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Sharing knowledge on topical issues in the Pharmaceuticals industry

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Ed Giniat
Global Sector Head – Pharmaceuticals – KPMG in the US

Keeping up to date with the very latest and most pressing issues facing your organization can be a challenge, and while there is no shortage of information in the public domain, filtering and prioritizing the knowledge you need can be time consuming and unrewarding. I hope that you find Issues Monitor useful and I welcome the opportunity to further discuss the issues presented and their impact on your sector.

Welcome to the February edition of Issues Monitor – Pharmaceuticals. Each edition pulls together and shares industry knowledge to help you quickly and easily get briefed on the issues that affect your sector.
Pharmaceutical companies adopt new technologies to build efficiency in sales and marketing

The rise in patent cliffs, regulatory pressures and increasing R&D costs have led major pharmaceutical players to move from traditional sales model toward the usage of digital media, smart phones, tablets and customer relationship management tools to help drive sales. As technologies evolve and doctors become more tech-savvy, the opportunity to move away from in person sales is bound to grow gradually.
Introduction

As pharmaceutical companies continue transforming their business model to reduce costs and improve performance, the traditional sales model focusing on in-person physician education and direct-to-consumer advertising is undergoing significant change. The high cost of direct sales, estimated at as much as 20–30 percent of total sales and marketing, has made sales force reduction and reengineering a key target for cost savings.1,2

Figure 1: Global layoffs by leading pharmaceutical companies, 2010

In addition, physicians have become less willing to spend time with sales representatives, as the information provided is increasingly scrutinized and the opportunities for connecting at venues outside the office have been reduced. The pressures on physicians’ time in administration and patient load also reduce their time available for sales calls.

New technologies and the evolution of social media have created tools and tactics to augment the value of direct sales and enhance the value of the relationship between the company and the physician. Similarly social media also create an opportunity — and a challenge — for companies to build the value of their corporate and product brands directly with physicians, and consumers / patients.
A hybrid model of pharmaceutical sales is evolving, where the sales team is equipped with online digital marketing tools and cost-effective channels of communication to enable interactions with physicians at their convenience.³ It is highly likely that the industry is on the path to replacing face-to-face sales completely with online communications, particularly as physicians themselves become more engaged and adept online.

Figure 2: Closed-loop marketing

At the same time, the sales and marketing team can leverage data from all of the company’s interactions with physicians and patients to tailor the content of their sales calls and their communications to individual physicians in a continuous process of customer relationship management called closed loop marketing, as shown in Figure 2.⁴
Newer technologies used in pharmaceutical sales and marketing

Figure 3 shows some of the ways that pharmaceutical companies are using digital media to enhance sales force effectiveness and build customer relationships.

**Figure 3: Digital tools used by pharmaceutical companies**

- **To enhance sales force effectiveness**
  - iPad/tablet Devices
  - Sales force automation software
  - E-detailing

- **To build customer relationships**
  - Social media
  - Portals for health practitioners/providers
  - Tools for patients
  - Companies are collaborating with social networking sites to access their subscriber database and promote drugs
  - Online portals developed by pharmaceutical companies allow information sharing, continuing medical education (CME), telemarketing services, ordering samples
  - Branded drug websites, online communities, and call centers for patients

- Mobile enabled devices that allow for interactive detailing and cloud access to sales information
- CRMs and CLM to analyze customer interactions, and bridge gap between sales force and company headquarters
- Detailing drug information using a remote live discussion with sales rep (virtual), an interactive website, interactive voice response phone calls, or with a webcam

**Tools to enhance sales force effectiveness**

**Smartphone-enabled medical applications and sales force automation**

Recent studies suggest that 72 percent of US doctors own a smartphone and 95 percent of them use it to download medical applications. Large pharmaceutical companies have tapped this opportunity by developing several smartphone-enabled applications for both physicians and patients.5

