

Media Mix Of The Future: Digital Channels and Unbranded MESSAGING

Consumer demand will force marketers to adopt the use of social media and targeted patient education as part of the marketing mix.

The media and channel mix of tomorrow will begin to shift toward more digital, consumer-centric media, although in the early days, bottom-line channel decisions will still be based on ROI, our experts say. Many predict that using social media channels, while still at a low spend percentage today, will increase, and one expert is bold enough to predict the end of print as we know it.

No one knows for sure what 2012 and beyond will bring to the marketing table, but one thing is certain, the industry will need to evolve like other industries in order to meet the needs of its new technology-savvy consumers.

According to Manhattan Research, 81% of physicians surveyed use a smartphone; 75% use an iPhone, iPad, or iPod; and 26% (173 million) of U.S. adults 18 and older used their mobile phones to access health information and tools in 2011. With the increase of consumer usage of social media, it follows that marketers should want to be where their consumers are.

According to R.J. Lewis, president and CEO of e-Healthcare Solutions, investments in digital will continue to increase at the expense of all forms of traditional media.

“The digital spend is still wildly disproportionately low compared with the amount of time both physicians and patients spend consuming media in various formats,” he says. “The movement toward digital media is a long-term trend, and we are only at the beginning.”

The digital platform’s ability to navigate across content areas and provide community support and real-time responses creates an “unmatched palette of opportunity” for the industry, says Mike Rutstein, president, StrikeForce Communications.

“A successful media mix is audience-specific and reflects how that audience wants to receive communication.”

JAY BOLLING / Roska Healthcare Advertising



“Today the right media mix is defined by consumer desires, not the brand team.”

NICK COLUCCI

Publicis Healthcare Communications Group



“The trend toward digital media is a long-term trend, and we are only at the beginning.”

R.J. LEWIS / e-Healthcare Solutions

“The result is that innovative solutions will continue to advance for years to come,” he says. “Many companies will unquestionably allocate a greater percentage of their media mix budgets toward this area.”

However, he cautions marketers to avoid the “e-envy” and “I’ve got to have an app for that” phenomenon because, ultimately, every brand challenge is unique and each brand needs to determine its best course of action.

A growing new component of digital media includes point-of-care technology, our experts say. As marketers focus on more targeted and cost-efficient ways to reach patients, point of care in its many forms will acquire a larger share of media mix budgets.

“This is the one channel in which the services of a healthcare provider are available and where there is an opportunity to deliver educational information at a relevant moment,” says Jim O’Dea, president and CEO, Rx EDGE. “In the treatment journey from initial symptoms through prescription drug therapy, most consumers will find themselves in a point-of-care location: the physician’s office, a clinic, the aisles of the retail pharmacy, or the prescription pick-up area. The advantage of messages delivered at point-of-care is location, location, and location. These messages are heard when healthcare is top of mind and can activate patient acquisition, brand and disease-state awareness, and adherence.”

And the brave person to predict that print may soon be making an exit from the traditional marketing mix is Bill Cooney, president and CEO of MedPoint Communications Digital.

“Some argue that print-on-paper will always be a mainstay because many people prefer the ability to flip pages, skim, makes notes, and so on in ways that only print allows, but I disagree,” he says. “The iPad, which has only been out for 18 months, heralds the beginning of a much broader phase that will be driven by remarkable advances in flexible hardware, powerful intuitive interfaces, and seamless connectivity,” Mr. Cooney says. “Digital media have far more advantages than paper — cost, convenience, search, and lower environmental impact, to name just a few. Digital media will replace, not co-exist with, paper. Digital media also will grow as an alternative to face-to-face interactions, but not in an absolute way.”

Consumer Focus Drives Media Use

Just as digital media could shape the fate of paper, consumer use of technology will ensure the rise of digital. Marketers will continue to choose their channels by who they are trying to reach, and as more physicians and patients operate on digital mechanisms, the more the in-

“ Digital media will replace, not co-exist with, paper. ”

BILL COONEY / MedPoint Communications Digital



“ Unbranded educational programs will take a big hit, because companies are focusing only on driving demand for their brands. ”

KEN RIBOTSKY / The Core Nation

dustry will want to be there. While there are several ways to determine how to best allocate budgets and resources among marketing channels, having an understanding of different media and consumer behaviors within digital channels is crucial to making good decisions, says Nick Colucci, president and CEO, Publicis Healthcare Communications Group.

