

Improving Access to PHYSICIANS *in 2014*

It will take more than technology to create successful relationships with physicians.

The role of today's pharmaceutical salesforce is in constant evolution, as is the environment in which it functions. As leaner sales teams continue to struggle with new market forces, our experts offer several new approaches that can be used to improve communications with physicians. According to Cutting Edge Information, the key to success in sales and account management for the future is a customer-centric strategy. As salesforces move to embrace this new methodology — in which patient, payer, and physician needs determine a product's value — reps must consider not only which messages will best reach doctors, but which sales experience will best drive the physician-rep relationship.

Traditional tools, including physician segmentation, must evolve to meet the needs of the new pharmaceutical sales landscape. Long-term relationships are valued in the new sales model, and efforts to nurture these relationships are priority.

In today's technical world, pharma reps are using digital devices to enhance and expand their sales calls. An iPad can deliver animation and other graphics to bring brand messages to life in ways that a traditional printed sales aid can't communicate. Digital devices now enable pharmaceutical sales reps to provide addi-

tional materials a doctor may request — in real time — with the touch of a finger. However, this exciting technology will lose its effectiveness over time, says Frank Saia, general manager at Group DCA.

"Tablets will cease to be novel, and sales reps will be in the same place again, that is, spending less face-to-face time with doctors," Mr. Saia says. "Improvement can come by evolving and finding new ways to engage doctors to bring brand messages to their attention. One way to accomplish this is by employing a salesforce that fits within an integrated sales and marketing plan. In today's marketplace, all promotional tactics must share an integrated platform that includes robust salesforce automation tools and the implementation of analytics to deliver actionable information to users."

As well as using technology, pharma companies must change how they communicate with HCPs, focusing on three keys: efficiency, convenience, and relevance, says Paul Shawah, VP of commercial strategy at Veeva Systems.

"Targeted communications, continuously across multiple channels, including face-to-face, email, phone, and the Web, are the answer, but easier said than done today," he says. "This requires a single view of the customer that spans all touchpoints, a platform for relationship management that integrates each of these channels, and a way to deliver highly relevant and personal programs, educational resources, and content when and how the physician wants it, on the device he or she chooses."

Cubist Pharmaceuticals has already made a fundamental shift from a product- to customer-centric strategy to deliver insights that help its customers adapt to the new outcomes-focused healthcare norm.

"With our acute care expertise, we are uniquely adept at helping institutions and their physicians align both choice of treatment and setting to importantly improve clinical outcomes and patient satisfaction, in addition to overall healthcare economics," says Cubist's Steven Gilman, Ph.D., executive VP of re-



“There will be a greater focus on micro targeting physicians and identifying those who specifically benefit from the brand and the message.”

DAVID REAR
Advanced Clinical Concepts

search and development and chief scientific officer.

Messaging on existing tools and digital channels needs to deliver new content to help physicians navigate current challenges, says Nagaraja Srivatsan, senior VP, and venture partner at Cognizant.

"Key messages must provide new perspectives and skills for evidence-based practice, effectively use information technology, focus on quality measurement and improvement, cost-awareness, care coordination, and shared decision making," he says. "Patient-centered communication is also necessary to help physicians understand patients' individual needs, perspectives, and values, so they may advise patients with the information they need to participate in their care and to build trust and understanding between physicians and patients."

Physician Access Declining Steadily for Five Years

According to ZS Associates' latest AccessMonitor survey, only 55% of prescribers were considered accessible in 2013, down from 65% last year, and 77% in 2008.

- » 12% of physicians severely limit visits
- » Only 2% of primary care and 13% of specialists allow reps to visit more than 24 times a year
- » Pharma companies waste \$1 billion to \$1.5 billion annually on infeasible calls

Source: ZS Associates. For more information, visit zsassociates.com.



“Using data for predictive analytics will help drive productivity and efficiency in commercial strategies.”