Companies are offering iPhone / iPad applications, with functions ranging from medication tracking and disease intensity calculators to drug education catalogs and patient diaries.6 For instance, Novo Nordisk healthcare practitioners launched Coags Uncomplicated — an iPad / iPhone application that helps doctors diagnose bleeding disorders. In the US, the company used this application with its sales force to build brand awareness of its drug NovoSeven, which helps stop the bleeding related to acquired hemophilia.7

Other apps — such as the GIST calculator from Novartis, Nursing ACE from Roche, GoMeals from Sanofi-Aventis and iChemoDiary from Merck — are being used by companies to improve customer outreach and gain competitive advantage, with presentations in a more structured and potentially more efficient manner.5, 9 Table 1 and 2 lists some of these applications.

Table 1: Applications for Consumers and Health Care providers (HCP)

<table>
<thead>
<tr>
<th>Application</th>
<th>Company</th>
<th>Description</th>
<th>Category</th>
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<tbody>
<tr>
<td>GIST calculator</td>
<td>Novartis</td>
<td>Helps calculate a patients risk of recurrence to Gastrointestinal Stromal Tumors (GIST).10</td>
<td>Medical information</td>
</tr>
<tr>
<td>MedScape</td>
<td>WebMD Health Corporation</td>
<td>Offers CME activities for physicians and health practitioners.11</td>
<td>Medical information</td>
</tr>
<tr>
<td>Nursing Avastin Center for Excellence (ACE)</td>
<td>Genentech</td>
<td>Used to provide information on Avastin utilized by the nursing community in patient management.12</td>
<td>Patient management</td>
</tr>
<tr>
<td>Gomeals</td>
<td>Sanofi</td>
<td>Helps users access nutritional information of daily food, track the value of food intake by meal and by day and monitor personal consumption of carbohydrates, fats and proteins.13</td>
<td>Patient management</td>
</tr>
<tr>
<td>iChemoDiary</td>
<td>Merck</td>
<td>Provides patients an easy way to record treatments and medications and keep track of the symptoms they experience.14</td>
<td>Patient management</td>
</tr>
<tr>
<td>Novartis Oncology Medical Information</td>
<td>Novartis</td>
<td>Provides healthcare professionals with accurate and timely medical information.15</td>
<td>Medical information</td>
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</table>
Table 2: Recent initiatives by pharmaceutical companies to digitize their sales forces

<table>
<thead>
<tr>
<th>Company</th>
<th>Digital augmentation</th>
<th>Purpose</th>
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<tbody>
<tr>
<td>Abbott Laboratories</td>
<td>At the end of 2010, Abbott distributed 1,000 iPads to its US sales reps.</td>
<td>To display product information or surgical-implant techniques to physicians.</td>
</tr>
<tr>
<td>Medtronic</td>
<td>In 2010, Medtronic purchased 4,500 iPads for its sales and marketing team, becoming one of the largest corporate buyers of iPads.</td>
<td>To eliminate non-productive time in sales pitches.</td>
</tr>
<tr>
<td>Boston Scientific</td>
<td>Boston Scientific purchased 2,000 iPads for its sales team and downloaded 20 specific product applications.</td>
<td>To reduce the time that sales reps spend on activities that do not drive sales, such as pricing, expense reports and filling requests.</td>
</tr>
<tr>
<td>Otsuka Pharmaceutical</td>
<td>Otsuka distributed 1,300 iPads to its reps in Asia, North America and Europe.</td>
<td>To display product information for direct presentations with physicians and to use the iPad as a personal training tool for reps.</td>
</tr>
</tbody>
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Sales Force Automation Software – CLM and CRM
Applications for customer relationship management (CRM) and closed-loop marketing (CLM) are helping the sales force analyze and improve their customer interaction, and enhance collaboration between sales and marketing teams to devise more efficient strategies.