“More than ever, we’re finding the right mix is not defined by the brand team or agency partner, but by listening to what the patient and medical community desires,” he says. “Successful brand managers in today’s environment will take an outside-in approach to their marketing plans and consider first where patients and physicians go for their information.”

In today’s market, the media mix needs to focus on the audience and how it wants to re-



“ Companies in specific therapeutic areas will make investments in nonbranded efforts. ”

SCOTT EVANGELISTA / Deloitte



“ Online resources today enable patients and their families to benefit from unbranded efforts. ”

PHILIP FREED / Maquet Cardiovascular



“ Point-of-care messaging will acquire a larger share of media mix budgets in the future. ”

JIM O’DEA / Rx EDGE

ceive messages, as opposed to picking the channel first.

“It’s time to stop looking at the media mix by channel and start by looking at it by customer,” says Jay Bolling, CEO and president, Roska Healthcare Advertising. “For example, as a brand manager, if my goal is to reach ER physicians, I better skew my channel mix to mobile; but if I want to communicate with 75-year-old men, direct mail and TV might be a better choice. While these are overly simplistic examples, the point is clear: the media mix should be

audience-specific and best reflect how that audience wants to receive communications.”

Decisions Still Driven By ROI

Choosing an appropriate media mix by following consumer behaviors is extremely important, however, it hasn’t quite surpassed the priority of good old-fashioned ROI. Digital may be the perfect fit for many products, however, proven results are still the key to success.

While measuring ROI may be trickier these days, if marketers know what their goals are, they can build a model around these, says Leigh Householder, VP, managing director at iQ.

“With so many variables involved in the marketing plan, the most critical component to evaluating ROI is starting every marketing project with the problem or opportunity,” she says. “When marketers have identified what they want to effect in the marketplace, ROI models can be built around the total campaign — with incremental KPIs attached to each tactic. Metrics are retro-fitted instead of the impact being central to the discussion.”

The bottom line is, marketing channels

should be aligned with the returns they demonstrate, according to Scott Evangelista, principal, national commercial practice leader, Deloitte Consulting.

“There is no single answer to the right mix, but a significant investment in a nonpersonal promotion platform that can be leveraged across products will go a long way,” he says. “In addition, evidenced-based medicine will require a sharper point on the segmentation tools. Marketers will need to know exactly the right population for the right technology and why. And then they will have to communicate to the R&D team early and often so that the data can be generated in a way that will be believable and valuable to the decision makers.”

Barbara Haimowitz, VP, marketing analytics, at HealthEd Group, says with pharmaceutical companies pulling back significantly on their salesforce infrastructures and investments, online and cost-effective nonpersonal promotion have become a driving force for new patient acquisition strategies.

“Any approach that can produce brand awareness lift and drive new patients starts will automatically float to the top in a channel breakdown, specifically if it steers patients directly to branded support programs or to retail pharmacies,” Ms. Haimowitz says. “As patient and retail/pharmacy marketing take center stage, the focus on measurable tactics that drive opt-in, increase adherence, and improve access, becomes even more magnified.”

It is obviously not a one-size-fits-all world anymore, and according to Elliott Berger, VP, global marketing and strategy at Catalent Pharma Solutions, media mix budgets should have different breakdowns from campaign to campaign depending on the type of product, final action desired, and type of audience.

Terry Nugent, VP, marketing, at Medical Marketing Service (MMS), says the reality is that it is difficult to measure ROI by media in a clear metric in prescription marketing.

“The overall marketing program should be viewed as an integrated package and its success or failure measured holistically,” he says. “Nonetheless, it is possible to test different approaches to specific tactics against various endpoints, for example click-through rates for email campaigns. It is also possible to test various aggregate and media-specific spend levels and evaluate impact retrospectively against sales.”

Unbranded Efforts Are Predicted To Grow — Or Not

Another big question in the future of digital marketing is the viability of nonbranded efforts. There are two distinct camps on the subject: unbranded is either growing, or it isn’t.