RICH PILNIK / Quintiles

The industry has made a tremendous investment in iPad detailing technology and infrastructure. However, Nicole Johnson, senior VP, director of digital strategy, at Flashpoint Medica, suggests it might be time to start over by pulling all stakeholders together to ask them what they really need and build new experiences for those needs.

“We are on the cusp of doing something great that could result in better health outcomes, which is something we all desire,” Ms. Johnson says. “The biggest advancement we should make is to flip the way we’ve done things in the past on its head.”

She recommends bringing together Apple user-experienced designers, sales representatives across specialties, physicians, nurses, payers, patients, and last but certainly not least, forward-thinking medical, legal, and regulatory teams to collaborate on doing things differently.

“For so long, our focus has been on delivering compelling data ‘to’ physicians,” Ms. Johnson says. “We’ve seen this in personal detailing and also in nonpersonal media drivers that push messages to physicians. Even when physicians are actively seeking information via search engines, we often create a one-way experience versus engaging with them.”

Charlene Prounis, CEO, managing partner, Flashpoint Medica, says improving engagement with physicians can come simply from letting them actually interact with the iPad.

“To make communications even better, we’ve got to have doctors interact with the iPad more often,” she says. “It’s great news that more than half of doctors believe the tablet makes the sales call more valuable as it helps them retain information better and they like that the information is customized to their interest, but we’ve got to spark their in-



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CHARLENE PROUNIS
Flashpoint Medica

terest with questions, aggregate data, and customize that data to their practice,” she says. “It’s been shown that when doctors interact with the tablet, they spend more time with the sales rep, request more samples, and more often prescribe the drug discussed.”

It is also crucial to keep a dialogue ongoing between office calls by keeping companies and clinicians involved with one another after a rep leaves the office, Mr. Saia says.

“We can’t allow an office visit by a sales rep to be the only touch point between brand message and physician interaction,” he says. “Rather the sales rep needs to be empowered to deliver communications to the physician when and where it is most beneficial, be it via online conferencing, edetails, esampling, forum participation, or something else.”

The tablet will continue to serve a useful role but will not be a panacea for the future, says Pratap Khedkar, managing principal and leader of ZS’ pharmaceuticals practice. The real solution lies in switching to a more customer-centric approach.

“Almost half of all physicians reduce access to reps to some extent, according to ZS’ latest AccessMonitor study, so reaching them through other channels has become critical,” Mr. Khedkar says. “But inundating the physician indiscriminately via multiple channels is also not working, so the whole approach needs to pivot to a customer-centric marketing approach, not a brand-centric approach.”

This requires putting the customer’s needs and channel affinity front and center, and ensuring that all channels coordinate around the customer to deliver an ongoing, coherent narrative personalized to them.

“This is very different from the transactional brand-pushed approach used in the past — it will need a new mindset, the ability to mine all the data and a coordinated approach



“The biggest change we need to make is to flip the way we have marketed to physicians in the past on its head.”

NICOLE JOHNSON / Flashpoint Medica

spanning sales and marketing to create a positive customer experience,” Mr. Khedkar says.

While physician receptiveness to tablet details is indicative of a need to gain more from their relationship with sales reps than access to product data, sales reps need to go far beyond simply adopting the latest channel, according to Kyle Sutton, senior digital strategy, Micro-Mass Communications.

“Reps are motivated by commercial success but to maintain access to physicians, they need to be able to effectively articulate the benefit of their product through the lens of patient outcomes,” he says.

Paul Kandle, VP and general manager, Opus Health, a division of Cegedim Relationship Management, also believes communication to physicians needs to focus on health outcomes and offer information regarding overall patient behavior, not just the financial aspects.

“Co-pay programs are marketed to physicians as patient savings and although cost is a large issue, it’s not the only issue affecting patient behavior,” Mr. Kandle says. “We need to provide more robust programs that support the physician in treating a patient and provide program effectiveness data to physicians so they clearly understand the effect of the program on their specific patient population.”

