



Updating Engagement Strategies for a Changing Healthcare Market

Surprising
integrations that
move the needle

A PharmaForce 2016 Report

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Executive Summary

As a consequence of widespread consolidation of buying power within integrated healthcare networks (IHNs), Pharma, Medical Device, and Biotech sales and marketing teams are facing information gaps that threaten their sales growth if left unaddressed. Success is now contingent on gaining the right insights and using technology to close these gaps and to keep pace with the evolution of the market, but many are still unsure of how they should react.

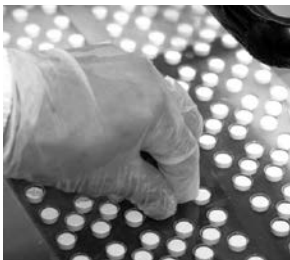
In order to shed light on which activities are driving the most effective engagements with individual healthcare providers (HCPs) and integrated healthcare networks (IHNs), this report analyzes the responses of 91 life sciences sales and marketing executives, and includes qualitative interviews with industry thought leaders. With a need to understand where their efforts relate to their peers, respondents detailed where data, communication, and technology challenges are holding them back, as well as which tools and techniques they are using to successfully engage healthcare providers.

This report uncovers three key integrations that are critical for effective engagement within the consolidated healthcare market. Within this new buying paradigm, the coordination between sales and marketing is more critical than ever. Sales feedback from the field must be harnessed to inform marketing of which assets are the most effective at creating engagement and adding value.

The more this coordination is developed, the more sales will be able to share assets in response to new opportunities. Obtaining the right technology that can streamline the production of these assets and support customization is another vital success factor, which is in turn contingent on closing information gaps that can slow down these processes and lead to lost growth opportunities.



Our research has uncovered three areas where greater integration can supercharge engagement strategies. The first is adoption of more adaptable and easy to use technology solutions. Both sales and marketing have a clear desire for a cost effective, efficient way to create and share customized marketing assets that facilitates acting on sales opportunities more quickly. In fact, 89% of respondents either already have technology to deliver personalized information to key decision makers or wish they did. Speed's importance is equally clear, as 88% of respondents say their sales teams are prompted to act on access opportunities as soon as they arise, or are in the process of developing this capability.



The second is closing critical data and information gaps. One out of every two respondents has felt the effects of information gaps limiting their growth. Whether these gaps occur around IHN decision maker access, formulary information at the doctor level, or individual HCP preferences, they can manifest in unrealized sales potential and delays in strategic execution. Gaining access to the right data presents a major opportunity recoup lost efficiency.



The third is the development of enhanced strategic communications. Communicating which assets are creating engagement in the field is an important part of how sales and marketing can better support each other. However, over half of respondents find that gathering this data is a time consuming process. In order to gain insight on which assets are the highest performing, organizations should focus on streamlining their feedback process with the right technology and also use it for asset utilization reporting.

Featured Contributors

Supplementing the benchmark data and analysis contained in this report, several executives and industry experts have contributed their insight via interviews. Selected quotations have been used to add context and color to the statistical information contained in this document. Interviews centered on benchmark findings as well as key trends identified by research. In addition to these featured contributors, a Senior Director of Marketing and a Director of HCP Marketing representing two leading Pharmaceutical brands opted to contribute quotes on an anonymous basis.



Jennifer Muszik
Director of Commercial Excellence
Roche



Debra Hussain
Senior Director of Marketing - Men's Health Business Unit
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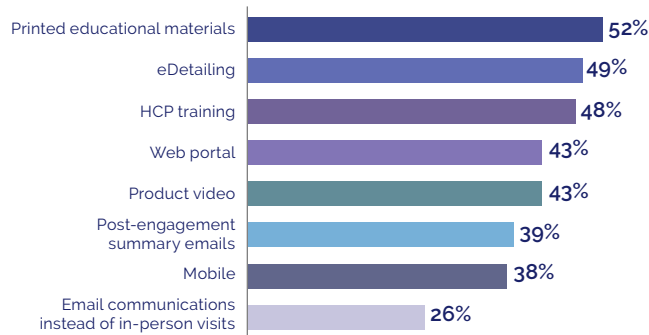


