

Marketing for THE MASSES

Marketing messages today may be reaching more people through the growing use of technology, at the same time those messages are becoming more personal.

Customer-centric messaging, patient engagement, and personalized content are an increasingly important part of the marketing tool kit. As digital channels have become an integral piece of the marketing media mix, the digital age also presents an opportunity to have a greater impact on audience behavior. With the ability to reach audiences where they want to receive information, it's also important to remember that the content must be relevant to the audience.

And now that communications are becoming a two-way street of sorts, marketers have an abundance of data to customize those messages.

Opportunities surrounding data also expand when wearable products are able to integrate multiple data points and aggregate them. Marketers should prepare now to be ready as the future of super big data evolves and they need to understand the rules and regulations — both company and federal — to make sure compliance is not an issue. They also need to thoughtfully think through the strategic use of the information and understand how technology can help inform those decisions.

A Digital World View

According to a recent Cegedim Strategic

Data (CSD) report, worldwide, industry investment in pharmaceuticals salesforce and marketing channels remained flat in 2013, at just under \$85 billion constant U.S. dollars. Notably, the leading 10 multinational companies ranked by promotional expenditure, all reduced investment during the 12 months to December 2013.

According to Christopher Wooden, VP for CSD global promotion audits, a combination of factors has led to a general consolidation in marketing activities, including the impact of the so-called patent cliff, and regulatory scrutiny and clearer compliance guidelines are putting pressure on the use of traditional, per-

VIEWPOINTS



EMILY TOWER

VP of Digital Strategy & Analytics
AbelsonTaylor

ePatient Message Delivery

While the ePatient era hasn't arrived yet, the access patients now have to

data and personal information requires that we as marketers tailor our communication to align with this new onslaught of information. What was once acceptable to deliver — general information on managing cholesterol, for example — now needs to be a more focused discussion for those patients who might be using an app to monitor their levels regularly. The patient journey is now even more granular, and for our marketing message to break through, we need to understand where the patient is in on the journey, what information he or she has access to, and what gaps we can fill.

Messaging for Multiple Stakeholder Groups

Messaging that addresses multiple stakeholders has always been difficult and typically is a watered-down version of your intent. That said, with the new sub-segments of users (Are they using apps to manage their health? Are they just learning about their condition? Have they already accessed WebMD?), it could be daunting and unrealistic to craft messaging specific to each one. Instead, it's best to take our communication strategy back to the core strategic objectives for the brand and then answer two fundamental questions. One, what do we want the

customer to learn from us? And, two what do they want to hear from us and where and when are we credible? We can then craft seemingly targeted messages, reducing our burden of creating content for each type of user from scratch.



CASHION BRANNON

Global President
Addison Whitney

Market Research is Key

Targeted messaging can best be developed with audience insights identified through strategic market research. Identifying key points of differentiation to measure against can help craft compelling messages to each audience while remaining in tune with the overarching brand positioning. Support targeted messages with proof points to prepare internal stakeholders for external communications. Finally, testing potential messaging across stakeholder groups can help identify the best options.

Regardless of the target and industry, all stakeholders are consumers, too. Starting with the value your company brings, succinct, clear messages that resonate as a consumer-facing story can be an effective way of communicating about a complex segmentation. Using tactics that are traditionally reserved for consumers can help level set, draw desired attention, and open up conversation.



ANDREW SCHULTZ

VP, Brand Strategy
AmerisourceBergen

Leveraging the Right Mix

Digital marketing is about pulling levers to find the best mix that works for your organization while the technology, platforms, and capabilities constantly change. But that leads to the opportunity to continuously evolve, providing fresh content to your audience. We've adapted a unique rhythm of moving quickly by piloting and refining programs, learning from our peers, and making our next move.



MATT WEBB

VP, Marketing Strategy
AmerisourceBergen

Taking a Consumer-Centric Approach



DAVE ESCALANTE

Senior VP, OneKey and
Marketing, Cegedim
Relationship Management

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sonal promotional channels. Finally, he says broad coverage primary care salesforces are

being transformed to promote highly specialized portfolios, therefore fewer reps are needed.

