

Service Review

Building the “New” Pharma Physician Marketing Model

MedTera’s “Life Long Learning” Platform

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Physicians today are likely to receive drug information from a variety of sources and more often than not these sources are accessed via the Internet. Devices such as the iPhone—and soon the iPad—will make it even more convenient for physicians to receive online content.

About 45,000 doctors meet with detailers using online video, and 300,000 physicians say they are open to doing so, according to a September 2008, study from Manhattan Research. At the same time, pharmaceutical companies are paring back the number of sales reps from a high of about 102,000 reps in the field in 2007 to a projected 75,000 in 2012 (see Figure 1, below).

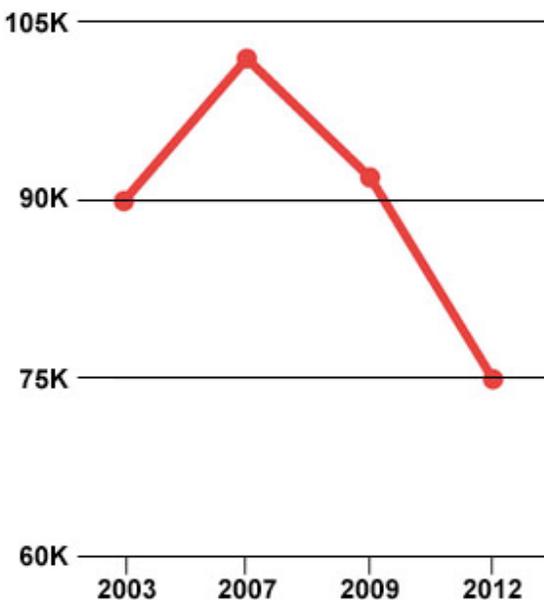


Figure 1: Number of Pharma Sales Reps Past & Future

Upsurge in eMarketing

In this new environment, eMarketing—also called non-personal promotion (NPP)—should be considered a tactic with unique advantages. This is undoubtedly a growing tactic in the marketing mix for all companies, pharma included. According to a recent report from the Center for Media research, an Econsultancy survey, conducted in association with ExactTarget of more than 1,000 marketers, found that 46% of companies plan to increase their marketing budgets in 2010 and 66% will increase their investments in digital marketing channels.

“Brand teams can and should leverage the speed and efficiency of the ‘e’ channel to improve overall responsiveness and efficiency of their physician

marketing programs,” said David S. Duplay, president of MedTera™, an integrated marketing solutions company. “What we are doing at MedTera is building an integrated marketing solutions company dedicated to improving education, promotion and communications in the healthcare, life science and pharmaceutical industry.”

MedTera is a wholly owned division of Structural Graphics, which has over 30 years of experience in delivering high impact dimensional mail solutions to pharmaceutical brand managers and other healthcare professionals. What MedTera is doing is developing closed-loop marketing solutions that integrate the non-digital assets of Structural Graphics’ dimensional designs. It does this with digital assets like websites, eLearning tools, Personalized URLs and mobile technologies to establish and extend a marketing or learning relationship with its client’s target audience.

Duplay described MedTera’s branded integrated solutions—MedTera’s HC Professional “Life Long Learning” Platform (see pg 3)—at a recent Pharma Marketing Talk interview (listen to the podcast: “Improve Patient & Physician Education with Integrated Closed-Loop Marketing & ROI Analysis”; <http://bit.ly/diFvDU>).

Research-based Solutions

“Those are just a sample of some of our branded solutions,” noted Duplay. “Of course we also work with our clients to design and execute custom programs and campaigns depending on the current set of marketing challenges that brand is facing.”

Before launching MedTera, Duplay’s team conducted a significant amount of research on how pharma marketing was changing, how brand teams have allocated their marketing budgets in the past, and how they saw the mix of marketing tactics changing over the next several years. “The pharmaceutical industry has seen significant change over the last several years in the way marketers launch and promote their brands,” said Duplay. “We have also seen changes in the way medical professionals as well as patients and caregivers want to receive information and be educated.”