Hayley Bohan
Chief Marketing Officer
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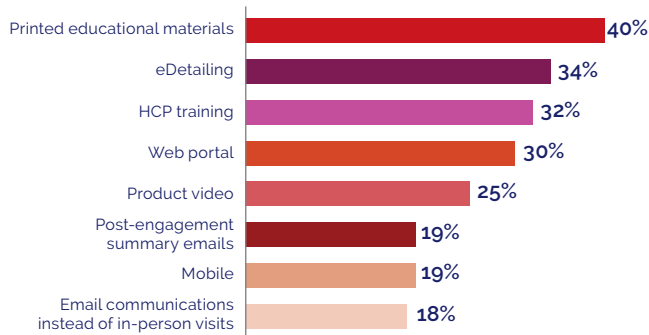
Driving engagement in a market experiencing shifting decision-making powers

Which activities do you feel are most effective for driving engagement? (Select all that apply)

HCPs (Healthcare Providers)



IHNs (Integrated Healthcare Networks)



Despite market changes due to the emergence of IHNs, the use of printed educational materials has remained the most widespread method of creating engagement around a product. For outreach to HCPs, 52% of respondents found them to be highly effective, while 40% rely on them as a part of IHN strategy as well. When survey results were segmented to reflect the distinct preferences of sales and marketing, both departments still agreed upon the continued importance of print. However, apart from printed materials, they seem to be on opposite sides when it

comes to identifying what is most effective for driving HCP engagement. The most prevalent techniques selected by marketing were e-detailing at 61% and HCP training at 54%. Interestingly, these were the least chosen activities by sales respondents with only 21% and 26% selecting them respectively. Because of the reduced amount of face-to-face time sales spent with decision makers, their ability to rely on printed assets is an important foundation of overall engagement strategies.

Contributor Insight

"In terms of which marketing materials would be most effective, it depends. For more established brands, a multi-channel approach may be more favorable. Whether information is delivered via a website or an app on their phone or iPad, it's the customer's choice on how and where they access that information. By contrast, with new to market brands where customers have less experience, having both a multi-channel approach as well as printed reminders at their fingertips would likely be more valuable."

- Jennifer Muszik, Director of Commercial Excellence, Roche

How are marketers preparing for and responding to consolidation of/ changes to buying power in the case of IHNs? (Select all that apply)



Regarding how marketers are approaching their strategies for reaching decision makers within IHNs, less than a quarter (22%) are not modifying their strategies at all. The rest are more or less evenly distributed across a range of techniques, suggesting that most marketers are in the midst of employing several strategies at once.

When survey results were segmented by company size, 32% of small company respondents reported that their marketing has not changed in the face of IHN consolidation

of buying power. By contrast, among large companies, only 8% had not yet made changes. Re-evaluating channels for effectiveness is the most popular single technique for addressing these consolidations. This is followed by the adoption of more data-driven messaging designed to drive specific outcomes, as well as organizational restructuring, putting the right individuals in contact with decision makers in the field.

