

## » SALES TRENDS

# THE SALES FORCE OF THE FUTURE: **TRAINED, SPECIALIZED, AND SOCIAL**

As the industry adjusts to patent expirations, changing customer demands, and a challenging payer landscape, commercial models will continue to evolve and sales forces will undoubtedly go through significant changes in the next five years.

**O**f all the factors that will influence how sales reps perform their jobs tomorrow, experts outline training, specialty roles, and social media as the top three that will most influence the size, strategies, and success of sales forces in the future.

## TRAINING IS CRUCIAL

As new skill sets become necessary, training will become more crucial than ever. The old sales model that entailed adding more reps to increase sales is long gone, which means the reps of the future must be better trained and have more skill sets than ever before.

“More people will not translate into better sales results,” says Joseph Regan, VP, U.S. sales, at Millennium. “We will need to understand and adapt to the emerging needs of the market, which in turn will require us to redefine and sharpen the skill sets of our sales representatives.”

Economic pressures on physicians are going to necessitate companies to be more selective in terms of deploying industry representatives.

This will drive the industry to raise its standards on the quality and training sales representatives receive and the level of service and value they bring to physicians.

“The complexity of the changing reimbursement landscape will require representatives to be much more in tune with the reimbursement nuances of their products and the larger industry to enable them to serve as

Sydney Clark

IMS

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Nicholas Landekic

PolyMedix

*“Progressive organizations will address the changing model by investing in specialized field-based resources that make the link between product and how prescribers optimize their clinical outcomes and reimbursement.”*

resources to their customers,” says Dean Tozer, senior VP of Advanced BioHealing.

“Healthcare providers are seeking information specific to their own needs and on their own schedule, yet are challenged to nav-

igate the large sea of industry personnel who approach them every day,” says John White, R.Ph., director, medical science liaisons, The

**Greg Barrett**  
Daiichi Sankyo

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**Frank Powers**  
Dudnyk

*"Branducation' will be required — selling tools that contain valuable educational content to attract and hold physician attention while demonstrating value."*

Medical Affairs Company. "With so many sales reps knocking on the door, it has become critical for a pharmaceutical company to truly distinguish itself from the current model by providing a representative who exactly meets the provider's needs."

Richard P. Micali, senior VP, sales services, PDI, agrees that the industry must get better at matching sales resources to physician needs with more finesse and precision.

"For example, highly trained specialty reps will only be used for science-intensive brands, whereas new reps will handle more routine details," he says. "Part-time resources will be used when there's no need for full-time coverage. And representative talent will be deployed to meet the information demands of the target or the realities of the geographic region. We've seen the last of the monolithic one-size-fits-all sales team applied in a vanilla strategy across the United States."

Given the changing role of the representative, company sales managers have had to take a deep look at the competencies of their existing sales organizations and evaluate whether they are ready to compete in today's complex market.

"Many companies are concluding that their existing sales forces need to develop new competencies or enhance existing ones to more accurately reflect the selling environment and customer demands that exist today," says Mark Samuel, managing partner, HealthAnswers Education, Sudler & Hennessey.

"Where in the past, sales training departments have spent much of their time in new product training and new hire training, looking forward sales training will play a critical role to retool the sales skills to align with customer-focused selling principles," Mr. Samuel says. "This doesn't mean just know-



**Karla Anderson**

PwC

*"The effectiveness of customer relationships in the future will not be measured by the size of the field force but by the impact of collective multichannel customer interactions on product sales."*

ing the physician and how the drug works anymore."

Additionally, he says in today's environment, the non-physician stakeholders' needs require sales resources with skill sets that vary significantly from the traditional physician-focused rep.

"Depending on the area of focus, companies will need highly trained and skilled sales forces to tackle the complexity of specialty markets," says Greg Barrett, VP of marketing, Daiichi Sankyo.

According to Sydney Clark, VP, practice leader, commercial effectiveness, IMS, defining roles and responsibilities of these resources, their competencies and skill-sets, and how they interact externally and internally, will be critical to ensure success.



"These new sales resources will require tailored processes, systems, and incentive compensation mechanisms that will allow them to work collaboratively with the various internal customer-facing resources to bring holistic solutions to their clients," Mr. Clark adds.

The most progressive pharmaceutical companies are rethinking the role of the traditional sales force in terms of size and responsibility, the complexity of the numerous specialized field-based resources looking to interact with the customer, and the growth of alternative communications channels to define a new customer relationship model.

