



The Power of Remote Physician Engagement end to end strategy

Bucharest 2020

Agenda for today

Digital
segmentation



Remote
detailing



Market
context



Online
marketing



Today's presenters



Alexandra Bosco

Consulting and Primary Market Research
Engagement Manager
IQVIA Consulting



Catalin Fota

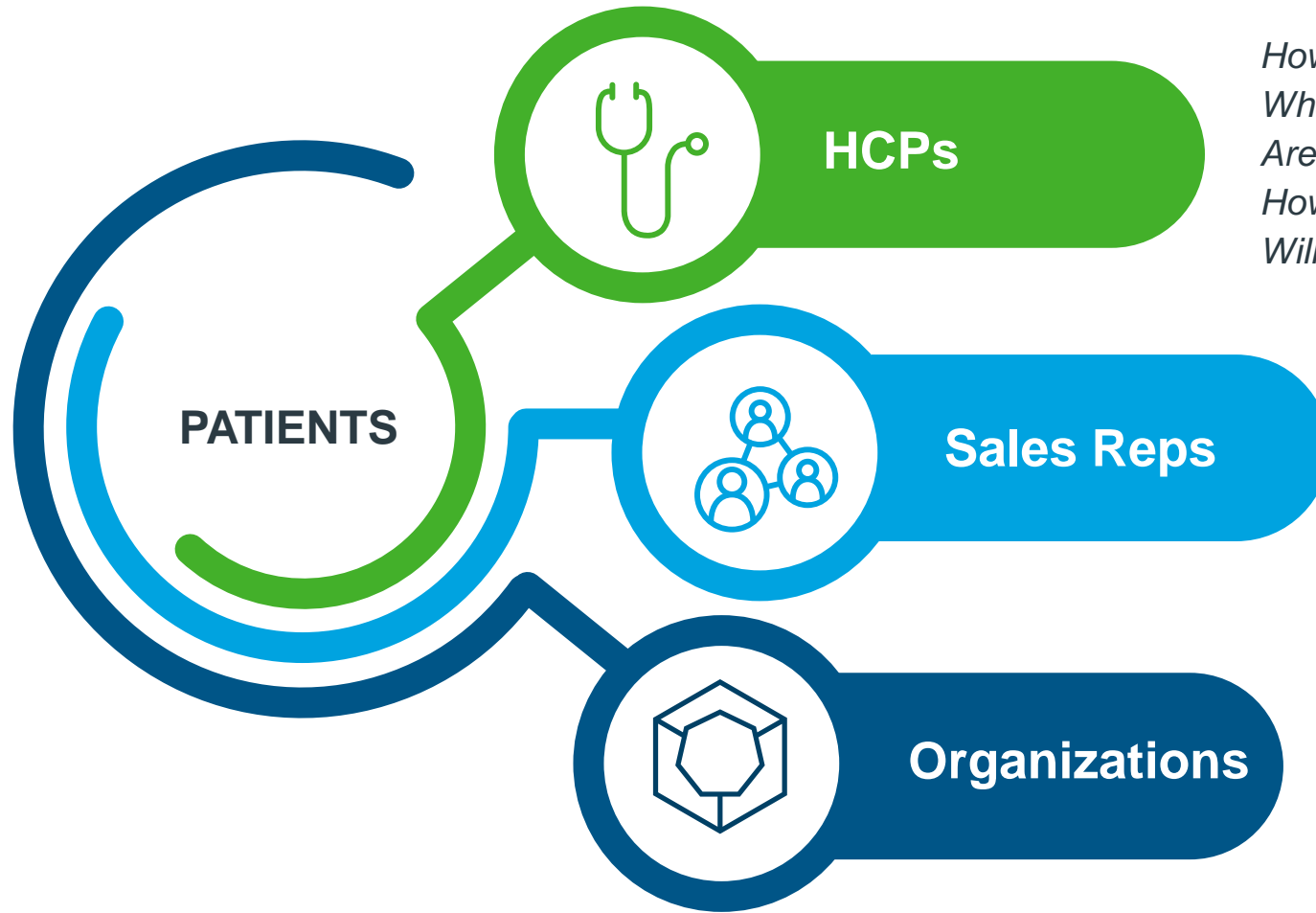
Technical Solution Sales
Associate Director
IQVIA Technology



**When we are no longer able to
change the SITUATION, we are
challenged to change OURSELVE**

Current context related concerns raised at all layers of the marketing process ...

Frequently Asked Questions



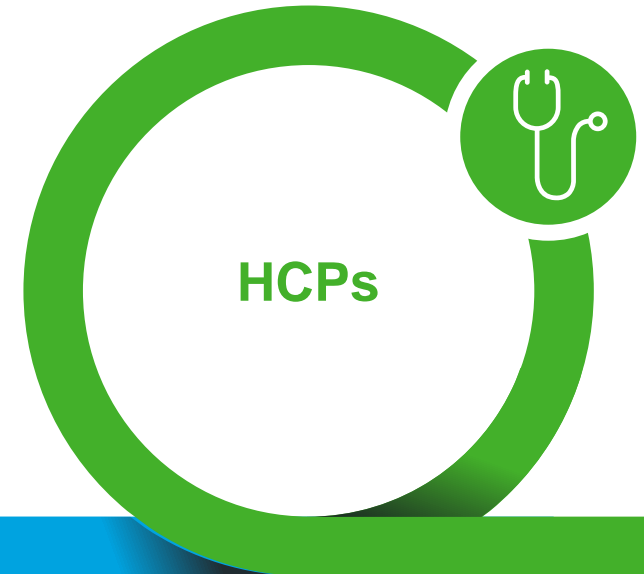
*How to properly engage HCPs?
What is best action sequence?
Are HCPs ready for a full digital connection?
How to engage with the HCPs that opted out?
Will they turn back to F2F once out of the current limits?*

*How to shift team towards digital?
How to adapt their speech/ anchors?
How to keep them engage?
What KPIs should we put in place?
What platforms to use? Is phone call sufficient?*

*How to cope with changing behavior (patients/
consumer and HCPs)?
How can we optimize the marketing sales processes?
What will be the future of our SalesRep teams?
How to set up tools and how to find the best value from
your existing tools?*

... drive changes to the solution of the HCPs engagement

Ways forward in managing the crisis



Challenging the status quo

- Generate and communicate adapted messages to both HCPs and Reps
- Understand changes behavior of both HCPs and patients
- Review product development, launches and portfolio to properly structure SalesReps teams

Salespeople are social creatures

- Take care of the team's wellbeing
- Ensure the right tools are in place (policies, procedures, KPIs, tools and techniques)
- Train the Sales Reps on how to adjust their messaging and outreach from a virtual setting

HCPs are shifting priorities

- Serve by providing guidance and clarity and then sell
- Pause "cold" discussions/ email initiatives, staying tuned to social changes, but don't leave long "on pause"
- Rework and reframe your messaging
- Be ready as people adjust to the new reality

With the epidemic in full swing, patients suffering from other disease are postponing treatments



Patients behavior



Up to **1700%** increased acceptance of **TELEMEDICINE** visits²⁾

Up to **65%** patients proactively cancelled/postponed non-essential visits¹⁾

Volume of patients compared with a normal period³⁾

 32%	Inpatient volume	 19%	Outpatient volume
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Between **21% - 33%** workload in **COVID-19** related departments and for physicians in chronic diseases⁴⁾

Between **6%-12%** workload was registered for non Covid-19 related specialties⁴⁾

1) IQVIA US Primary Intelligence N=1071 HCPs 17-23 March 2020 "Have your patients proactively cancelled/postponed office visits because of COVID-19?"

