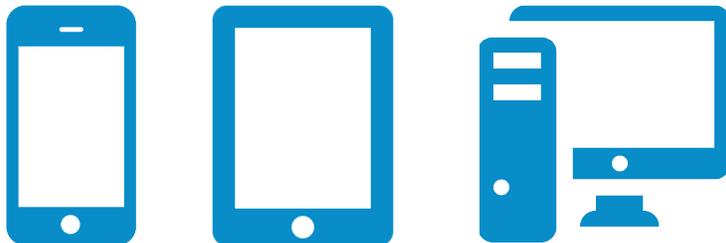


WHITEPAPER

The New Rules of HCP Engagement:

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5 Strategies to Consider in an Evolving Pharma Landscape



Pharma's Evolving Landscape

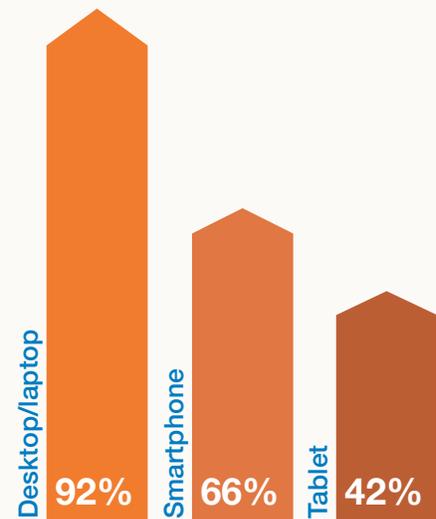
Fewer In-Person Connections,
Plentiful Digital Opportunities

The ongoing digital pharma evolution is hardly news; it's been unfurling over the past 10 years. While pharma representatives still play a vital role in this changing industry, they no longer dominate the medical marketing landscape. Sales reps have seen their impact diminish as hospitals and healthcare practices restrict access. In fact, when Healthcasts surveyed its member physicians, we found that nearly 50% of HCPs could "imagine a world without a sales rep." Even as some doctors continue to be receptive to sales reps and other items from the "traditional" marketing toolbox, there is a growing recognition that targeted, cost-effective digital promotions can be used in conjunction with traditional tactics to drive an even greater ROI.

Consequently, pharma marketers increasingly focus on digital media, albeit at a slower pace than other industries. eMarketer, which reports on trends in digital marketing, forecasts that US healthcare and pharma

marketers will spend \$1.64 billion on paid online and mobile advertising this year, compared to \$1.43 billion in 2014. This figure is expected to rise to \$2.55 billion by 2019. The shifting focus to digital media largely reflects HCP preferences for electronic communication. Multiple studies have shown that HCPs turn first to digital sources when seeking clinical information to inform their decision-making. This fact is especially apparent when examining usage patterns for smartphones and tablets for new drug information and research. According to our most recent research on HCP device usage, two-thirds of HCPs now use smartphones for work, and over 40% use

Fig 1.



Q. How often do you use the following devices for work? (regularly or often)

Sources: Healthcasts 2015 Physician Voices Study; 46% of HCPs say that they can "definitely" imagine a world without sales reps; n=900

eMarketer: Can Digital Ad Spend in the US Healthcare and Pharma Industry Catch Up? May 26, 2015. <http://www.emarketer.com/Article/Digital-Ad-Spend-US-Healthcare-Pharma-Industry-Catch-Up/1012526>; Healthcasts HCP Digital Education Survey October, 2015: n=399

tablets for this purpose. (See Figure 1) Even as there is an increasing realization that digital solutions can enhance traditional marketing efforts, creating a marketing plan with optimal reach, frequency, and cadence across multiple channels is a difficult task. More difficult is aligning your messaging strategy to the varying ways physicians prefer to receive information and their individual practice needs. The challenge is disseminating content to educate physicians in the most engaging way, without bombarding them with messaging.