In 2008, advertising reports showed that spending on unbranded campaigns was on the



“ Done correctly and in concert with effective promotion, unbranded efforts will become an increasingly important component in the marketing mix. ”

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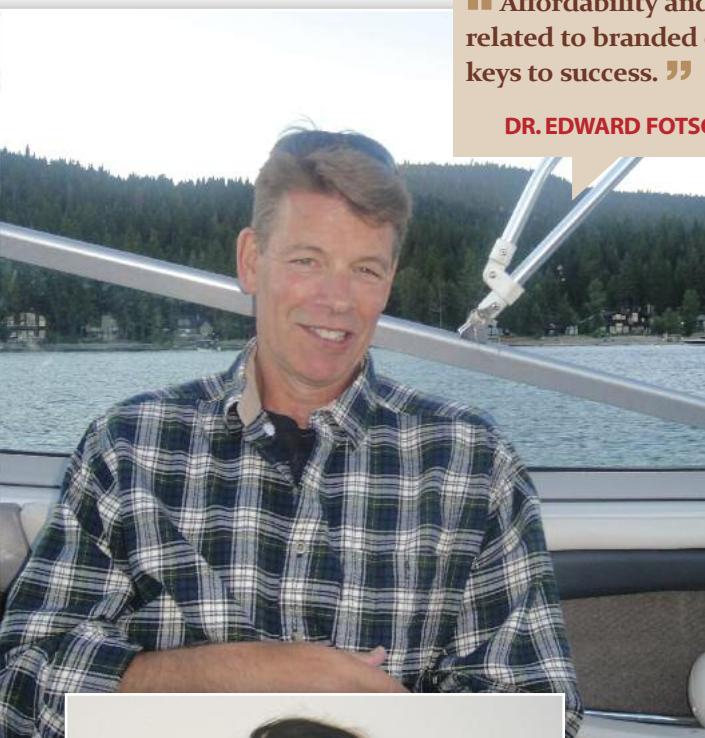
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“Affordability and adherence related to branded efforts are the keys to success.”

DR. EDWARD FOTSCH / PDR Network



decline in the industry (but what wasn't on the decline in 2008?) and some experts today still say the tightening of budgets and the inability to tie results directly to sales will require smart pharmaceutical marketers to put unbranded on the back burner.

However, other experts believe unbranded is exactly what the doctor ordered in these times of consumer-driven healthcare and patient empowerment. The willingness of patients to educate themselves online along with increased regulatory scrutiny and the trend toward social media platforms could drive a renewed interest in unbranded, thus preserving its place in the marketing mix.

In 2010, Manhattan Research reported that consumers respond favorably to unbranded ads, and in the past couple of years, several pharmaceutical companies, including Takeda, Vertex, Merck, EMD Serono, and Pfizer have launched new unbranded disease awareness campaigns. Still, the fate of the unbranded message debate rages on.

“I think that unbranded educational programs are going to take a big hit, because

companies are focusing only on strategies that specifically drive demand for their brands,” says Ken Ribotsky, president and CEO of The Core Nation. “This will always be a viable way to increase overall disease awareness, but it is a tactic that is largely becoming reserved for big pharma companies because they are the only ones who can afford it. I expect more resources will be dedicated to online efforts, and we will see less money being spent on sales force lead programming.”

Creating a successful unbranded effort is a challenge in any environment, and with the social media guidance remaining in the wings, Edward Fotsch, M.D., CEO of PDR Network, believes unbranded messaging for pharma is challenging right now.

“Affordability and adherence re-

lated to branded efforts are the keys to success,” he says.

But let's not forget the physicians who are in this equation, says Mr. Cooney of MedPoint Communications Digital. As physicians become tougher to access, it's imperative to build marketing programs around what physicians want, not what marketers want.

“One thing that physicians crave is the opportunity to engage with their peers on the clinical issues they care about,” he points out. “For this reason, unbranded peer-to-peer programs will continue to gain ground as an effective tactic that provides value to physicians and creates much-needed access for sales reps.”

Mr. Nugent says unbranded efforts make sense particularly for the market leader or for innovative treatments for previously under-served disease states.

“They may be particularly appropriate for social media, which is hostile territory for branded marketing due to regulatory uncertainty,” he says. “Direct marketing, aka nonpersonal promotion, will continue to gain budget share from personal sales as regulatory and attitudinal factors reduce access and pharma becomes more efficient. Digital marketing will continue to gain share. However, contrarian tactics may lead to a resurgence in analog tactics such as direct mail and journal ads.”

As a result of the Affordable Care Act and managed care organizations mandating that patients get moved to comparable generics to save money, unbranded messaging is not going to be relevant for all brands, cautions Michael Brzozowski, chief strategy officer, HealthEd Group.

“Branded marketing will become even more crucial in the categories where generics are present,” he says. “However, using service sub-brands can be a way to demonstrate value in the face of generic competition.”

Rob Nauman, principal, BioPharma Advisors, agrees, saying unbranded marketing makes sense for the larger brands and market leaders because they will benefit greatly from any incremental increase in the total market, but new markets need to be evaluated to determine if unbranded work would be beneficial. Marketers in this situation will most likely want to invest in ensuring managed care adoption of their therapy.

