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RELEVANCE



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RESILIENCE



Handbook for **Medical Representatives** to embrace Digital Transformation through digital tools.

INT.

SUMMARY

THE SUMMARY

The pandemic is not yet over! The world is strained and going through a massive change in how we behave and do business. A number of corporates have suffered a loss, though the recovery process has started hence more it demands extensive changes and accelerates the process of deploying resources to tackle the situation. Pharma is one such industry that demands it all and if we look at the micro-level, it is pharma sales reps that need the most digital transformation.

Health care professionals (HCPs) are busy in treating the confirmed covid cases. Many HCPs are also giving virtual advice to non-covid patients. Amid the pandemic, we have seen the frequency of meeting pharma sales reps has contracted since March 2020. More is likely to do so in future. Yahoo News reports only 34% of frontline physicians treating COVID-19 will take in-person pharma sales meetings before 2021. In-person visits are the standard process of educating, promoting and selling the drugs to the HCPs but the on-going environments don't permit to do so.

HCPs need more assistance from the pharma industry. They are looking for Pharma sales reps who will be involved in faster decision making, will adopt digital technologies faster and will persistently improve the collaboration and communications with HCPs.

Will the new remote model have operational efficiency? Or How can the Pharma Companies get started to prepare their front end stakeholders for the future-ready?

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PRE-COVID PHARMA SALES MODEL & CHALLENGES



Advocacy rate of a particular pharma brand depends upon the pharma sales reps. They are the bridge between Pharma companies and HCPs. The period between Economic Boom and Pre-covid, the pharma companies have understood the importance of sales reps. The evolution of pharma sales-reps started back then.

The pre-covid period saw the importance of differentiating the brand position to HCPs. They understood the importance of “detailing” to avoid getting trapped in the crowd of reps. Pharma Companies have noticed the significance of providing the added value to build credibility. They ensured that once the HCPs got accustomed with the brand and new method of treating their patients, the sales reps can start to educate the HCPs about the intricate details of the drugs including their effects. Therefore they focused more on building relationships.

When all the pharma companies started following the same procedure of educating via sales reps, they understood the market requires more than just awareness and knowledge. Pharma companies started strategizing another way to differentiate. BCG in its 2019 report confirmed the death of one-size-fits-all sales reps model. They came up with six distinct roles that pharma sales reps hold.

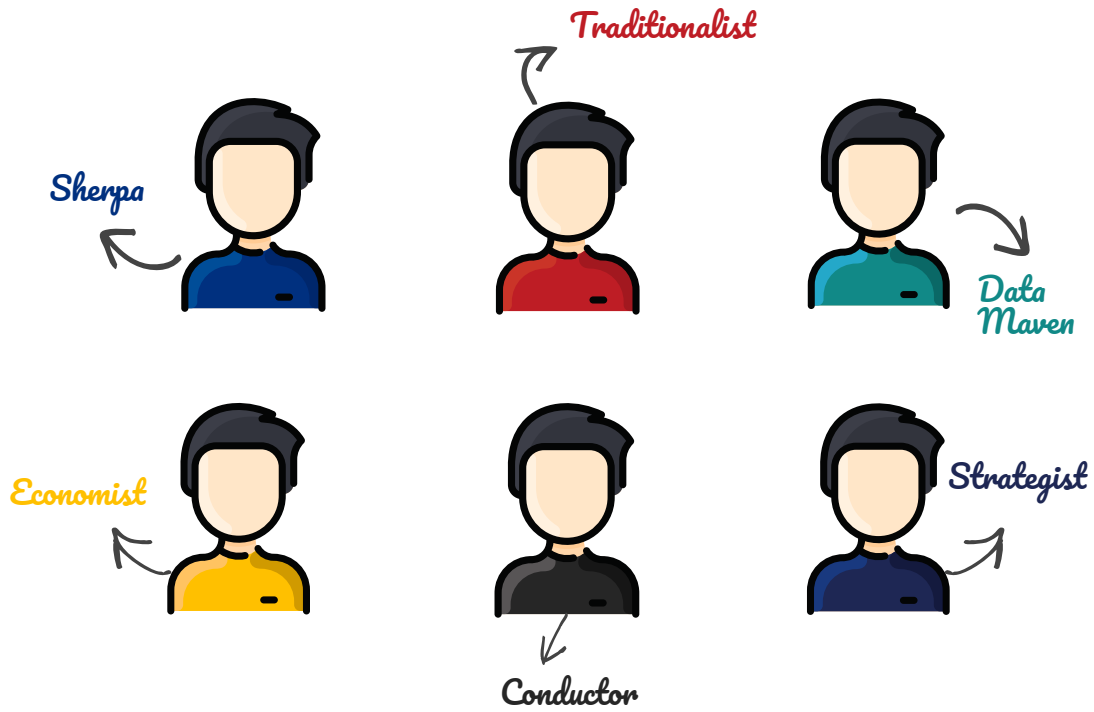
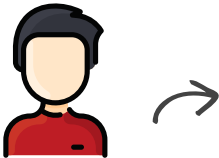
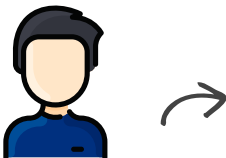