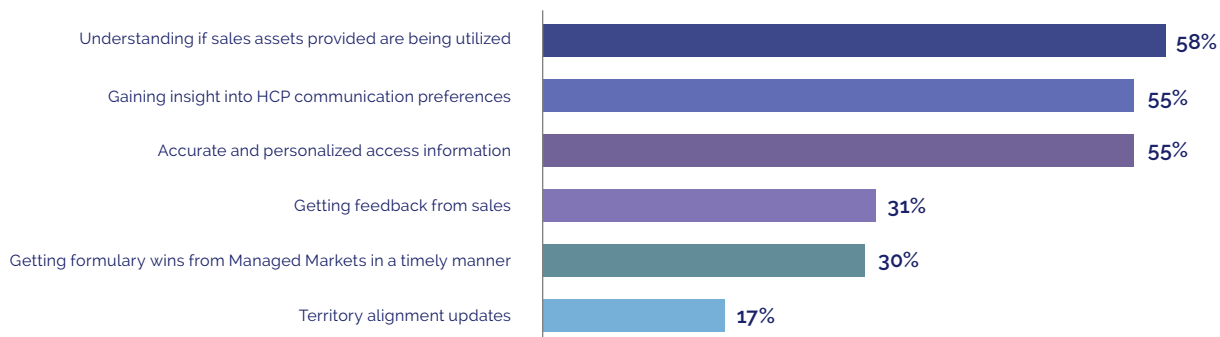
Contributor Insight

"The importance of true integration between sales and marketing will continue to be of major importance in 2016. The evolution of our ability to execute multi-channel marketing effectively is a cornerstone where sales and marketing intersect. We need to better understand the journey that integrated health networks are on. This will likely impact our model, causing us to rethink how we approach the market. We have a common goal, which is to serve the patient in the best way possible. If we can find a way to combine our efforts, then real value will be realized by patients."

- Debra Hussain, Senior Director of Marketing - Men's Health Business Unit, Eli Lilly and Company

Data management and coordination around healthcare provider engagement

What kind of data/ information is the most time-consuming for you and your team to make actionable for use in HCP engagement? (Select all that apply)



When it comes to identifying what kinds of data are the most time consuming to make actionable for HCP engagement, segmented sales and marketing responses align with the general survey data. The two most chosen responses, for both functions, are obtaining accurate and personalized access information and understanding which assets are being utilized. Building strong lines of communication between sales and marketing is an essential component of healthcare provider outreach. When there is a disconnect between what is happening in the field and what marketing is able to perceive, it

creates a scenario where sales is not armed with the optimal materials to do their jobs, and marketing expends time, effort, and resources producing assets that will be ignored. A gap around communications is revealed when response is segmented by company size. While 63% of small companies report that learning whether sales assets are being utilized for HCP engagement is one of the most time consuming types of data to collect, 41% of large company respondents have the same issues, a significantly lower number.

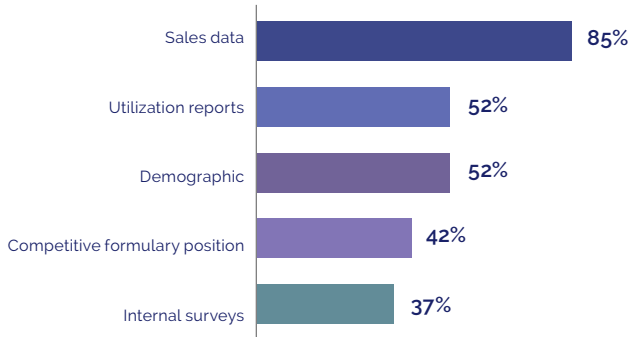
Contributor Insight

"There can be challenges aligning marketing and sales perceptions around collateral pieces. There have been scenarios where a marketer would say, for example, 'we did a focus group of 30 doctors and this is what the focus group said.' To this, a sales leader might respond, 'your focus group does not trump my years of experience being in front of customers.' One is not right and one is not wrong. They're both very accurate in their information. The sales manager needs to remember he is in an individual locality, and the input from a broad section of customers is valuable. Similarly, a focus group can give good insight, but having both sales and marketing's perspectives is truly valuable. If a sales colleague doesn't believe in a sales asset they have been given, there is the potential for increased risk for it not to be used appropriately."

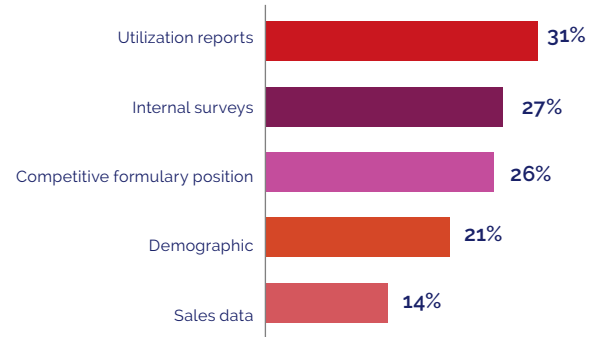
- Jennifer Muszik, Director of Commercial Excellence, Roche

What data types are you using to evaluate the effectiveness of engagement tactics? Which types do you wish you had? (select all that apply)

Using now



Wishlist



Sales data is the primary data type that 85% of respondents use to gauge the effectiveness of their engagement strategies. Supplementing this data, 52% look to utilization reports and demographic data, respectively. Utilization reports are on the wishlist of just under a third of respondents, apart from the need for more visibility into their markets, segmenting the response by function

reveals that salespeople want to be heard. 37% wish they had marketing asset utilization reports to communicate their preferences more effectively, while 30% wish internal surveys were used to evaluate the effectiveness of HCP engagements, bridging the gaps between the feedback marketing needs and what it might otherwise receive from the sales team.

