

By Robin Robinson

GLOBAL LAUNCHES

A shifting market landscape requires new strategies for global launches.



though brand success is rooted in science and data, communicating evidence to many varied stakeholders grows increasingly complex in a global market.

“Information silos, for instance, make it difficult for teams worldwide to access the latest claims, content, and messaging,” Mr. Shawah says. “This means that each region often creates entirely new assets rather than adapting core materials, thus increasing cost, complexity, and the risk of propagating inconsistent claims.”

Striking the balance between developing a clear, consistent story while enabling regions to adapt materials based on local needs remains a challenge.

With the level of variability in different markets, ranging from language to treatment and cultural paradigms, marketers must ensure messaging is locally relevant while still aligning with global themes and data.

“Another key component to delivering globally harmonized campaigns is leveraging a single source of truth for commercial content across the digital supply chain,” Mr. Shawah says. “This helps ensure that all geographies are using the latest, approved claims and minimizes the risk of outdated information. Starting with a base of core assets that can be modified for local conditions helps ensure consistency, while freeing marketers from the time and cost of creating new content for each use.”

Organizations now have the technology to be able to sync core claims that are driven by the scientific platform related to a brand. Regional marketers can then leverage the core claims associated with the brand and deliver those to their geographies that make sense based on market, regulatory, and cultural requirements, as well as local patient demographics.

According to Mark Degatano, consultant

Most of today’s new therapy launches are global, but the strategy behind those launches has changed significantly, due to the advent of more specialty drugs targeting smaller populations, and the impact of the shift in decision making from physician to payer. The industry can no longer rely on physician promotion only for a successful global launch.

As the life-sciences industry continues to expand into new markets globally, companies are challenged with balancing the need for coordinated global strategies and local flexibility. Because each geography has its own linguistic, cultural, and market profile necessitating an individualized approach, having the business flexibility and agility to respond quickly to change is crucial.

According to IMS Health, in the last decade, the pharmaceutical industry has seen extremely rapid changes in the environment for new launches. Understanding how the environment has changed and what this means for today’s launches is a vital launch preparation activity.

“However, some companies are still stuck on inflexible, aging legacy systems to support

FAST FACT

TWO-THIRDS OF A SAMPLE GROUP OF DRUG LAUNCHES FAILED TO MEET PRELAUNCH SALES EXPECTATIONS FOR THEIR FIRST YEAR ON THE MARKET.

Source: McKinsey

areas most crucial to a successful launch, including customer relationship and content management,” says Paul Shawah, VP of product marketing, Veeva. “Content and customer information is disconnected, trapped in separate systems, making it difficult for commercial teams to tailor messaging to customers’ preferences and interests.”

The fragmented landscape of medical and promotional content also increases cost and complexity while limiting visibility. Al-

How Technology Is Influencing Global Launches

Digital tools allow for better targeting of customers



ERIN BYRNE
Chief Engagement
Officer, GHG

Technology brings both opportunities and challenges. Information created for one country is available to all others, which means messaging must be as consistent as possible across boundaries.

I did a series of interviews for a client a year ago for a brand that had been launched in the United States and was preparing to launch in other countries. I asked a physician from a European country: "What will you do when the patient asks you for more information on this product and the pharmaceutical company is not allowed to communicate directly to the patient?" The physician said: "I'll just send them to the U.S. website."

So, it's no longer enough to create a set of messages and standard launch materials and be done. Marketers need to think about their products more like consumer brands and think about the overall experience of the product and the brand.

Another opportunity lies in that the Internet can be viewed almost as a real-time focus group, so customizing messaging for different markets can be done in real time by reviewing how patients access content, how patients are talking about their disease, how they're talking about their treatment, and what is most important to them.

Using technology to facilitate messaging research in this way can result in having feedback in a week versus several weeks from the methodology used 10 years or 15 years ago.

MARK DEGATANO
Consultant, Verix

The ever-growing importance of the patient in treatment decisions is further reinforced with the



explosion of information tools, website, devices, social media, and increased patient accountability.

The result is that the commercialization models have to be better designed for quickly

adapting to new changes as they emerge. Big data has to turn into big action. Fast action has to become faster action because the competition continues to intensify and there is no end in sight.

Fortunately, new analytic and reporting solutions are emerging to help commercialization teams transform big data into action. These technologies can optimize data assets and provide sales and marketing personnel with easy-to-use tools that enable them to analyze their particular situation, such as identifying which physicians are most important right now, and act on the insights.