2) US data taken from Kaiser Health Network - [Telemedicine Surges, Fueled By Coronavirus Fears And Shift In Payment Rules](#) (March 27, 2020)

3)) IQVIA Hubei Province Primary Intelligence online interviews N=1377, February 2020

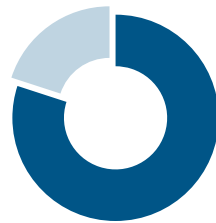
4) IQVIA Hubei Province Primary Intelligence online interviews N=1377, February 2020

Remote interaction increased as F2F promotion was drastically affected

HCPs behavior



HCPs growing interest in online connection with PharmaCos¹⁾



80%²⁾ of HCP the wishes to maintain an online/ remote contact with Pharma Cos

Preferred channel

- ✉ 80% Mail
- 📞 30% Phone call
- 📱 24% WhatsApp
- 📺 12% Video call (eg. Skype)
- 💬 11% PharmaCo chat
- 📺 10% Video call (with HCPs)
- 👤 4% Others

Preferred time for engagement³⁾

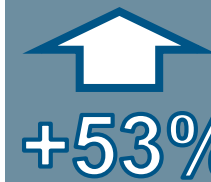


- 31% **Evening** (4:00 PM- 8:00 PM)
- 28% **Morning** (9:00 AM- 12:00 PM)
- 24% **Afternoon** (12:00 PM- 4:00 PM)
- 10% **No preference**

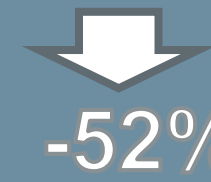


- 36% **Weekdays** (Monday- Friday)
- 31% **Anytime**
- 16% **Weekends** (Saturday - Sunday)
- 18% **Undecided**

Change in promotional activity²⁾, Mar'20 vs Mar'19



Remote detailing



F2F detailing

In this context of need and struggle, HCPs appreciate PharmaCos which are **present, available with sensitive reps and provide support¹⁾**

Information and services that HCP seek during COVID-19 phase



Information

- Scientific update on new drugs
- Information on safety profile
- Clinical trial data



Needs/ Service

- Gloves and masks
- Digital means to manage patients remote (online info)
- Drug home delivery

1) IQVIA Italy Primary Intelligence N=1095 physicians, 14-18 March 2020, The information herein is provided "AS IS" and without warranty of any kind, express or implied.

2) IQVIA ChannelDynamics, Romania, HCP's perceived number of interactions

3) IQVIA India Primary Intelligence N=500+ doctors across 16 specialties

COVID crisis is requiring PharmaCos to rapidly adapt go to market models to secure the relationship with Physicians

Short term

Restrictions to F2F contacts (detailing and meetings) has led to a shift to remote interactions. Reduction in HCP contacts has freed up Sales Force capacity for value adding back office activities.

Focus areas in a short-term perspective

Call related activities



Remote contacts and increased digital experience



Shorter call duration, higher flexibility



Shift of communication from product to disease/ customer



Full availability and support through proactive listening

Back office activities



Online trainings (Mainly technical trainings)



Targeting & Call Planning review



Support in Services deployment

Mid term

Maturity of MCM need to be increased to ensure go to market models will be fit for a future where daily remote interactions will be the "new normal" and needs will emerge from HCPs

Focus areas in a mid term perspective



Full MCM approach

Remote interactions becoming the new normal?

- Need to scale up from "Digital experience" to a Multichannel approach integrated with F2F
- FF training on soft skills for an effective multichannel customer engagement as a priority



New HCP needs

- HCPs requiring support in patient management with an increase in eHealth solutions (e.g. e/tele-health patients visits, remote monitoring of adherence, virtual clinical trials).
- HCP communication focused on different drivers (e.g. drug administration, pathology focus, HCP triggered contents)



Post-COVID Healthcare system

New stakeholder focus and changes in patient treatment, drug delivery and purchase path:

- Change in reimbursement policies and focus on sustainability
 - Different treatment settings, shift of hospital drug dispensation to other channels
- Focus on services like home delivery and multidisciplinary virtual teams

The current context gives each company the opportunity to focus on designing or revamping its MCM strategy

Multi-Channel Marketing components



Digital segmentation

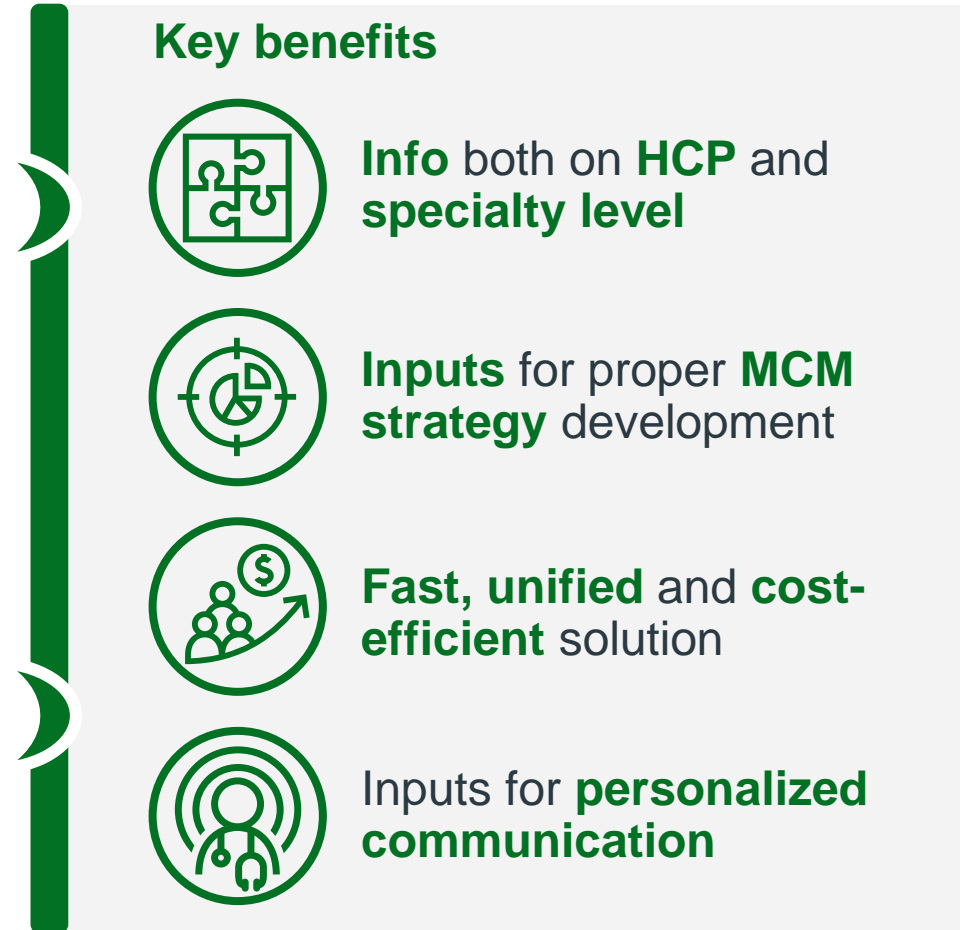
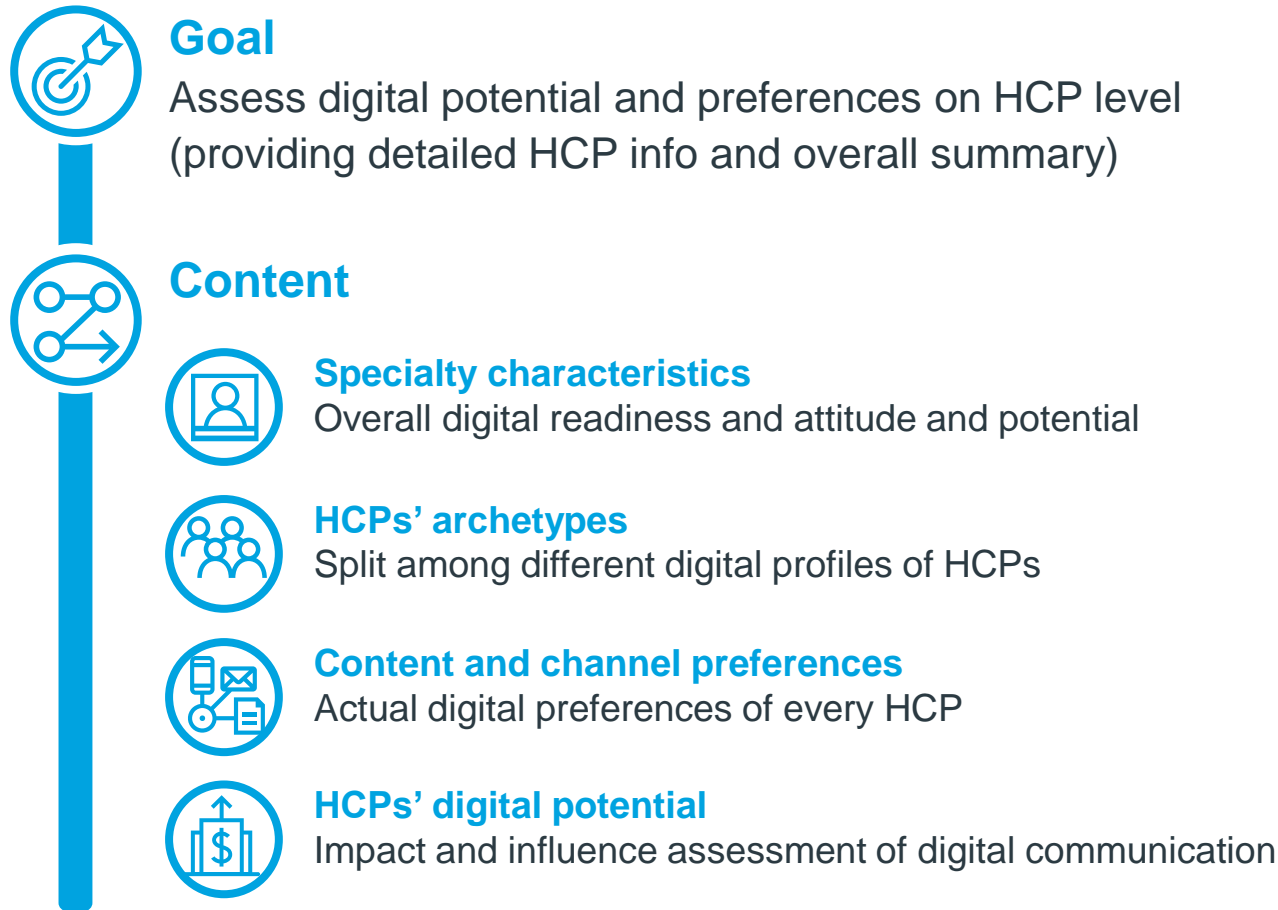
WHY?