Benefits of Unbranded Efforts

For categories that are less exposed to the threat from generics, unbranded messages can be used to not only educate, but also to build relationships with consumers, establish trust, and create a role for the brand. Unbranded efforts allow for communications that resonate with customers and build company trust and appreciation.

“Providing patient support beyond therapy through digital channels is key for pharma today.”

FRIEDA HERNANDEZ / Siren Interactive



“As patient and retail/pharmacy marketing take center stage, the focus on measurable tactics that drive opt-in, increase adherence, and improve access, becomes even more magnified.”

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Online resources today enable patients and their families to benefit from unbranded efforts, such as patient education campaigns, to better understand disease conditions and therapy areas that they might not have had information about in the past, Mr. Brzozowski says.

“In a highly regulated industry, unbranded

communication tactics offer a platform with which to educate, build loyalty and trust, and grow the market,” Mr. Lewis says. “Unbranded communications are a canvas on which to paint a broad and powerful message of customer support and dedication.”

By launching an unbranded campaign

proactively educating patients and their family members, physicians and patients are able to have more productive discussions about the specific disease and therapy area of interest.

“Online resources today enable patients and their families to benefit from unbranded efforts, such as patient education campaigns,

SOUND BITES FROM THE FIELD ►►

The Top Trends Impacting Marketing



MARK BARD is a Board Member of The Digital Health Coalition, a nonprofit organization that was created to serve as the collective voice and national forum for the discussion of the current and future issues relevant to digital and electronic marketing of healthcare products and services. For more information, visit digitalhealthcoalition.org.

1. New media continues to evolve into just media with the same demands around strategic value, budget allocation, scale, and so on.
2. Online video is achieving scale, reach, and impact.
3. Customer service is based on customer channel preferences.



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1. Reduced margins will result in even greater efforts to drive better ROI.
2. The iPad was a tipping point in delivering sales messages: It's more engaging than previous tools, can be obtained at an affordable cost, and offers relatively low training costs. Pharma will dramatically expand its use in 2012 and beyond.
3. The one area where cost concerns will not intrude is the medical-legal-regulatory process. The cost of DOJ inquiries makes compliance a strategic imperative for the industry.



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1. Getting new patients will become harder with many therapies and therefore keeping patients on treatment will be more important than ever.

Adherence to therapy will be the key to growing prescriptions over time. Learning more about why patients don't stay on therapy and why they don't adhere to drug regimens should be a part of every marketing strategy.

2. More doctors are not seeing sales representatives and this is primarily where physicians get information on new products/therapies. How to inform doctors about new products will become increasingly important as sales forces are cut.
3. Patients have access to the same information as doctors and are becoming more knowledgeable and educated about therapies than ever before. Companies will need to better understand how patients are responding — or not — to treatments and realize that therapies cannot be marketed as one-size-fits-all anymore.



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1. Patent expiration and the growth of specialty pharmaceuticals: With about \$100 billion in branded pharmaceuticals coming off patent by 2013, the focus of industry growth will shift to specialty pharmaceuticals directed at treating rare diseases. This trend, in turn, will require marketers to understand diseases that have greater complexity and force them to be able to communicate with audiences who have greater sophistication. The core challenge will be to stay top of mind for diseases that many HCPs — even specialists — may only encounter a few times in their careers.
2. Healthcare reform and the removal of lifetime caps: As healthcare reform takes hold in America, several key aspects will affect the biopharmaceutical marketing landscape. One in particular, the removal of lifetime caps, means that patients can have unlimited access to expensive but necessary treatments. This also means that commercial managed care organizations will

shoulder significantly greater financial risk and will resort to managing categories that have traditionally not been managed before. For marketers who hope to avoid paying high rebates and who want to gain or maintain product access, this means they will have to work harder to develop compelling brand value propositions in the managed care arena that include validated, real-world outcomes data.

3. Patient experience and satisfaction: With the focus shifting to specialty biopharmaceuticals, orphan diseases, and small patient populations, competition to gain and maintain patient share will not be measured by thousands of scripts, but rather by individual patients. Given that typical specialty biopharmaceutical brands can cost into the tens of thousands of dollars per month for hundreds, not thousands, of patients who are taking a particular drug, smaller biopharmaceutical companies' fates can rise and fall on a single patient. The implications for marketers is that the patient's brand experience becomes more critical than ever before, and includes everything from disease and product education to access and reimbursement support. Brand managers must demonstrate expertise in all of these areas to optimize patient retention.