E-detailing
E-detailing has emerged as an effective tactic to cut sales costs and improve efficiency. E-detailing can be practiced through a remote live discussion with a sales rep (virtual live e-detailing), through scripted interactions with a web site (scripted e-detailing), over Interactive Voice Response phone calls, or via a web-cam or a pre-designed screen / portal with an option to raise queries via email or telephone.

According to the 2010 study “US Pharma Company Promotional Spending Trends in New Media”, pharmaceutical spend through e-detailing or telephone meetings increased about six times from January 2006 to July 2010. While the average cost of traditional detailing involving a visit from a sales rep was US$150–200, e-detailing costs less than US$100. From 2005 to 2008, Merck reduced its promotional spend by as much as nine percent through the use of various e-detailing programs and estimated a further increase in savings of 15–20 percent by 2010 by expanding its e-detailing network and tools.
Tools / platforms to build customer relationships

Social media
Physicians are using podcasts, social networking sites, blogs, online communities and various other web tools to search for and discuss information on health-related topics.

- Social networking sites such as Ozmosis, SocialMD and DoctorNetworking are platforms exclusively for physicians, each with a subscription base of 3,000–10,000 physicians.
- As early as 2007, Pfizer partnered with Sermo, an online forum with approximately 30,000 member physicians, where Pfizer’s staff doctors could participate in online discussions with other physicians. This enabled the company to better understand the physicians’ views on various diseases and products, providing information for its marketing and research strategies while helping to strengthen its relationships with physicians.26
- In the UK, Boehringer Ingelheim marketed its product Asasantin Retard (an antithrombotic agent that prevents the formation of blood clots) solely through online media in 2008. The company carried out a 12-month campaign in collaboration with the physician community doctors.net to raise awareness and build sales, resulting in a 15.2 percent increase in its drug sales that year.27, 28

Pharmaceutical companies are also leveraging the general online social networking platforms such as Facebook and Twitter, which not only offer avenues to promote products, but can also help enhance customer relationships and improve brand management by monitoring and analyzing user-generated content.29

Healthcare professionals: Company portals and service platforms
Pharma companies have used the internet in ways ranging from providing physicians with general information about their brands to providing online support to order samples and obtain formulary / drug information and patient education materials.30

For example, Sanofi-Aventis’ ipractice.com, AstraZeneca’s AZ TouchPoints and Merck’s merckservices.com provide drug information, host topics of discussion, offer continuing medical education (CME) and enable practitioners to share patient experiences.31

AstraZeneca recently laid off all the sales representatives for its heartburn drug Nexium, and replaced them with telemarketing call center executives to answer physicians’ questions or visit them on request.32 This enabled the company to meet the needs of many prescribers efficiently, while at the same time increasing the price of Nexium by 7.4 percent. Analysts believe that this approach could be beneficial for other mature brands like Nexium, which require need-based support rather than a strong initial sales push.33

Innovative interactive content is also a successful tactic. For example, Genzyme’s website for physicians specializing in chronic kidney diseases provides an augmented reality-based interactive experience about cardiovascular risk that patients may suffer by using calcium-based medications, instead of the company’s calcium-free Renvela. The application helped create interest in the treatment of chronic kidney diseases and make healthcare professionals familiar with the dangers of a calcified heart.34

Patients: Company portals and service platforms
Digital media has provided an opportunity for pharmaceutical companies to connect more effectively with patients as well as physicians. Where direct-to-consumer advertising is permitted, digital media is increasingly brought to use. Branded drug websites have become a key source for patients seeking information about a specific disease and treatment options. According to a February 2011 ePharma Consumer v10.0 study by Manhattan Research, approximately 74 percent of the consumers visiting drug brand websites take a product-related action afterward — which could include further discussion with a doctor or family and friends, making a prescription fill request or exploring more about the product online.35

For example, In-Bed — Bayer Schering’s online marketing campaign for its erectile dysfunction (ED) drug Levitra — won Revolution magazine’s much-coveted Grand Prix for outstanding digital marketing. Among the 320 websites tracked in ePharma Consumer v10.0 study, the Levitra website was found most likely to drive visitors to request a prescription from their doctor.36
In addition, patient communities such as Patientslikeme, Accu-chek connect, C2C: Connect to Conquer Epilepsy and CF Voice provide platforms for patients to share disease stories, experiences and information. These communities, some of which are brand-sponsored, such as Bayer’s Betaplus and Gilead’s Voices in PAH, offer useful insights for pharmaceutical companies to develop new products and gather feedback on their existing formulations.