HOW?

WHAT?

Digital segmentation offers detailed info on HCP level as well as overall specialty summary providing required info for MCM

Digital segmentation

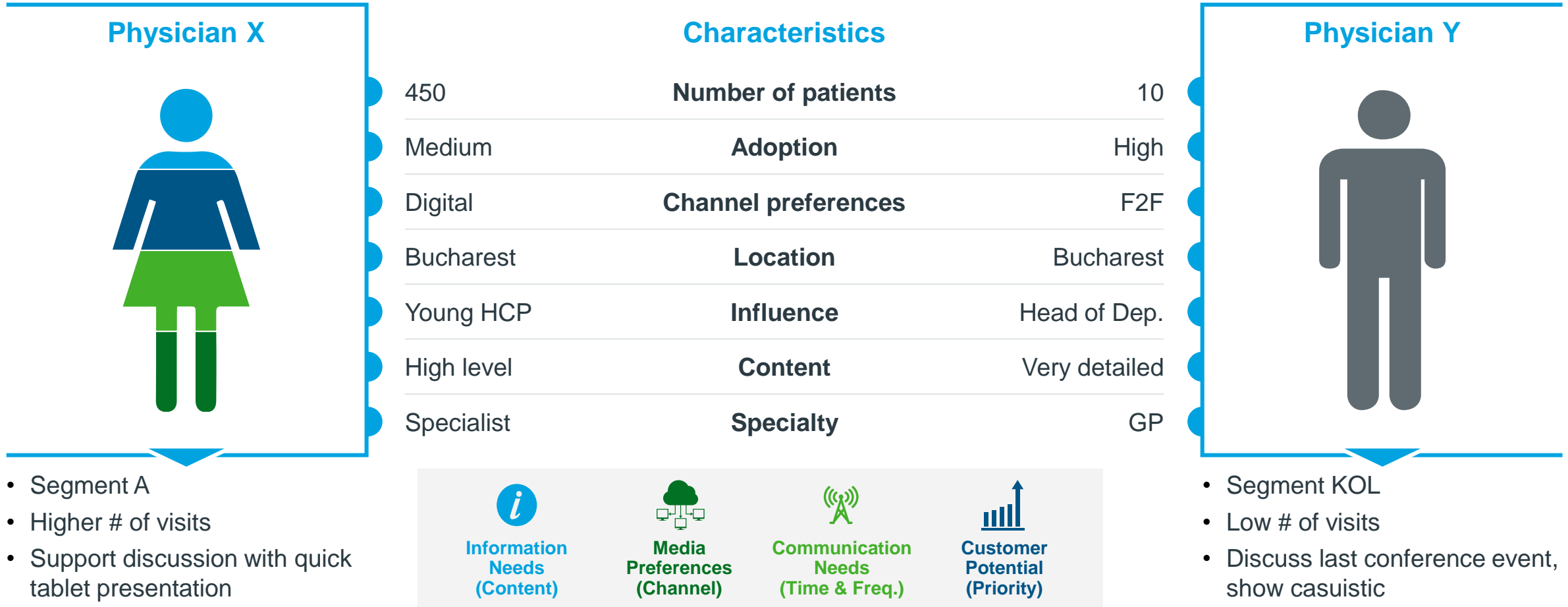


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Source: IQVIA

Each physician is different – personalized approach to individual customer is needed

Why do we segment?























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Source: IQVIA

Thanks to segmentation we can tailor our communication strategies to different specialty segments

