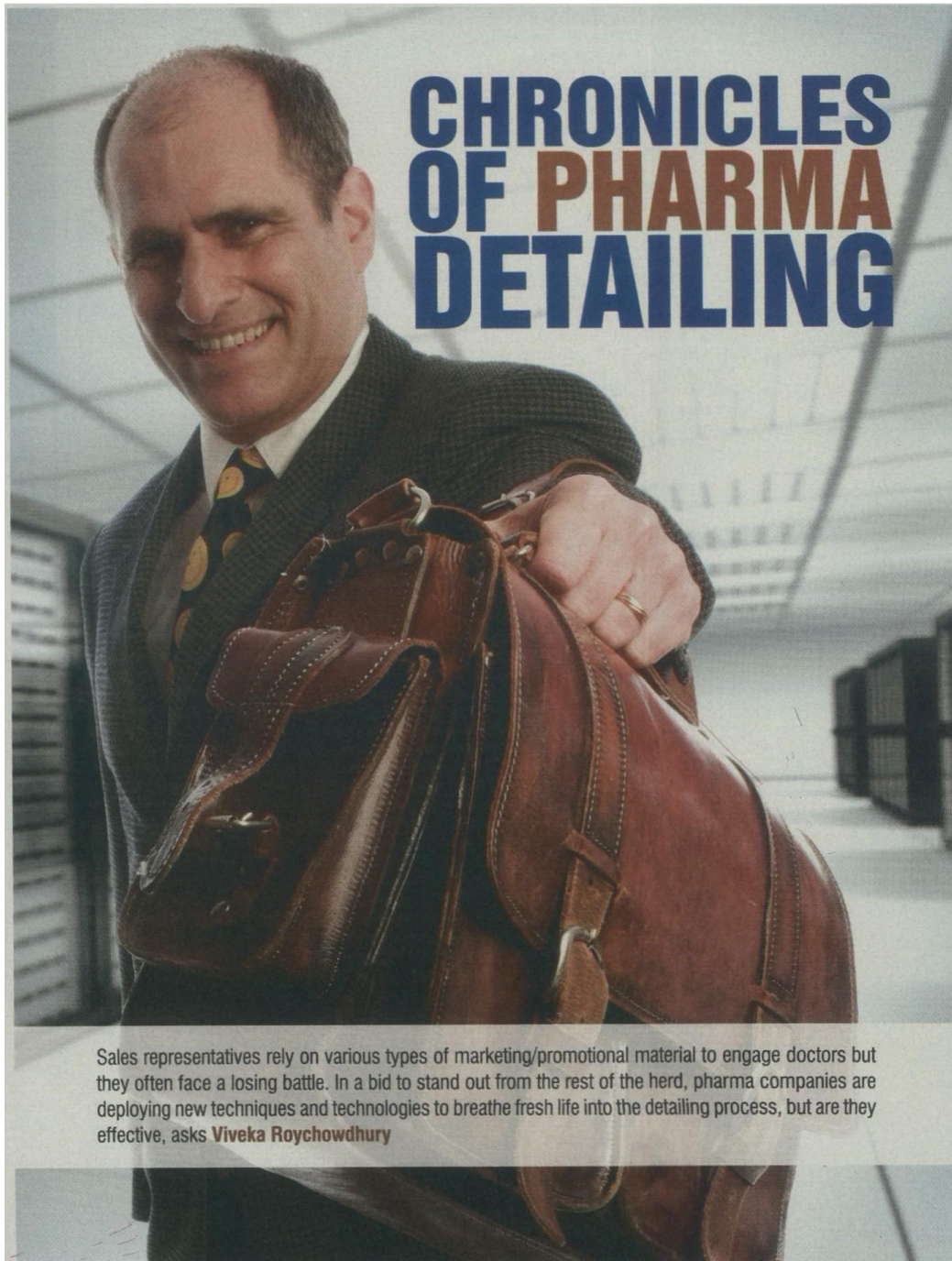


Chronicles of Pharma Detailing

Viveka Roychoudhary – Express Pharma



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In India, the role played by promotional aids and channels becomes critical thanks to the country's low doctor-patient ratio. Sales representatives, the key link between pharma companies and doctors, get hardly a couple of minutes with doctors to detail new products and retain share of voice in the market. Effective detailing techniques and aids are therefore more essential than before.

Detailing aids generally used by pharma companies include leave behind literature, gifts, DVD players with CDs for video detailing, in-clinic activities, SMS reminders and CMEs. In the fight for the doctor's share of mind, pharma companies try to outperform their peers but regulators are now cracking down on the way companies may influence doctor prescription patterns.

