Sales automation tools make strides in addressing industry needs

The near-takeover of detailing with the Apple iPad has created a springboard for new applications

By Nicholas Basta

What a difference 30 seconds make! That's generally regarded as the difference in loading time between an Apple iPad and most types of laptop computers. And because pharma sales reps average between one and two minutes of face time when visiting physicians, those 30 seconds could become half of the time available for the interaction.

That's only one of the many reasons that sales forces throughout the worldwide life sciences industry have jumped onto the iPad platform; Apple's interactive tablet is, of course, one of the most successful consumer electronics products in years, lauded for its convenience, ease of use and pleasantly viewed graphics. The iPad, in turn, has generated an upheaval in pharma sales force automation (SFA)—and that upheaval is having a ripple effect on overall pharma sales and marketing activities.

Ironically, the longer-term effects of this upheaval are to diminish, to some degree, the importance of the customer-relationship management (CRM) aspect of SFA. As the vendors of CRM systems adapt their offerings to the iPad, and as desired data (such as physician master data) becomes roughly equally available regardless of the vendor, CRM becomes a more-commoditized IT resource. CRM vendors are moving rapidly to build out their CRM systems with other capabilities, particularly business analytics—and the competitive race rachets up another notch.

"Veeva Systems made the right bets on cloud-based CRM and on the iPad," says Eric Newmark, program director at IDC Health Insights (Framingham, MA), an IT market-research company. Last summer, Newmark projected that Veeva (Pleasanton, CA) is now the leading life-sciences CRM vendor in the US, having doubled its client base in each of the past three years. (Oracle's offerings, CRM On Demand and its Siebel Systems subsidiary, are said to be the global leader, and Cegedim Relationship Management, which claims 200,000 users worldwide, is of comparable scale.) Newmark's company is about to commence a new market study; results are expected this summer.

Other CRM vendors with some life-sciences presence include Synergistix (Sunrise, FL), StayInFront (Fairfield, NJ), Update

CRM (Vienna, Austria) and Salesforce.com; the latter is significant because Veeva is a licensee of SalesForce's cloud-based IT platform. Microsoft's Dynamics CRM is being tried by a few manufacturers. A new-to-the-US company, Interactive Medica (Madrid, Spain), is about to be launched in the US by Mark Cieplik, an industry veteran.

Ovum, another IT market research firm, issued a report last summer giving Oracle and Cegedim a tied score of 6.7 for "market impact" (roughly, share of market), while giving Cegedim and Veeva a tied score of 8.0 for "market evolution" (innovation) and Oracle a score of 8.5.

Veeva entered the market several years ago with one of the first cloud-based CRM offerings for life sciences, and has had to overcome some initial pharma-industry resistance to cloud computing, based mostly on concerns over data security. "But the industry is past that concern today," says Paul Shawah, VP CRM strategies at Veeva. "The advantages of scalability and rapid implementation are compelling."

Veeva continues to emphasize its "true multitenant architecture," in that it builds one version of its platform, and all customers use the same platform, hosted remotely. When Veeva performs an upgrade, that upgrade applies to all clients simultaneously—drastically different from the scenario of a site license and the need to maintain and update each site.

Bedminster, NJ-based Cegedim, which used to be primarily a site-license vendor (the company has been doing life sciences CRM for a couple decades), mostly offers cloud-based implementation now—but in three Mobile Intelligence versions: MI Touch (for the iPad); MI Pocket (for smartphones) and MI PC (for laptops and desktops). Feeling the competitive heat from Veeva, it upgraded
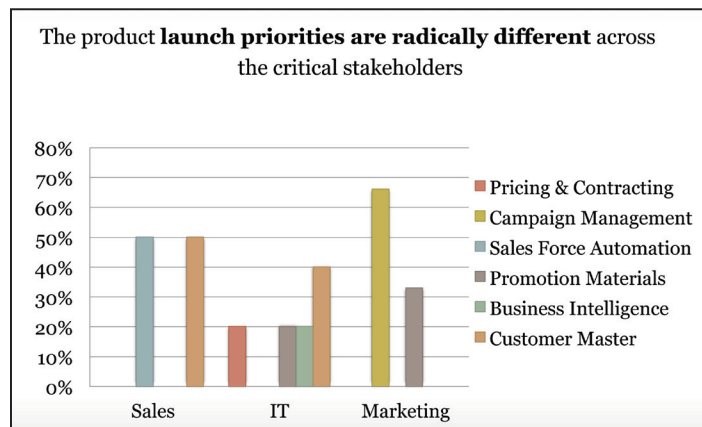
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Fig. 1. A 2012 Highpoint Solutions industry survey focused on preparations for product launches.