Contributor Insight

"A significant pitfall we have in pharmaceutical marketing is when we approach the market based on our needs alone, without contemplating the needs of our customers. By utilizing affinity databases or developing our own databases, we can understand what's meaningful to our customers and how they want to engage with us so that we can meet them where they are, as opposed to trying to bring them to where we are."

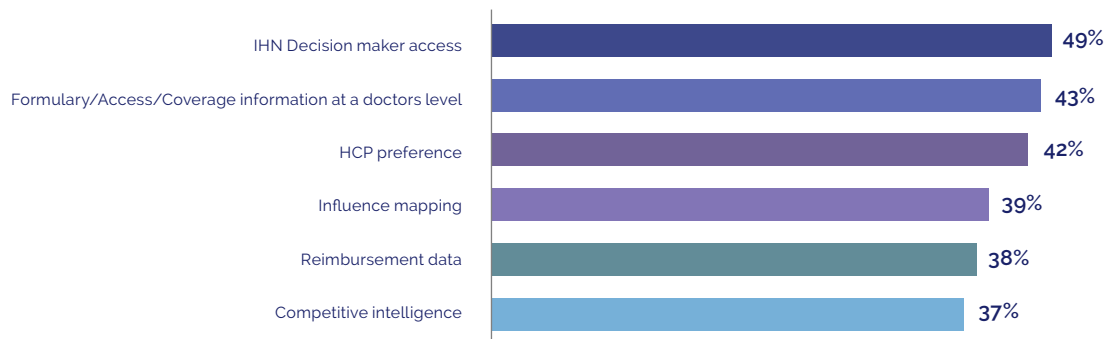
- Debra Hussain, Senior Director of Marketing - Men's Health Business Unit, Eli Lilly and Company

"Finding a way to get feedback in real time is a big deal. There is a common issue in that marketers don't know what is resonating or being used in the field, and the sales team doesn't feel heard. In many cases, the sales team wouldn't even know who to give feedback to if they wanted to."

- Hayley Bohan, Chief Marketing Officer, elandas

Overcoming information gaps to better enable sales

Which information gaps are affecting sales the most? (select all that apply)



Currently, the increased buying power of IHNs is creating challenges for sales team execution, with 49% of respondents reporting that gaps in IHN decision maker access are affecting sales. Formulary information was the second most commonly cited data gap, with 43% of respondents stating that sales is affected by a lack of awareness of their formulary positions. When the response

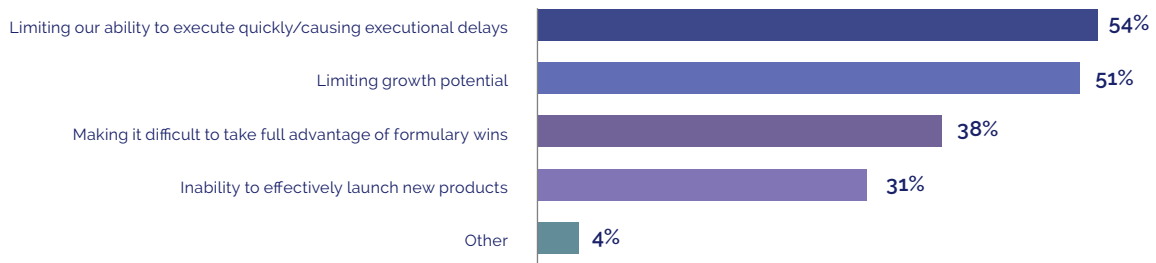
was segmented by sales and marketing roles, sales felt most strongly about sales and marketing roles, sales felt most strongly about competitive intelligence, with 44% selecting it. Marketing cited IHN decision maker access, with 51% placing it as their most chosen concern, though 41% of sales also chose this.