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1. Mobility. Patients/consumers are navigating decision-making on the go. Once primarily used for communication and entertainment, PDAs are increasingly being used for their apps and search engine capabilities to evaluate potential purchases, carry coupons, and gather information.
2. Value — not just price. Consumers want products and services that improve the overall well-being of themselves and their communities. They will seek out companies that are transparent in relaying their value, whether it's how a product is made, who makes it, and how its production affects the world around them.

to better understand disease conditions and therapy areas that they might not have had information about in the past,” says Philip Freed, VP, U.S. marketing, Maquet Cardiovascular. “By launching an unbranded campaign proactively educating patients and their family members, physicians and patients are able to

have more productive discussions about the specific disease and therapy area of interest. Such discussions may initiate conversations about potential treatment options that may not have otherwise been discussed.”

Until the FDA and the pharmaceutical industry can come up with a better way to serve

up fair balance and the reporting of side effects, unbranded will continue to be an effective strategy to pull in patients who are investigating their disease and treatment options, Mr. Brzozowski adds. Another driver of unbranded promotion in the future will be therapies that are relevant to a smaller targeted audience.

3. Branded digital content. We expect this arena to grow exponentially. The consumer’s digital footprint is giving us an incredible depth of knowledge about how best to make a connection with them.



PAM GARFIELD is VP at Patients Health Perspectives, which specializes in creating and managing technology solutions to help healthcare

organizations capture and maximize the patient experience to affect change and compel action. For more information, visit phperspectives.com.

1. Pharma will recognize that traditional social media will not work for them and will seek new and different social media solutions to reach their target audiences.

2. The growing impact of reality TV culture will drive consumers to look to real people — not celebrities — as opinion leaders when they are seeking health information.

3. A new influencer, the patient opinion leader, will take on a key role in healthcare decision-making, equaling and possibly even surpassing the role of the traditional physician KOL, driving marketers to shift their focus and their budgets accordingly.



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For more information, visit healogix.com.

1. Evidence: The core of sustainable differentiation will be directly linked to the quality and quantity of evidence provided by a company in support of its new product. In an era when physicians are under increasing time pressure to see patients and payers demand proof as to why they should pay a premium or provide access to a new product, it is the evidence that will be the fulcrum for the success or failure of a new product. This means more expense, more time, and potentially greater risk associated with the development of new

products. Placebo-based trials will give way to head-to-head comparisons, etc. But the trend is clear: as more emphasis shifts from product features to comparative effectiveness, companies and their marketing efforts will only be as successful as the evidence allows them to be.

2. Consumerism: In the United States, the rise of employees in high deductible health plans plus the new infusion of uninsured who, under Obamacare, will likely enter into plans of this nature, creates a new force that pharma will need to learn how to effectively address. The challenge is not just limited to the United States. Growing middle classes in China, India, and Brazil, will also be in the market for drugs to extend and improve their quality of life. For branded products across the globe, there will be growing pressure to demonstrate superior outcomes to justify the increased co-payment costs vs generics.

3. Social media, which is increasingly the lingua franca of consumers, poses unique problems for pharma on a couple of fronts. One, pharma can only be a passive listener rather than an active participant and, two, controlling message becomes a difficult challenge when Facebook and Twitter can provide instantaneous communication between individuals, good or bad. How all of this will impact DTC per se is difficult to assess, but the consumer is the new force to be reckoned with.

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1. The emergence of new channels, such as social media and mobility, is where more of the marketing push is happening in the life-sciences industry.

2. In the next few years, the marketing spend will shift more toward online and mobile instead of traditional channels. Overall, marketing budgets will decrease.

3. Regulations in pharmaceutical marketing such as the Sunshine Act, technology, and consumption trends will change the way that companies

communicate to their customers and consumers.



WINSELOW TUCKER is VP of Marketing at Infinity, which is an innovative drug discovery and development company seeking to

discover, develop, and deliver to patients best-in-class medicines for difficult-to-treat diseases. For more information, visit infi.com.

1. Increased competition, pricing pressure, and market access challenges are the top three trends that will most impact the marketing landscape in the next five years. These trends will result in a focus on the early integration of a commercial strategy into the clinical development process.

2. Companies will shift their commercialization focus to include earlier development and integration of evidence-based approaches to demonstrate product value.

3. Companies will develop and integrate health economic and biomarker strategies into the early-development process to build a compelling value proposition that can support reimbursement and market access.



SCOTT WEINTRAUB is Chief Marketing Officer and Principal at Healthcare Regional Marketing, a regional marketing services provider.