Fig. 2. Trinity Pharma's just-launched Agile M tool aggregates sales and customer data to provide a sales-effectiveness dashboard. Credit: Trinity

its trio of systems three times in 2012, and Neeraj Singhal, VP of product development at the firm, says that the company is looking at deployment on the just-announced Microsoft Windows Surface tablet, running Windows 8 Pro.

"There is a point to Veeva's claim of multitenancy," says IDC's Newmark, "but ultimately it depends on the "nimbleness" of CRM vendors' in-house programming capabilities and, in the final analysis, the prices they charge for their offerings.

Low-maintenance implementation of a CRM would appear to be a must these days, if the results of a study from HighPoint Solutions (East Norriton, PA), an IT advisory firm, are to be believed. The company surveyed a cross-section of pharma companies (big, medium and small) in the past year, looking for trends in how they prepare for product launches. What it found was that the teams that should be most interested in making these preparations—sales, marketing and IT—don't talk to each other and don't have the same priorities (Fig. 1). In particular, SFA is a priority only of the sales team—not IT, and not marketing. Conversely, the IT team is looking ahead to the need for business analytics, but the sales team is not. "This is not so surprising when you find that another result of our survey is that 50% of companies doing product launches do not have an integrated launch plan between product marketing, sales, regulatory compliance and IT," says Mark Zubey, head of the commercial effectiveness practice at HighPoint.

Zubey says that for this reason, it is recommending that pharma companies put as much of their IT resources into the cloud as they can; the support from internal IT departments that might have been there in the past is no longer there.

CRM plus

All CRM vendors provide the basic capabilities of displaying healthcare provider (HCP) information and history so that reps can track their appointments and past business with the HCP. The iPad brings a new level of usability to displaying sales presentations and promotional materials (more about that later), and then various sales-assistance tools, such as a mapping function to help the rep make the next call and related functions.

Veeva works with a network of related service providers, including J. Knipper for sample accountability and fulfillment, Terralign for geographic plotting, and Concur, a widely used expense-management tool, for rep expense accounting. Most recently, Veeva has introduced Veeva Vault, a complementary, cloud-based service for storing and retrieving documents.

The PromoMats component stores promotional materials and other collateral; another module stores and retrieves clinical trial documents. Like Veeva's multitenancy for its CRM platform, the central storage enables a marketing team to keep a current version of promotional materials "on file" with the assurance that the entire sales team (nationally or even globally) is seeing and using the same documents.

Cegedim, meanwhile, touts its "native" applications—service modules built into the MI platform, including AggregateSpend360, for compliance with the Physicians Sunshine Act for reporting expenditures on HCPs, and OneKey, a global database of HCPs. (The two complement each other nicely, since pharma companies need to know precisely which HCPs received payments from them, and to aggregate the total spending over the year.) These modules are self-standing, and are offered by Cegedim to customers who aren't necessarily using its CRM platform.

Both companies, as well as several third-party firms, are also offering capabilities that generally have fallen under the heading of closed-loop marketing (CLM), which entails not only presenting promotional materials to HCPs, but tracking what they do in going through these materials. Those data can be combined with other data streams, such as the Web-based activity of the same HCPs, to give a fuller view of how receptive an HCP is to a marketing message. Sample ordering (which can be done face-to-face with the HCP, or remotely when the HCP is online) is yet another data stream that can flow into the loop.

A Danish company, Agnitio A/S, has developed a life-sciences-specific CLM platform, and says that it has integrated it with most of the leading CRM vendors. The first iteration of incorporating promotional materials into iPad applications can be likened to "electronic paper," says Benjamin Post, solutions expert at Agnitio.