Furthermore, new solutions are emerging that provide transparency to account and sales teams regarding the performance of market access campaigns. This common platform approach provides the collaboration needed to drive more effective pull through, because everyone is on the same page instead of pointing fingers.

While sales calls are still a functional marketing channel, there's a clear shift to receive information on new pharmaceutical products through online communications, whether emails, online database, or other digital media.

In fact, pharma companies are now sending almost 50% more digital messages than the number of personal face-to-face calls. With the younger generation of doctors using the Internet as a data source and for communication purposes, this marketing strategy should have worked wonders for the pharma industry.

But doctors are so bombarded with marketing

messages from the industry that they gradually ignore them, fulfilling pharma marketers' worst nightmares.

The best way to win physicians' hearts is by tailoring a unique marketing and sales contact for them. With meticulous metrics and accurate analytics of physician contact preferences, pharma companies can approach each physician with the best-suited tactics.



PAUL SHAWAH
VP, Product
Marketing, Veeva

More and more, life-sciences organizations are evolving the customer journey. Technological advances in the digital space, including the growing use of data science, are allowing the pharmaceutical industry to start the transition away from mass promotion to a more diverse and intelligent way of customer engagement. But this requires distilling all of the data into genuine customer insights that sales and marketing teams can act on quickly.

Across the healthcare landscape, physicians, patients, and other stakeholders expect the same experience with pharmaceutical companies that they have as consumers in every other aspect of their lives. They expect to receive the right information, on demand, through the channel of their choice — and this channel is increasingly digital. Another factor driving the prevalence of digital in the launch space is the growth of specialized drugs. The rare disease space requires continued focus on digital tactics, because building and nurturing a relatively small community of patients and often spread around the world is so key to these audiences. Digital can help create and nurture that community efficiently.

and an advisory board member at Verix, the differences in healthcare systems, patient populations, and underlying treatment paradigms can be significant challenges across countries; however, in some ways, the world has become smaller with the sharing of information, the availability of healthcare-related

technologies and websites, and the widespread and rapid diffusion of medical and scientific discoveries.

"Global commercialization today requires a greater skill in developing the product positioning and key-selling messages that meet the needs of local markets while also supporting

the product worldwide," he says. "Marketers must deeply understand the features of their products, ensure that they have fully captured the needs and perceptions of relevant audiences across countries, and then craft the benefit statements that best align product features to their customers."

Using technology and digital channels to drive physician behavior worldwide, marketers are leveraging databases that capture the influence networks among and across physicians. Marketers can identify physician influencers at local levels, in contrast to the KOLs who are international or national influencers, and activate their sales and marketing efforts to deliver messages via these physician connections at the territory or district level.

Getting input from stakeholders in the various localities early in the game is extremely helpful for streamlining the launch process, says Erin Byrne, chief engagement officer, GHG.

“When doing a global launch, one of the things we find to be helpful is getting involvement and alignment from colleagues in other regions early on because we can then pull those opinions into the global brand platform. This can potentially minimize customization and reworking down the line.”

Creating this type of coordinated launch requires collaboration between all customer-facing teams, including medical affairs, sales and marketing, and market access, which will result in more orchestrated customer experiences, Mr. Shawah says. “Traditional methods of sourcing stakeholder data — in which each team acquires demographic lists

of active KOLs in each territory — will no longer suffice,” he says. “Today, achieving competitive advantage will hinge upon having a single, global source of stakeholder information and unique, qualitative insights.”

For instance, understanding stakeholders’ clinical interests, sentiments, and attitudes toward particular therapies can make the difference between delivering a valuable customer interaction and missing the mark with generalized outreach.

“The challenge becomes if there are messages that are different market to market, it’s important to make sure that there’s a very logical reason for this strategy,” Ms. Byrne adds. “The Internet levels the playing field, so to speak. At the same time it’s important to not create confusion or conflicts in the messaging.” ^{PV}

Editor’s Note: This is an excerpt from the article that was published February 2016. To read the complete article, go to: <http://viewer.zmags.com/publication/c453cb3c#c453cb3c/34>



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PAUL SHAWAH
Veeva

Key Challenges to Global Launches

More than ever, companies must seek to eliminate avoidable inconsistency in the execution of their launches, because every launch, and every country within a global launch plan, will count.

This is a consequence of:

- ▶ The trend to a larger number of smaller launches in shorter spaces of time, in other words, a higher intensity launch environment, and
- ▶ An indefinitely restrictive launch environment in the European countries that constitute five out of eight key mature launch markets, meaning that, while these countries still continue to be very important to launch, companies have to seek ways to make other markets, such as pharmerging markets, matter more.