

# Digital Marketing: *Driving New Strategies* IN 2013

Increasing interest and investment rev up digital channel use.

**A**ccording to reports from Cutting Edge Information, pharmaceutical companies have been increasing their investment in digital marketing strategies over the past three years, and growth trends indicate that certain digital channels will soon surpass more traditional media tools. Between 2009 and 2011, digital marketing increased by 2.9%, representing a 12% growth in digital's share of the marketing mix. Mobile marketing tops this list with an impressive 288% gain in the share of marketing mix from 2009 to 2011.

Social media also doubled its share of the

marketing mix in only two years, Cutting Edge Information reports.

There are several elements to getting the most out of the various digital channels and the interactions they offer, our experts say. One is to understand how consumers will be using the data, and how to align their behaviors and digital use with business objectives.

Ryan Cohlhepp, senior director, U.S. marketing, Millennium: The Takeda Oncology Company, says the key to harnessing digital lies in understanding the interactions between different digital elements or channels.

"We historically described patient journeys and mapped those to a digital experience as if we're laying down parallel tracks," Mr. Cohlhepp says. "That's really not the case, however. For instance, YouTube videos get linked on Facebook, Instagram, and Flickr photos get linked from Twitter, so in fact, although each digital channel is unique, they tend to bleed into one another. The connective tissue between these interactions is data."

If hits, touches, and interactions are measured in isolation, the numbers may be accurate, but they say nothing about behaviors, Mr. Cohlhepp says. Understanding how the data connects allows one to draw insights from interactions and truly measure progress through analytics.

"To maximize return on digital investment, it is critical that it is aligned to business objectives; that tactics use rich media to engage customers and ensure they are gaining the most value from the time they spend; and that analytics are in place to measure and refine digital tactics," he says.

Digital offers the immediacy of engagement data that feeds analytics and optimization plans. These data also inform personalization inside the marketing platform.

**"Understanding the context of a physician's engagement allows marketers to design best-in-class experiences with the content and utility that address individual needs."**

**MARTIN O'BRIEN** / Rosetta

**"Marketers must elevate the importance of digital planning and analytics; isolated digital tactics are no longer acceptable."**

**MATT BROWN** / ICC Lowe



"A closed loop marketing approach allows marketers to optimize messages, channel mix and personalize experiences based on an explicit or implicit understanding of user's needs," says Martin O'Brien, partner, healthcare strategy and planning, Rosetta.



Research and measurement provide companies with the greatest opportunity for maximizing their investment. When companies take the time to conduct solid market research to learn the best venue, timing, and content source for a digital channel, they increase their opportunity to get things right the first time, says Christopher Tobias, Ph.D., executive VP, chief scientific officer, director of business development, Dudnyk.

"Measuring and analyzing the digital channel effectiveness, which is often overlooked and deemed too expensive, is essential for refining, tweaking, and providing directional guidance on how to develop the opportunity," he adds.

Digital has extended its footprint into all types of media channels and customer interactions.

"There are few moments in life today that don't invite the use of technology to create an exponential experience," says Matt Brown, general manager at ICC Lowe. "Thus, a greater level of expectation has been set that requires marketers to commit to delivering digital interactions and be consistent in their implementation."

To accomplish this, he says, marketers must further elevate the importance of digital planning and analytics; isolated digital tactics are no longer acceptable.

"We need to leverage analytics to learn from past experiences and to effectively predict and influence future behaviors and preferences," Mr. Brown says.

Patient compliance and treatment adherence are two areas that may be supported through digital channels, especially as companies work to improve patient outcomes, says John Haney, VP, immunology marketing, Janssen Biotech.

"One example of ensuring patient compliance is the Janssen Biotech oncology team's Zytiga Adherence Program, a multi-channel adherence program," he says. "This initiative includes a Telly Award-winning patient instruction video, targeted to leverage patient touch points with specialty pharmaceutical providers, and ZytigaOne, our patient support program. Care4Today is another adherence application where patients are provided mobile support to track medical needs."