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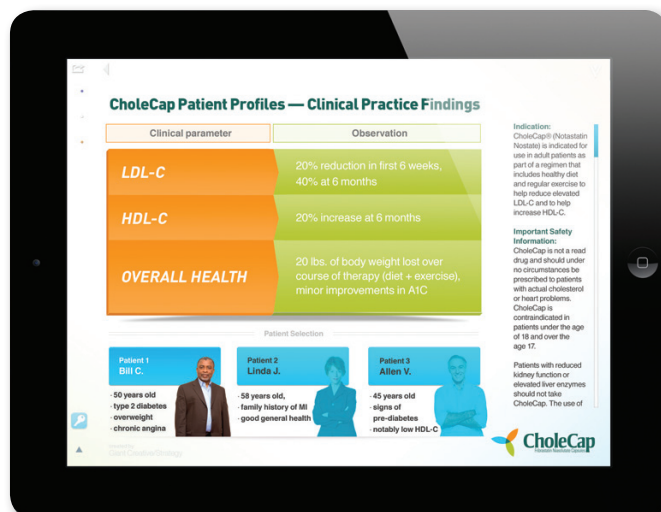
Fig. 3. A mock-up display of promotional material in Veeva's iRep CRM platform. Credit: Veeva

They were simply static representations of what could be shown in paper hardcopy. With Agnitio's resources, presentations become trackable sessions, and the data generated during HCP visits becomes part of the refinement of the marketing message in next iterations. Ultimately, says Post, CLM should be thought of as the front end of the sales process: "When you've integrated HCP preferences and past interactions, that should be the view you have of an HCP for your next meeting, and the refinement of the basic sales presentation."

The highly structured way of capturing HCP interactions with presentations points to an evolving capability of CRM/CLM systems: nonpersonal promotion. The point is, when a presentation is offered on a platform like an iPad, with its ease of use, and when viewer interactions are tracked and responded to dynamically, why does the rep have to be in front of the HCP while this is going on? For a number of years, there have been efforts to conduct "e-detailing" with a rep on a telephone, interacting with an HCP at a manufacturer website, addressing questions and performing actions in response to the HCP's requests. The iPad is now making e-detailing just a variation on a basic sales presentation. And although live video is beginning to be available (including through the use of Apple Computer's FaceTime software), that functionality is not quite ready for prime time.

"There's interest in this, but the technology is not quite there yet," says Cegedim's Singhal.

"The ease of use of the iPad improves communication between rep and physician, allowing the rep to spend more time speaking with the physician rather than speaking 'to' the computer," says Chirag Desai, VP of IT at PDI, Inc. (Parsippany, NJ), a contract sales organization serving life sciences companies. "Video detailing has been tried, but we're not seeing a high adoption by physicians (who would presumably be on the other side of a FaceTime call), and thus there hasn't been much demand from pharma companies."

PDI has been a longtime user of Veeva, and Desai says that PDI has developed some of its own CLM and analytics capabilities to work in concert with the Veeva platform. The company also has an in-house agency, Group DCA, that assists in content development and content-based analytics.