Segment impact on content delivered and channel

ILLUSTRATIVE

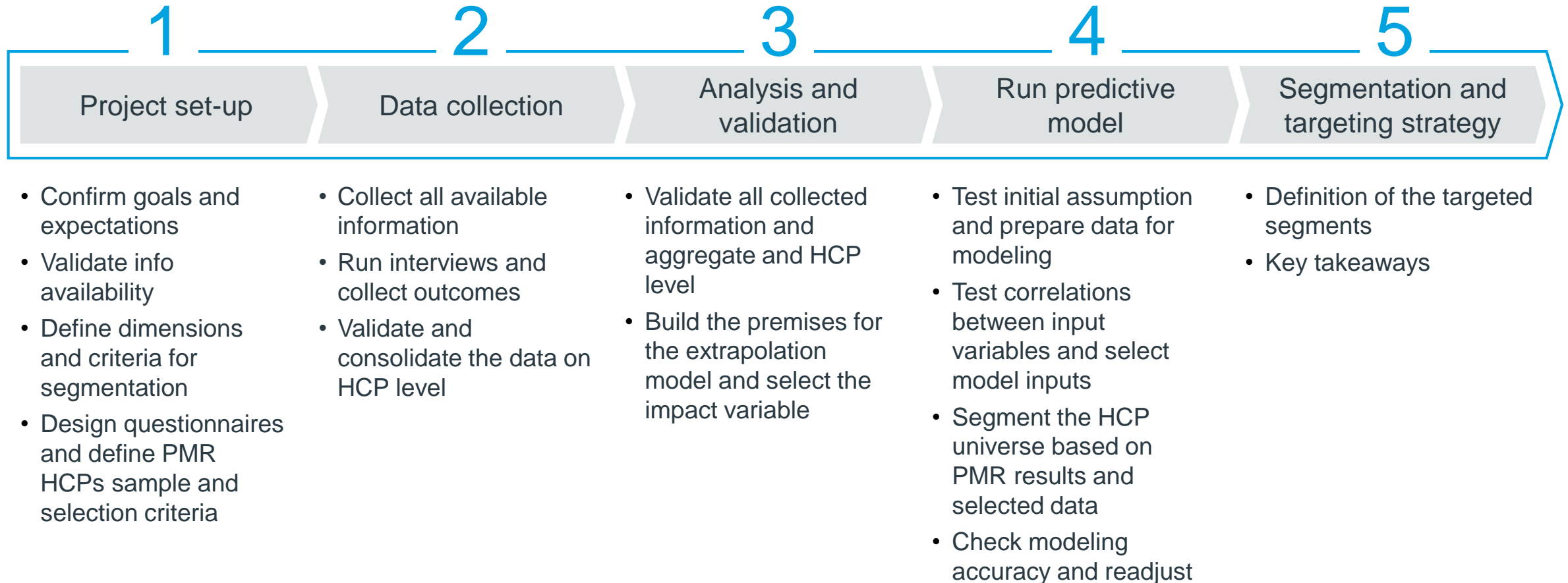
<p>Archetype</p>	 INNOVATORS	 OPPORTUNIST	 RESISTANT	 CONSERVATIVE
<p>What message to deliver</p>	<p><i>Clinical trials</i> <i>Info from foreign congresses</i> <i>Safety and side effects</i></p>	<p><i>Experience from colleagues</i> <i>Clinical trials</i> <i>Safety and side effects</i></p>	<p><i>Clinical trials</i> <i>Info from foreign congresses</i> <i>Safety and side effects</i></p>	<p><i>Clinical trials</i> <i>Experience from colleagues</i> <i>Case studies</i></p>
<p>How to engage</p>	<p>Seminars </p> <p>Journals </p> <p>Sales rep </p> <p>Mobile app </p>	<p>Seminars </p> <p>Journals </p> <p>PharmaCo website </p> <p>Email </p>	<p>Seminars </p> <p>Journals </p> <p>Sales rep </p> <p>Professional website </p>	<p>Seminars </p> <p>Journals </p> <p>Professional website </p> <p>Sales rep (digital) </p>

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Source: IQVIA

The initiative outcome relies on modeling various sources of data that needs to be fully aligned to the end objective of project

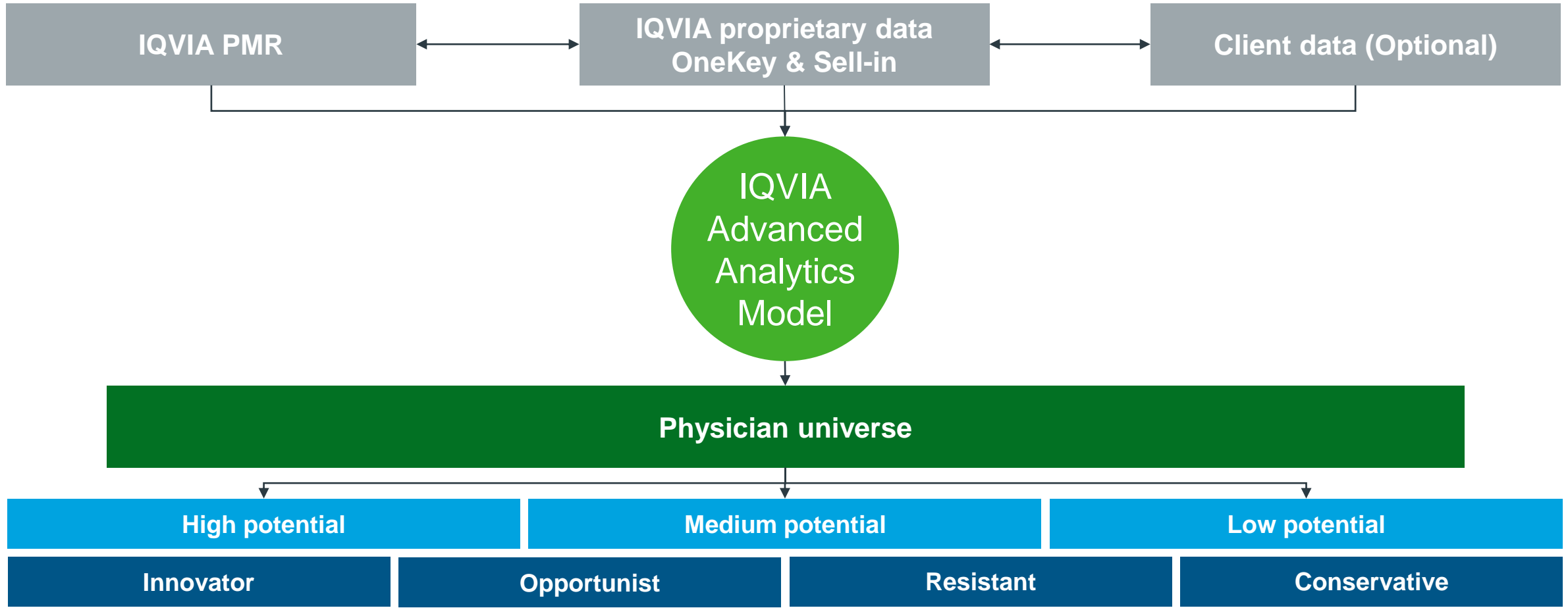
Typical project approach overview



Using various data sources, IQVIA leverages advanced analytics models to segment the whole universe of HCPs

High-level approach to multi-dimensional segmentation

ILLUSTRATIVE



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Source: IQVIA

Digital segments and their segmenting criteria are discussed and mutually agreed at the beginning of the project

Digital segmentation criteria

ILLUSTRATIVE

Digital Adoption		Digital Preferences		Digital Content		Digital Potential	
Traditionalist	No emails on smartphone and not open to digital communication	Digital basic	<ul style="list-style-type: none"> • Newsletter • Email support • Pharma specific web • PharmaCos web 	Medical info	<ul style="list-style-type: none"> • Healthcare news • PharmaCos' news • Medical Information 	Low	<ul style="list-style-type: none"> • Patient number/ Prescription potential • Email on smart phone • Openness to digital communication • Digital content average • Digital channels average
Conservative	Emails on smartphone but not open to digital communication	Digitally maturing	<ul style="list-style-type: none"> • E-cases • E-learning 	Medical education	<ul style="list-style-type: none"> • Medical education 	Medium	
Digitally open	No emails on smartphone but open to digital communication	Digital nomad	<ul style="list-style-type: none"> • E-detailing • Apps • E-conferences 	Interaction with peers	<ul style="list-style-type: none"> • Interaction with peers 	High	
Digitalist	Both emails on smartphone and open to digital communication			Event information	<ul style="list-style-type: none"> • Events invites 		

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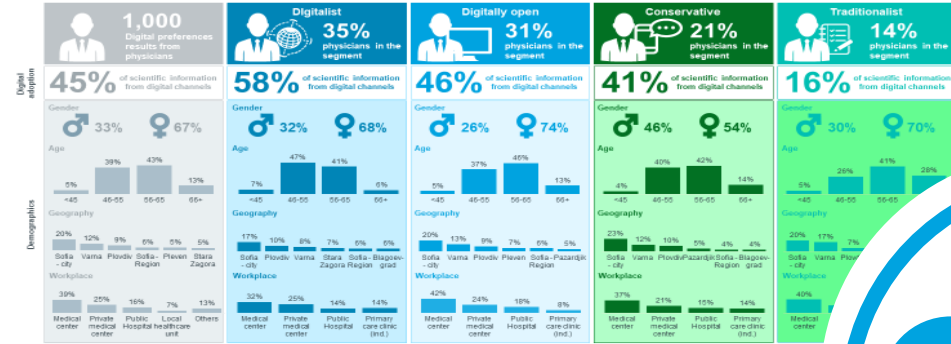
The segmentation will result in a series of analysis to uncover market insights about the HCP population