Manhattan Research recently reported that adoption of tablet devices by U.S. physicians has almost doubled since 2011 and two-thirds of physicians are expected to be using tablets professionally by 2013. In addition, physicians have now focused their attention on health outcomes.



**"Marketers must understand how physicians use their mobile devices and design a program accordingly."**

**WILL REESE / Cadient Group**

Experts say there is a clear need to develop digital tools and resources that help support and educate patients, and the increasing use of online videos, disease-based websites, and apps specifically designed to meet physicians' needs will help in this regard.

It is important, however, to have a strategy in place before adopting digital channels into the mix.

"We need to move away from having lists of marketing tactics and cultivate a smart marketing mix of channels that maximizes resources, budget, messaging, and brand experience, says Jim Dayton, digital strategy lead, Intouch Solutions.

"Companies need to understand exactly which channels can ladder up to their business objectives instead of just developing a tactic within a specific channel just to say they have done digital," he says.

### Benefits of Social Media

Pharmaceutical companies are starting to find that they can learn from listening to the activity on social media networks, and use this information to create effective marketing strategies.

Pat Connelly, associate director, corporate



**"Research and measurement provide companies with the greatest opportunity for maximizing their investment."**

**DR. CHRISTOPHER TOBIAS / Dudnyk**



**“The industry needs to cultivate a smart marketing mix of channels that maximizes resources and budgets.”**

**JIM DAYTON** / Intouch Solutions

communications, Millennium: The Takeda Oncology Company, outlines how his company has benefited from its interaction with its audience. One best practice, he says, is to first conduct a listening survey of what is actually being said about the organization and its brands; from these insights, one can easily determine the platforms, content, and tone to which users will respond.

“The best way to use social media is to listen to patients and see how they want the company to use these channels,” Mr. Connelly says. “The essence of social media is a two-way conversation; pushing an agenda or plan won’t work. A company has to say something about which the audience is interested.”

Listening is absolutely critical, because not all channels will work for all conditions or therapies. For example, HIV information may not get liked on a real name channel such as Facebook, whereas a healthy, robust conversation may still happen on anonymous forums.

“I do believe that, when done well, disease state education and corporate communications is a great place for companies to establish and nurture an initial presence on social networks,” Mr. Connelly says. “Listen to the audience and see if there is any value you can add to the conversation. Use blogs and pages to call attention to topics that there may be interest in but not a lot of discussion.”

Mr. Connelly views social media and digital channels as a good way to promote some of the positive work the industry does, which should help in improving or building credible corporate reputations.

“I believe we have an obligation to positively promote the work that goes on in biopharma organizations,” he says. “When I come to work I see hundreds of people dedicated to discovering and developing new

medicines to positively impact our society, not a nameless or faceless corporation with negative intentions. Social media gives us a chance to say ‘we are making the medicines for tomorrow’ and this is difficult work. We are trying to make medicines that have a positive impact on society; we want to make a difference in the lives of patients, this is what we are about.”

Mr. Connelly believes the two digital channels with the most potential are Facebook and YouTube and sees applications for clinical trial recruitment and patient education. Facebook has potential because of the sheer enormity of the platform’s reach. Mr. Connelly believes there is also a potential to use Facebook to get the word out about clinical trials for rare diseases more quickly through a more engaged audience. He reasons that as participation in this platform increases so will consumer interest in receiving health-related information through the channel.

“I think there is potential for Facebook to play a huge role in clinical trial recruitment,” Mr. Connelly says. “Companies are running more and more global clinical trials and 80% of Facebook’s users are outside of North America.”

YouTube has great potential as a learning platform, he adds.

“A huge component of adult learning is keeping someone’s interest,” Mr. Connelly says. “One can learn about anything on YouTube — from the American revolution to Photoshop; a lot of education happens on that platform. So I believe there is great potential to educate HCPs and patients in ways we have not fully explored yet. And, this platform is already the No. 2 social platform physicians use, so the audience is already there.”