Exhibit 1: BCG six different pharma sales role (pre-covid)



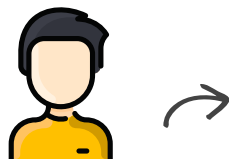
Traditionalist

The therapeutic area with diverse treatment options and where the disease is not well understood. Traditionalists help HCPs with detailing.



Sherpa

Sherpa helps HCPs to navigate and overcome the barriers such as restrictions such as formulary, restrictive distributions, new ways to administer treatments and potential side effects.



Economist

When cost is an important consideration and when HCPs weigh the cost against the efficacy.



Data Maven



Sales reps have a good understanding of the strength and weakness of different data sources and how to connect dots to deliver larger insight for strategizing.



Strategist



Strategist strategises every detailing and successfully drives out the plan of pharma adoption based on the unique location.



Conductor



The sales rep as conductor takes the lead in driving compliant collaboration, coordination, and communication across the enterprise, ensuring that customers' needs are being addressed as efficiently and effectively as possible.

Therefore, Pharma sales reps started focussing on understanding the desired patient outcomes of HCPs and their sentiments and behaviour. Pharma industry deployed the sales reps with the skill best suited for the areas. Further, Sales reps started questioning HCPs to gain insight into their needs and attain the sought results. With insightful conversations and understanding of HCPs practices, business goals, the companies with support from the marketing department started strategizing solutions to cater to the needs.

THE JOLT

Just when the new pharma sales model began to pay-off, the world jolted by the outbreak of novel coronavirus. Covid-19 pandemic affected industries globally. Many thought the pharma industry will be least affected and will see the uptrend in revenue due to the dire need of medicines. Quite unexpectedly, the virus disrupted the pharma operations too.



Supply chain Disruption

COVID-19 halted the operations of industries and to lower the spread of the virus, many countries adopted full-scale lockdown. The restrictions made a notable revelation of the fragile logistic and supply-chain. The international market has also observed an increase in freight cost. As we know, China is the manufacturer of more than 70 per cent API and generic drugs for major countries across the world. India exports 20 percent of generic drugs globally. The spread of the virus and the lockdown restricted interstate movement in India. Due to this and the fear of a shortage of drugs has also curbed the export of generic drugs. Covid-19 stalled its operation moreover closing down of borders disrupted the supply chain massively.

In-Person Interaction

Pharma sales reps could no longer visit the HCPs as hospitals barred the visit of the non-medical caregiver. Engagement with the doctors has decreased significantly as the HCP have closed down the access and got busier with treating the covid positive patients. Even past months have seen a dramatic decline in footfall of non-covid patients due to the fear of contamination. Therefore the demand for reps assistance with non-urgent medicine declined. The Mckinsey report shows that the number of weekly visits for the patients by specialties such as dermatology, oncology and cardiology has decreased by 43 percent, 14 percent and 31 percent respectively.



Also data gathered from incrowd shows us very few HCPs would like to have in-person meetings due to the ongoing pandemic (Exhibit 2). Supporting the data further, Mckinsey reports that 28% of HCPs said that the "COVID-19 pandemic will have a lasting impact on their willingness to have in-person meetings with sales reps".