Analysis outcome of the digital profiling

SEGMENTS OVERVIEW

These 4 segments have the below main demographic characteristics, Digitalist segment consists of 54% of doctors with age below 55 years

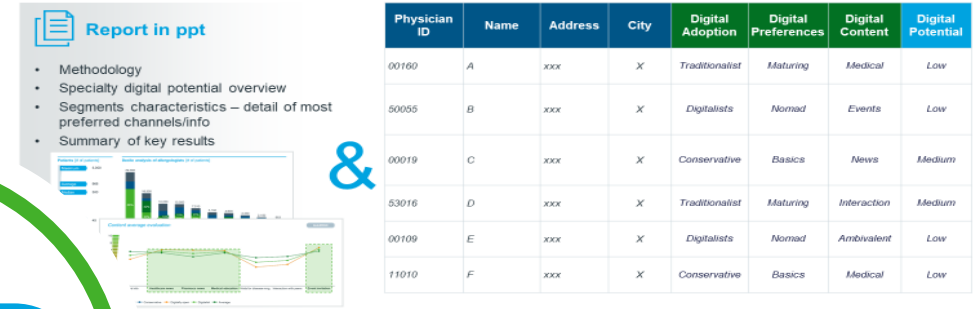
Physician segments overview – Demographics



DIGITAL SEGMENTATION – THE WHAT?

The ultimate outcome will be thorough analysis of the specialty as well as HCP-level digital segmentation

Illustrative deliverable



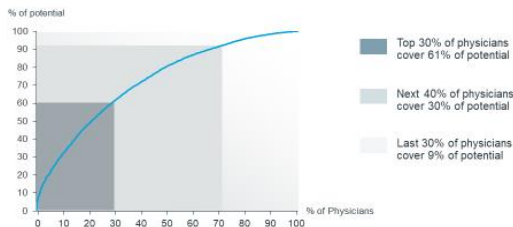
ILLUSTRATIVE EXAMPLES

DIGITAL SEGMENTATION – THE WHAT?

Market is relatively concentrated – 30% of physicians covers 61% of patient potential

Potential detail

Concentration curve [Total # of patients]



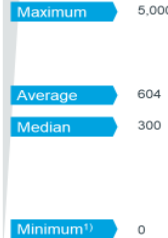
Segment split	Number of HCPs
High	75
Medium	101
Low	78

DIGITAL SEGMENTATION – THE WHAT?

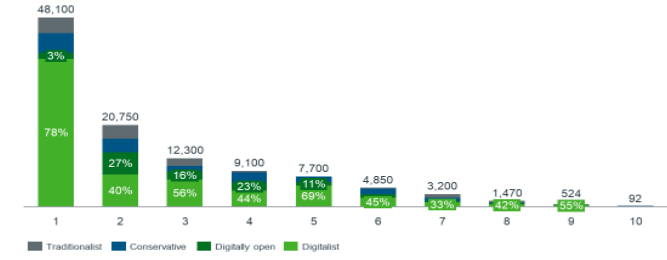
Segmenting at decile analyses, it gives you nice information on digital adoption and potential

Adoption and potential

Physicians [# of patients]



Decile analysis of pneumologists [# of patients]



We have several specialties ready to deliver, any other specialty is possible to deliver and tailor to specific needs

Currently available specialties

Specialty	E-mail responsiveness	Pre-existing IQVIA digi profiling	Exclusive update
General Practitioner	✓	Sample: 6198 HCPs ✓	✓
Psychiatry	✓	Sample: 614 HCPs ✓	✓
Internal Medicine	✓	Sample: 609 HCPs ✓	✓
Neurology	✓	Sample: 369 HCPs ✓	✓
Cardiology	✓	Sample: 330 HCPs ✓	✓
Intensive Care	✓	Sample: 306 HCPs ✓	✓
Nutrition	✓	Sample: 299 HCPs ✓	✓
General Surgery	✓	Sample: 269 HCPs ✓	✓
Nutrition – Assistant	✓	Sample: 260 HCPs ✓	✓
Orthopedy	✓	Sample: 178 HCPs ✓	✓
Oncology	✓	Sample: 114 HCPs ✓	✓
Other specialty	✓	Sample: N/A ✗	✓

DELIVERY TIME

3 days

2-5 weeks

8-12 weeks

BASED ON:


IQVIA e-mailing campaigns
HCP responsiveness rates

IQVIA PMR on digital preference
HCP responses

New tailored PMR study

IQVIA digital segmentation offer multiple benefits over alternative options

Why IQVIA?

		SEGMENTATION	ALTERNATIVE OPTION
Cost effectiveness	Savings on HCPs incentives and field force remuneration	PMR done on limited percentage of HCPs of total universe only (~20) and then extrapolated	Collect information on every HCP – time consuming, hardly feasible driving the total costs up
Time efficiency	Segmentation done in ~12 weeks	With dedicated team to collect inputs and extrapolation expertise, the segmentation can be done within limited time	Collect information via own sales force – time consuming and possibly not fully reflecting the reality – HCPs often adjusting answers to specific PharmaCo
Data availability	Various data information for AI model	With various pieces of information (sales, web presence, HCPs demographics the model becomes more precise)	Collect all data internally – time consuming and hardly feasible due to limited access to some types of information (e.g. prescription data, call pressure,..)
Central approach	Centralized segmentation	Centrally aligned segmentation gives possibility to create unified MCM approach in CEE with only minor local adjustments	Run segmentations locally resulting in varied approaches across CEE and limiting future possible synergies

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Source: IQVIA

Digital marketing

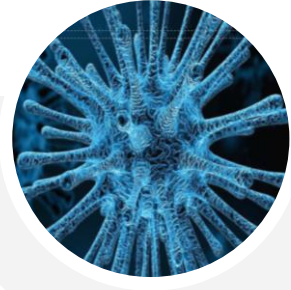
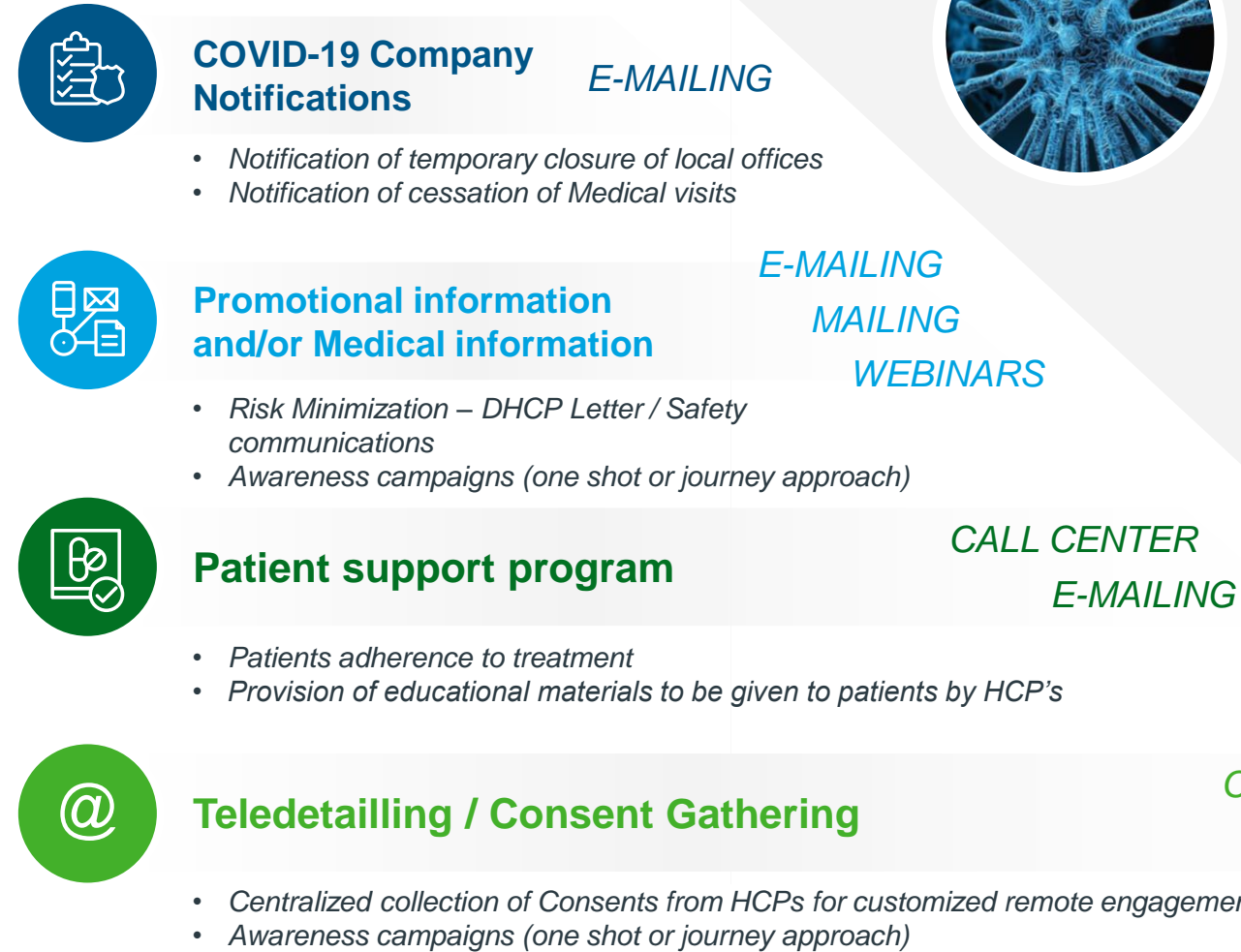
Seven key success factors for effective remote engagement