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1. Regional marketing is the biggest trend. Pharma executives are becoming more and more frustrated with variations in product performance. A product might be doing well in Boston but doing poorly in Dallas.

2. Marketers will realize variation in product uptake can be caused by any one of the six Ps of regional marketing — place, payer, provider system, product, prescriber, and/or population; 10 years ago everyone assumed this variation was due to either poor sales reps or poor formulary access.

3. Healthcare is local and marketers need to figure out a way to market locally and in a scalable way.

“As pharmaceutical companies continue to develop highly targeted therapies, the use of unbranded disease state education programs should become more prominent in the future,” he says.

Mr. Evangelista of Deloitte also predicts that specialty therapies will increase spending in the unbranded arena.

“Companies that are focused in specific therapeutic areas and seek to dominate those areas through innovation will be fully invested in the area for the long term and will make investments in non-branded efforts,” he says.

Mr. Bolling from Roska predicts the role of the unbranded ad will increase and it will occur sooner rather than later — and the industry will see an uptake in the coming year,

he says. But the purpose of unbranded messaging will need to change to be effective.

“Unbranded can’t be used successfully as an awareness-only vehicle anymore, since unbranded tactics favor market leaders,” he says. “But efforts that get consumers’ attention and evolve into a relationship that includes two-way communication will be very beneficial.

“Unbranded efforts will play a more significant role in 2012, and they will be used to raise disease awareness as well as generate a response from potential consumers,” Mr. Bolling continues. “Once customers respond and express their interests, marketers can then deliver branded messages in a way that best meets their needs and adds value.”

Unbranded strategies are complementary

assets to product-focused content and can extend a brand’s reach throughout the patient life cycle, Mr. Colucci from Publicis says.

“Last year, Manhattan Research showed that more than half of e-pharma consumers have used or are interested in using unbranded websites from pharma companies, and trust is not an issue,” he says.

However, Mr. Berger thinks there are trust issues between consumers and brands in the current world, and this is exactly why he thinks brands should invest in unbranded messaging.

“The increasing sophistication of patients in search of information and their active participation in treatment options requires marketers to provide valuable information to facilitate that choice,” Mr. Berger says. “Some types of infor-

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LEIGH HOUSEHOLDER is VP, managing director at iQ, the innovation lab of GSW Worldwide. For more information, visit whatsyourdigitaliq.com.

“Figuring out true brand journalism — new content, real voices, multimedia — and how this integrates with other big changes afoot, such as Internet TV (finally), interdevice streaming, social search, connected cars, wired houses, etc., is game changing and extremely close at hand. Amazon is now selling more eBooks than print books; 70% of Americans are watching YouTube videos; and millions are streaming all their favorite programs on Hulu and Netflix. This is a critical change for the screen. People are devouring content and calling into question everything we think we know about how to write and create for digital media. Short paragraphs and bullet points are the easy answer, but they’re not the right answer.”



ED MITZEN is Founder of FingerPaint Marketing Inc., an integrated marketing and advertising firm, equal parts offline and online, employee-owned, and inspired. For more information, visit fingerpaintmarketing.com.

“Now more than ever, pharma marketers need to understand the basic elements of Web analytics as well as have a core understanding of

how search engines rank content. It doesn’t take a Ph.D. in human behavior to realize that after talking with a physician, the Web is the next most valuable resource to which people turn for healthcare info. Every day, we see marketing managers who don’t understand how Google, YouTube, etc. value content, what content on their brand or educational websites are most valued by the engines, the impact of Flash on search algorithms, geographic implications of search, how fresh content and social media impact rankings, and so on. All decent advertising firms that understand digital marketing will have these basic skill sets. But if today’s marketing managers are truly going to understand how to reach physicians and patients online, as well as how to best optimize their online spend compared with more traditional marketing materials, they need to have a basic understanding of what’s behind the Google curtain.”



MIKE MYERS is President of Palio, a full-spectrum advertising and communications agency. For more information, visit palio.com.

“Marketers need to continue to be well-rounded and have a firm understanding of the marketing continuum from sales through later-stage brand life promotion. An expertise in one area will no longer ensure a reasonable level of success.”



TIM O’ROURKE, PH.D., is Chief Research Officer at Healogix, which provides marketing research and

consulting for the pharma and biotech industries. For more information, visit healogix.com.

“Marketers need new skills, including the ability to work and balance the various channels to find the right mix for their brands. They also need to be even more analytical. There is an ocean of data in front of everyone, and we need to know how to surf it to get our brands where we want them to go.”



