

# Nurturing *change*

Multichannel pharma marketing  
could be ready to hatch

**A**t the turn of the millennium, as the industry began its painful descent from the summit of the blockbuster era, the optimisation of sales resources in a changing environment was global pharma's biggest strategic challenge.

Arguably, it still is. The days when vast armies of representatives descended on GPs in their droves have long departed; they were expensive, unsustainable and misaligned with the emergence of payers as key influencers in the adoption of medicines. As the industry's single biggest commercial outlay, the field force was always going to take the hardest hit - but analysts' post-millennium forebodings of the Death of a Salesman have never materialised. Fifteen years later and, despite a significant reduction in the number of representatives, plummeting access rates and the ever-increasing importance of payer communication, the sales force still remains. The 2015 model is the Elton John of field forces; it's half-sized, it's had its fair share of cosmetic surgery, but it's still standing. The transition through facelifts such as key account management and the deployment of field-based market access teams, has given the appearance of sales force evolution - but critics claim that much of that restructuring has been skin deep, producing superficial transformations that mask a continued reliance on old methodologies. But, as the wider world adapts to technological evolution, even pharma is not immune to the need for real change. In fact, if managed appropriately, technology could provide the catalyst for optimal, efficient and highly effective sales engagement.



## ‘The development of a more nuanced, multichannel approach ... can support and supplement the field force’

The rapid development of digital, mobile and ambient technologies has transformed the global communications paradigm, and, with it, set new expectations in how consumers and professionals consume information. The potential impact on pharma/HCP interaction is significant. To succeed, and indeed to optimise valuable resources, companies must align disruptive innovation with the undisputed skills of specialist sales resource to deliver targeted and effective integrated communications.

But despite rhetoric to the contrary, new technologies will never replace face-to-face engagement. The next phase of commercial optimisation will focus not on the death, but on the depth of a salesman. The development of a more nuanced, multichannel approach, where organisations harness technology and leverage communications and insight across a variety of channels, can support and supplement the work of the field force. By adopting a balanced, multichannel approach with the sales force at the centre, companies can enjoy deeper engagement, build deeper relationships and communicate the depth of information that customers in the value-based economy require.

The jury is out on whether European field force numbers have finally plumbed the depths - but the signs are encouraging. “In a lot of markets, downsizing has bottomed out,” says Julian Tompkins, regional president, Ashfield Commercial and

Medical Services. “Across Europe, lots of companies have cut quite deeply - in some cases up to 50% - but many are now in a phase where new opportunities are emerging and they’re looking to reinvest in sales resources. The most progressive companies are resisting the temptation to revert back towards bloated headcount and are instead resourcing sales much more flexibly. In addition, companies are increasingly considering alternative channels and how they can supplement the activity of the field force and make it more efficient and more cost-effective. The trend towards adopting a multichannel approach is growing, but there remains a lot of experimentation across newer channels.”

### Deep-seated culture

The approach is embryonic. In a conservative industry, it’s hardly surprising that the move to multichannel is a slow work-in-progress. Perhaps more surprising, however, is the apparent failure of some organisations to learn from the lessons of history. “There are occurrences of resurgence in sales resourcing and reversion to the old models, particularly to support new product launches,” says Jan van den Burg, VP commercial strategy, Veeva Systems. “Rather than opting for a more customer-centric multichannel approach, the failing reach and frequency approach is tried once again.”

This reliance on old methodology often manifests itself in the field force, where rebadged sales representatives can often resemble new dogs doing old tricks. “As the industry’s customer-base has expanded, companies now fully recognise the need to understand why each stakeholder is important, and how they must tailor communications in line with the diverse needs of individual influencers,” says Alex Ide, principal, commercial analytics at IMS Health. “However, in

some organisations, marketers go through the process of stakeholder mapping with real rigour - but conclude by writing job profiles that ask representatives to perform in exactly the same ways that they would have done five years ago. The tendency to lapse back into old, familiar habits is a barrier to multichannel progress.”

