's all about data at the end of the day. The trick is to find ways to leverage the data by understanding and categorizing target insights and developing a strategic action plan. The challenge is to effectively and efficiently target specialty groups to get the most out of the marketing dollar; this is becoming more of a reality with so many different online options available now, such as social networks and Websites such as Sermo for physicians. Tapping into these types of sites will allow marketers to stretch those dollars and actually realize a higher ROI. Pharma tends to be a little bit



Patients are taking a more interactive role in their care, so we are looking at ways to encourage patient adherence to therapy regimens.

**DAVID STERN**  
EMD Serono

slow to change, but once the cost and ROI of what can be done online is compared with traditional communications, the online story tells itself.

**BERNSTEIN.** FLASHPOINT MEDICA. The PCP model is often about producing feature and benefit selling aids and mass approaches to marketing, but in the specialty market the tactical mix is different. The focus is on having deeper dialogues with specialists, using reprints, participating in roundtable proceedings, and relying on documents or other editorial vehicles that explore the science behind the

drug. Cornerstone tactics that diverge from the usual approach include the use of thought leader Webcasts.

## Facing the challenges

*Specialty pharma companies must meet many of the same challenges as big pharma companies, such as reduced physician access, treatment access, reimbursement issues, generic competition, and increased scrutiny from the government and the public. Our Forum experts share their thoughts on other challenges the specialty market faces.*

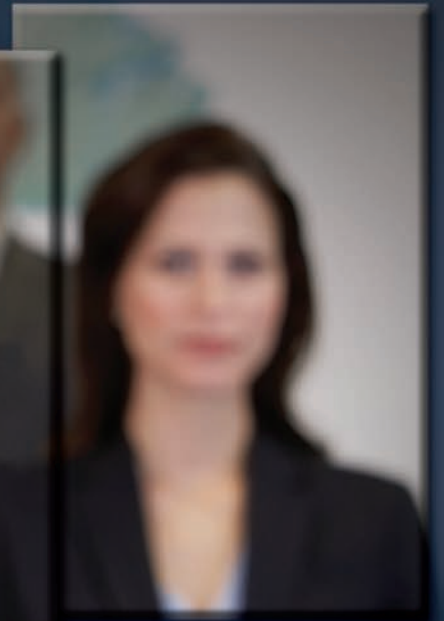
**SIMES.** BIOSANTE. The most important prevailing trends shaping marketing strategies are FDA safety concerns, the resulting delays in FDA approvals, and physicians' reluctance to change prescribing habits.

**MATHEWS.** BAYER. One challenge is patients having access to treatment. Only 25% to 30% of the hemophilia patient population, for example, is diagnosed and receiving therapy, so we work with patient organizations around the world such as the World Federation of Hemophilia to increase awareness, improve diagnosis, and create funding for treatment. One of our key goals is to establish and elevate the standard of care in all markets. To achieve this, our investment begins long before the drug has approval by engaging physicians, patients, and governments.

**STERN.** EMD SERONO. The challenge overall is understanding the underlying cost in the biotech/pharma market and the drivers behind getting a drug approved. Whether a product gets approved or not, a company still has to absorb the development cost. One of the challenges in the market is that people don't understand it costs money to create innovative products that meet patients' unmet needs. The cost to develop new drugs is high but the benefits are higher, let alone the reinvestment into research that drives continued innovation.

**MELLOY.** ENDO PHARMACEUTICALS. Pharma is under scrutiny and even PhRMA is determining how we can approach our business. We will have to discover completely new ways — besides just using the sales reps — to provide personal promotion at the doctors' convenience.

**PODOLSKI.** REPROS. One of the biggest hurdles is determining whether a product is going to have as big a market as we think and whether it will give the anticipated return to the shareholders. Sometimes a successful



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launch leads to mature product sales and when ROI is evaluated from a business standpoint companies have to evaluate whether it is better to sell the product to a bigger company at net present value or spend more money to build an infrastructure that allows for playing with the big boys.

**BORNE.** SKYSCAPE. In general, it's tough to find innovation in physician marketing, as brand teams are notoriously slow to adopt new ways of communicating with doctors. Now that brand teams are under the proverbial microscope, they are keeping even more to their comfort zones. Technology allows marketers to intelligently

communicate with their target audiences in a far more meaningful way than ever before. Profiling and the contextual or behavioral targeting capabilities of digital media allow for messages to be customer-centric. Additionally, there is the ability have a continuous one-on-one dialogue with each of the physician specialists,

## Sound Bites from the Field

**THERE ARE NUMEROUS FACTORS AFFECTING CHANGE IN THE MARKETING OF SPECIALTY PRODUCTS TODAY. WE ASKED EXPERTS IN THE FIELD TO COMMENT ON WHAT THEY BELIEVE TO BE THE MOST SIGNIFICANT.**



**JAY CARTER** is Senior VP at AbelsonTaylor Inc., Chicago, a medical and pharmaceutical advertising agency. For more information, visit [abelsontaylor.com](http://abelsontaylor.com).