Making the most of remote interactions with HCPs requires a focus on both the people delivering the program, the technology used to support delivery, and the content that makes up the program

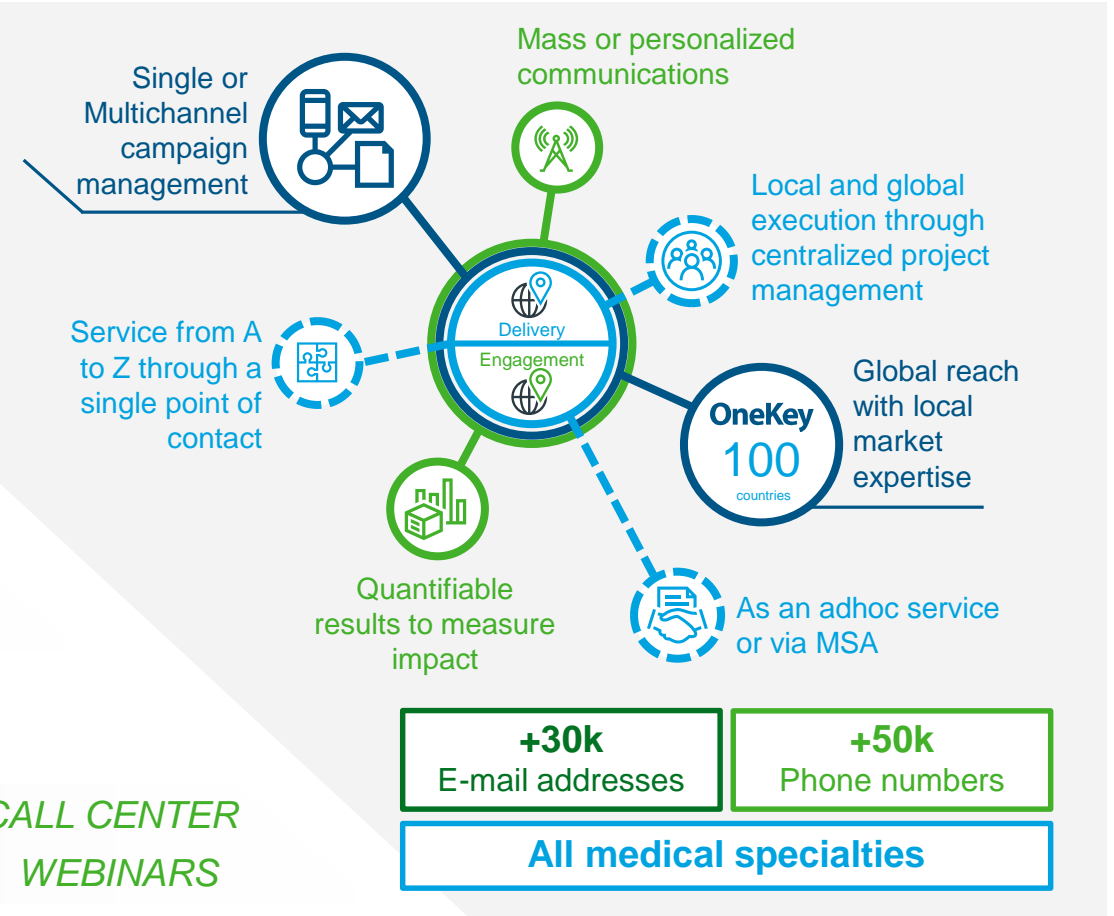


COVID-19

Multi-channel Marketing Services



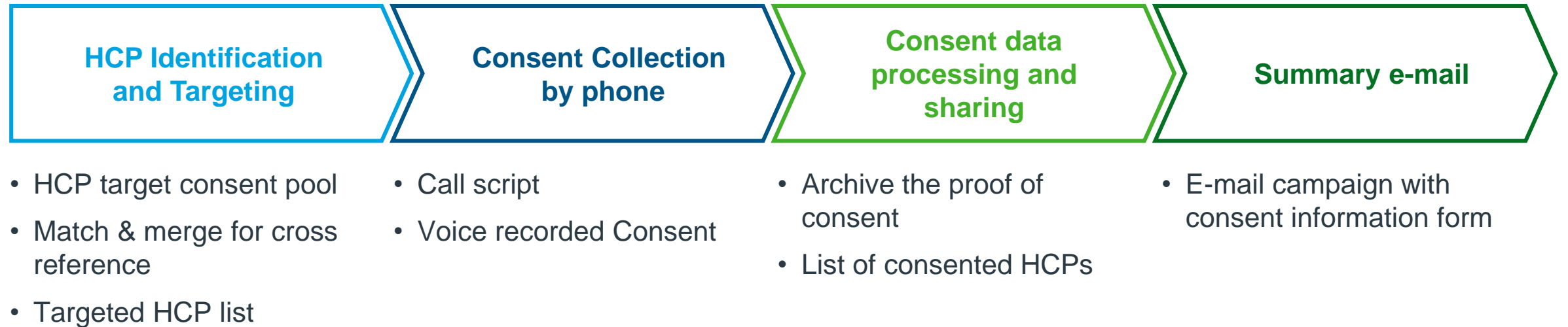
Delivery Model



Consent collection

Consent collection methodology

IQVIA TM follows a structured process to capture consent by phone



Call center agents can perform Pharmacovigilance

Consent collection insights



More than
50,000

Phone numbers of healthcare professionals



Phone call opt-in
More than
90%

Given consents



Between
30-35%

More than

25,000

HCP's targeted in consent collection project (last year)