In conducting this research Duplay’s team conducted one-on-one interviews of brand managers and vice presidents of marketing at several big and mid-tier pharma companies. Duplay also met with and conducted focus groups with physicians, patients and caregivers to better understand how these important stakeholders wanted to be marketed to and educated.

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From these studies Duplay determined which non-personal promotion tactics are most used and valued by physicians and pharma brand managers. The following is a summary of a few of the findings of that research.

What's Important to Pharma Brand Managers

"Our research validates that non-personal promotion is an important and growing tactic in the marketing mix for all pharma companies," said Duplay. Table 1 on page 4 lists the marketing tactics valued the most by pharma brand managers in big and mid-tier pharmaceutical companies.

"One interesting finding was that marketers are looking at targeting and segmentation in a much different way," said Duplay. "The days of looking at the market in terms of strictly deciled physicians is being expanded."

Key takeaways of the research involving brand managers include:

- Brand teams can and should leverage the speed and efficiency of the "e" channel to improve overall responsiveness and efficiency.
- Segmentation and physician targeting is key to successful marketing.
- Plan/integrate eMarketing in conjunction with other channels.
- Involving the field sale force into the overall marketing effort provides an integrated approach to targeting physicians.
- Given the relatively short time that a brand has market exclusivity, brand managers search for marketing solutions that not only help their brand gain share quickly but also increase the returns on their promotional dollars.

What's Important to Physicians

Allied healthcare professions are playing a larger role in delivering care and educating patients. Key local physicians (not key opinion leaders but local respected physicians) are having more influence over which medications are being prescribed in the clinical setting and more medical institutions are adopting no see/no sample policies. All these factors are requiring pharma marketers to rethink their marketing strategies.

"It's no surprise that we found that digital and mobile technologies continue to grow in terms of importance to physicians when it comes to receiving medically relevant information," said Duplay.

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MedTera's HC Professional "Life Long Learning" Platform

- **MedTera™ 360:** Proven closed-loop marketing program that starts with detailed market segmentation and targeting to identify the right audience. We then launch a high-impact dimensional mail solution which will drive that target to an online environment to deliver the right message at the right time, We then complete the cycle with a comprehensive ROI analysis and dashboard which allows us to enhance the campaign for the next wave of target touch points.
- **MedTera™ RxAccelerator:** Fast, cost-effective solution for marketers looking to accelerate the growth of their market share and increase new patient starts through market segmentation, influential marketing tools and ROI analysis.
- **MedTera™ Rx Loyalty:** Set of online and off-line tools that help establish ongoing relationships with patients to drive adherence, compliance and persistency, ultimately increasing the lifetime value of a patient for a brand manager.
- **MedTera™ Clinical Dialogue:** Establishes ongoing communication for brands with physicians, utilizing digital and non-digital tools such as pharmaceutical detail aids or representative tablet PCs.
- **MedTera™ Clinical Perspective.** Innovative solutions to communicate with and educate patients and physicians through proven, high-impact detail aids, direct mail and informational marketing materials.

Findings from the physician research include these key takeaways:

- Over 70% of the physicians use the internet one or more times a day for professional use.
- 77% prefer to go to a non-pharma site for information.
- 77% of them accept, store and use drug samples.
- 74% of the physicians believe that vouchers, debit, and co-pay assistance cards are as effective as live samples in delivering quality care.
- 67% of the physicians see drug reps to get medically relevant information.
- 70% of the physicians that see drug reps for medically relevant information will reduce or eliminate time with the rep in the near future.
- 60% of the physicians believe the number one value provided by a pharma rep is delivering samples.
- The preferred way to receive medically relevant information: email or direct mail.
- The preferred way of educating patients on medically relevant information: Physician approved website, dimensional models, printed materials.
- Over 70% of the physicians place a high value on doing eDetails.