Using social media to inform patients about options and resources available to them

**“The best way to capitalize on physician smartphone usage is to make the physician’s job easier when he or she uses it.”**

**SANJAY PINGLE** / Physicians Interactive

is a great opportunity, because it is going to hopefully increase the productivity of the conversations patients have with their HCPs.

“For this reason, I think it is important that we partner with these platforms in an effort to make the resources available and potentially uncover any needs that the community may have,” Mr. Connelly says. “I see the feedback that we receive from patient communities really informing our approach to how we develop educational pieces.”

## Upwardly Mobile

More than any other digital channel, mobile surged in 2011 as more companies allocated resources to the channel. According to Cutting Edge Information, about 69% of companies with a brand said they used mobile technology for marketing or medical affairs initiatives, a figure expected to rise to 100% in the next year. For those companies with mobile apps, 95% say the majority of these are directed to physicians, with 45% directed to patients. Clearly, mobile may be the darling channel of the year.

A study released by Pew Research Center earlier this year stated that almost half of all cell phone users are smartphone users, and that number is expected to grow exponentially in the years to come. As such, marketers need to think differently about how they develop resources and educational platforms to ensure they are mobile-friendly and effectively connecting with their audiences in the preferred way of communication, Janssen Biotech’s Mr. Haney says.

“This is what we’ve done with our Stelara

brand, for example,” he says. “The phrase ‘there’s an app for that’ isn’t just a catch phrase, it’s a fact, and we’ll fall behind as an industry if we aren’t embracing the smartphone owner as a prime customer.”

Mr. Dayton agrees that the industry needs to start focusing on mobile, and may even want to prioritize mobile over other digital and traditional channels.

“The industry as a whole has been slow to embrace the mobile platform,” he says. “Mobile has so much to offer all customers, not only physicians. Whether it is simple optimization, responsive design, or native application development, pharma companies must

find ways to deliver value on this platform for all customers.”

The development and use of apps is critical for marketers if they want to remain competitive in the pharma industry.

Because smartphones have changed the way physicians interact with patients, there is a growing demand for tools and services that



**“The best way to use social media is to listen to the patients and identify what they want.”**

**PAT CONNELLY**

Millennium: The Takeda Oncology Company

## BEST PRACTICES FOR A CONSUMER-ORIENTED BRAND STRATEGY ►

**Experts say there is no more one-size-fits-all strategy when it comes to consumer-directed messaging.**



**GLEN GIOVANNETTI**

*Global Life Sciences Leader,  
Ernst & Young.*

As patients become consumers of healthcare and take on more responsibility for managing their condition, they will seek information and participate more actively in their treatment. At the same time, technology advancements, such as smartphones and other monitoring devices, allow for behaviors and outcomes to be captured and analyzed by providers in real time. Together, these trends are putting outcomes as well as patient behavior in the spotlight. To leverage this trend, pharma companies are now shifting from selling products to providing wellness or becoming more integrated in the delivery of healthcare. The knowledge companies have amassed through their years of research and experience uniquely positions them to redefine their products and services to enhance health outcomes. They must demonstrate this knowledge to stakeholders as well as explore partnerships that extend their market access.



**ANDY LEVITT**

*Founding Partner, HealthTalker*

The industry needs to emphasize two core areas in order to excel: loyalty and engagement. Most importantly, brands must establish value beyond the pill, creating buzz-worthy unique services that are attached to any new prescription. This extends to personalized tools, customizable apps, 24-hour nursing hotlines, and world-class reimbursement support. Some brands have been more successful at this strategy than others; however, it will soon become the expectation of the

patient/consumer, and brands will need to keep up or be marginalized by superior offerings from similar products.

Central to an effective consumer-oriented strategy is also the creation of a fan base that feels engaged by the brand over time to spread the word. Patients need to feel like their needs are understood and have been anticipated by the companies who help them manage their overall health and well being, and as a result, positive word of mouth will ensue, helping to drive product demand while increasing product persistency over time.