Contributor Insight

"With the consolidation in the market, decisions are moving much further up into organized hospital systems. Understanding who the decision makers are and how to get in touch with them is the million-dollar question. This is especially true because within some IHNs, you might have one committee making decisions on one disease state and a very different committee making decisions on another disease state. The traditional sales representative that is compensated to go out and sell pills may not be the right colleague to identify and engage these decision-makers. The customers are different, so engaging them requires a different skill set. The question really is about identifying who in the organization has been equipped with the right skills and resources to engage these customers."

- Jennifer Muszik, Director of Commercial Excellence, Roche

In which ways do you feel these information gaps are affecting your business? (select all that apply)



When it comes to the negative impact of these information gaps on sales, 54% of respondents cited a limited ability to execute quickly, and another 51% felt that their growth potential was limited. A lack of proper data is a factor that can also hamper the ability to act on formulary wins, which 38% of respondents felt was an issue, while 31% felt that their product launches suffered. Other responses included issues with customization, a lack of insight of which tools were the most effective, and a resulting inability to plan ahead for new initiatives.

When response is segmented by marketing and sales roles, 63% of sales respondents say the information gaps

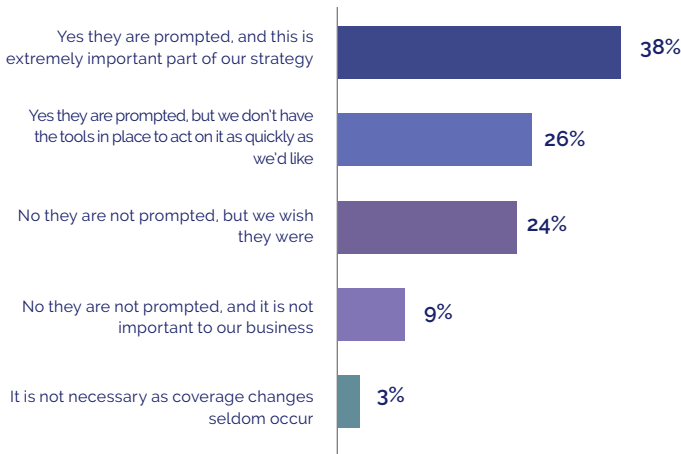
are limiting their growth potential. On top of that, 61% of marketers say they are limiting their ability to be responsive, as well as causing executional delays. These responses reflect two sides of the same coin; on the one hand, sales is impeded from pursuing greater business growth, on the other, marketing has less information that can be leveraged into assets that would help sales with their missions. These challenges can manifest particularly around the quick responses needed for taking advantage of formulary wins, as well as create difficulty with new product launches.

Contributor Insight

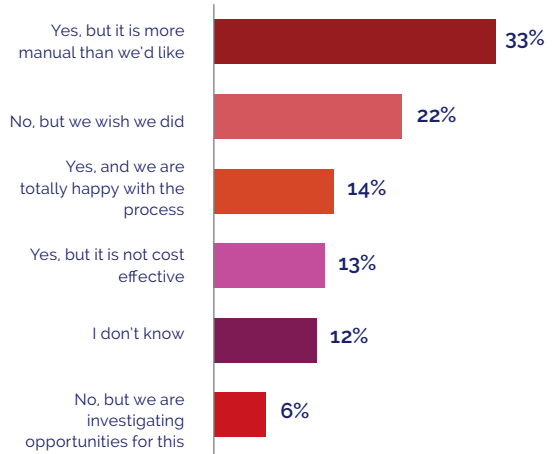
"Sales and marketing teams have an enormous amount of data to sift through. For instance, how a drug is being covered is something that significantly impacts prescribing decisions and the patients' ability to gain access to the drugs they need. The right technology can offer a significant competitive advantage by pulling the most relevant data and offering it up on a silver platter."

- Hayley Bohan, Chief Marketing Officer, elandas

Is your sales team prompted to act on key market access opportunities as soon they arise? How important is this to your business?



If yes, do you have readily customizable assets available to quickly support these opportunities?