AL TOPIN is President of Topin & Associates, an independent, full-service, medical marketing communications company. For more information, visit topin.com.

“Today’s healthcare brand marketer faces an increasing flurry of options, opportunities, and shifts to how business is done. With all of the innovations that digital technology has brought about, from new channels to new regulations, today’s marketers need more than new skills. They need a return to the basics, starting with strategy. With so many alternatives available, a lack of strategy can turn promising programs into a laundry list of interesting, but unharnessed tactics. And they need to focus on simplicity: too many channels and a brand’s position and messaging can become muddled. Lastly, team building becomes critical; more departments, more partners, and often more regions become part of the team. Each contributes, but each can fractionate the effort if a brand’s strategy, position, and message are not clear. A good, skilled marketer will stick to the basics to keep his or her brand on track.”

mation, especially early in the purchase cycle, could be better provided in nonbranded environments, and often by sources other than marketers themselves, including experts, KOLs, and even patients. These efforts need to provide real value to customers to be successful.”

The increase in specialty pharmaceutical brands, the effects of healthcare reform, an aging population, and poor compliance lead to a clear conclusion: that an increasing proportion of the marketing mix needs to be put against unbranded efforts, Mr. Rutstein says.

“The movement toward very complex, high-science compounds requires a greater depth of understanding for both physicians and patients,” he says. “To truly value these new therapies and drive behavior and compliance, education is more critical than ever before.”


Beyond the obvious need for information and understanding, pharma will be increasingly pressured to “give back” to patients based on healthcare reform. Part and parcel of this effort will be less promotion and a greater focus on both patient support and unbranded efforts.

Frieda Hernandez, VP of business development at Siren Interactive, agrees that the need for consumer support and services is at an all-time high, and unbranded messaging is the way to meet this demand.

“It will become more important for pharma to provide patient support beyond therapy,” she says. “The differentiator that will set a brand apart from its competition will be the value that’s been established through meeting additional unmet informational needs of patients, caregivers, and healthcare professionals. All

communication and services provided around patient support and disease management will be essential to the ultimate success of the brand.”

Mr. Rutstein says as the marketing environment continues to change — with more niche therapies, fewer blockbusters, and a continuing array of new and emerging media — the ability to carve out an ownable space will become less challenging over time.

“Done correctly and in concert with effective promotion, unbranded efforts will become an increasingly important component in the marketing mix,” he says. 



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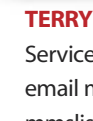
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Breaking *The* SILOS

Digital marketing requires an open cross-functional dialogue.

“ Once a level of process integration is achieved, no one will want to return to the cumbersome silos. ”

DAVID ORMESHER / closerlook





“A brand steward should be able to correctly coordinate all of a company’s diverse marketing disciplines.”

KEN RIBOTSKY / The Core Nation

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s a result of the growing use of digital channels, the industry is faced with an old challenge in a new environment:

silos in digital marketing.

The industry’s marketing teams are still functioning in silos; they are using the various channels to address the consumer as each team see fits. Not only do silos exist within the marketing organization, but they also remain, at times, within the same brand team. Even though social media is all about two-way communications and networking, many companies that are using digital promotion do not adhere internally to this type of cross-functional collaboration. This practice can result in a dizzying kaleidoscope of messages, which only confuse the consumer and fragment the brand identity. In today’s competitive environment of clutter and cutbacks, every message needs to count. Tactics need to be coordinated and marketers who want to effectively develop a consistent brand message and identity will need to tear down the internal communication barriers.

Companies can break down these internal silos in several ways, our experts say. The key elements that lead to successful silo busting include communication, collaboration, corporate culture, senior level buy-in, and focusing on the consumer in brand messaging.

Buy-In from the Top

It is very important to have senior leadership alignment and support of marketing initiatives. Many companies have developed the processes and tools to be successful in a cross-functional marketing approach, says Nagaraja Srivatsan, senior VP and head of life sciences, North America, Cognizant. However, they may have failed to realize that their corporate cultures are sales rep-centric.

“Executives need to align their marketing teams’ goals and incentives to create an organization that is willing to pilot alternative marketing mixes/models to show value,” he says.

Breaking down those silos requires senior management resolve, but also rationalization of employee incentives, and a process for actually managing a marketing mix that is more effective than stand-alone tactics.