“Economics favor niche products that meet an unmet need. Advocacy groups for the disease state are focused upon an area that is probably under-resourced, the opinion leaders are predisposed to embrace a product that offers an improvement, and practicing physicians who specialize in treating a niche disease just want something new that works. Couple these factors with high demand from a small group of prescribers, and brand teams can service the group with a smaller and less expensive salesforce. This leads to high returns, at least for a time.

Unfortunately, as Thomas Wilmott of International Data Corp. puts it, ‘defending a niche is like being in the Alamo.’ Once the market is created and there is proof of concept for a class of agents that successfully meets the needs of the market, competition rushes in.

The best marketing strategy to deal with competition was best articulated 2,500 years ago, by Sun-Tzu: ‘Whoever is first in the field and awaits the coming of the enemy will be fresh for the fight; whoever is second in the field and has to hasten to battle will arrive exhausted.’

New specialty players have the advantage of being more nimble than many of their big pharma competitors, and their principal advantage is the all-important first mover advantage.”



**GARNETT DEZEMBER** is President of The Navicor Group, inVentiv Communications, Westerville, Ohio, a full-service advertising agency specializing in oncology and immunology.

For more information, visit [navicorgroup.com](http://navicorgroup.com).

“Assuming that the definition of ‘specialty products’ in the broadest and most traditional terms is ‘products targeted to nonprimary care healthcare providers,’ then a major trend is toward treatment diagnostics. That is, using diagnostic testing to predict which treatments will provide patients the greatest benefit. This heightened precision will enable healthcare providers to treat with greater outcome assurance, increase quality of life for patients, and reduce overall healthcare costs.

As the role of treatment diagnostics increases, marketing becomes more interesting because patient selection becomes more critical. Traditional patient profiles are no longer as valuable as they used to be. The appropriate diagnostic tool will require coordinated marketing alongside its partner therapy to create a combination value proposition. Also, additional key audiences will likely need to be targeted. For instance, with cancer, where oncologists were once the primary target audience, surgeons and pathologists may take a more critical role in drug treatment decisions.”

**GEORGE GLATCZ JR.** is President of Vox Medica, Philadelphia, a communications company focused on building brand recognition and visibility, customizing meaningful education and knowledge solutions, and delivering market access to healthcare clients worldwide. For more information, visit [voxmedica.com](http://voxmedica.com).



“The very definition of a specialty product is an issue today. In the past, these products were used by select physicians in controlled settings for niche diseases, and a linear approach

was used to market to these physicians. Today, these conversations are fragmented and inclusive of diverse and vast audiences. Patients, caregivers, physicians, regulators, and payers are sharing information more readily and making decisions in a community context, in part thanks to technology. Therefore, the uptake and potential for specialty products are enhanced, and we hear of ‘specialty blockbusters’ as the new model of success.

Those who can leverage their brand’s ‘common diversity’ across audiences and media will enjoy strategically sound growth no matter how specialty is defined.”



**STEVEN MICHAELSON** is Founder and CEO of Wishbone ITP, New York, an independent, full service healthcare advertising agency. For more information, visit [wishbone-itp.com](http://wishbone-itp.com).

“From the specialty pharma perspective, the primary issue is salesforce effectiveness. Specialty companies usually have good products and appropriate resourcing relative to the size of their audience. Unfortunately, it is difficult for them to attract and retain top sales talent and as result they are unable to gain access and make appropriate impact against key physician targets. On the specialty product front, the primary trend occurring in the marketing of specialty products is the development of patient communities and the



The biggest challenge is being able to identify and develop products for a market with little competition, branded or generic.

**STEPHEN SIMES** BioSante



Virtual detail aids are one way to leverage behavioral insights. Information is provided to physicians, most often through an online experience, specific to their interests, knowledge, and learning styles.

**KIM LEVY** MicroMass Communications

advent of social networking. Patients in these specialty communities are looking to be connected and pharma manufacturers are listening. This is leading to the integration of the company and brand more directly into the communities that they serve.”



**MICHAEL PARISI** is President of Altum at CommonHealth, Parsippany, N.J., a network of specialized healthcare marketing companies, all aligned to build brands. For more information,

visit [commonhealth.com](http://commonhealth.com).

“Both innovation and speed are critical to building a successful specialty business. Innovation must be applied across the board, from the discovery platform through marketing and sales execution. Companies invest incredible amounts of money to find the clinical breakthrough to change the course of a disease, so why not take a chance and think about the brand in a nontraditional way? Technology can be used to build new ideas and reach those hard-to-see customers in new and unique ways.

Most specialty markets are emotionally charged and often address serious diseases such as oncology and HIV, where time is of the essence. Access to breaking data is critical when educating about new treatment approaches; the salesforce needs information to impart to their customers. A real specialty marketer lives for the term ‘rapid and accelerated’ — this is the heart and soul of biotechnology. Specialty products require marketers to move quickly and out-manuever their competition, but it’s not for the weak-hearted; they have to be courageous and willing to take calculated risks.”

delivering messages and data that are highly tailored to their profile and area of practice. Technology has affected a paradigm shift from mass communications to one-to-one communications.