Reduced marketing investment, however, was not universal. Major emerging countries

VIEWPOINTS

► The new ecosystem of healthcare delivery is maturing rapidly. The integrated customer is moving from uncoordinated to advanced levels of influence, control and financial responsibility. In some markets, such as Wisconsin, the health system has far-reaching influence because it owns or is affiliated with nearly every worksite. Commercial success will mean accurately identifying your new integrated targets, mapping geographic areas of influence, and understanding new policies and protocols.



MIKE SUESSERMAN

Managing Director Early Product Commercialization
Cello Health Consulting

Integrated Care Models

Stakeholders such as health insurers, integrated delivery systems, and employers are looking for ways to partner to implement integrated care models. Manufacturers will need to demonstrate how they can help these partnerships achieve their quality and cost reduction objectives, as well as how their drugs and services can deliver value in a population management setting.



ROGER VIOLA

Managing Director,
Engagement Practice
Cello Health
Communications

The New Landscape

Through the lens of evidence-based medicine, an optimal approach for multi-group message development is to conduct a landscape assessment for unmet need identification, determine available evidence, and draft key and supporting statements communicating need-oriented benefits using the evidence. This core message platform is the basis for subsequent message enhancement aligned with the needs and communication objectives per stakeholder type. Finally, refine these group-oriented

platforms with feedback from internal multifunctional teams and external stakeholder representatives.



TODD ARMSTRONG

VP Media Director
Communications Media Inc.

True Customer-Centricity

The new ecosystem is requiring marketers to focus on individual customer attitudes, needs, values, and preferences. Marketers need to get away from grouping customers into profiles, deciles, and segments and strive to understand how each customer responds, reacts, and feels about the message and/or brand. This understanding will help build a level of trust that will exist through the current ecosystem and the ones that will follow.



BORIS KUSHKULEY, PH.D.

Executive VP, Multichannel Marketing and Consulting
Intouch Solutions

A Tapestry of Ideas

I see an ecosystem as a tapestry of clever, targeted, smaller ideas that work seamlessly together. Today, marketers must think of themselves not as creators of unidirectional broadcasted messages, but as customer-service professionals who deliver support and information to patients and professionals that is useful, meaningful, and timely.

A Maze of Opportunity

The biggest challenge of marketing in a digital age is the speed with which the field evolves. Many concepts that worked well for decades just don't match reality anymore. The HCP/sales rep relationship has changed drastically. Managed care stakeholders and patients are much more involved in healthcare choices. Trying to understand the need of each customer and helping them navigate this maze is a clear opportunity.



JEFF MEEHAN

Chief Commercial Officer
MD On-line (MDOL)

Key Marketing Strategies

The first is evolution. As increasing numbers of HCPs look to technology for delivery of messaging, marketers need to be able to keep up. In addition, marketers who already receive messaging through a technology-based platform with all the bells and whistles should realize that HCPs are expecting and demanding the very same thing.

Big Data Holds Opportunity

Perhaps the most promising opportunity is in the increasing focus on big data. Whereas storage was its only function at one time, now big data is also valued for its expanding role in efforts to improve the healthcare and lives of patients. The key is not only in generating data, but in generating insights from that data, and actions from those insights.



ROBERT D. BEDFORD

Executive VP, Sales and Marketing
MediScripts

Maximizing Reach

The key to marketing for the new ecosystem is maximizing budgets and reach with a strategic multichannel approach. Physicians today are overwhelmed with information sources, therefore the competition to engage with this audience is greater than ever before. The best way to connect with HCPs is to deliver the information they find valuable across multiple touch points. It's also critical for your strategy to incorporate point of care channels that reach physicians when they are making prescribing decisions.

Understanding the Value Proposition

When messaging to multiple stakeholder groups, it's essential to understand the value proposition that will be compelling to each

saw increased expenditure, including China (+9%), Brazil (+11%), Mexico (+9%), South

Korea (+4%), and Russia (+16%). Nevertheless, these increases were offset by cuts in the

USA (-4%) and generally across Europe with spending in the UK down almost 13%.

group and then tailor your message accordingly. The vehicles you use to reach these audiences should also be selected based on their preference to specific channels. Today, physicians, patients and payers alike are harder to reach than ever, and all want to be reached at a time and place of their choosing rather than interrupted.