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I WILL CONSIDER MEETING WITH REPS IN...	30 DAYS	60 DAYS	90 DAYS	2021	I WILL NEVER BE COMFORTABLE W/ THIS AGAIN	I WAS NEVER MEETING THIS WAY & DON'T PLAN TO
VIRTUAL MEETINGS	36%	5%	3%	8%	1%	47%
IN-PERSON MEETINGS	13%	9%	12%	25%	2%	39%

Exhibit 2: Incrowd survey “marketing tracking report”

I WILL CONSIDER MEETING WITH REPS IN...	30 DAYS	60 DAYS	90 DAYS	2021	I WILL NEVER BE COMFORTABLE W/ THIS AGAIN	I WAS NEVER MEETING THIS WAY & DON'T PLAN TO
IN-PERSON MEETINGS	<p><i>'With self monitoring of symptoms and masks it would be acceptable to return to a more normal setting.'</i></p> <p>- Pediatrician WV, Age 37</p>	<p><i>'First there needs to be proper protocols in place for meetings & PPE available.'</i></p> <p>- EMCC MD IL, Age 49</p>	<p><i>'I expect more information will be known & more antibody test results available. Infection rate should be a lot less.'</i></p> <p>- PCP IN, Age 53</p>	<p><i>'It's unnecessary to bring someone into the hospital, especially when they're going from facility to facility-I'm concerned for vector.'</i></p> <p>- EMCC MD OH, Age 38</p>	<p><i>'No benefits to in-person. They disrupt my schedule & it's rude to make a patient wait longer to listen to what is (no matter how it's spun) advertising.'</i></p> <p>- EMCC MD OH, Age 38</p>	<p><i>'Takes up too much time, and there's too much bias & conflict of interest.'</i></p> <p>- PCP MD, Age 47</p>

Covid-19 revealed the importance of digitisation. On-going pandemic and the spread of the novel virus has demanded a model for pharma sales reps considering the scenario of not being able to have an in-person visit soon. Thus, forcing the pharma companies to adopt a different approach to communicate about their products to the HCPs.

BUT, ARE PHARMA SALES REPS DIGITAL READY?

Companies have adopted remote working facilities to stop spreading Covid-19. Digitisation is considered a needed awakening to the business turbulence. In the pre-covid scenario, in-person meetings were crucial for detailing and building long term relationships with the HCPs.

Now it seems long gone, in the New-normal pharma sales reps need a digital infrastructure to continue their daily sales activities. Here we list up the problems that have become challenges to the road of adopting the digital transformation:



Adaption issue

Though pharma sales reps use technology such as CRM tool, still due to the lack of adaption there has been missing reporting details and thereby making difficult for HCPs and management to have a 360-degree view.

Training issue

Conducting training of pharma sales reps to upskill requires physical presence. The outbreak of covid -19 stalled the training process and hence upskilling.

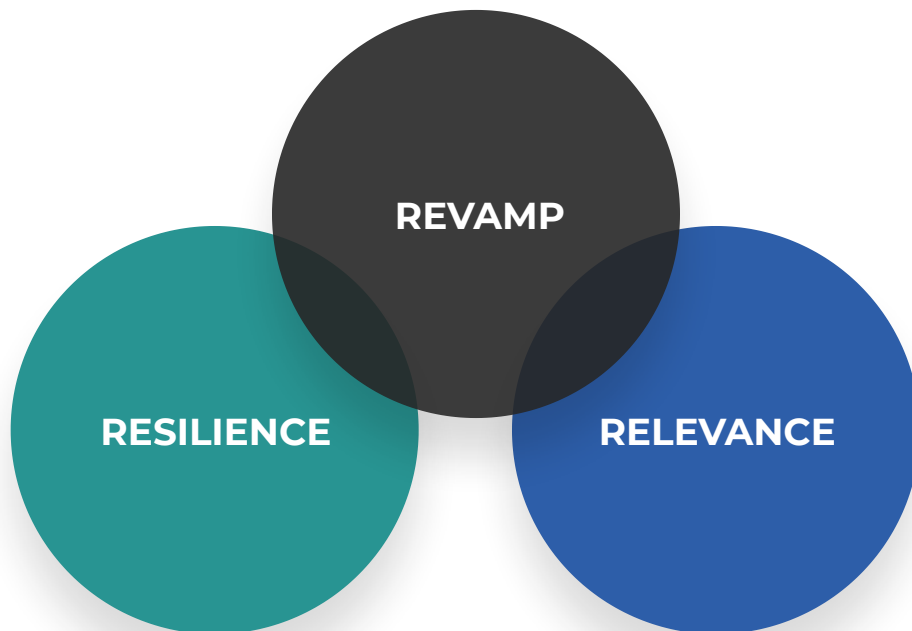
Lack of digital tools

HCPs, sales reps, management requires digital tools for digital transformation. Due to a sudden outbreak, there has been a revelation of negligency is using digital tools. Moreover, in many cases, we found out pharma sales reps lacks tools and infrastructure to work remotely.