More Information to Share, More Information to Receive

Pharmaceutical companies have overwhelming amounts of information on the treatments they manufacture as well as the diseases they treat. In fact, in the past few years the FDA has approved record numbers of new therapies, resulting in even more information to share. In March 2014, McKinsey & Company estimated that pharmaceutical companies would launch approximately 400 new products over the following three years — an increase of 146% from 2005. Additionally, many new drugs are coming to market faster, largely thanks to the FDA’s “Breakthrough Therapy” designation, which facilitates approval of treatments for particularly

serious or rare conditions. These drugs, primarily prescribed by smaller cadres of specialists, are all fighting for share of mind, share of voice, and share of market.

And yet, not everyone is convinced that the explosion of new drug approvals is a good thing. In his recent essay, “The 21st Century Cures Act: The (Somewhat) Good, The (Mostly) Bad, and The (Very) Ugly,” Dr. David H. Gorski voices the concern that faster, more numerous approvals may lead to lowered standards for providing drug safety and efficacy information. As greater numbers of drugs are approved more quickly, HCPs will need to examine clinical data more closely to make informed judgments regarding a drug’s safety and effectiveness for each individual patient.

Physician discretion and experience will therefore play an even more important role in patient care in the unfolding Accelerated Approval era. It will become increasingly important for HCPs to quickly access newly published clinical data so their assessments can evolve in real time. For new drugs to help patients most effectively, the industry will need to improve how it educates physicians and provide up-to-date clinical trial data and prescribing information.

These trends should drive a different marketing mindset for addressing the

need for rapid education. Ideally, this new mindset should find synergies between traditional marketing approaches and digital non-personal promotion (NPP). The question is, how do pharma manufacturers decide which tactics will supplement their traditional marketing programs effectively? How do existing assets work in a digital world? How is tactical selection impacted at each point of a brand's lifecycle? More importantly, how do you guide the physician journey from introduction to influence?

The New Rules of Engagement

The Internet has empowered doctors to use multiple devices to access innovative online platforms and self-learning tools to get important information on disease states and medications. These new vehicles are a strong complement to sales reps as purveyors of key information. The kind of

information physicians need has not changed – it's the format, timing, and delivery of that information that have changed.

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To truly educate doctors, it is vital to provide them with rich content while they are researching new drugs and learning from influential opinion leaders. This is the point at which they are ready to engage with your brand. What's needed is a comprehensive messaging framework across a cohesive ecosystem of traditional marketing tactics and innovative NPP. Finding this synergy depends upon adhering to the following "Rules of Engagement."

1

When, Where, and How Matter, More Than Ever

Physicians today are overworked — tasked with seeing more patients in less time and managing a thicket of government regulations and payor paperwork. In fact, 81% of physicians surveyed by the Physicians Foundation said they were over-extended or at full capacity. HCPs are expected to manage more responsibilities than ever before — from making diagnoses

Source: 2014 Physician's Foundation Biennial Physician survey http://www.physiciansfoundation.org/uploads/default/2014_Physicians_Foundation_Biennial_Physician_Survey_Report.pdf

and providing treatment to ordering tests and updating documentation. This new generation of time-constrained HCPs have less time to gather and digest the copious amounts of information available to them. In fact, our Healthcasts member physicians tell us that they generally engage with our content in the evening (from 6 to 9 p.m.) when they are able to dedicate time to learning about emerging research and treatments.

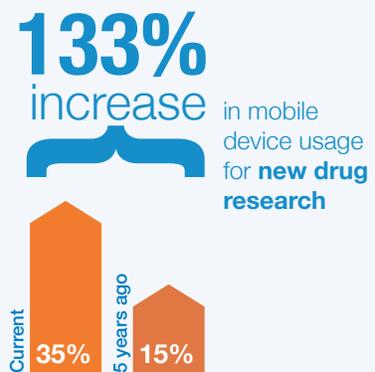
This fact underscores the point that time is of the essence, and that marketers must create content that doctors can discover and absorb at the right time. For physicians to engage with your brand at a higher level, it is folly to vie for their attention at the height of the workday.