“The tools to manage a comprehensive marketing mix include campaign management, content management, and physician-level analytics to understand which messages and channels are working for which doctor,” says David Ormesher, CEO, closerlook. “Once this level of



“Marketers need to turn the traditional physician-first and consumer-second orientation upside down.”

JEFF BURKEL / MicroMass Communications

process integration is achieved, no one will want to return to the cumbersome silos.”

Leadership not only has to be supportive of the initiative, it also has to lead by example, by embracing the communication tools that the customers are using and learning firsthand the benefits and opportunities these tools present.

According to R.J. Lewis, president and CEO at e-Healthcare Solutions, companies should be using their own internal social media tools and leaders should be among the most active users to both set an example and to set expectations.

“It’s hard to be a leader of a brand if the marketing team isn’t connected and communicating with their constituents and customers,” Mr. Lewis says.

Corporate Culture

Most pharmaceutical marketing teams, along with their organizations and budgets, are siloed primarily around professionals and patients, and secondly by medium and tactics. Historically, physicians take priority over consumers in terms of focus and spending, but Jeff Burkel, chief operating officer at MicroMass Communications, proposes the industry turn that thinking around, and says by doing so, it will force the silos to disappear.

“First and foremost, marketers need to turn the traditional physician relationship and consumer orientation upside down and start instead with improving patient outcomes,” he

says. “By starting with the patients and building ways to support them and having the right conversations with their physicians and supporting them too, a seamless and silo-less approach emerges.”

“Future success will depend heavily on a company’s ability to operate in a more holistic way,” agrees Mike Rutstein, founder and president, Strikeforce Communications.

Given the convergence of payers, patients, and providers in the pharmaceutical category, companies will need to get out of their silos and aim toward a matrix management structure, where functional area expertise lives fluidly and harmoniously in a sea of cross-trained talented people, who bring both depth and breadth to the table, he says.

“Everyone knows that effective HCP and patient dialogues are a key to better health outcomes, but few companies organize themselves around this interaction,” says Michael Brzozowski, chief strategy officer, HealthEd Group. “Pharmaceutical companies need to take a hard look at their organizational structure and marketing budgets to determine how best to leverage this dynamic to improve health outcomes and product sales. Healthcare and pharmaceutical marketers need to look at new frameworks that focus on the holistic healthcare experience such as the patient journey and experience from sickness to treatment to better health.

“Having this lens forces marketers to think holistically about how best to sequence and in-

tegrate patient and HCP education and marketing messages so they have the maximum desired impact,” Mr. Brzozowski continues. “If companies continue to silo healthcare provider, managed care organization, and patient communications separately without focusing on the integrated experience or their core customer segment needs, there will continue to be misalignment and wasted marketing dollars.”

Adopting a customer-centric philosophy, infrastructure, and marketing plan is essential to breaking down internal silos, says Jay Bolling, president and CEO, Roska Healthcare Advertising.

“Companies must recreate their internal marketing and communications infrastructures to revolve around specific customers, such as patients, prospective patients, influencers, prescribers, payers, etc.,” he says. “Successful agencies of the future will specialize in these audience types and understand how to reach, engage, motivate, and retain them from start to finish.”

Communication And Changing Roles

Communication and understanding, particularly around corporate decision-making, can help create cross-functional collaboration.

Jay Carter, senior VP, director of strategy services, AbelsonTaylor, takes a look back 50 years to look to the future of silo busting.

“Back in the 1950s, Procter & Gamble cre-

ated the product manager function to drive consensus among different departments in the organization,” Mr. Carter says. “These people had little authority but great responsibility, and the best ones drove consensus by developing a unified brand vision. This same approach needs to happen today.”

Today, ROI demands that organizations integrate to optimize resource allocation, he adds.

“Many of today’s roles require specialized knowledge that is new to many organizations: CRM, DTC, social media, and managed markets all have complexities that require experts in the field,” Mr. Carter says.

One such role is that of brand steward. In order for effective communication across departments and channels to occur, there needs to be a dedicated brand steward who is solely focused on the big picture, says Ken Ribotsky, president and CEO, The Core Nation.

“A brand steward should have the knowledge, experience, and foresight to be able to correctly coordinate all of a company’s diverse marketing disciplines,” he adds.

Cutbacks may actually be forcing marketing teams to function across disciplines, says Mike Myers, president of Palio.

“Silo-busting is already happening in many ways due to the reduction in the size of marketing departments and client companies,” he says. “Staff now have to wear different hats to fulfill their evolved roles. In some cases, they’ve taken over the jobs of their rival departments.” **PV**

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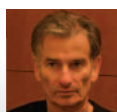
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