

Navigating the new prescriber network

How to understand critical networks of influence in this multichannel world

To state that today's life sciences industry is faced with a real challenge in achieving market access throughout Europe is an understatement. For starters, there's the growing trend towards the development of Health Technology Assessment (HTA) bodies that weigh a drug's usefulness to the healthcare system in each of their covered territories - this, on top of the outcomes-based reimbursement approaches dictated by payers throughout Europe. Additionally, each country - and sometimes regions within each country - still has its own set of ground rules for market access. Indeed, the increasingly complex delivery of healthcare has created a true labyrinth that needs to be carefully negotiated. Yet never has the payoff been greater, with pharmaceutical market value at retail prices in Europe climbing past €239bn.

No longer can life sciences sales and marketing teams solely communicate with prescribing physicians to promote their brands. Instead, today's life sciences 'customer' has many faces and wears many different hats, encompassing a more complex and broader group than ever before and requiring companies to address a network of individuals. This network is as disparate as it is crowded, consisting of government entities including HTA bodies, payers, insurance companies, prescribers, pharmacists, patients and patient organisations.

Successfully navigating this network, therefore, is critical to success. Life sciences companies must learn how to efficiently and expertly support each of these new network members. Commercial teams need to understand precisely who the influencers, payers and physicians are in the network and how to engage with and deliver value to each of them personally. They need to be confident in understanding how they can influence these groups effectively to get a brand on formulary for a particular indication(s), and how to ensure it gets reimbursed and prescribed.

To make things more challenging, field forces have been reduced due to commercial transformations at play. Life sciences companies know that they must change their commercial models to adapt to both smaller sales teams and a larger, highly complex, access-restricted, heterogeneous landscape ... but how? Despite all its challenges, the situation is not insurmountable. By using coordinated multichannel strategies, life sciences companies can interact with different target stakeholders in today's prescriber network and supplement their smaller sales teams with tailored content delivery through preferred channels. The key is giving the customer the choice of channel to access relevant content, and interact through, when needed.

The customer - profiling the new provider network

One thing that has not changed in this ever-shifting European market landscape is life sciences companies' necessity for a richer understanding of their customers' needs and behaviours. If it is going to be effective, multichannel promotion must reach the influencer/prescriber/payer in a way that will resonate the most. This means collecting preference and interaction data on each individual within the provider network and integrating this data across channels in order to orchestrate interactions effectively.

"The complexity of Europe's prescriber network is undeniable, but not impossible to navigate"

This, in itself, can be a herculean task considering the market complexity. Take the UK, for example, which is a payer-driven marketplace where the Department of Health effectively controls medicine-pricing decisions, the National Institute for Health and Care Excellence (NICE) as well as the Scottish Medicines Consortium determine the health economic value, and the National Health Service decides on reimbursement for grey- and black-listed medicines. Doctors decide on the clinical appropriateness of NICE recommended drugs and treatments on a patient case by case basis. Within this system, there will be those primarily concerned with health issues and outcomes and others with cost containment plus these individuals can be involved in multiple spheres of influence.

Identifying all the appropriate individuals within these groups is just step one, yet much of the industry is beginning to master it. The next step - understanding how to reach and most appropriately interact with each member of the network - remains a challenge. Doing so will require working within sophisticated customer relationship management (CRM) platforms that can house all demographic and preference data and integrate it across channels. Multitenant cloud-based CRM systems provide data accessibility across delivery platforms and enable seamless integration for the added bonus of shared insights. Companies can collect and analyse important data about customer preferences and

interactions as they occur to enable a better understanding of his or her needs and then respond immediately and appropriately.

The channel - optimising performance

Without combined data intelligence on all of the individuals within today's new provider network, multichannel communication remains a series of disconnected, singular promotional efforts across multiple channels. Since outreach will not be based on the target's preferences for how and what he or she wants to receive, the recipient will most likely 'turn off' the message, viewing it as a push of content that the life science company wants to send rather than a pull of the content desired.

Unfortunately, most data collected from non-personal channel interactions with customers, if it is collected at all, has been housed in data siloes within the organisation. For example, sales force platforms remain independent from any intelligence collected from website interactions or e-detail participation. How much more effective would any of these promotional efforts be if the e-detail delivered was responsive to customer intelligence recorded by the sales rep based on a personal relationship with the individuals in the network? Or imagine how much more effective sales reps would be if they knew that the target had recently downloaded scientific data on a certain brand when came time for the next two-minute presentation drill?

A cloud-based, integrated CRM database is the answer. Not only does management have customer insights at its fingertips, but it can manage channels, country by country, or region by region, and thereby overcome any government-enforced limitations. For example, email open-rate tracking is not allowed in Germany. Knowing this, companies can turn off tracking mechanisms in order to still leverage this valuable channel here to send compelling content via email that directs customers to call centres, e-details, or video conferences.

Clearly, a CRM database is only as strong as its users. To address this, many pharmaceutical companies are establishing new roles within the market access team. Others are creating new internal positions such as the Network Manager, who have a role similar to key account managers, but with a broader group that is not necessarily grouped as an account. There are also regional market access managers, who oversee the entire network within a region. These managers are using the data obtained and mapping it to market conditions and regulations in order to implement appropriate promotional technologies within channels to meet target needs. Drawing upon their multichannel CRM database they are able to

answer such key questions as: How do we communicate to people in the network without overlapping with the communications efforts involved by other therapeutic areas and brands in the same company? How do we manage communication across channels so we don't bombard one target with too many messages?

The content - delivering relevant information

Delivering content via multichannel promotion can be tricky, but things are changing quickly. Today, advanced technology enables sales reps to send fully compliant promotional content even via email - overcoming former regulatory hurdles. Companies can now work with the marketing teams upstream to find out what the customers want, and then create a repository of tailored, relevant and compliant content that can be delivered through the channels customers prefer.

Email and mobile communications, driven by the rep in response to a request for more information, offers a dramatically new level of value and effectiveness, extending the call beyond the walls of the office and opening doors to low-access targets. In addition to email and mobile, there's also a growing interest in e-details and other online sources. Nearly a quarter of the 1,000 general practitioners surveyed by the UK-based online physician community Doctors.net.uk said they preferred to find drug information via independent online resources, with physicians choosing an average of 2.9 different preferred channels of communication, according to a 2013 study. Multichannel content delivery is not only cost-effective but necessary in meeting today's target requirements for communicating.

The complexity of Europe's prescriber network is undeniable, but not impossible to navigate. It is essential to put in place a market access strategy that leverages an in-depth understanding of critical networks of influence. Multichannel outreach based on a cloud-based CRM platform - with strong planning, execution and integration across all channels - offers a flexible, cost-effective methodology to achieve market access throughout the network while delivering greater value. New technology allows companies

to focus on understanding the full network of customers, leveraging the preferred channels, and delivering tailored content that take sales in the right direction ... up.



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