The industry is reaping the rewards of digital media adoption

Although the industry is moving cautiously toward such technologies, these could act as enablers to reduce costs and create brand awareness.

- **AstraZeneca: Estimated cost savings of US$1.9 billion, by 2014**
  In 2009, AstraZeneca’s Digital Marketing Group launched a web-based service platform for physicians named AZ Touchpoints. By using AZ Touchpoints and other digital media, AstraZeneca plans to reduce its sales force by 16 percent, eliminate 10,400 jobs, and realize estimated cost savings of US$1.9 billion by 2014.

- **Novartis’ iPad for sales force: Savings of 250 man-hours per sales rep**
  Novartis recently provided its sales reps with iPads, to improve their sales and marketing efficiency. This resulted in a saving of more than 250 hours per sales rep and an additional 35,000 customer visits per year. Novartis management also notes that the use of such devices leaves no room for data fudging by the sales force.

- **Boehringer Ingelheim (BI): Digital tools helped double market share of a product in Poland**
  In 2009, BI’s Consumer Health Care (CHC) team launched a digital campaign in Poland for the antispasmodic drug Buscopan. The campaign helped the company grow its share from two percent to four percent in the first year without TV support, and then to eight percent in 2010, when this campaign added TV commercials. Similarly, in Brazil, the company conducted successful digital marketing campaigns for brands such as Buscofem, Mucosolvan, and Pharmaton. Following its success in Brazil, CHC has expanded its digital campaigns across the world, and has over 250 websites with more than 15 million visitors per year from more than 40 countries.
Challenges in adoption of new technologies

Pharmaceutical companies are taking cautious steps to use digital media. As regulatory frameworks become clearer, the industry is expected to further embrace digital tools and make them an increasingly important part of their sales and marketing strategy. However, as a highly regulated industry with reputation at risk, pharmaceutical companies face a number of challenges in implementing new technologies in their sales and marketing process.

Limited regulatory guidelines

There is little clarity from regulatory bodies on the use of digital media for marketing. The US FDA recently released a limited guidance around how drug and medical device firms should respond to queries from consumers, physicians and third parties when creating awareness about products through social media forums.42 (Please see box for details).

Although this document does not address most types of social media activities that drug and medical device companies are engaged in, it begins to lay the foundation for how companies should interact with the public when providing product information. Also, through such guidance the FDA seems to have focused only on the means by which communication of off-label usage of products can be managed in online forums.

Similarly, the UK’s Prescription Medicines Code of Practice Authority (PMCPA) also offers highly limited information by way of informal guidance on the use of Twitter, blogs, online meetings, and linking to non-company websites.43, 44, 45 PMCPA offers a Q&A document which companies could refer to when using social or digital media for marketing. Though, at the moment it is uncertain if the guidance will prove adequate to overcome the industry’s concerns regarding the appropriate usage of social/digital media.46

The late December guideline by FDA on social media focuses mainly on guided response to unsolicited requests for off-label information about prescription drugs and medical devices. The recommendation is for the company to identify themselves publicly, note that the usage is not approved by the FDA, provide access to the prescribing information (PI) and provide the person with a contact name of a medical or scientific professional at the company to respond to their request in a private, one-on-one conversation. The illustration below depicts how a conversation between a patient/consumer seeking information from the company on a off-label drug in a public forum would take place.