**JULIE MANGANELLO**

*Senior VP, Marketing and Creative  
Services, Catalina Health*

To execute an effective consumer-oriented brand strategy, it’s critical to recognize that a one-size-fits-all approach will no longer work. Consumers who are engaged in their health want messages that are personalized and that resonate with them. They want to know about the medications being prescribed: the side effects and dosing. They want to learn more about alternative therapies they should ask their doctor about. In today’s connected world, they want these messages delivered to them through people and channels they trust and respect, such as in the pharmacy or in the physician’s office.

It’s important to remember that motivating health consumers to change their behavior is complex and does not happen overnight. An on-going relationship and communication will be necessary to ultimately improve adherence and influence healthier outcomes.



**MARK MCCONAGHY**

*Senior Director, Strategy,  
evoke interaction*

Many leaders in the diabetes space have made a commitment to help better educate patients beyond just a medication to drive better patient health and better communication between doctors and patients. In the years to come, I’d expect to see more companies following this lead by demonstrating how a patient’s health is a function of the lifestyle choices they’ve made and how they can right the ship. Moreover, I would expect to see pharma continue to push the envelope in this area by using technology, such as social and mobile, to facilitate a more personalized method to deliver these messages while responding to each individual patient’s needs.

**DEREK RAGO**

*VP, Strategy and Marketing,  
McKesson Patient Relationship Solutions*

Integrated solutions that reach the patient with varied messages and tactics designed to modify behavior require a shift toward a more patient-centric approach with an emphasis on collaboration across adherence stakeholders, which not only includes physicians, but also nurse practitioners, pharmacists, payers, PBMs, policymakers, and manufacturers. Behavioral-based interactions with personal, one-to-one conversations designed to deliver the right message at the right time are the cornerstone of patient-centric programs. Solutions should integrate technology to enable personalized conversations that result in meaningful interactions, increased engagement, and higher adherence.

help physicians communicate better with patients about treatments.

One of the main purposes of the mobile tool is to make the physician's job easier and aid in the transition from paper to smartphone.

"The industry should develop more therapeutic educational tools via native apps," Dr. Tobias says. "We have come a long way since the days when interns and residents had to carry six booklets in every pocket in order to

be armed with dosing options for every disease they needed to treat. The industry can capitalize on this opportunity, helping providers transition from paper to their trusted smartphone."

## TRENDING NOW ►

**Marketing experts identify the trends that will have the most impact on the marketing landscape in the next five years.**



**KEITH DIONNE, PH.D.**  
*President and CEO*  
*Constellation Pharmaceuticals*

1. Heavier reliance on clinical data to differentiate products.
2. Incentives for payers.
3. Increasing prevalence of generics requiring greater differentiation.



**BRIAN GRINER, PH.D.**  
*Market Intelligence, Consulting,*  
*Quintiles*

1. 2010 Protection and Affordable Care Act (PPACA). The implications of the passage of the PPACA in 2010 on the business of conducting market research are far reaching. No longer can a market researcher rely on physician research alone to confidently guide the marketing strategy for a new product launch. Reimbursement and market access have become key drivers of a successful launch. Market researchers must include payer's perceptions and intentions in primary research to identify the value drivers that will ensure favorable reimbursement and access. This will require market researchers to work hand-in-hand with their colleagues in HEOR, market access, and pricing to understand and measure perceptions of the comparative effectiveness of new therapies and the value drivers that will ensure physician adoption and patient adherence in the new market landscape.
2. Integrated Delivery Networks (IDNs). With the growth of managed care organizations and their emphasis on primary care and the coordination of care, closed loop systems have emerged that use electronic medical records to link information from patient charts to medical and pharmacy claims. This new source of data is now being analyzed alongside primary market research to answer many questions that were traditionally addressed using primary market research alone, e.g., physician treatment algorithms and the buying process used to identify leverage points to drive adoption and adherence.
3. Electronic Medical Records (EMR). As the use of EMR data becomes more prevalent, it is likely to be used in place of traditional primary market research to address many research questions. Market

researchers will have to embrace these new data sources and understand their strengths and limitations to provide accurate insights. Market researchers will have to adapt to this new world of EMR data and develop the knowledge and skills to leverage EMR where appropriate and augment with primary research where necessary.