Multichannel and digital resources are increasingly important in actively communicating with healthcare professionals, but the approach needs continual tweaking depending on many variables, says Rich Pilnik, president, commercial solutions, Quintiles. “The use of digital assets to improve the frequency of coverage, extend geographic reach and access key stakeholders outside of high-density population areas needs ongoing refinement and enhancement,” Mr. Pilnik says. “To optimize effectiveness, the communication mix needs to vary according to the product’s therapeutic



“Once pharma companies understand provider attitudes and beliefs, their targeting efforts will become more efficient.”

DR. LAWRENCE NELSON
MicroMass Communications

profile, stage in lifecycle, target patient population, and the health system in which the product is being prescribed.”

Rick Keefer, president, Publicis Touchpoint Solutions, says using multiple channels to reach busy physicians is key in today’s marketplace.

“Physician access is declining, but when multiple channels are deployed in an integrated fashion, we are seeing high success rates of HCP access, especially when physicians have flexibility to interact at times, locations, and channels of their choosing.”

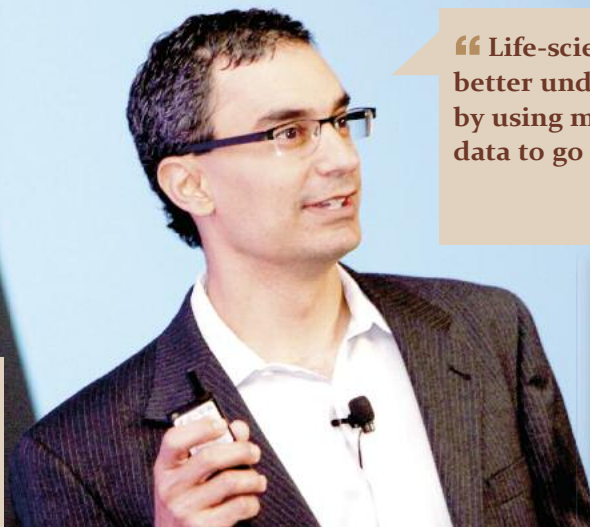
Tips for Targeting Physicians in 2014

As access to physicians continues to decline, sales teams should extend their efforts to include other clinicians in the office, such as nurse practitioners and physician assistants. According to Nancy McGee, managing director, Manatt Health Solutions, the definition of treatment providers will likely expand beyond physicians in the coming years, and this can help the industry become more effective in targeting efforts.

“While physicians remain critical, there are other providers who will become very important in providing basic care,” Ms. McGee says. “The American Association of Medical Colleges projects a shortage of 45,000 primary care physicians by 2020. At the same time, there will be a 36% increase in the number of Americans over 65 — the very segment with the greatest healthcare needs.”

Pharmacists, nurse practitioners, and physician assistants will likely be taking on more routine patient care to fill the treatment gap.

“As the environment changes, it will be



“Life-sciences companies need to better understand customer preferences by using more robust physician-level data to go way beyond decile metrics.”

PAUL SHAWAH / Veeva Systems

important to understand which providers are administering which products,” she says. “Targeting industry support to new provider groups and sites of care will help reps be successful in an environment focused on smart spending and positive health outcomes.”

Extending the reach beyond high-decile prescribing physicians is also critical for successful sales roles of the future. Targeting capabilities need to evolve from the current de facto standard of chasing high deciles to developing predictive models to understanding the characteristics of prescribing behavior for a specific product.

“By analyzing combined prescription, CRM, socioeconomic, managed market, and demographic data, reps can identify a high value physician and search for the other target physicians that have this similar make up,” says Patrick Homer, principal industry consultant, global practice, health and life sciences, at SAS. “This practice needs to evolve from the sales call and be applied to all marketing channels.”