7

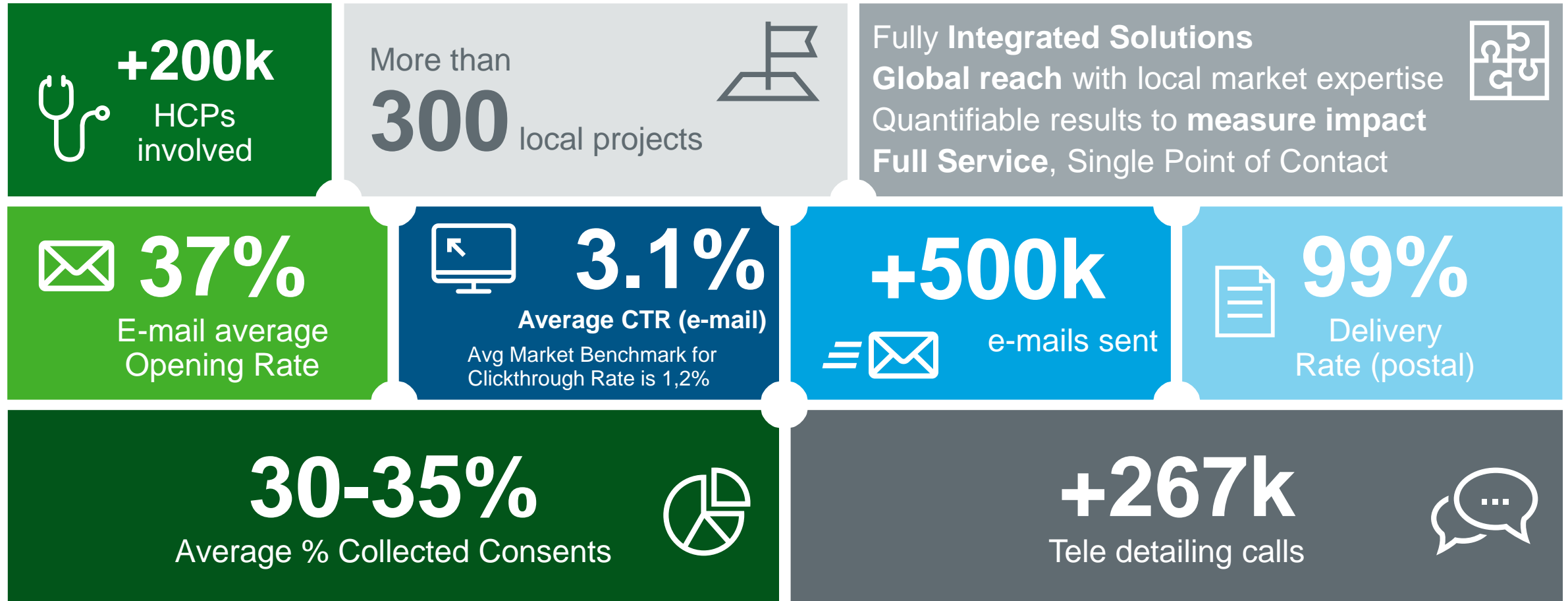
Consent collection projects

4

Consent management platforms

Multichannel Marketing Services campaigns Impact

Last 2 years



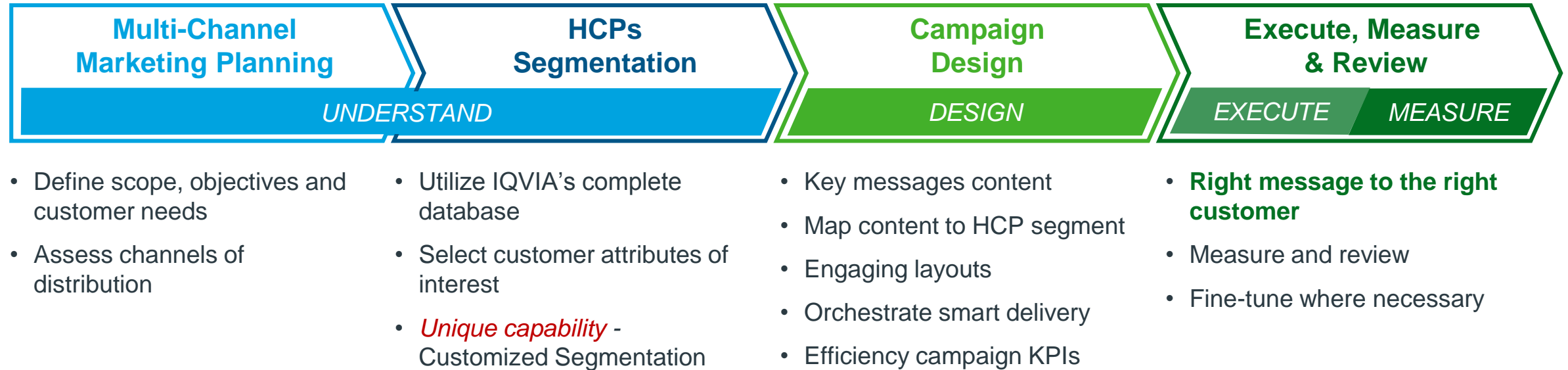
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E-mailing



HCPs Multi-channel Marketing methodology

IQVIA will be there to fine-tune every step of the campaign



By combining these four activities, IQVIA provides a complete MCM solution allowing organizations to transform from strategy & marketing to execution

OneKey Database insights



More than
50,000

addresses of healthcare professionals



Daily updated by a team of operators

Continuous validation of all records



nearly **90%**

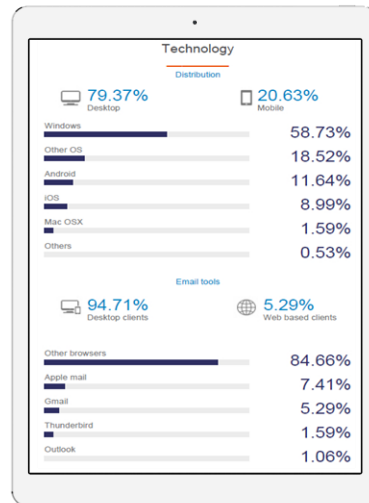
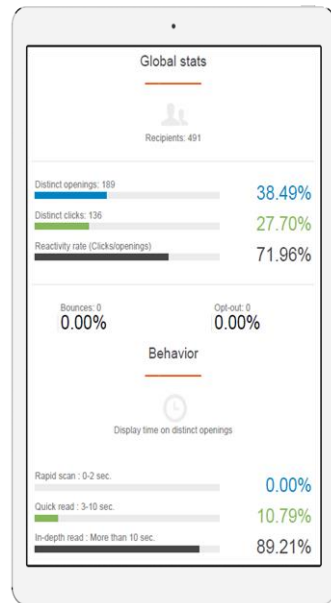
of records are updated over the last 12 months

More than
30,000

e-mail addresses with consents for e-mailing (100% GDPR compliant)