**LIZ KAY**  
*VP, Business Development,*  
*Healthcare, Cramer*

The major trends we see revolve around the industry's hottest topic: adherence. We can influence helping the patient not only get on therapy, but stay on therapy, in three ways:

1. The pharmacy/pharma connection. The benefit of a stronger relationship between the pharmacy and manufacturer is two-fold. It can educate the pharmacist on disease states, providing the patient additional touch points for adherence. It can also provide access to pharmacy data on lapses that can then be addressed with targeted interventions toward better patient outcomes. These communications channels are expanding and playing into stronger overall adherence programming in an effort to manage disease states more aggressively. And, if we are to come full circle, these activities can also build and strengthen payer relationships.
2. Early behavior programming. There is an opportunity to test behavioral adherence programming as early as the R&D stage and build it into the business case in Phase III clinical trials and commercialization. It's an approach that worked for Alli and Chantix, both of which include a program to manage retention/adherence.
3. Social circles. While social media remains a regulatory minefield for pharma companies, there are opportunities to support unbranded digital outlets with patient-generated content to create social circles of support around adherence.



**CHRIS MAHONEY**  
*Director, Healthcare Strategy*  
*Cynergy*

1. Mobile devices will continue to increase as a driver of Web traffic. The PC won't go away, but it will be a tertiary device for accessing information via the Web, whereas more mobile devices, such as the smartphone and the tablet, will be primary and secondary devices. Thus the way we have currently accessed information through traditional Web experiences will have to be rethought for a mobile world.

2. Context or location aware services know where you are and, presumably, why you are there. Today, the building blocks are just beginning to enable new applications. We expect the growth of big data and demand from the public for personalized experiences and quick responses will yield new examples of location-based services advancing healthcare marketing.

3. Customer experience (CX) is a hot term these days, especially as technology is becoming a main form of interaction. People have expectations about how technology and applications should work and how they should feel during the process. Customers want experiences and processes that are intuitive, quick, and easy to use and work on whichever device they are using at the time. For companies that want to be seen as innovative and customer-focused, CX is an important consideration for how they market their brands and products and interact with their customers.



**DAVID ORMESHER**  
*CEO*  
*closerlook inc.*

1. The need to do more with less in most pharma companies is translating into increased investment in digital channels as a way to increase reach and engagement at a lower cost. Mid- and lower-decile professionals make up the long tail of the market that is now accessible at a cost-effective price point, and this audience offers an important new source of incremental revenue.

2. Multichannel marketing will move from basic multitactic coordination to channel integration that requires data sharing, transparency among agencies, and performance accountability. This is may be



To best capitalize on physician adoption, marketers must really understand how physicians use devices and design their programs with the utility and convenience of physicians in mind.

"Marketers have to keep pushing them-

selves to identify time-savers, high-impact transactions, and valuable services to avoid me-too apps and mediocre mobile experiences," says Will Reese, chief innovation officer, Cadient Group.

uncomfortable for many agency heads and will require strong leadership at the enterprise level.

**3.** Physicians are still slow to prescribe apps to their patients, but it's coming. Brands are beginning to recognize the power of unbranded disease and healthy lifestyle apps to help build deeper relationships between patients and their providers. Look for more sophisticated mHealth apps sponsored by pharma in the iTunes Store.

#### DEREK RAGO

*VP, Strategy and Marketing*

*McKesson Patient Relationship Solutions*

**1.** The healthcare consumer is changing due to new digital resources, population shifts, and an aging and more healthcare educated population. With the proliferation of digital resources, patients have access to more health information than ever, however they aren't always confident of their credibility. At the same time, we have a more culturally diverse population (e.g., the growing Hispanic population) that requires a greater degree of culturally relevant communications. Taken together, these changes will influence the strategies marketers utilize to effectively reach and influence their customer.

**2.** Driven by the Affordable Care Act, physician payment incentives are being linked to performance goals, quality metrics, and health outcomes. Designed to encourage a focus on chronic care management and rewarding health outcomes, payment incentives will continue to be influential in driving more effective patient/provider engagement. This shift will create a focus on chronic disease management and rewarding health outcomes.

