DIGITALIZATION RECHRISTENING
THE PHARMA COMMERCIAL MODELS

Whitepaper
1. INTRODUCTION

Pharmaceutical industry is going through transformation across the value chain owing to the Digital revolution. The digital initiatives are driving the pharmaceutical industry towards increased collaboration and thereby new business models are evolving. Industry is struggling to meet up to the expectations of various digital stakeholders in their decision journey, whilst technology is aiding the stakeholders in various engagement models.

- **ASK** – Enabling stakeholders to seek and find information by queries or search. (Patient education portals, Doctor Inquiries portals etc.)
- **SHARE** – Enabling stakeholders to share their feedback and reviews. (Patient forums/ portals, Feedback from doctors etc.)
- **TRANSACT** – Connecting with stakeholders through online shops or support programs. (Telemedicine, Free samples eShop etc.)
- **CO-CREATE** – Adding value by crowdsourcing or co-inventing. (Crowdsourcing Adverse Events.)
- **CHANGE** – Allowing the digital shape the real. (Games for mental health using augmented reality and virtual reality.)
- **BEING** – Merging digital with real. (Continuous Health tracking through wearables.)
The below infographic details are the engagement models and strategies for the various stakeholders.

Exhibit – Engagement strategies:
2. DIGITAL ONLINE LEADER (DOL) ENGAGEMENT

In the pharmaceutical marketing world, one of the most effective ways to influence physicians has been creating and maintaining meaningful and collaborative relationships with Key Opinion Leaders (KOLs). In today’s digital era, it has been observed that most influential conversations and content have surfaced over various online forums and platforms from a set of digitally active KOLs, leading to the emergence of the concept of Digital Opinion Leaders (DOLs).

Many Healthcare Practitioners (HCPs) are now not limiting to closed doctor’s networks, but are able to learn and get influenced from a far wider range of international experts by using mainstream channels like Twitter, public forums and doctors’ blogs. A study claims that only 57% of the KOLs use medical association and other social networks and in general internet for professional purposes.¹ DOLs may not necessarily be the traditional ‘type’ who conduct research, write articles and speak, influencing their peers to prescribe chosen products. However, if they are seen as an influential leader among their peers online in particular therapy area, it may be just as important to create the right strategy to engage with them, as it would be to engage with traditional KOLs.

As new insights emerge into the digital behaviour of HCPs, drug-makers are coming up with new and innovative engagement strategies and tactics to garner DOL interest. Most effective way to engage DOLs is to help them by providing various high value resources or content like online videos, research articles etc. for them to share on social networks. German drug maker Boehringer Ingelheim GmbH launched the cardiovascular drug Pradaxa in the U.S., it put together a digital-marketing package to target doctors, including organizing webcasts for leading physicians to speak to other physicians about the drug. Boehringer Ingelheim was also recognised as one of the leading pharma companies in digital stakeholder management with its very successful tweetchats, #COPDChat and #ChatAfib. These two tweetchats have inspired 1.7Mn tweet chat impressions and 489 twitter mentions of the company.² Roche hosts diabetes blogging by various DOLs and patient opinion leaders. Sanofi took a highly proactive approach by positioning themselves as an ally to doctors who may be hoping to develop professionally through the use of digital channels. Sanofi Campus is a free training programme for healthcare professionals who want to take full advantage of the Internet, social networks and other digital tools.
3. SMART MEDICAL REPRESENTATIVE

However influential the opinion leaders might be, sales calls to the doctor’s offices are still, undeniably the most powerful tool for driving prescriptions. The Marketing kit of the representative has evolved from the traditional kit with samples, promotional materials, planner, visiting cards etc. to electronic kits with complete information available on their iPads and mobile apps. Doctors’ bandwidth is committed to treating more and more patients and improving their health outcomes. In this pursuit, technology-led information sharing on new drugs, new indications and peer information on emerging treatment protocols is of tremendous benefit to the medical fraternity. It frees up their time for patients and at the same time, keeps them updated on the latest medical information.