NEW MODEL FOR NEW NORMAL

If we need to predict the future of pharma sale-rep then we have to look at the trends during the outbreak of the coronavirus pandemic. The transformation of digitisation that started during this time is going to evolve and be the new normal. It has accelerated the trend of adopting telehealth consultation, app-based ecosystem and digital tools. Now, becoming future-ready is a pressing need to survive in the new normal. The survival of pharma sales reps model needs three R's- Revamp, Relevance and Resilience.



REVAMP

COVID-19 has a seismic shift in the pharma sales structure. During Pre-covid period, in-personal selling became important. Today, in the time of maintaining social distance, the concept of in-personal selling becomes invalid. Today, the scenario demands significant change. Companies must adapt and deploy strategies to provide HCPs with on-demand seamless services. Here, REVAMP is an approach that can be adopted by pharma companies to sail through the crisis. This approach has the value-added focus on remote engagement and revamping the old model gives a cutting edge to the industry.

Revamp of Meetings

No more in-personal meetings. Pharma companies have shifted the sales activity into a remote mode. Today, social distancing, lockdowns, fear of virus contamination have forced the Pharma reps to continue their working activity from home. Face to Face meeting rates has declined by more than 75 % thus creating challenges for launching new products and creating brand awareness. Reports also suggest that many medical facilities have flipped 99 per cent F2F meetings to 90 per cent virtual meetings. Sales reps talked more about the available time that they saved by not visiting the HCPs physically and thereby enabling them to attend more HCPs virtually.

Today in-personal meetings have been revamped into virtual meetings. Pharma sales reps are using virtual meeting platforms such as google meet, Zoom to interact with HCPs. Reports suggest that over 41% of HCPs have become comfortable in virtual meetings for promotional and educational purposes as they began to see more value in it. Following Virtual Engagement Tools can be leveraged to enhance the quality of interactions between HCPs, Patients and Pharma sales reps:

- More usage of CRM tools to conduct 1 to 1 meeting to present Closed-Loop Marketing (CLM) has observed.
- Installing AI-based voice enabled chatbots will answer the minor queries of HCP instantly sparing time for pharma sales reps to deal with complex ones.
- Leveraging Augmented Reality to reduce the communication noise between HCPs and pharma sales reps. It also enables the pharma sales reps to present complex drugs into an interactive way.

Revamp Content

Previously, pharma sales reps were considered as pill sellers. It was more of promoting the products for the pharma companies than adding value to the process. Today in the time of crisis, the HCPs have less time due to their tireless service by fighting from the front line. Conveying promotional messages won't be effective. Thus revamping content is necessary.

Today if pharma sales reps push their sales directly by conveying the superior properties of the drug, then it is very likely that the strategy might fail. Pharma sales reps should focus on assisting in directing HCPs to channels for extracting information as HCPs are looking out for having more than product information from sales reps. The content leveraged for providing information on APIs and generic drugs should be easily accessible. The content must be easy to understand as making digital adoption smoother for HCPs is the purpose and path for digital transformation. This step will make the reps as trusted partners rather than a seller.

Accenture reported that 58 per cent of HCP agreed that at least one of the pharmaceutical companies spammed them with digital content during covid-19. Today pharma reps are focusing more on adding value proposition via content to the HCPs. Pharma companies must invest in analytics to develop more engaging content via digital tools. Due to the restrictions in the visit, it is highly likely that HCPs will find comfort in remote engagement. Excellence in digital success can be achieved by optimising the customer journey path from introduction to advocacy. Pharma sales reps can follow the following process to build engaging contents:

- Collecting data by leveraging CRM tool
- Segmentation of HCP based on current customer journey status
- Identifying the channel preference by each HCPs
- Build a content management strategy
- Tailor the content framework and define the message as per different HCP segment
- Add insight
- Craft the content as per the channel
- Create a feedback-loop to strategize better for next time

Revamp Engagement

Previously, engagement with the HCPs was more of providing information, USP and physical detailing. Now physical detailing seems a faraway dream. Therefore, Today pharmaceutical companies are focusing on remote e-detailing to enhance customer engagement.