One of the most important factors of success within the market is rapidly responding to key access opportunities. While 38% of respondents are prompted to follow up on new opportunities as soon as they arise, and acknowledge that it's a major part of their strategy, a collective 50% are impeded by elements of their internal processes. For 26%, a market opportunity does trigger a prompt, but the

process of acting on it is impeded by technology that doesn't support the level of speed they are looking for. Another 24% are not prompted, but wish that they were. By contrast, only 9% feel that they don't need to be prompted, and a further 3% state being prompted isn't important to their strategies because coverage changes that affect them rarely occur.

Contributor Insight

"Often times Managed Markets teams do not share new coverage information in a timely fashion for fear that it will be communicated in market before effective dates. This means that there is a lag time between when the information is coming in and when usable assets are created and ready to be shared. Having a technology solution that streamlines communication to only the appropriate people at the right time can take some of that fear away enabling teams to take full advantage of all those opportunities sooner."

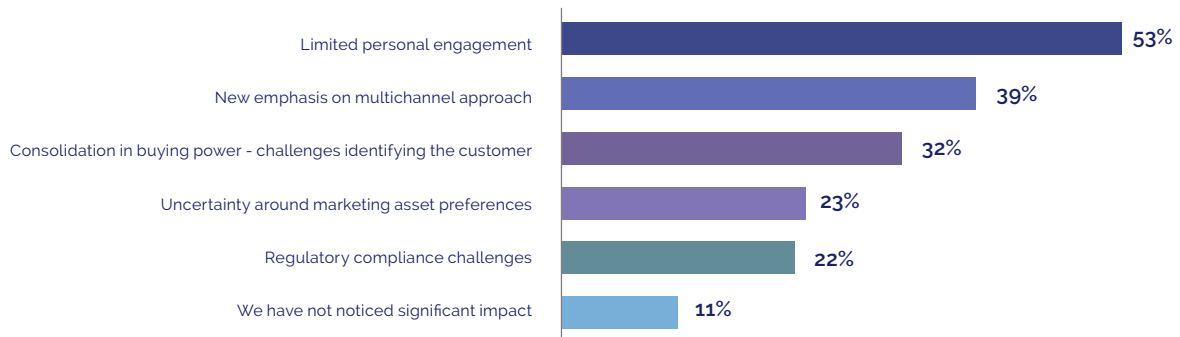
- Hayley Bohan, Chief Marketing Officer, elandas

"The speed with which an organization can react to new opportunities is critical. When you have a favorable decision from a market access perspective, you need to know how quickly you can get in and capitalize on it."

- Director of HCP Marketing

The impact of market consolidation on sales practices

How is the sales rep's communication with HCPs impacted with the emergence of IHNs? (Select all that apply)



For 53% of respondents, sales rep communication with individual healthcare providers has become more scarce, which in turn has 39% reporting an increased adoption of a multichannel strategy. The consolidations of buying power

has the potential to create uncertainty about who the right decision makers are, which challenges just under one in three respondents. Only 11% of respondents have not felt any change in the communication dynamics their sales reps enjoy with healthcare providers.

Contributor Insight

"Healthcare providers both within and outside of IHNs are seeking information from multiple sources, which is driving us to evolve our marketing efforts to be integrated across numerous channels. We need to better understand the challenges they're facing and the decisions they're making. Once we do, then we can better determine what role we have in providing them information, resources, and value that can help them achieve their goals on behalf of their patients."

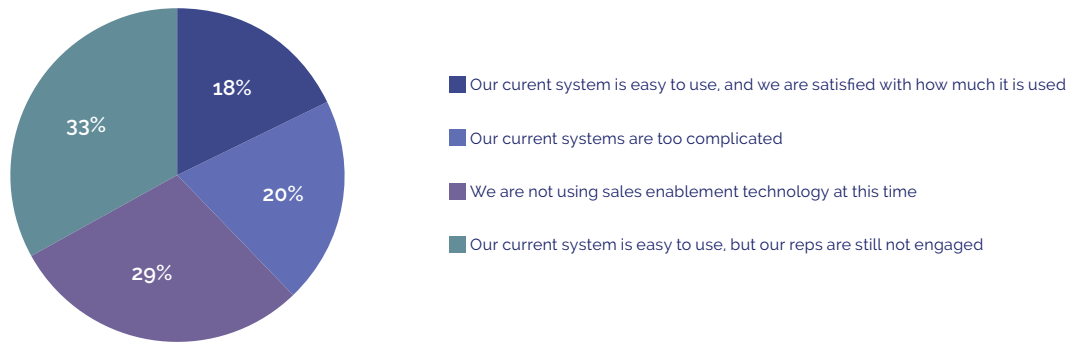
- Debra Hussain, Senior Director of Marketing - Men's Health Business Unit, Eli Lilly and Company