**3.** Physician face-time with patients is decreasing because of new communication technologies and the increased role of other healthcare providers in the patient care ecosystem. Pharmacists are coming out from behind the counter and becoming a strong and more accessible patient resource as they provide pharmacy coaching and other clinical services. Additionally, physician assistants and nurse practitioners are becoming more visible in direct patient care.



#### RICK RANDALL

*Founder and Chief Patient*

*Success Officer*

*Triplefin*

The changes will be in multiple channels of our industry impacting the patient, physician, and the pharmaceutical marketers. The industry technology innovation wave is key to the future options that will be available.

**1.** Integration of in-office tools that will allow more insight and services available to the physician at the point of prescribing. This will include real-time reimbursement options and faster administration of prior authorization and patient assistance programs as a result of emerging technologies.

**2.** Continued and increased focus on adherence and loyalty programs for existing patients.

**3.** Stronger positioning by the managed care organizations limiting use of copay reduction programs as manufacturers take more control over the distribution channel to the patient. There is an increasing trend among specialty product manufacturers to deliver direct to patients from their internal distribution channel or through very limited delivery channels, thus eliminating the retail pharmacy entirely.



#### ANNA WALZ

*CEO*

*Medisys Health Communications*

**1.** Emerging markets continue to become more significant contributors; adoption of global launch platforms for precommercial brands will be needed to ensure consistency across borders.

**2.** Deep and early collaboration between marketing and cross-functional teams will become increasingly important to ensure internal alignment around assets in product development.

**3.** As product mechanisms of action become more complex, marketing leaders will need to have a much deeper understanding of the therapeutic spaces and the unmet needs that exist; the complex science behind their products; and a clear vision of the health economic value their product will have as it enters the marketplace.



**"There's an app for that' isn't just a phrase, it's a fact, and we'll fall behind if we aren't embracing the smartphone owner as a prime customer."**

**JOHN HANEY / Janssen Biotech**

Mr. O'Brien agrees, adding that the first step is to understand how physicians are using apps and where these cases intersect with marketing opportunities.

"Physicians are interacting with apps in patient care and daily practice at an exponential rate, accessing digital content from a PC or laptop," he says. "Understanding the context of a physician's engagement allows marketers to design best-in-class experiences with the content and utility that address individual needs."

This can mean helping HCPs as they diagnose cases with integrated pictures and video, medical reference materials, case histories, and more, says Sanjay Pingle, president of Physicians Interactive.

He adds that digital media could help physicians streamline their workflow and make tasks like writing a prescription or ordering samples faster, more intuitive, and non-distracting.

"Also, mHealth media allow physicians to share knowledge and data about new apps and tools that are making a difference for others," Mr. Pingle says. "For example, programs such as Health eVillages have seen smartphone and tablet usage grow as a force in developing countries where mobile access to proper drug dosages or patient education material is a vital, growing resource. Apps can save lives, and mHealth can deftly assist in containing the spread of infectious diseases, such as the Hepatitis E virus, in remote and underserved regions." <sup>PV</sup>



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# Changing Commercial Environment Requires NEW STRATEGIES

Marketing's focus needs to evolve to include payers and patients.

V

alue-add is the marketing buzzword of 2013. The industry needs to shift its focus from promoting a drug to physicians to include providing value to all of its consumers, whether they are patients, payers, or physicians.

The industry has been dealing with payers for a long time, but the interactions of the past are obsolete. Today, companies need to view payers as customers, according to a recent re-

port by Deloitte called, aptly enough, Viewing Payers as Customers. Recent industry trends and developments in the healthcare space are forcing a change in the dynamics between pharma and payers. The ever-changing industry landscape requires pharma organizations to rethink their commercial model, collaborate with stakeholders, and adopt strategies built around a view of the payer as a customer, the report says. Payers want improved information, exceptional service, and advanced contracting along with proof of a product's real value, assistance with cost management, and a less contentious relationships with pharma.

Our experts address progressive strategies the industry must use in order to meet these latest, burgeoning needs.