In today’s multichannel world, physicians now have a choice as to where and how they want to consume drug information and services from pharma companies. Creating an easy pathway through the maze of multiple channels is also an important key in accessing physicians successfully. Naturally, they will migrate to the best and easiest sources, so the industry needs to understand the customer preferences.

“Life-sciences companies will achieve this goal using more robust physician level data, for example, behavioral data such as channel preferences, that go way beyond decile,” says Paul Shawah, VP of commercial strategy at Veeva Systems. “Based on a more robust segmentation, pharma can then deploy the right services and content based on each customer’s specific needs. For example, for doctors with populations that have high cash paying pa-



“Physician targeting capabilities need to evolve from the current model of chasing high-decile prescribers to developing predictive models.”

PATRICK HOMER / SAS

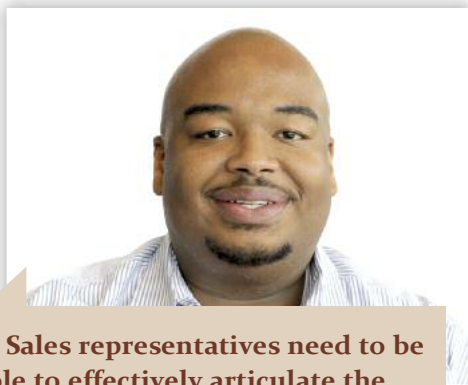
tients, pharma companies could enact reimbursement programs. The industry must make these personalized services and information available at any time, on the customer’s terms — on the Web, over the phone, through an email from their sales representative, or in a face-to-face interaction.”

Multichannel Marketing Through Analytics

Multichannel marketing will take on increasing importance to maintain and grow relationships with physicians, as physicians are increasingly becoming employees of integrated delivery networks. Pharma companies are losing access to these physicians as these provider entities restrict access to sales reps, according to Brad Sitler, principal industry consultant, SAS Center for Health Analytics and Insights.

Capturing and analyzing data to best understand physicians’ behavior online can also increase a rep’s chances of creating an ongoing relationship with a physician.

“Tracking physician behavior across multiple online platforms can reveal where physicians are and where they’ve been,” Mr. Saia from Group DCA says. “For example, when a physician is navigating the Web, we may be able to track his or her movements on that site and realize topics/products of interest. Then we can take that knowledge and create customized messages that meet specific physician



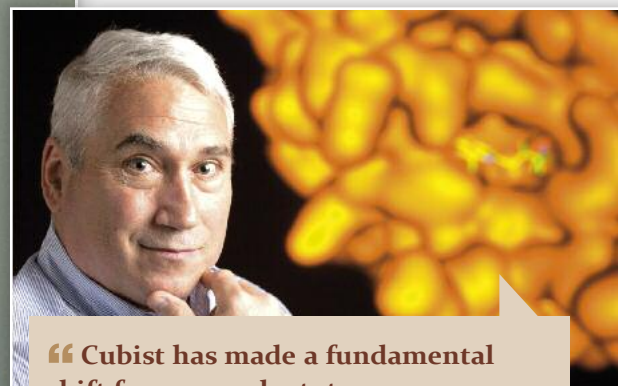
“ Sales representatives need to be able to effectively articulate the benefit of their products through the lens of patient outcomes. ”

KYLE SUTTON / MicroMass Communications



“ Improvement can come by evolving new ways beyond the tablet to engage doctors to bring brand messages to their attention. ”

FRANK SAIA / Group DCA



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DR. STEVEN GILMAN / Cubist Pharmaceuticals

needs at their places of interest. Personalizing their experience opens opportunities for easier access and longer engagement with brand messages.”

Mr. Pilnik agrees that using data for predictive analytics will help drive productivity and efficiency in commercial strategy and ensure that the right resource is deployed based on potential return on investment. In addition, better understanding of physician preferences will help to improve the time and quality of interaction, he says. The industry will need to extend the sales role to include brand new skills.