SHELAGH BROOKE

Joint Head of Planning
Ogilvy CommonHealth

Investment and Reward

The new ecosystem will reward brands that represent a worthy investment. To accomplish this, brands must generate trust as follows: create a strong emotional connection; demonstrate that you understand their issues and develop programs that create a better experience, without being self-serving; explain yourself — consumers increasingly want to know how you work and why that matters; and make it easy to engage with you.

Let your first impression be welcoming. Don't make them hunt for information. Avoid content redundancies.



MINDY PRICE

Joint Head of Planning
OgilvyCommonHealth

A Higher Purpose

A brand has lasting power when it stands for a higher-order purpose that reaches beyond category conventions. When you start with a brand viewpoint that solves an unmet need and that resonates with multiple stakeholders, it can then serve as the strategic foundation to underpin your messaging architecture. While there will be a common emotional core for the brand that cuts across all target audiences, messaging can then be tailored to each audience's functional needs.



JEFF GAUS

CEO
Prolifiq Software

Digital Opportunities

The major marketing opportunities of the digital age are also major challenges. First, is the speed that messages can be created and disseminated now; marketers need to pick up the pace. Second, is cost. Digital represents the least expensive medium, yet budgets aren't prioritized. And, third is measurability. Digital is, by definition, measurable, meaning we know with extreme clarity what works, yet many do not know how to make sense of the data and its implications.



DAVID ZARITSKY

President
PulseCX

The Customer Journey

Although marketing strategies will vary based on specific brand/ market objectives, roadblocks, and opportunities, they all must be customer-centric in today's new ecosystem. If we try to force our messages on audiences when they're not ready, they'll ignore them. But when we're able to truly understand the customer experience, define the customer journey, and identify the moments of truth when customers are most receptive to specific communications, we're able to fully engage our target audiences and measurably increase the impact of brand messaging.



JAY BOLLING

CEO
PulseCX

A Positive Customer Experience

Successful messaging is all about creating a positive customer experience (CX) and, in today's world, those experiences

need to firmly connect physicians, patients, and caregivers. To maximize the impact of every touch point, we need to think of our key stakeholders as characters in a "single" story, and be very strategic about when and where these characters will intersect, how they will influence each other, and what moments of the journey they will own to make every touch point an impactful experience and memorable moment.



DAVID BENNETT

President of Global Sales and Marketing
Zinc Ahead

Multichannel Strategies in a Patient-Centric Model

Multichannel strategies, with a heavy emphasis on digital, must now be the focus to help facilitate communication within a patient-centric marketing model. While digital strategy development requires more intensive planning and collaboration across a wider internal audience, it provides stakeholders the ability to have interactive dialogue. It gives patients the opportunity to engage with the brand, understand potential health and social outcomes of the treatment, and have a role in their therapy. In order to facilitate digital strategies and to embrace the potential, it is paramount to integrate a mechanism that ensures content remains compliant while speeding up approval times.

MLR Key to Content Development

The engagement and alignment of key medical and legal review (MLR) stakeholders from the outset of a life-sciences' product's conception (USPs, branding, claims) is key to the efficiency of content development. The defining of a regulatory process for each publication channel (paper and digital) ensures that the right processes are aligned to provide quality assurance and consistency. Centralized storage of approved materials will guarantee efficient reuse of content and simplified global dissemination of key messaging.



Globally, the use of “digital” channels such as e-detailing, e-mailing, and e-meetings continued to expand with these three channels up more than 14% compared with 2012 at \$1.9 billion constant U.S. dollars. In the last six months of 2013, all digital channels tracked by CSD, including pharma company websites, social media, Web banner advertising in professional online journals and mobile apps came to almost \$2.5 billion — approximately 6% of audited marketing expenditure.