"When you're talking with people in an integrated system, they want to hear about the features and benefits of your products, but they also tend to be more interested in the cost. They're looking at a much bigger price point, much bigger expenditures. Whereas, if you're a solo practitioner, yes, you're worried about the bottom line, but you have to look more closely at the features and benefits of a particular product. We had numerous instances where we would lose bids with large systems just because the pricing we offered was not as competitive, despite the fact that we might have had products that were more convenient and easier for them to use. Usually, the opposite with the case with a smaller practitioner, and they were considering the totality of the product and not focusing as much on the pricing."

- Senior Director of Marketing

Empowering sales with compliant and efficient technology

How would you rate the simplicity of your current sales enablement technology and how important is ease of use to you? Select answer that best fits your current situation.



Data- driven and personalized messaging, being able to act on access opportunities quickly, gaining a better understanding of the competition and of asset utilization, and gathering feedback from the field have all been identified as important for enhancing engagement, and many companies are turning to sales enablement tools to help create the efficiencies and safeguards they need to do it right.

Unfortunately for many, systems in use today were not built to address the challenges of today. Survey results show only 18% of respondents were using the technology and felt that it was working for them. A third felt that they were using intuitive technology, but their sales reps were

still not engaged with it, highlighting a disconnect between the perceived value of the technology and the actual support that it provides to sales.

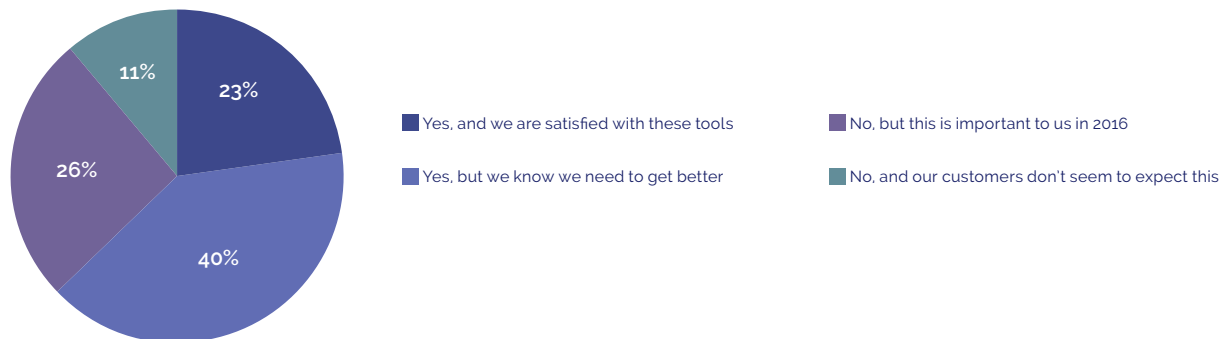
When response was segmented by company size, 34% of small companies report they are not using sales enablement technology at all, whereas only 15% of the larger companies said they aren't using it. While a solution may be easy to use, if sales does not see how it can create value for them, they will not use it, creating both wasted resources and lost potential for gathering insight on their preferences. The ideal solution should be easy to use, with clearly communicated value and the ability to give insight back to marketers.

Contributor Insight

"Ease of use is critical not only from the standpoint that one wrong click could cost you a decision maker's attention in a meeting, but also from the perspective that technology that is not user intuitive will not get used. As the industry continues to evolve at such a rapid pace the need for adaptable technology that can help marketing and sales keep up grows similarly."

- Hayley Bohan, Chief Marketing Officer, elandas

Does the sales team have access to technology tools to deliver personalized information?