However, doctors no longer welcome sales reps as before. Manish Gupta, Chief Executive Officer, Indegene Lifesciences, a medical and scientific marketing services and analytics services provider, points out, "Several studies have highlighted that oversized sales forces have saturated the market, and doctors are more reluctant to see reps in their offices. About 20 per cent of doctors in the US and the UK now refuse to see any sales reps leading to a decline in the return on investment (ROI) on detailing. The situation is similar in India as well. With pharma companies in India launching newer products in the marketplace, this problem is only going to increase in future."

In fact, effective detailing techniques can add to and build the brand of the company. For instance, when GlaxoSmithKline Pharmaceuticals (GSK) recently launched the E-detailer, the latest evolutionary new form of the detail aid, it caught the attention of doctors. C T Renganathan, Vice President, Pharmaceuticals—Specialty Business, GlaxoSmithKline Pharmaceuticals says that, "Right from the start, the E-detailer was able to grab the attention of many of our customers as it was distinctly different from the conventional visual aid used by other pharma companies. The early response to the E-detailer has been very encouraging. We are confident that this digital mode will help us to enhance our medical rep's communication and shorten the marketing materials development time."

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from the E-detailer, Renganathan points out, as it gives the marketing team a platform to showcase their creativity and revitalise the brand. The recent inclusion of animation in the E-detailer will help them improve message retention and augment overall brand recall.

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very little time to spare. He too has observed that when all the information is animated it makes a greater visual impact in the customer's mind so an e-detailer could stimulate a better scientific discussion than a paper detailing.

Engaging doctors

Unfortunately, India has not seen too many innovations in the sales and marketing area. As Soumitra Sen, President and Head, DDB Health and Lifestyle, DDB Mudra puts it, "Innovations in this sphere have been



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detailer so this increases time spent with them, hence the company's brands get increased exposure. He also commented that the animations in the e-detailer help the field staff to draw the doctor's interest towards details of brand benefits.

The sales tool has a rub off on the attitudes of the employees as well, introducing an element of newness into the detailing routine. Rajeev Anand, ABM North, GSK Pharmaceuticals reported that GSK's Medical Communication Executives (MCEs) using the e-detailer worked "with a difference, confidence and passion."

S Venkataraman, RBM South too confirmed that e-detailers have started yielding the desired results as they are getting more talk time in the doctor's chamber. According to him, the animation is the icing on the cake as it adds to the impact and increases conversation time with doctors.

The E-detailer's compactness, hardy battery and handiness seem to be its biggest plus points. Manas Chatteraj, ABM North mentions that it takes less time to charge than a laptop and back up is also very good. It takes a laptop three minutes to go from 'standby mode' to 'start mode' but an e-detailer takes less than five seconds and this is very important because the doctor has

very rare. After the invention of the detail aid, nothing much has ever happened till E-detailing took over in fits and starts. Even E-detailing is in its infancy and most pharma companies still depend on the printed visual aid."

Reasons for this dearth of options are primarily monetary. Sen points out that the cost of hardware, supporting software coupled with a wide spread operational structure restricts the use of modern devices. A low cost of generics resulting in lower realisations further impedes the decision to shift to modern media.

Globally, there has been a trend to move from local, offline solutions to more online solutions when it comes to CRM solutions. Detailing has moved from hard copy to electronic formats, to mobile devices like smart phones. Gupta confirms that with some of their global pharma clients across different geographies, they have observed a shift toward multichannel marketing, sales, marketing programmes, and platforms that include web, mobile, tablets, and iPads as well as engagements such as tele-detailing. These alternate channels allow pharma companies to effectively engage doctors on their own terms in a cost-effective manner and are being seriously explored by most big pharma companies.



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Soumitra Sen
President & Head
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DDB Mudra (Part of the
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Variations of these moves are being seen in the Indian pharma market place as well. Use of the smart phone for detailing has not yet been seen in India, says Dr R B Smarta, Managing Director, Interlink Marketing Consultancy, but some larger pharma organisations have developed a support system for detailing which involves call planning, messages, tracking discussion of last call, objection raised by customer, commitments given and reporting which will be helpful in planning the next call. Sen mentions that some sporadic efforts are being tried wherein web based doctor relationship management programmes are being initiated.

Giving an example, Gupta says one of their global clients with India operations has engaged Indegene for a large-scale digital-based platform that allows them to engage doctors leveraging content, interactive cases, and continuing medical education. Indegene is seeing early signs of success in terms of enrolments into this programme and in time spent by the doctors online. More than 16,000 doctors have registered for this programme. On an average, doctors visit the platform twice every month, with an average time of five minutes spent at each visit. Cardiology, endocrinology, oncology, and dermatology have shown higher physician engagement compared to other specialties, according to Gupta.