“In absolute terms, digital marketing investment is still a relatively small portion of the mix,” Mr. Wooden says. “However, we expect the use of these channels will only continue to advance as marketers seek to maintain reach through ease of access while delivering a high level of information quality to HCPs.”

The Digital Revolution at Hand

Smartphones, tablets, and other electronic devices have become ubiquitous in today’s society. Consumers, patients, physicians use these handheld minicomputers to access information, health apps, and life-style management systems.

A recent survey of 3,000 patients representing more than 200 health conditions by CDMiConnect reveals a behavioral shift in how patients manage their health.

The research revealed some key digital health trends, including information on in-office mobile device use.

When looking at in-office mobile use, the survey showed that patients are actively using the waiting room time to make every minute with their doctor more meaningful. Patients are researching health information so they can be better prepared for their appointment. In fact, one out of every 5 patients uses his or her smartphone in the waiting room to prep for the appointment. And 82% of patients who kept their mobile devices out in the actual exam room reported they felt their doctors understood them better.

Capitalizing on mHealth

Deloitte researchers note that to leverage the power and reach of mobile communications for mHealth four critical dimensions must align: people, places, payment, and purpose.

When it comes to people, a nuanced understanding of demographics such as age, gender, and income can point to technology preferences and help drive customization and targeting of users’ mHealth experiences.

mHealth programs should be designed to be operable via multiple communication plat-

forms and channels such as phones, tablets, laptops, and social media.

Smartphone ownership in the United States is at a high and still growing. Almost all U.S. adults own a cell phone, half of which are smartphones. And, more than two in five (42%) own a tablet. On average, a U.S. adult carries three devices, with the most popular being a smartphone. Mobile devices are heavily used for connectivity; Internet usage among U.S. adult mobile phone owners is now at 63%, twice as high as in 2009, and at least half of owners have downloaded an application (app). And one in three U.S. consumers has used his or her mobile phone to look for health information.

In terms of places, the convergence of local infrastructure needs — reliable local networks, including cellular, broadband and wireless, download speeds, and bandwidth capacity and rapid technological development — may be a tipping point for mHealth adoption.

Interoperable systems and analytic capabilities are essential to enable healthcare organizations to use incoming streams of data. For example, mobile access to patient information was found to improve accessibility, productivity, and workflow in a Department of Veterans Affairs’ (VA) 2011 mobile health clinician pilot.

Modeling of widespread adoption of inter-

operability among medical devices, electronic health records (EHRs), mobile devices, and health information technology (HIT) systems projects savings of around \$30 billion per year.

Reimbursement and regulatory value-based reforms are prompting healthcare organizations to find more efficient ways to improve care while increasing quality; expand care delivery outside the hospital and physician office; facilitate patient-provider connectivity anytime and anywhere; and increase patient engagement. Addressing privacy and security concerns, as well as reimbursement approaches and regulatory consistency across jurisdictions, should remove several existing barriers to adoption.

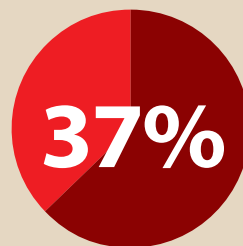
mHealth’s communication, coordination, monitoring, and data collection capabilities may provide tools to help achieve the goals inherent in new service delivery models such as accountable care organizations. These new delivery models and reimbursement reforms such as bundled payments are predicated on achieving quality outcomes against evidence-based standards. Payments are based on evaluations of clinical processes, patient experiences, outcomes, and efficiencies against industry benchmarks and base thresholds, including incorporating data flowing both remotely and at the point of care.

Disease dynamics, including fitness, well-

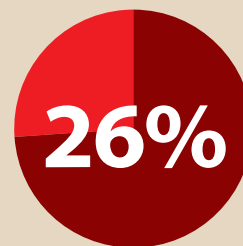
Who’s Using Mobile In Physicians’ Offices?

It’s not just millennials who live for their devices and engage with mobile in-office. The numbers are consistently high for patients up to age 50, with 37% of patients, ages 18-30 and 26% ages 30-49 reporting they’ve used mobile in the waiting room to find health information in the past six months. As mobile device use becomes more and more ubiquitous, these numbers are only expected to rise.