“Within this model, a different mix of skills and professionals will be required — from medical science liaisons, to health outcomes managers, remote and e-detailing sales representatives and nurse educators,” he says.

Pharma companies have an abundance of data that are readily available to them that they have yet to leverage, Mr. Sitler says.

“Tying this data together and using advanced analytics to drive the allocation of resources, prioritize targets, and define the appropriate messaging at the individual physician level will be more important going forward,” he says. “Advanced analytics will also play an increasing role in defining which doctors are writing which scripts.”

Mr. Sitler also suggests leveraging social network data to understand how prescribers influence one another across the continuum of education, training, and practice and how this has and will impact future prescribing.

As has been referenced previously, the industry will also have to look beyond its own assumptions and include feedback from physicians in their decision making of the best channel mix to use. As a consequence, traditional approaches to segmentation and targeting will change.

“The industry has targeted physicians his-

torically on the company’s or brand’s valuation of the physician’s potential patient base,” Mr. Khedkar says. “This has to be supplemented by the customer’s valuation of the company and channel, for example, the customer’s preference in addition to their value and the resulting responsiveness to all the promotion the company conducts.”

To access physicians in an effective way, pharma needs to incorporate data that not only go far beyond the physician’s share and specialty, but also his or her individual responsiveness and preferences, he says.

Learning more about physicians’ inherent behavioral drivers and how they affect decision making can help pharma be more effective, says Lawrence Nelson, Ph.D., VP, medical strategy at MicroMass Communications.

“As the trend to maximize every dollar spent marches onward, it becomes ever more important to ensure our approaches to identifying and segmenting providers are aligned for success,” Dr. Nelson says. “Like patients, physicians are rarely homogeneous in their skills, beliefs and attitudes, yet pharma treats them that way when targeting and delivering communications. By targeting and communicating according to innate beliefs and attitudes, pharma should see improved access, better receptivity, and greater perceived value by their customers. Once pharma understands provider attitudes and beliefs, the efficiency of their targeting will increase as trends in limited provider time and healthcare demands of an aging population intensify.”

According to David Rear, president of Advanced Clinical Concepts, in the near future, the industry has to look at a more holistic approach of reaching out not just to the providers, but also to the patients and the payers. However, when targeting physicians, there will be greater focus on micro targeting —



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NANCY MCGEE / Manatt Health Solutions

identifying those who may specifically benefit from the brand and the message, he says.

“For example, instead of broadly targeting physicians who write a certain volume of prescriptions, we may be able to someday target only those physicians who are having difficulty achieving their patient goals — a much smaller target group, but one in need of intervention and in whom the opportunity is greater. Once we find them, we can then create medical education stories that specifically focus on the areas where these physicians need support and where our clients’ brands can help. In this scenario, everyone wins — physicians get valuable assistance, patients get better, and companies profit.” ^{PV}



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The ACA *is Here:* WHAT DO WE DO NOW?

Helping physicians cope with the impact of healthcare reform.

In a webinar hosted by PharmaVOICE last year, WG Consulting and Penn Schoen Berland discussed how the Affordable Care Act (ACA) has changed the pharmaceutical landscape forever. The ACA impacts every facet of the market — from commercialization and marketing to payer cost control and risk-sharing strategies to physician practice dynamics and quality metrics. According to a survey conducted by WG Consulting and Penn Schoen Berland, half of those polled believed pharma should focus exclusively on producing safe and effective treatments, while the other half thought pharma should add supporting ACA execution to its responsibilities. The majority of payers and providers believe controlling costs is the most important action pharma can take to help them with the ACA.

The research showed that many physicians and payers want pharma's help with the ACA and have concrete suggestions on how drug companies can work with them to ease implementation of the ACA's provisions. Although controlling costs tops the list, they'd also like to see pharma provide educational programs

on the impact of reform changes, create better access to drugs, improve physician incentives to ensure proper use of treatments, and demonstrate value through outcomes studies.