Closed-Loop Marketing

Pharma marketers are moving to a “closed loop” marketing approach through the utilization of real time program data for better segmentation, recruiting and program execution.

“At MedTera we view closed loop marketing solutions as beginning with very detailed segmentation of the market, which allows the marketer to better and more cost effectively recruit their targets into a marketing campaign,” said Duplay. “Once we have recruited them, we can authenticate them by gathering detailed demographic information so we know that we are truly hitting our target audience. We can then present a marketing message or educational information to them in the way they prefer to receive it (on-line or off-line).”

To close the loop, MedTera tracks whether or not the targeted physicians are responding to the call-to-action. Also, the impact on TRx and NRx is measured and the marketing program is modified and enhanced to drive better campaign performance in future touch points to those targets. See Figure 2, pg 5, for a comparison of Open Loop Marketing to Closed Loop Marketing.

Integrated and Life-Long Solutions

“Based on our research of pharma brand managers, physician interviews, physician focus groups and pharma focus groups with [major pharmaceutical

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| Rated Highest by Big Pharma Brand Managers | Rated Highest by Mid-Tier Pharma Brand Managers |
|--|---|
| Online Patient Compliance Tools | eDetailing |
| Online Physician Education | Online Physician Education |
| eDetailing | Online Disease Mgmt Info |
| Vouchers, Debit, Co-pay, COB Cards | Vouchers, Debit, Co-pay, COB Cards |
| Online Patient Information | Online Patient Compliance Tools |
| Direct Mail Programs | Direct Mail Programs |
| eSampling | eSampling |
| eMail Messaging | eMail Messaging |
| Online Disease Mgmt. Info | Tele-Marketing Peer to Peer |
| Tele-Marketing Peer to Peer | Fax Marketing Programs |
| Fax Marketing Programs | Online Specialty Focused Articles and Practice Info |

Table 1: Impact and Value of Marketing Tactics Rated by Brand Managers. Tactics with the highest ratings appear closer to the top of each list.

Closing the Marketing Loop

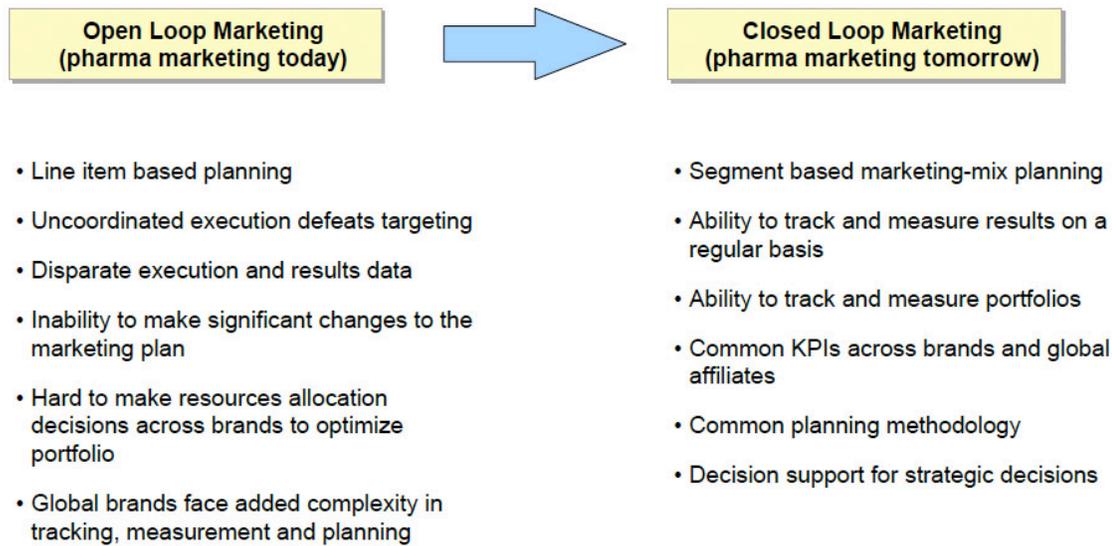


Figure 2. Open Loop Marketing vs. Closed Loop Marketing.

companies using alternative channels to maximize commercial productivity],” said Duplay, “it is clear that an integrated marketing solutions company must deliver an integrated set of capabilities.”