"The effectiveness of the new customer-relationship model, which is more integrated from a sales, marketing, and medical affairs customer-interaction perspective and more reliant on using customer behavior information to understand the optimal interaction model for each customer, will not be measured in terms of the size of the company's sales force but instead on the impact of the collective customer interactions on product sales," says Karla Anderson, partner and principal, pharmaceutical and life sciences advisory practice, at PricewaterhouseCoopers.



**Joseph Regan**

*Millennium*

*"The industry needs to understand and adapt to the emerging needs of our markets."*



**Richard Micali**

*PDI*

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**Mark Samuel**

*Sudler & Hennessey*

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## A NEW LANDSCAPE REQUIRES A SPECIALIZED REP

As companies expand the definition of the field force beyond the sales representative to include a broader team of resources with specific expertise who can engage in different discussions with the customer compared with that of a traditional sales representative, the customer engagement model has become more complex.

Ms. Anderson from PwC says this stakeholder group now includes clinical resources, reimbursement specialists, thought leader resources, and medical affairs liaisons.

According to Jane Hollingsworth, CEO of NuPathe, sales forces need embody an educational team in order to be embraced by specialty physicians who require updated scientific information.

"On the other hand, in primary care, the need for an extensive sales force is less clear," she says. "There may be hybrid models that combine face-to-face interactions with

remote technologies to provide value to primary care clinicians while maintaining commercial viability."

Outsourcing could also become more mainstream in the course of specialization, Mr. Micali of PDI says.

"The industry will be focusing on reducing sales costs while also

insulating against risk," he says. "As part of the overall focus on streamlining the middle of their P&L, pharma companies are going to look at outsourcing sales teams and related functions as a variable expense opposed to a significant fixed cost. In the current environment, there are too many variables impacting sales for that to be handled entirely and efficiently in-house, especially for start-up companies or drugs awaiting approval.

"Like most large enterprises, pharma companies aren't set up to be nimble," Mr. Micali adds. "They require a different specialized infrastructure. Given that, outsourcing becomes an attractive cost-savings strategy."

## A BLOCKBUSTER SHIFT

The decline of mass-market blockbusters is also a factor in shaping the role of the new sales rep.

As many blockbuster brands continue to lose patent protection and become exposed to generic competition, large primary-care sales

forces will continue to contract and pharma companies will focus their resources on new and emerging opportunities, says Dan Bobear, executive VP, managing director of client service, Palio.

"Sales representatives will become more of a valued resource, and specialty sales forces will thrive," he says. "The blockbuster drugs of the future, many of which are biologics and targeted therapies, will require a completely different skill set to promote, and the target audience will also much more defined. For instance, promoting to oncologists is a much more cost-effective proposition than trying to cover multiple primary-care audiences."

The local stakeholder mix will also dictate the types and quantity of sales resources deployed, optimizing investments toward groups who have greater influence on brand penetration.

"In many mature countries this will mean more investment in specialized sales forces, such as KAMs for IDNs, physician groups, or local plans, at the expense of the traditional sales force," Mr. Clark from IMS says. "In some emerging markets, this change may be less dramatic in the short term given the slower pace in loss of prescribing freedom, but companies must continually update their understanding of the local landscape and be prepared to adapt to changes in these fast moving economies."

In the ever-changing world, the traditional sales rep will continue to have his place in the marketing mix, but will lose ground to alternate forms of product marketing.

"The most successful marketing in the future will focus on third-party payers, managed-care providers, formulary managers, and will incorporate pharmacoeconomic assessments as an integral strategy of the clinical program," says Nicholas Landekic, president and CEO, PolyMedix. "Progressive commercial organizations will likely invest in specialized field-based resources that can make the linkage between the product and how prescribers optimize their clinical outcomes and the corresponding reimbursement to address the changing model."