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Risk of customers and consumers receiving misinformation
The challenge to control content online can pose significant risk to pharmaceutical companies, ranging from inaccurate information about drug usage to highly visible negative commentary:

- An effort by KV Pharmaceuticals to promote its patient assistance plan for the newly launched orphan drug Makena in February 2011 highlighted the subsidized price of US$20 per treatment compared to the standard US$1,500 per injection. Rapid and widespread reaction to the price disparity by US consumers and healthcare professionals on social media caused the company to cut its standard price by almost 55 percent.47, 48, 49, 50
- In 2009, Bayer started a marketing campaign for its contraceptive drug YAZ on YouTube. However, the company lost control of its intended message. When viewers clicked to view ‘comments’ and ‘related videos,’ they were directed away from the Bayer channel to generic YouTube videos, some from law firms suing for its YAZ TV commercial.51, 52 Even when Bayer deactivated the ‘comments’ link, it was unable to stop viewers from seeing the inappropriate videos. Recently, several pharmaceutical companies decided to close down their Facebook pages when a policy change by the social media platform led to permitting public comments on such pages.53

Conclusion
The pharmaceutical industry is moving away from the traditional sales model to increasing use of digital media in a hybrid sales model.54 The use of new technologies in pharmaceutical sales and marketing is expected to increase as younger physicians are accustomed to digital delivery platforms.55 Although the new technologies offer a cost-effective tool for sales and marketing activities, pharmaceutical companies need to be cautious in their use. In the absence of formal guidelines from regulatory bodies, pharmaceutical marketers should continue to be cautious in participating in online communities and be aware of the potential for real-time, viral adverse publicity.56, 57

Nevertheless, the trend toward the use of digital marketing in a hybrid model, with an evolving mix of traditional marketing tools and technologies and communication channels, is expected to continue.
Further Information

Visit kpmg.com for the following related publications

- Pharmaceuticals Risk and Disclosure Summary 2009-2010
- Future Pharma: Five Strategies to Accelerate the Transformation of the Pharmaceutical Industry by 2020

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Key contacts

Ed Giniat
Global Sector Head – Pharmaceuticals
KPMG in the US
Tel. +1 312 665 2073
eginiat@kpmg.com

David Blumberg
Global Leader – Pharmaceuticals Advisory Services
KPMG in the US
Tel. +1 267 256 3270
dblumberg@kpmg.com
### Companies Mentioned in this Issue

<table>
<thead>
<tr>
<th>Company</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbott Laboratories</td>
<td>2, 6</td>
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<td>AstraZeneca</td>
<td>2, 7, 8</td>
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<td>Bayer</td>
<td>2, 7, 8, 10</td>
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<td>BMS</td>
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</tr>
<tr>
<td>Boehringer Ingelheim</td>
<td>7, 8</td>
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<tr>
<td>Boston Scientific</td>
<td>6</td>
</tr>
<tr>
<td>DoctorNetworking</td>
<td>7</td>
</tr>
<tr>
<td>Genentech</td>
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<td>GSK</td>
<td>2</td>
</tr>
<tr>
<td>KV Pharmaceuticals</td>
<td>10</td>
</tr>
<tr>
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<td>7</td>
</tr>
<tr>
<td>Medtronic</td>
<td>6</td>
</tr>
<tr>
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<td>5, 6, 7</td>
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<td>Novartis</td>
<td>2, 5, 8</td>
</tr>
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<td>7</td>
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<td>2, 7</td>
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<td>2, 5</td>
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<td>UK’s Prescription Medicines Code of Practice Authority (PMCPA)</td>
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<td>US Food and Drug Administration (FDA)</td>
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</tr>
<tr>
<td>WebMD Health Corporation</td>
<td>5</td>
</tr>
</tbody>
</table>
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Contact: Vipin Kumar
Head of Global Markets Research
KPMG in India
Tel +91 124 612 9321

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