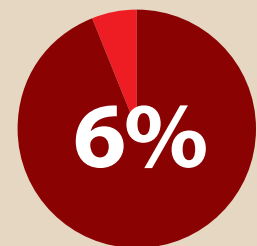
Mobile in-office use within age groups



aged 18-29



aged 30-49



aged 50+

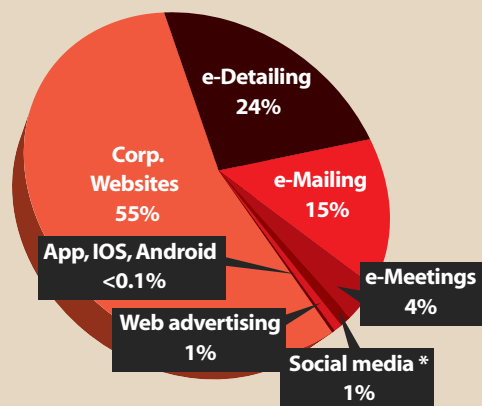
Gender Distribution

Those using mobile in the waiting room represent genders equally, with demographics split nearly down the middle between male and female.



Source: CDMiConnect

**Total Digital Promotion Worldwide:
\$2.5 Billion — July to December 2013**



*(Facebook, Twitter, YouTube)

Source: Cegedim Strategic Data, Promotion Database 2014

ness, care provision, disease management, and complex case management can be supported by mHealth functionality, but the approach has to fit the condition.

mHealth can support fitness and wellness activities and assist patients in managing certain health conditions, particularly chronic conditions such as diabetes, asthma, hypertension, and HIV/AIDS, and behavioral change

programs that require regular management, such as smoking cessation and weight loss.

Healthcare organizations — providers, payers, and life-sciences companies — should consider each of the four dimensions of mHealth as they weigh market entry. Deloitte researchers say there are some additional important considerations to keep in mind.

First, they say personalize the consumer's experience. mHealth offers tools — consumer engagement strategies, retail capabilities based upon mobile platforms and data analytics, digitization of an individual's wellness and health care needs, and more — that can enable competitive differentiation by creating personalized solutions that help drive consumer loyalty.

Second, they suggest that mHealth functionality should be easy to use and akin to users' mobile experiences in hospitality, retail, travel, and banking.

Next, pay attention to privacy and security. mHealth technologies and permeable boundaries among existing and new entrants in the healthcare ecosystem increase the complexity of managing protected health information (PHI).

Organizations need to be secure, vigilant, and resilient in the face of threats to information security. **PV**

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Source: CMI/Compass Media Virals™ 2014



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Source: Google, 2012

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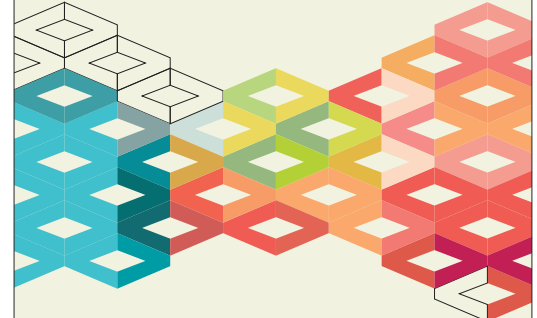
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*Sources: IMS' 2013 Year in Review: 4.2 billion total prescriptions
 Surscripts' 2013 National Progress Report: 1,038 billion total e-prescriptions



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Ogilvy CommonHealth Worldwide, representing the largest assembly of creative talent in the world of healthcare communications with 65 offices across 36 countries, provides marketing services including brand identity and development, clinical trial recruitment, digital/interactive services, direct-to-consumer, direct-to-patient, global integration, managed care marketing, market research and analytics, medical advertising and promotion, medical education, media planning and buying, public affairs and relations, relationship marketing, scientific communications and publications and strategic consulting. The organization also houses and maintains individual Ogilvy CommonHealth and Ogilvy Healthworld brand identities within the marketplace.


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