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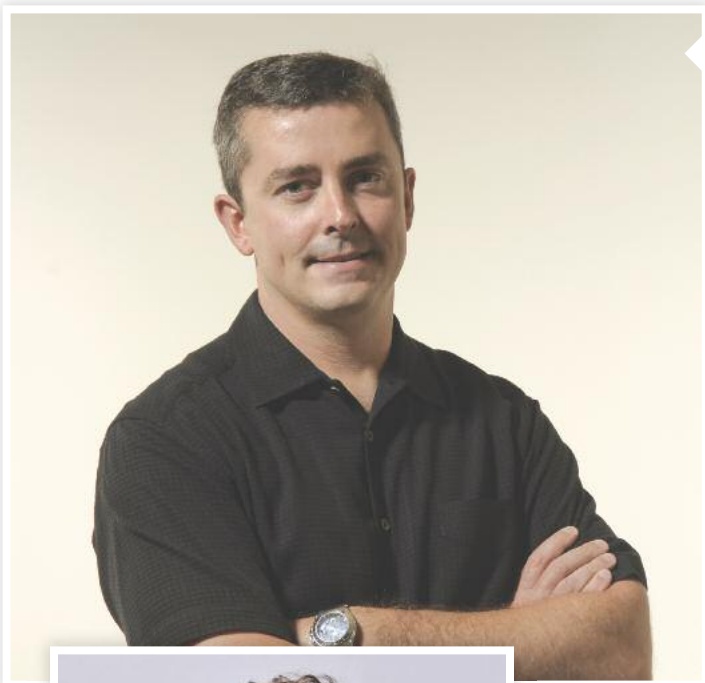
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**Dan Bobear**

*Palio*

*"In the coming years, reps will become more of a valued resource, and specialty sales forces will thrive."*



**Dean Tozer**

*Advanced BioHealing*

*"Reps of today need to be more in tune with the reimbursement nuances of their products."*



**John White**

*The Medical Affairs Company*

*"It is critical for companies to truly distinguish themselves from the current model by providing a representative who exactly meets the providers' needs."*

## SOCIAL MEDIA AND TECHNOLOGY

According to our experts, social media and technology are having a profound impact on the use and deployment of a sales force. Depending upon the product and the physician targets, social media can be used to inform, educate, and enlighten physicians and patients on the appropriate use of new biopharmaceuticals.

"While the use of this media is evolving and regulations need to be issued to establish ground rules among and between biopharmaceutical companies, it is nevertheless, a fact of

life that the landscape has been irrevocably changed by this media," Ms. Hollingsworth says.

The move toward technology and social media is a logical transition, since social networking and relationship-building has been and will continue to be an

integral part of sales success. However, the challenge today is using methods that integrate more into the physician's social stream.

"Reps will need better mobile applications and sales-force automation to improve responsiveness and provide better communication and education," Mr. Barrett of Daiichi Sankyo says.

The reliance on building and sustaining the customer relationship through a dependence on face-to-face interactions is changing dramatically, Ms. Anderson says.

"The increase in multichannel communications with customers and, in particular, the significance of the digital channel have resulted in an evolved relationship-management model that recognizes customer preference related to communication channels of choice," she says.

"Organizations are becoming more sophisticated in their ability to collect and analyze how customers prefer to be communicated with and what information customers want from the organization and where they want to get that information," she continues. "The result is a more refined customer-interaction model that acknowledges that a successful customer relationship can be developed and grown through multiple communication channels."

"The representative of the future will be technology-enabled in ways that benefit both companies and physicians," Mr. Micali adds. "Technology will create an omniscient representative who is better armed with more real-time data, not only about the target physician's practice and information preferences, but about which recent programs they've par-

ticipated in, what information was presented, and if they gave any opinion or feedback.

"Technology will allow sales representatives to present meaningful content that dovetails with the physician's real needs," he says. "At the same time, new hybrid channels, such as video detailing, will increasingly be used to complement sales forces, with the result of making in-person details, although fewer in number, more in depth and productive."

Technology platforms will also have to evolve along with the new role of the sales rep.

Sudler & Hennessey's Mr. Samuel predicts that platforms for closed-looped marketing, sales-force automation systems, and customer relationship marketing will evolve into one integrated solution.

"The use of tablet PCs, iPads, or slates will be ubiquitous and sales representatives will need to not only be proficient in using new technology in calls with their customers but be expected to make better territory planning decisions based on the analytics and insights generated by one integrated technology solution," he says.

These types of advancements, however, may take awhile, says Frank Powers, president of Dudnyk Healthcare Group. For social media to do the job for healthcare professionals, there will have to be personalized and secure media channels that physicians can use for peer-to-peer educational purposes.