Educational programs are at the top of Kyle Sutton's ACA pharma to-do list. Mr. Sutton, senior digital strategy at MicroMass Communications, predicts the sizeable influx of new patients into healthcare systems will tax physicians who are already pressed for time, so proper education of these new patients will be a considerable challenge.

"This is where pharma can provide incredible value for patients and physicians alike," Mr. Sutton says. "Pharma has the resources to craft a variety of experiences aimed at educating patients not just around disease state and treatment options but in the behavioral changes that when combined with appropriate therapy can provide lasting, positive health outcomes."

According to Rick Keefer, president and CEO of Publicis Touchpoint Solutions, the ACA will create a paradox for physicians of having less time for more patients while also needing to improve health outcomes for these patients. This is a place where life-sciences companies can step in and provide medical information that the physicians need when, where, and how they want, through preferred channels and at a time of their choosing. Mr. Keefer also expects there to be a significant growth in clinical health education programs that provide support to both HCPs and patients through education that ultimately optimizes health outcomes.

The ACA requires providers and payers to take on risk based upon patient outcomes as the healthcare industry moves from fee-for-service to fee-for-value. Not only will providers and/or payers be responsible for additional costs associated with poor patient outcomes, they can also be penalized for failing to manage improved patient outcomes, for example, readmission penalties.

"As such, physicians are now incentivized to help patients manage their disease and treatment," says Brad Sitler, principal industry consultant, SAS Center for Health Analytics and Insight. "This will require sustained behavior on behalf of patients. Information,

tools, and aids that pharma can provide to clinicians, which assists patients, will have an increasing importance."

Another opportunity for pharma is helping clinicians screen patients for lack of activation or inability to manage a treatment approach due to complexity, cost, or other reasons.

"This will provide insights to physicians as to where to invest more of their time and resources," Mr. Sitler says. "Additionally, assisting clinicians in understanding how to secure patients' alignment to a proposed treatment plan and then helping to support the patient in following the treatment plan will provide value."

Market access will be a challenge for physicians, and pharma can assist them with issues around managed care and formulary guidance. Frank Saia, general manager at Group DCA, says he expects to see fewer sales reps and more reps that specialize in managed care in the future, and this will benefit all stakeholders.

"Physicians can use the most help and guidance on market access; we believe that an increase in the number of sales reps that specialize in managed care will soon emerge," Mr. Saia says. "We're already incorporating managed care data into all our nonpersonal promotions. For example, each of our e-details now contains a map of the United States that links to specific formulary coverage for a specific drug — state-by-state and region-by-region. This information is extremely important to physicians, nurse practitioners, and physician assistants because it helps them make a more informed prescribing decision."

According to the report by WG Consulting, pharma must take action around helping physicians and payers cope with the ACA changes or risk having other groups in the driver's seat. The EU countries have been operating under similar reforms for years, and American companies can learn from their experiences. Key lessons include engaging early with payers and providers to drive better outcomes, integrating clinical and health economics outcomes research at the beginning stages of product development, promoting close collaboration among internal teams, and developing and delivering clear and compelling value stories. **PV**

Impact of the ACA

According to a survey conducted by WG Consulting and Penn Schoen Berland, there are wide variations among stakeholders in their responses to the potential impact of the Affordable Care Act (ACA). Findings are based on an online poll of 101 primary care physicians; 50 payers; and 50 representatives from pharmaceutical, biotech, and medical device companies.

- » **Physicians:** Two-thirds of physicians anticipate they will see their incomes drop as a result of the ACA; more than half believe their patients will be worse off, with less access to the treatments needed to provide positive health outcomes.
- » **Pharma:** Almost three-quarters — 72% — of pharma employees believe it will be more difficult to get coverage and reimbursement for their products.
- » **Payers:** 62% of payers are predicting their revenue will increase as more patients receive health insurance coverage.



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