Publicis Touchpoint Solutions (Yardley, PA), another contract sales organization, is also an avid Veeva user. Rich Keefer, president, says that some of its pharma clients have used their sales agreement with Touchpoint as a way to pilot the iPad-based Veeva platform, and then went on to become Veeva customers themselves. He also sees considerable potential in the real-time video potential of the iPad: "The advantage is that the HCP decides when to engage with a rep; we're fitting into the HCP's schedule, rather than the other way around." He envisions a future "hybrid" rep, who spends part of the week making face-to-face calls, and part of the week interacting remotely with clients.
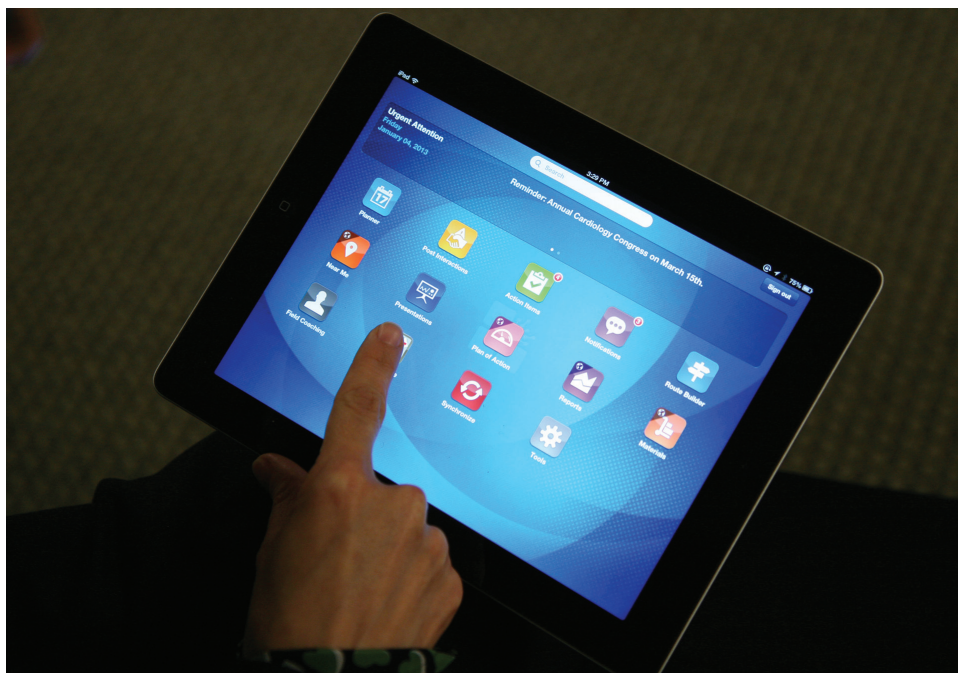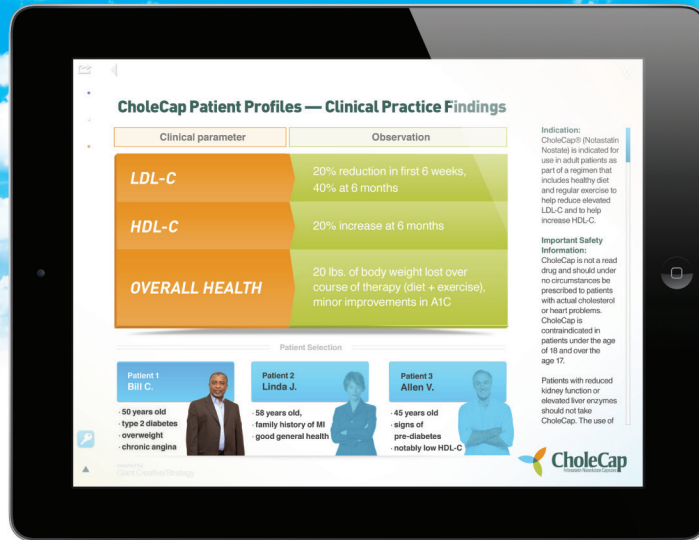

Fig. 4. Cegedim offers its CRM solution in iPad (pictured), smartphone and desktop versions. Credit: Cegedim

Big data analytics

While the iPad has brought dramatically new capabilities into sales interactions, there are complaints that the ability to produce or even simply display analytics coming from deep data analysis is limited. All the vendors mentioned have greater or lesser degrees of reporting functions and some level of analytics, but there is a desire to bring the full depth of business intelligence resources into the rep's tablet display.

That's the goal of Trinity Pharma Solutions (Waltham, MA), specializing in business intelligence in pharma marketing and sales. The company is introducing a new product, Agile M, as "the first mobile analytics platform designed specifically for life sciences," according to the company. Zack King, co-founder of the company, says that the company has spent the better part of a year developing analytics-presentation capabilities written in HTML5 (the preferred coding language for the iPad) but "light" enough to be used effectively on an iPad, given its data-processing limitations (Fig. 2).

"Our data engines capture everything relevant to pharma marketing known to man, and we've been doing high-level data visualization for a decade," he boasts, noting the company routinely integrates scrip data, inventory or channel transactions coming from wholesaler/distributors, payer formulary rules, group purchasing organization (GPO) contracts and other sources. "You get the 360° view when you stitch all these together," he says, "but in many CRMs, if these analytics are available at all, they tend to be a large array of confusing one-off charts and data sets. We've created a dashboard-type view that presents these data in ways that are meaningful to the rep in the field." PCm