"As the personal selling time of sales reps decreases, the importance of nonpersonal and digital interactions with physicians will increase, and a new type of 'branducation' will be required — selling tools that also contain valuable educational content to attract and hold physician attention while demonstrating value," Mr. Powers says. ♦

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## Factors Impacting Sales Forces of Today and Tomorrow

THERE ARE SOME VERY INTERESTING PHENOMENA EXPECTED TO INFLUENCE SALES FORCES IN THE FUTURE.



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1. As a social herd, we are moving toward digital relationships and face-to-face conversations are fewer and fewer. Sales needs to tap into those digital conversations and the FDA and industry need to quickly define — in partnership — rules for navigating the new relationship terrain.
2. Companies will need to bring a new, dynamic way for physicians to experience visually what the medication can do for their patients.
3. MSLS will become an industry norm. Physicians respond to people who know science and who they can directly relate to — other physicians, scientists, and nurses. We will move away from the historic sales rep to “folks I trust” model.



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1. Product life-cycle demands require a new eye toward selling techniques. The selling experience is shifting toward improving patient adherence and compliance by focusing on patient-assistance programs, reimbursement, and education.
2. Beginning in April 2012, companies will be required to report sample-distribution activity. While tracking is not new, we will see turn-key solutions to manage sample compliance proactively. Programs, such as Vacant Territory, will be used more frequently to support geographical needs.

3. Physician face-time availability and sales force resources are diminishing. Most major pharma companies are now working with at least two different outsource providers to achieve their outreach needs.



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1. Identification and targeting of viable customers will improve through technology.
2. The sales strategy focus will shift from only physicians as targets to include mid-level providers.
3. Customers are demanding quality over quantity, so real thought needs to be used in engagement of the customer.

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1. Sales forces will get smaller and smarter. Drugs that have real incremental value need fewer calls to get their message across.
2. Despite advances in technology, the detail force is still a primary means for communicating the value of a new product. Differentiated products will require fewer calls to stimulate physician prescribing.
3. Sales forces will increasingly support new products in their early phases of market launch. Once a brand matures, new, nonpersonal technologies will pick up the fulfillment role that occupies so many calls today.



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1. The sales force of the future will be better educated and trained as well as proficient in using clinical studies and evidence-based medicine in conversations with prescribers.

2. The increased use and number of nontraditional representatives will augment traditional field sales teams, such as customer service representatives, clinical health educators, live video representatives, and hybrid representatives, who call on physicians both in-field and virtually via webcam.
3. There will be greater use of preference- and behavior-based marketing with the objective of always providing customers with what they want, when they want it, and how they want it, which will take multichannel marketing to the next level.

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1. There will be a move toward solutions that drive health outcomes.
2. There will be a paradigm shift in the capabilities of the reps to fit into the new commercial model.
3. New models that collaborate with nontraditional partners to drive awareness, access, and health outcomes will emerge.

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1. Companies will need to provide customer-focused interactions.
2. There will be a need for quality, nonbiased scientific and clinical exchanges with physicians.
3. Companies will need to deploy consultative sales models.



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1. The increase of products in specialty markets will impact the expertise required to market these individualized targeted products.
2. The overall importance of the United States market will decrease significantly — some experts suggest it could end up being only 25% of the global market.
3. Pharmaceutical companies are recognizing — and even calculating — the point of diminishing returns of their sales forces.



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company Alpha & Omega. The Core Nation connects its family of healthcare marketing and communications companies with its own high-level strategic, branding and creative consulting

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1. First is the degree to which doctors will allow access. As practices trend toward becoming corporate endeavors, access will become even more gated and controlled.
2. Online access to information doctors previously could get only from representatives will replace sales calls from reps.
3. Sales forces will be called into action to launch and educate for a limited amount of time after introduction of a new product. They will then be scaled back as the brand takes hold and the returns start to diminish.



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1. Influence-based targeting will replace a disproportionate reliance on pure prescription data.

2. Internet-driven content will stimulate on-demand interactive dialogs.
3. Certified prescribing programs will demonstrate provider competency over drug use, which fits with postmarketing requirements.



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1. The shift away from primary-care blockbusters will continue to reduce overall headcount among pharma sales reps.
2. Technology, specifically cloud computing, will enable sales forces to be more nimble and to experiment with new models more easily.
3. Sales reps will need re-training to become better versed in their therapeutic areas and able to help customers navigate the internal pharma organization in search of information.

## EXPERTS

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