### Silo mentality

The word ‘multichannel’ is now de rigueur in marketing circles, but in the pharmaceutical industry, it’s a look that’s proving difficult to pull off. In the real world, however, it’s a simple proposition. “The Holy Grail is having a mixture of channels that enable you to engage with the broadest contingent of customers, with the requisite frequency, to help influence prescribing and change behaviours,” says Julian. “From a sales perspective, the routes to market are manifold. For example, the medical representative, KAM, hospital representative and MSL (medical scientific liaison) are all different channels. So too are call centres, web-enabled remote representatives and other forms of online engagement. The industry is looking at lots of different ways in which it can engage, but - crucially - none of them are mutually exclusive.”

Perhaps that’s the major obstacle: mutual exclusivity runs deep in pharma’s operational psyche. “To progress, everything needs to be integrated across all channels. However, although pharma is putting all these channels in place, they still operate them in silos,” says Jan. “Interaction information rarely makes it back to the representative. The most effective models provide the representative - or anyone with customer-facing responsibilities - with full end-to-end visibility of all interactions. For example, MSLs can see interactions between customers and representatives, or monitor online engagement. Likewise, representatives have

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visibility that a clinician has logged a medical enquiry. By improving visibility across all channels, sales professionals can develop more informed interactions.

“Companies have historically struggled to connect all of their channels. But, with advances in Cloud technology, the opportunity to integrate everything - from digital and face-to-face interaction, to remote detailing and events - is here, providing the stimulus for a measurable multichannel approach. Proactive companies are now combining CLM, approved emails, co-browsing and other digital engagement tools with CRM functionality to empower their field force with end-to-end multichannel visibility. And it's helping reinforce the value of face-to-face engagement.”

### Measure for measures

For senior executives buoyed by the opportunities of multichannel, measurability is key. Optimising sales and marketing resources is a perennial challenge, but as long as companies persist with operational silos, divisions such as sales, digital, marketing communications and SFE will continue to compete head-to-head for budget - and the multichannel opportunity risks being squandered. “Organisations need to develop effective ways of measuring ROI across every channel,” says Alex. “Pharma is used to making decisions based on lots of data, but with many of the more innovative digital initiatives still in their infancy, some of that data is not available to them. This makes marketers uncomfortable and can perpetuate a tendency to maintain the status quo. What's needed is independent and rigorous approach to help companies understand where they should be investing, across brands and channels, and why. The prior year's plan is a common base for much strategic planning - but it's just one component and far from the most important. If organisations really do want to develop an effective multichannel approach, they must plan and resource based on detailed insights into which channels work. The best insights will not only drill down into therapy areas, markets and specific customer groups, in some cases they can be as granular as individual physicians and payer influencers.”

The best solution will be to adopt an agile, brand-by-brand approach to resourcing and marketing spend, based on a holistic understanding of all the key constituents in the decision-making matrix. “You need to evaluate where your product is in its life cycle in every market, and understand the relative market constraints, key customer characteristics and market access challenges. This will help inform the level of resource that's most suited to those individual circumstances. This forms the basis of your multichannel strategy - enabling you to coordinate digital and educational campaigns in harmony with targeted, face-to-face engagement,” says Julian.

The future model of pharmaceutical sales will almost certainly be multichannel - but, despite the harbingers of doom, the sales professional will remain the driving force. “The best multichannel approaches will comprise the proper alignment of human and digital resources,” says Jan. “Technology can help provide scale, speed, intelligence and analytics - but it's only by putting human resource at the centre of communications that multichannel can fully deliver.”

### Deep and meaningful

As field force deployment begins to show green shoots of

resurgence, pharma's determination to optimise its European sales resources remains a major strategic priority. For many, multichannel may be a desirable, yet distant, destination. But as they endeavour to maximise salesforce ROI in an evolving healthcare environment, companies are increasingly recognising the role that integrated technologies can play in adding quality, value and, crucially, depth to face-to-face interaction.

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