Smarta relates some more cases where pharma companies are stepping in to provide more services. If hospitals and individual doctors want a second opinion in complicated cases, pharma companies provide a diagnosis service on a case-to-case basis via the web with overseas consultants.

Ruth D'Souza, Executive Director, Interlink Marketing Consultancy mentions that webinars and webcasts of experts' presentations are commonly used by pharma companies as a marketing strategy. Patient portals (for online doctor-patient collaboration) are mainly used by diagnostics as well as equipment / instrument companies for their stakeholders. Online events like seminars, CME events, KOL events, or web conference are also being used.

Patient benefits

Pharma companies are often criticised for investing more on marketing and sales promotion aids than in R&D but they argue that the benefit of these tools trickle down to patients as well. Gupta reasons that, "With newer detailing tools, the doctor/physician can update himself with the latest in his field without his or her clinical time being encroached."

Gupta also mentions that doctors can provide topical, relevant, and credible information to the patient through better pictorial representation, graphics, and demos. In time we can hope for delivering better quality of care and better patient compliance to treatment plans through these newer tools. Digital platforms now allow doctors to enrol their patients for education and provide treatment reminders, thereby expanding the scope of patient care, says Gupta.

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panies go beyond the traditional business of developing and manufacturing products. Smarta mentions that in such cases, pharma companies arrange product demonstrations in collaboration with doctors in order to educate the patients.

Medium versus message

While pharma companies are spending more on new platforms and new age media, they are only too aware that the content too has to match up. As Sen say, healthcare is primarily a content business. What is 'content' today is 'primitive' tomorrow and what is 'primitive' is considered 'trash' the day after. He opines that most 'content' in India is global and sourced from the web with the only exception being recordings of KOL lectures/seminars and MNCs sourcing own content from their HQs abroad. An important source for developing messaging is the medium of clinical trials, which too is only now happening in some numbers but these are always a part of a global initiative. Any 'content' so developed is once again a part of a particular MNC which sponsors the whole effort on a global scale.

D'Souza opines that the message and medium are both equally important. There is also the problem of the message getting lost, she says, when clients try to convey too much information. High attrition levels in the industry too play havoc as a change in the product manager could mean that the consistency in the message gets lost, she cautions. Smarta too says this debate is a perennial question for pharma industry. The message needs to be further sharpened while the medium needs to be further substantiated as they are non exclusive, he opines.

Gupta makes a key point when he says, "A transition from a predominantly 'push' model to one where a mix of 'push' and 'pull' elements are judiciously leveraged is critical for success. In the current multichannel environment, based on preferences, it is important to successfully engage physicians on their own terms using an alternate channel that provides them control over when, where, and how they get information. With media fragmentation on the rise, it is critical to offer physicians a variety of content format options and use all available communication channels in an integrated manner."

Engaging patients

To stay relevant, companies will need to address issues and concerns of multiple stakeholders. With increased scrutiny from regulators and patient activist groups across the world, pharma companies have to engage with and provide more value to key stakeholders such as patients and payors. Gupta says the principal reason for this is the increasing focus on chronic diseases. A study published in the *American Journal of Hospital Pharmacy* by Bond and Hussar has documented that patient adherence to treatment of chronic diseases is hovering around 40 per cent. According to a recent report from the Task Force for Compliance,

which was first established and funded by 20 major pharma manufacturers in 1992 to study the problem and examine solutions, it is estimated that over 50 per cent of prescriptions written annually are not adhered to correctly resulting in a revenue leakage of over \$70 billion. Gupta says that adherence programmes for patients have therefore started to gain prominence along with the use of alternative channels for physician access.

Catching and retaining a doctor's attention therefore calls for a multi-pronged approach. Simply hoping that the doctor will go through the material on his smart phone or online would be foolish because why would a doctor self-detail when he avoids a live detailing session?

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Sales Representatives rely on various types of Marketing/Promotional material to engage doctors but they often face a losing battle. In a bid to stand out from the rest of the herd, pharma companies are deploying new techniques and technologies to breath fresh life into the detailing process, but are they effective, asks Viveka Roychoudhary

Squeezed between decreasing R&D output, increasing R&D cost and losing patent protection, pharmaceutical companies are today forced to look at ways to do more with less. But one area where budgets have not been cut as much is sales promotion and customer relationship management (CRM). A white paper from Indegene Lifesciences estimates that between 1996 to 2005, the total pharma promotion spend increased from \$11.4 billion to \$29.9 billion. If a company needs to increase market share, they have no choice but to be seen and heard in the market, engaging with Key Opinion Leaders (KOLs) in the medical profession on a regular basis.

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