A study from 2015 observed that 34% of physicians globally value the smartphone as a key resource in seeking medical information. Over 75% of doctors demand drug companies combine the use of digital tablets and iPads along with direct interaction when medical representatives (MRs) are detailing the portfolio of medicines. In terms of overall digital engagement across channels, globally pharma companies are far ahead, with MSD at the top followed by GSK, AstraZeneca and Pfizer. In India, Abbott leads the pack as the top digital engager, who doctors believe is effectively leveraging technology to reach out to them for providing drug information. Abbott is followed by MSD, Pfizer, Novartis, GSK and Sanofi.3

Abbott has created web based and app based repository for scientific education for doctors across multiple therapy areas called the ‘Knowledge Genie Portal’. GSK Pharma has developed a cloud based application which enables direct communication between doctors and the company’s medical department and has also hired 20 doctors to respond to medical and clinical related questions from doctors. AstraZeneca has created “AZ Touch points,” a website doctors can use to ask questions, order free samples and ask about insurance coverage along with brochures and other educational materials.

4. DIGITAL DOCTOR-PATIENT ENGAGEMENTS

Patient doctor engagement is effected by time constraints and other logistic challenges. Digital channels pose a remedy for these by allowing patients to interact with doctors online. A report states that over 64% of patient-doctor interactions are digital, with email, website and text message as their channels.3 Kaiser Permanente claimed that they conducted nearly 110 million digital interactions with patients in 2015, ranging from digital doctor visits through telemedicine to mobile Apps.
Various efforts like digital health biographies, mobiles apps etc. are being made to digitize several components of doctor-patient engagements. Future road towards digital health biographies feature patient information, diagnostics, test reports and images, comments, referral, prescription, medication remainders and upcoming schedules, all present in one platform or app. The Baidu Doctor app allows patients to ask doctors direct questions, book appointments online and search for healthcare-related information. Melody medical assistant from Baidu uses deep learning to help doctors gather information from patients about their medical conditions and help physicians arrive at a diagnosis.

A report from Accenture on customer loyalty in healthcare showed that 61% of patients will switch providers if it means they are able to get an appointment faster. Digital health platforms are able to provide this kind of accessibility by eliminating the typical logistics involved with office visits. A doctor on a digital health platform can determine how many questions she/he can answer in a given day and the platform can direct questions to doctors based on availability to decrease the wait for an answer. By opening up patient questions to a network of physicians these platforms solve one aspect of the scheduling problem.

5. ePATIENT

In the digital and social media age, the healthcare conversation has been democratised and the relationship between healthcare providers and patients has shifted. Patients are no longer the passive recipients of information and advice on how to manage their condition – they are going into armed with information from Google and ready to challenge the medical experts. For an industry that has always dealt with complex customer networks of direct prescribers and influencers, Patient Opinion Leaders (POLs) have become as important as medical Key Opinion Leaders and they are found everywhere. Engaging with the POLs will build your credibility and trust, which will ultimately result in your organization being invited into the inner circle. Industry benchmarks have shown that patient insight sessions have significantly raised their willingness to recommend the brand.

Pfizer engaged with people living with chronic pain using an online crowdsourcing model and social media campaign that connected thousands of people, from patients and caregivers, to nurses and doctors. It collaborated with patient advocacy groups to launch a photo-sharing initiative using Flickr and encouraged chronic pain patients to share photos representing their pain and to tell their stories. The campaign also used Facebook, Twitter, and a social cause site Care2 to empower patients to share their feelings using their preferred channels. Patient advocacy groups partnering with Pfizer integrated the campaign’s social media channels as widgets onto their own websites and digital platforms to give the initiative maximum reach among patients. Another major effort being made by pharmaceutical companies is to listen to the patient voice to improve the care provided is Crowdsourcing adverse events.
6. CONCLUSION

Leading pharmaceutical companies are rechristening their commercial models in the following ways to adapt to the digital demands:

- Engagement vs Promotion – Rather than just promoting the products, pharmaceutical companies are delving into elaborate engagement strategies for all the stakeholders with the aid of new age technologies like Chat Bot, Augmented Reality (AR) and Virtual Reality (VR).

- Portfolio of Touch-points – Conventional Pharma commercial models focus on Physician engagement primarily for prescription generation. Trend is now shifting towards focussed interactions with Physicians/Patients, providing value over a longer time frame and thereby building trust. E.g.: Patient portals, educatory webcasts, gamification, Q&A platforms for HCPs.

- Designing customer/stakeholder experience – Pharmaceutical companies are orchestrating various touch-points as a single digital system, in order to deliver an integrated and engrossing experience to the stakeholders across the touch-points.

- Analytics – The industry is focusing on the creation of predictive, algorithm-driven analytic models to help speed the translation of insights gathered across the stakeholder interactions into specific, business-actionable recommendations.

7. REFERENCES

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