## Tracking trends

*The specialty pharma industry is ever changing and evolving as it grows, and our experts comment on some of the major trends that are shaping the sector today.*

**STERN.** EMD SERONO. One of the trends today is having an online focus — the ability to communicate with patients or future patients. The Internet allows patients to do more research on a disease state, whether for themselves or a loved one. And there are a lot of opportunities to give quality information to patients — not to sell the product but to educate patients. The more educated patients are the more compliant they become because they understand the importance of adherence, side effects, that no drug is a panacea. All drugs have risks associated with them; most of the time the benefits outweigh the risks. From a technology perspective, one of the programs we’ve rolled out is to e-detail patients. We work with a patient advocacy group that sends out our electronic detail with disease state information to its patient base because our information will be helpful to its members. Patients have the option to opt in and when they do, they receive a year’s worth of membership in the patient organization. This gives them an opportunity to learn more about products and the disease.

**LYNNER.** SCIENTIFIC VOICE. Conservatism is driving compliance and compliance challenges are driving more creative tactics. On the one hand, the compliance regulations can be perceived as a challenge; on the other hand, there has been great interest and a willingness

in the industry to try very different and unique ways to market within the guidelines. So, the need to be far more strategic because of compliance has, in fact, allowed specialty marketers to look at new tactics.

**KEEFER.** PUBLICIS. In the past, a smaller company would partner with a larger one that had a big PCP salesforce to jointly market a product. But specialty companies are not so eager to partner anymore. Smaller companies are outsourcing their own salesforces and are forgoing long-term arrangements with bigger partners.

**BORNE.** SKYSCAPE. The bottom line is brand teams need to understand the relative low influence of traditional communications channels on these physicians and identify new opportunities to reach them in their preferred medium. This presents a valuable opportunity



The move to mobile and digital technologies has changed how pharma companies can engage and communicate with specialty physicians.

**CHERYL BORNE** Skyscape



for pharma to integrate their key clinical messages and brand information into a highly used, medically credible channel.

### Looking behind, looking ahead

*Continued growth, uptake of electronic health records, increased online utilization, greater consumer awareness, and personalized medicine are some of the major trends that will positively impact the specialty pharmaceutical sector going forward.*

**HUMPHRIES.** STIEFEL LABORATORIES. I would like to see a more robust physician/representative interaction as well as more discussion around data and product merits. I'd like to see salespeople spend more time with physicians so they can provide them with valuable information and in a respectful and compliant manner. So many reps now are perceived to be sample droppers and caterers; this is a disservice to the sales professional and the physician.

**STERN.** EMD SERONO. Five to 10 years from now there will be a lot more use of electronics around treatment and healthcare. Physicians are moving toward electronic medical records or EMR. Patients will continue to go online to get more tailored information. So, if a physician can put medical information into an EMR then the patient can receive an e-mail with a link to a helpful Website that is relevant to the treatment or the disease.

**PODOLSKI.** REPROS. The consumer is taking a more active role in his or her treatment. I also think the Internet is going to influence how things are done in the future. Children — regardless of economic status — are coming out of school wired and they are the patients of the future. The patients of the

future are going to behave a lot differently from my parents, who won't ask the doctor any questions. My generation is starting to ask more questions, but my kids are going to have a big part in how they get treated. The electronic media that is so prevalent today is going to play an even bigger role.

**WHITE.** SIREN. I think there is going to be a change in how we market and this change will become more about online and search engine marketing. Information is becoming fractionated and people want to find the answer they are looking for fast, and that requires a really good search engine. Specialty pharma will continue to grow as a percentage of the marketplace and I predict companies in this space will be doing more online detailing, especially since specialists are spread out all across the country.

**BORNE.** SKYSCAPE. From Web 2.0, truer communities of practice will evolve that allow physician specialists from around the world to come together to share knowledge peer to peer, thereby stimulating innovation and nurturing new knowledge.

**MORROW.** HEARTBEAT DIGITAL. The trend seems to be that more drugs are being developed as targeted therapies. If this is the case, there may be fewer blockbuster drugs and more drugs that are subtly nuanced, which would allow for a more efficacious approach to treating individuals. As the field of personalized medicine becomes more of a reality, we



Specialty marketing is about creating customer relationships one at a time.

**MIKE MATHEWS** Bayer

are going to have smaller products targeted to specific human genetic makeups. Finding ways to market these targeted therapies to people in very specific ways is going to become more necessary, and chances are the opportunities for marketing will be online.

**BERNSTEIN.** FLASHPOINT MEDICA. Cornerstone tactics that diverge from the usual approaches include the use of thought leader Webcasts. Thought leaders can be engaged in virtual advisory Webcasts to come together and interact to present case studies and be asked questions by participating physicians. Information extracted from major meetings and congresses will be presented online in real time; getting that information out right away to doctors will be a benefit. There's no doubt that the big pharma model is clearly changing and partnerships with biologic and targeted therapy companies that develop smart medicines are the future; the marketing landscape is going to look very different. ♦

PharmaVOICE welcomes comments about this article. E-mail us at [feedback@pharmavoice.com](mailto:feedback@pharmavoice.com).