But it's not only the "when" that matters. "Where" is at least as important. The astute marketer is one who delivers content in the right place, as well as at the right time. When applicable, you can use geo-targeting to target physicians by zip code, region, or state. Alternatively, you can roll out geographic campaigns over time to align with your strategy. Geographically focused campaigns are especially effective as a means to complement formulary approvals, to align with regional MSL or sales rep regions, to promote around specific institutions (especially where HCPs have been certified for a specific procedure), or to "surround" referring physicians near your target specialists.

It should go without saying that "how" also matters: You need to deliver content on the right platform – all of them.

Multi-screen engagement is the most effective way for doctors to access content. Research suggests that nearly 63% of HCPs are now "triple screen" users. Additionally, our most recent Healthcasts research demonstrates that physician use of smartphones and tablets to access information about new drugs has increased 133% over the last 5 years. (See Figure 2)

Fig 2.



Q. For learning about a new drug, please allocate the percent of time you use the following devices: iPad/tablet & smartphone.

As pharmaceutical marketers begin to innovate more often with content creation—offering multiple formats, from short and long form video, to interactive self-learning experiences—it will become increasingly important to provide access via the multiple devices physicians use, in the environments they find most convenient.

2

The “What” Still Matters Most

A marketer’s biggest challenge is engaging physicians longer and more meaningfully with information that informs practice decisions. In a world of 6-second Vine videos, 140-character Tweets, and 10-second Snapchats, many companies are making their content more concise to meet consumer demand. That poses a special challenge for pharma, which is constrained by legal requirements for fair balance.

To move doctors from “informed” to “influenced,” pharmaceutical companies must still deliver—and physicians still desire deeply engaging educational information, whether in the form of disease information or branded content, to help HCPs understand new treatments and make better diagnostic and therapeutic decisions. But no matter its length, content must offer real value to the physician, as that is what promotes meaningful clinical activity that ultimately helps patients. Content that works should be factual and academic in tone, focusing on the long-term benefits of specific treatment options. After all, science resonates best with HCPs.

Rich, robust content will position your brand as a credible resource. Whereas banner ads might get noticed in the moment and generate immediate awareness, they are imprecise in that they reach an audience that is much broader than your target list of physicians. More importantly, banner ads typically don’t

provide enough information to impact doctors' long-term prescription-writing behavior.

You must engage physicians on a deeper level, using your content to drive them through the funnel faster and more effectively. As an online medium, video is extremely effective for showcasing detailed data, mechanism of action (MOA) illustrations, key opinion leader (KOL) interviews, and other educational content to help physicians understand new treatment approaches, drug-drug interactions, and long-term effects on patient care. Our most recent research on HCP education demonstrates that for learning about a new drug, HCPs were twice as likely to watch an online video today than they were 5 years ago. For marketers with a trove of video content, finding interesting ways to repurpose that content—whether filmed for digital distribution or for other purposes—will prove impactful if optimized for the HCP's viewing environment.

Video, however, is not the only medium for delivering valuable content.

KOL-led discussions and commentary, detailed PowerPoint presentations, MOA graphical representations, and whitepapers are all conducive to deeper engagement with physicians, and are easily optimized for digital consumption.

Our most recent research on HCP media usage demonstrates that for learning about a new drug, HCPs were **twice as likely** to watch a video today than they were 5 years ago.



Source: Healthcasts HCP Digital Education Survey, October 2015: n = 399

3

Content Must Be Results-Driven

Data collection and analysis are essential to a successful campaign. Different kinds of research should be employed throughout a campaign to measure and assess message delivery, and to analyze the campaign's results. Such assessment should be done routinely in order to gauge your target audience's perception of your messages and secure their feedback. As the saying goes, "Ask not what your HCP can do for your company..."

As a research tool, qualitative measures (e.g., pre-survey focus groups, phone interviews, surveys of medical congress attendees) can provide insights that otherwise may remain hidden, and are particularly useful for gauging physician receptivity to new ideas, especially if the questions are open-ended, and if the insights gathered are from influential KOLs.



Campaign-based research using quantitative surveys can validate the relevance of key messages and benefit statements that drive your content creation plan.