Another key benefit of the right technology is the ability to support a higher level of personalization. Sales should be able to share personalized assets, delivering them to the healthcare decision makers they work with in order to contextualize key information and build engagement, however, just under a quarter (23%) are able to do so, while 40% are able but acknowledge that they could be doing it better. Over a quarter (26%) aren't able to

customize the information that they deliver, but feel that it's important to develop that ability in 2016. The ability to quickly customize assets can increase an organization's ability to replicate effective engagement techniques at scale. When sales identifies a high performing asset, that win can be communicated and the asset updated and shared, minimizing the turnaround between discovering an opportunity and acting on it.

Contributor Insight

"In my previous experience, everything we were doing with the customers was customized and written to be specific to their brand and their 'language'. There has to be a level of localization present, and I don't think organizations always do that. It would be great to have a series of presentations ready to go and ready to be customized. Probably the biggest issue holding these back is the level of understanding of a copy review or promotional review committee around why they have to review all these pieces. To me, the sweet spot would be to create something that would fit for purpose and could be quickly adapted by pulling a string or two to make it relevant to a specific local environment.."

- Director of HCP Marketing

Is your current technology meeting expectations around internal compliance?



Apart from speed and ease of use, sales enablement technology for the life sciences must meet the internal compliance standards of the organization. Less than half of respondents (40%) are satisfied by the internal compliance of their current technology. An additional 12% are satisfied, but acknowledge that they must continue to improve their compliance going forward and cannot

afford to slacken their efforts. Though 26% claim that internal compliance is not an area of concern for them, 22% have made it a priority in 2016. Without technology to streamline compliance and approval processes, an organization risks executional delays, or a breach of standards in the event that an asset is shared without having been fully vetted.

Contributor Insight

"Today, in the healthcare industry, technology that supports compliance is a must. Companies should look for technologies that can be configured to enhance compliance through approval workflows and built-in business rules and safe guards. There are a lot of things that are out of our control in the industry right now- having technology that supports adherence to compliance should not be one of them."

- Hayley Bohan, Chief Marketing Officer, elandas



Strengthen the lines of communication between marketing and sales.

Currently, within many organizations there is a communication gap between sales and marketing around which assets are most effective in the field. Formalizing feedback from sales and encouraging adoption of easy to use sales enablement technology can help to close this gap. Oftentimes, sales needs to have the value of an initiative or asset explained, while on the other hand marketing may be removed from the constructive feedback sales can bring them directly from the field.



Adopt solutions that can pare down the time it takes to react to new market opportunities with the right sales assets and information.

Speed has always been a key component of capitalizing on emerging opportunities, and within many organizations, producing customized assets to support new market openings and formulary wins remains a manual and costly process. New solutions can significantly speed up turnaround, and empower sales to share customized assets on a case-by-case basis, reacting to new opportunities in the market with confidence.



Work to fill data gaps that can cause executional delays and hamper growth.

Without an understanding of formulary position, how to reach decision makers within IHNs, and what the preferences of HCPs are, a sales team can be significantly obstructed. Marketers as well need to close data gaps in order to produce the content that can best serve their customers. A focus on closing these gaps will serve both teams, and contribute to business growth.

Methodology

The results analyzed in this report were gathered from responses to a digital benchmarking survey delivered to members of the PharmaForce email database in Spring of 2016. 91 executives responded to the survey. Respondents included a mix of sales and marketing

professionals from Pharma, Medical Device, and Biotechnology companies. Interviews with sources were conducted after survey data was compiled, and centered on discussion of benchmark results.

about



elandas is a fast growing technology innovator specializing in highly configurable data management and marketing on demand solutions for the global Life Sciences industry.

elandas provides users with layered data views and executive dashboards that enable key stakeholders to react in near real time to today's evolving regulatory and insurance landscapes. The company's leading edge technology changes the way people work by enabling

them to blend and verify vast quantities of information from across organizational silos and easily integrate third party data for actionable market insights. The elandas platform makes it simple for Marketing and Sales teams to quickly create customized and compliant marketing materials.

For more information, visit www.elandas.com or contact us at 1 (855) 435-2632.



WBR Digital connects solution providers to their target audiences with year-round online branding and engagement lead generation campaigns. We are a team of content specialists, marketers, and advisors with a passion

for powerful marketing. We believe in demand generation with a creative twist. We believe in the power of content to engage audiences. And we believe in campaigns that deliver results.