Based on MedTera’s research with both pharmaceutical marketers and physicians, it is known that:

- Pharmaceutical marketers have not only a desire but also a significant business imperative to market the benefits of their brands to physicians, nurses and pharmacists in new and innovative ways.
- Physicians, nurses, and pharmacists have information needs and requirements based on critical medical decisions made across the continuum of care.
- With the development of an integrated learning/ education platform in which information is both pushed and pulled (based on user requirements), the solution can be extended to the clinical enterprise user.
- If developed and executed properly, the learning/ education platform will extend throughout the life of the medical professionals career—from student to residency to professional practice—“Life Long Learning.”

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| Rated Highest by Physicians |
|------------------------------------|
| Vouchers, Debit, Co-pay, COB Cards |
| eDetailing Online |
| eEducation (non-CME) |
| Physical Drug Samples |
| Disease Management Information |
| Patient Education Information |
| Drug Information |
| Hard Copy Patient Information |
| Peer Reviewed Articles |
| Patient Assistance Information |
| eDetailing Offline* |

Table 2: Impact and Value of Marketing Tactics Rated by Physicians. Based on focus group study. *Concept that allows a physician to use a computer offline (ie, no access to Internet) to obtain information on specific pharmaceuticals and treatment protocols. The offline eDetail experience is generally non-interactive, however the user is taken through information and asked questions along the way to ensure understanding. The offline eDetailing solution is distributed to the physician by a CD or flash drive and used in their computer.

Under Duplay's leadership, MedTera develops solutions with the medical professional's workflow in mind. "Over the last 20 years," said Duplay, "I have focused my career on working with teams that are passionate about developing and executing marketing and business strategies for the pharmaceutical and healthcare industries. The approach I have taken is to spend a significant amount of time understanding the workflow of medical professionals along with the behavior of patients and care givers and then applying emerging technologies that enhance education and solve business and marketing challenges."

Comments from Physicians Regarding Non-Personal Promotion

MedTera received plenty of physician feedback regarding non-personal promotions during its focus group interviews. A sampling of a few of these comments is presented below:

"Most if not all the physicians in our office are online and I think we are all using iPhones. We have all participated in eDetails and other online programs sponsored by pharma companies. Most of my online work is done at night when I am at home or on the weekends. Any solution that would be valuable to me would need to be accessed outside my office."

"I have participated in eDetails and some are good and some are not so good. If a physician is doing an eDetail in the office, the system has to allow the physician to end the session before it is completed and then pick up where we left off at another time. I got an education URL from one of the reps that came into the office and every time I had to exit the education, I had to start from the beginning again."

"Online education for physicians as well as disease management information is the life blood of our learning. It must be easy to use, flexible / searchable and appropriate for my area of practice. Pharma companies have a bad habit of giving us what THEY want and not what is useful to us."

Of course, the solution also must satisfy the needs of the brand manager. "If we are developing a pharma rep detail aid, patient education or starter kit or an on-line promotional campaign," said Duplay, "we take into consideration how that solution will be delivered and the message or call to action it has to achieve to drive a return on investment that is acceptable to the brand manager."

"I think it is also important to mention that at MedTera every solution that we develop whether it be digital, non-digital or the integration of the two in a closed loop fashion, is in compliance with the PhRMA Code," said Duplay.

Pharma Marketing News



MedTera™ is an integrated marketing solutions partner dedicated to improving education, promotion and communications in the healthcare, life sciences and pharmaceutical industries.

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David S. Duplay

"As the sophistication of segmentation, targeting, analytics and marketing tactics increases, MedTera is well positioned with our solutions to assist brand teams in increasing market share with demonstrated ROI on marketing programs in the range of 7:1 to 20:1."

Pharma Marketing News

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