Quantitative surveys can substantiate learnings gleaned from qualitative results by providing deep insights into longer-term marketplace trends, as well as to test hypotheses or to demonstrate changes in HCP behavior. Campaign-based research using quantitative surveys can validate the relevance

of key messages and benefit statements that drive your content creation plan. Quantitative survey research can also be a strong predictor of ROI – the ultimate demonstration of success.

Regardless of the types of measurements used, research should answer the following types of questions about what the campaign seeks to accomplish:

- **Which types of HCPs are consuming the information?**
- **Which pieces of content are preferred across the target list and by distinct physician segments?**
- **What educational gaps still remain?**
- **Has engagement with the information led to more desirable behaviors such as change in practice behavior or prescription writing?**

Answers to those questions can provide ongoing feedback to hone messaging even as the campaign continues to unfold. The feedback can also reveal insights over time, such as treatment trends that can inform future marketing efforts.

Deeper data, derived from interactions at the physician level, are also highly valuable if protocols for data analysis are put in place at an organization level. Insights shared from such interactions are potentially the most valuable, as they can help to inform efforts across your multi-channel marketing plan. For example, data collected from physicians who view an MOA video can be used to prompt sales reps to follow up with those physicians and provide them with more detailed MOA information.

4

Create Memorable Interactions with Multiple Touchpoints

Of course, it's not enough to hit your targets with a single impactful message. To make a campaign truly resonate with your audience, you need to create a story arc across multiple touchpoints, enlivened with refreshed data. Repeated engagement with your targets can help establish a true ongoing dialog, enhancing the impact and consistency of your interactions. This can be done by leveraging multiple formats of your existing assets including interactive learning programs, quizzes, slide decks, videos, texts, and self-directed learning modules with multiple tabs for information on topics such as product efficacy, safety, dosing, preclinical data, and supporting literature. Working in multiple media, you can re-post or re-package content at appropriate intervals to reinforce your messaging. In an analysis of nearly 2,000 HCPs who viewed promotional content from two distinct campaigns from the same brand on Healthcasts, dual engagement with both programs resulted in a 4-fold impact

Source: Healthcasts Breast Cancer Campaigns 2015. 1898 physicians watched two programs. 1389 physicians watched one program. Clients' target lists were evaluated after each program to measure tier changes. These same lists were used across all of the client's marketing initiatives.

(24% vs. 6%) on HCP script volume compared to those who engaged with only one program. (See Figure 3)

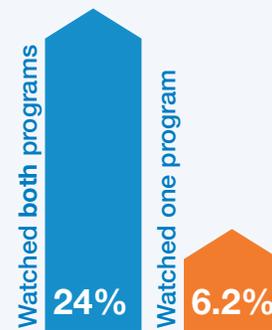
Creating content to work across your marketing plan doesn't have to be a regulatory nightmare. In the new world of multi-channel marketing (MCM), you can optimize existing print assets for other media. After all, once copy has been approved, it doesn't take much time or effort to secure medical/legal/regulatory approval in a different format.

Detail aids and other sales force materials can be made more visually compelling and interactive with voice-over capability, as can patient profiles, which can incorporate digital "quiz" elements to bolster their educational impact. Additionally, an approved KOL slide deck can be leveraged as the "script" for a deeply engaging educational video, a series of videos or an engaging self-learning module. The possibilities extend to telesales scripts, whereby you can digitally reproduce the phone "algorithm" with approved messaging.

Once you have a body of content that highlights your key messages and brand benefits, it can be rolled out to complement your segmentation strategy and aligned to specific HCP needs. For instance, you can use digital tactics to promote clinical data as soon as they are available, maximizing the impact of particularly noteworthy results. This approach may be particularly effective with specialists who are already familiar with your brand, whereas a digitized hypothetical patient profile may help PCPs identify appropriate targets for treatment or referral. Product labels, once approved, can also be presented and disseminated digitally, and should find a receptive audience among physicians eager to see your product information.

In short, creating resonant, meaningful interactions with HCPs is a matter of maintaining continuous dialogue with these practitioners. You therefore need to craft consistent, personalized experiences across multiple touch points, making judicious use of targeted, sequential messaging.