Emailing campaign's outcomes

Monitoring of recipient's behavior



Message retention level

Redesign the content

Opening rate analysis

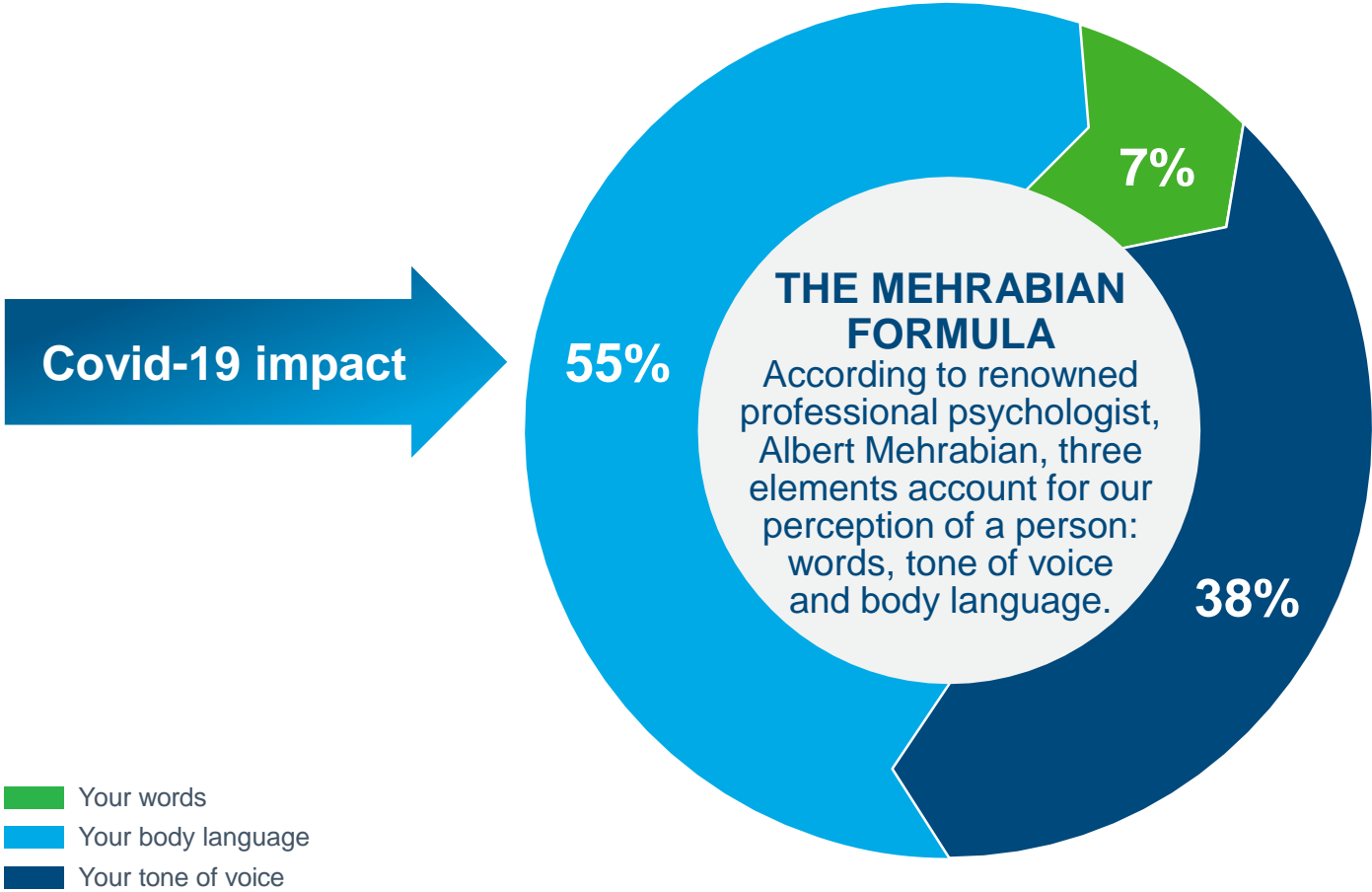
Rethink the wave pattern

Company/Product adherence

Change the channel mix

Remote detailing

The Mehrabian formula – what is the impact of a remote interaction



- ✓ Successful remote interactions require different communication styles.
- ✓ Teams involved in remote interactions must rely less on body language, balance listening with talking, effective use of voice tone and be confident using technology

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Technology – Why it is key to use the right tool



High HCPs' engagement, we need their focused and interactive attention



WE KNOW NOTHING about their technology environment



FULL solution that will seamlessly engage HCP's



HCP will expect: 10 seconds and 2 clicks to get to the presentation, system guaranteed secured, non-invasive and 100% compliant

IQVIA Remote Detailing's Key Differentiators

Non-intrusive:

Nothing to know, no preparation, no dial-in, no downloads, no installation, nothing left behind.
10 seconds to log on with
1 URL, 2 clicks.



Universal:

No Firewall, Proxy, VPN limitations
Device, OS & browser agnostic
+1,000,000 calls
85 countries



Compliant:

Content centrally managed.
Assigned to reps on named basis.
PI availability, AE reporting,
Medical Inquiry, PV and
unlimited tailored forms



Customizable:

From URL to look and feel, including
landing page disclaimers, privacy
policy statements, terms
and conditions,
GDPR compliance...



Insightful:

Fully tracked with automated
data extractions
Unique custom in-call
and post call surveys



Secure & Mobile:

Fully secured and encrypted with
HTTPS, randomly generated
token-based logon
100% functional in 3G
without content alteration



Summary of HCP (Participants) features

Nothing to know, no preparation, no dial-in, no downloads, no installation. 1 URL, 2 clicks.

The HCP needs:

- A device with an internet connection (whatever device)
- A web browser (whatever web browser)

The screenshot shows a web browser interface for Kadrige LifeScience. On the left is a video call sidebar with a participant's name 'Nicolas Laurent' and a video feed. The main content area displays a slide titled 'Diabetika' with a navigation menu on the left containing 'Legal / Additional documents', '2015 Kadrige SLAs', 'Coucou', and 'Product Information'. The slide content includes the text 'STRENGTH IN NUMBERS' and 'Diabetika helps your patients manage diabetes'. Below this are three columns of text: 'Diabetika: heritage in helping your patients manage their type 2 diabetes' with a bulleted list of benefits; 'Diabetika: best safety and tolerability profile in the glitazone family'; and 'Diabetika: cost-effectively promotes quality of life and treatment adherence'. A footer contains the Kadrige LifeScience logo and 'Kadrige an IQVIA Company'. Three blue callout boxes provide additional information: one points to the 'Legal / Additional documents' menu with the text 'Product PI and any other mandatory or promotional material made available to HCP at all time. May be downloaded as PDF documents'; another points to the video feed with the text 'Rep's name and photo and/or live video feed. This can be toggled off by the rep after a few seconds into the call, to allow for full screen display of content. 2-way video can be enabled if compliant'; and a third points to the bottom right of the slide with the text 'Slides invoked by Rep'.

Summary of Host's Features

All at hand in one place

- Reps & MSLs, like HCPs, access the platform...
 - From anywhere, whatever the connection conditions
 - From any device (PC, Mac, Tablet, iPad,...)
 - Running whatever operating system (Win XP, Win 7, Win 8, Android, Linux, Mac OS, iOS...)
 - Using whatever web browser (IE8, IE9, IE10, Edge, Safari, Firefox, Chrome, Opera,...)
- They select slides in a click as required by the conversation.
- The regulatory approved content presented is locked down in a server and assigned on a named basis. **NOTHING** but what is secured and assigned can be shown to HCPs.
- MSLs only can be allowed to upload and share own content from private storage space.

The screenshot shows a web browser window displaying the Diabetika platform. The interface includes a sidebar menu on the left with options like 'Logout', 'Participants', 'Customer Management', and 'Administration'. The main content area features a slide titled 'STRENGTH IN NUMBERS' with the text 'Diabetika helps your patients manage diabetes'. The slide contains three columns of text and images, along with the Kadriga LifeScience logo. A bottom navigation bar shows 'Menu', 'Documents', 'Diabetika', and '1. Manage diabetes'. A speaker notes window is open at the bottom right, displaying the text: 'Hello Doctor, Today we will talk about controlling your type 2 diabetes patients and the benefits of Diabetika.' Callout boxes point to various features: 'Rep connection & setup information' (top left), 'Timer triggered when HCPs log on' (top center), 'Slide displayed' (top right), 'Handy features: turn HCP full screen, turn pointer over to HCP, Medical Inquiry, live video cam, VoIP...' (top right), 'Randomly generated, secured one-time-use HCP access code' (center), 'Share by mail' and 'Share on Wechat' (center), 'Participant(s) connection & setup information' (center), 'Rep's menu: Content folders, slides, forms and target surveys' (bottom left), 'Slide thumbnails' (bottom center), and 'Speaker notes for each slide' (bottom right).

The current context gives each company the opportunity to focus on designing or revamping its MCM strategy

Multi-Channel Marketing components





Thank you

Please contact us for more details

RomaniaOffice@iqvia.com