Identifying the needs of payers is the easy part, says Jim Dayton, digital strategy lead, Intouch Solutions. The difficulty comes into play in understanding and fulfilling them.

"Just as important to assisting physicians and patients, companies need to make sure they are making payers' operations easier," he says. "Many companies are just starting to understand what payers need and, in my opinion, marketers are still testing theoretical strategies to see what works."

The industry has viewed payers as a group with increasing strategic importance for several years now, and most companies are actively engaged in developing innovative strategic solutions to connect with this powerful and important audience, says Gabrielle Pastore, VP, global strategic commercial innovation, Cadient Group.

One strategic shift, however, has been

to deploy teams of seasoned account managers to engage across integrated delivery networks.

"This more holistic approach, coupled with truly delivering the right message to the right customer on the right platform — for example, digital, social, and mobile — will fundamentally change the way the industry engages with these critical customers," she says.

Changes brought about with the Affordable Care Act are going to put pressure on payers to control costs, with physicians bearing much of this responsibility, says Mark McConaghy, senior director, strategy, evoke interaction. Thus, they will look to those with whom they do business to help them help their patients as they do more with less.

"Moving forward, the industry must share the challenges faced by payers and providers by demonstrating a commitment to improved overall patient outcomes," Mr. McConaghy says. "Two specific changes I'd expect to see providers and payers demand are a greater commitment to health education and a more personalized service from pharma to patients."

For years, the pharmaceutical industry has been communicating with providers in terms of improved symptom control and/or working toward a particular measure and a successful endpoint, but in the coming years, that will not be enough, he adds.

Some experts say pharmaceutical companies are already preparing to function in a comparative effectiveness world, which includes communicating to payers about the value of their brands.

One new role that marketers can play in this new environment is that of provider of support programs for disease management. According to Martin O'Brien, partner, healthcare strategy and planning, Rosetta, pharma has the unique opportunity to take on much of



**“The industry must share the challenges faced by payers and providers by demonstrating a commitment to improved overall patient outcomes.”**

**MARK MCCONAGHY** / evoke interaction



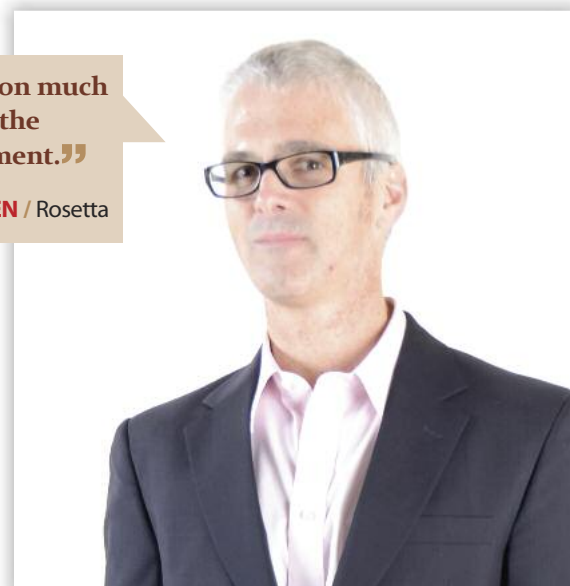
the disease management burden in the context of patients owning their treatment.

**“Pharma has an opportunity to take on much of the disease management burden in the context of patients owning their treatment.”**

**MARTIN O'BRIEN** / Rosetta

“Healthcare reform and the rise of consumerism in the individual health insurance market forces payers to provide more customer centric healthcare solutions,” he says. “These support programs can manage the authorization process, screening, and education, through ongoing adherence with the long-term view of maintaining health and reducing the financial burden.”

According to the Deloitte report, the relationship between pharmaceutical companies and payers will be evolving for some time, and as payers continue to gain influence in the funding and reimbursement of healthcare, pharma companies must shift their fundamental perception of these organizations from one



of viewing payers as obstacles, or even counterparts, to viewing them as a customers. Only then will the industry be able to fully incorporate payers into a customer-centric model. **PV**

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