Fig 3.



24% of physicians who watched both Program #1 and #2 moved up at least 1 Rx tier in the client's target list.

5

Build Trust

Just as the physician-patient relationship is built on trust, the success of your marketing campaign depends on establishing trust with your target physicians. After all, trust is the main mechanism and moral guide that physicians use to measure the credibility of your content and the potential effectiveness and safety of your treatment. Furthermore, in today's healthcare environment, trust is a commodity in limited supply, one that has eroded in the face of increasingly restrictive marketplace trends. Indeed, many doctors feel they have lost some authority in picking medicines, as health plans have learned to wield co-pays to steer use of certain drugs.

To restore physicians' trust, you need to empower them by giving them the information they need via platforms they feel comfortable with. Choosing the right platforms for communicating with physicians is largely a matter of aligning your brand with KOLs, medical specialty societies, and/or patient advocacy associations. These entities imbue your messages with credibility. Chances are, many if not most of your target physicians already get much of their information from these sources. To the extent that you can collaborate synergistically with these individuals and organizations, you can strengthen delivery of your messages.

The value of KOLs as message-deliverers cannot be overstated. As voices of authority in their fields of discipline, KOLs can be leveraged to boost your brand's credibility and to summarize complex information into important takeaways. Whether

Fig 4.



Q. How likely are you to prescribe a new drug if it's endorsed by a Key Opinion Leader (KOL)?

packaged as independent editorial content or within brand messaging, input from KOLs carries considerable weight among practicing physicians who look to these experts for unbiased, clinically useful medical information. The power of KOL support is illustrated in Figure 4, which suggests that 84% of physicians are likely to prescribe a new drug if it's endorsed by a Key Opinion Leader. In addition to leveraging KOLs at the national level, KOLs with regional stature can be deployed in key geographic areas to address localized issues. Similarly, data presentations by prominent KOLs at medical congresses can be promoted to local physicians in the markets where the meetings take place. Moreover, KOL-driven content can be leveraged via multiple channels to reach other audiences including payors and regulators.

It should go without saying that maintaining relationships is a key component of trust-building. No one appreciates being the target of scattershot marketing tactics, and physicians are no exception. Targeting lists of HCPs that have been compiled by third-party vendors can do more harm than good. This is one area where you can leverage your channel partners to strengthen ties with your target physicians – and with the KOLs whose input they value. Look for partners offering a long history of engaging physicians with unbiased content, top-tier KOLs, and a member-driven approach to marketing. Appropriate partners are conscientious about targeting the right physicians with the right messaging at the right time, and have strong relationships with their members – offering them valuable content they need to improve patient outcomes.

In short, whether you're working with KOLs or collaborating with media partners to maintain your physician relationships, you need to look for platforms that have a sound reputation for clinical accuracy, utility, and unbiased content. That is the key to building trust.

Some Concluding Thoughts

One of the great pluses of working in pharma marketing is knowing that the products we're promoting make a real difference in people's lives. This industry produces and distributes products that save lives and alleviate suffering. And yet, with that status comes great responsibility. To the extent that marketing tactics enhance awareness of the availability and utility of potentially life-saving medications, the greater the benefits to public health. When you, as a marketer, adhere to the marketplace's new rules of engagement to connect and engage with HCPs appropriately and meaningfully, you help to create and nurture the educated physician—a noble endeavor, which will help a greater number of patients in the long run.



About Healthcasts

Healthcasts is the leading educational resource for physicians with an exclusive, verified network of practicing members that spans over 30 clinical specialty areas. Since its inception in 2001, Healthcasts has been leveraging research and member feedback to provide relevant, personalized educational content from more than 50 medical conferences, insights from Key Opinion Leaders and CME programming through partnerships with leading educational institutions. Healthcasts programming is available digitally, on-demand on all devices for an optimized, cross-channel experience.

To learn how your brand can leverage the new rules of HCP engagement on Healthcasts, visit us at healthcasts.com/digitalpromotions or call us at 866-275-7861 ext 2028