E-detailing refers to digitising sales content. Remote E-detailing is effective digital tools due to its highly targeted feature. HCPs can also avail the information at any convenient time without having any pre-downloaded software. Moreover, easy storage of scientific documents on pharmaceutical products makes the process hassle-free for MSLs or HCPs. E-detailing should be very engaging to attract the HCPs that will further understand their preferences.

E-detailing has also evolved with time. Once pharma sales reps consider uploading physical aid details to mobile electronic devices. That uploaded digitised sales content is known as e-detailing in the beginning. Then the time came when pharma sales reps began to build a room for HCPs to engage through building engaging digitised physical sales content. The interaction became relatively engaging. But the process solely depends upon the ability of sales reps to create an engaging content.

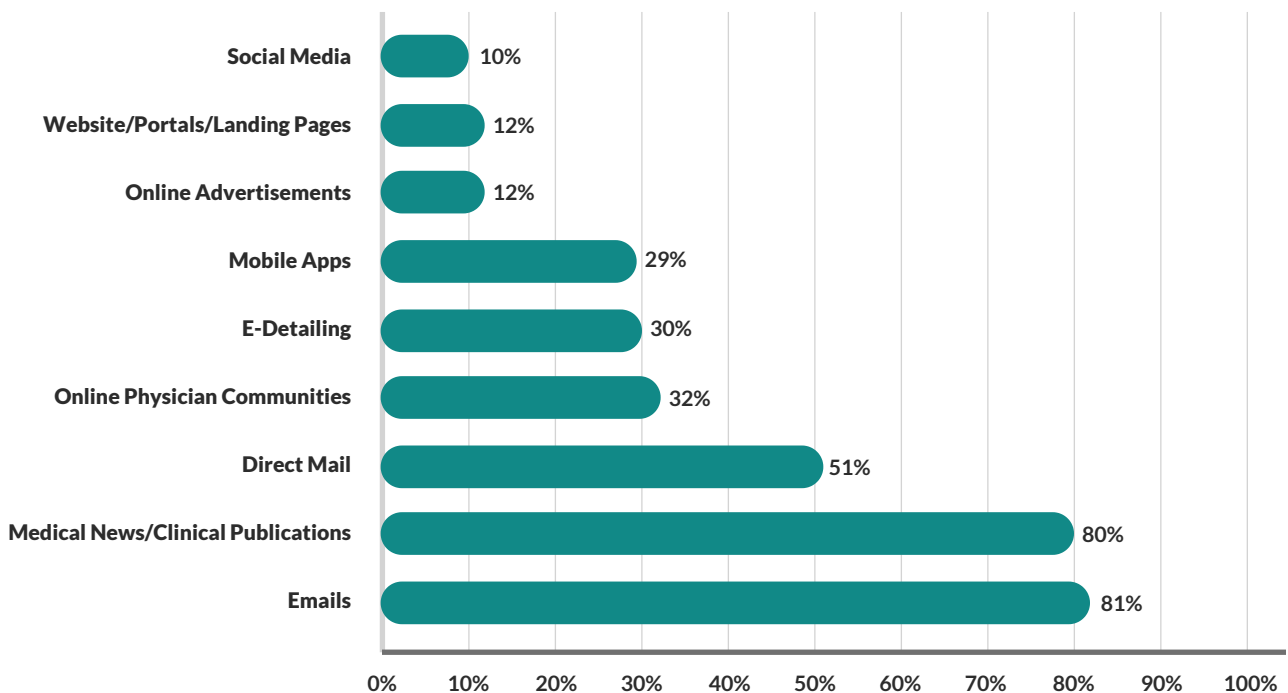
E-detailing evolved more with time. Pharma companies leverage emails for their non-promotional mix of e-detailing of physical aid. Through email and its CTA method, many HCPs could avail the detailing as per their convenience. Today, AI is defining a new-angle of e-detailing.

IT plays an important role in providing software solutions to ease e-detailing for Pharma companies. Customised e-detailing app enables the pharma industries to provide pharma sales reps with latest information which can be used in delivering engaging presentations to HCPs through 3D visualization, graphics and many more.

Moreover, the back end solutions provided by the IT companies empowers the sales reps to customise the content as per their target groups and also helps them in analysing the data on HCPs. The analytics provided them with a transparent picture of the content's engagement rate. The data collected from each meeting can be sent to the CRM and be used to create more refined and engaging HCP experience contents.

IT are also providing content management solutions to the pharma sales reps by designing and developing tailor made contents for different preferred channels of HCPs. A Meddata group survey showed us the top preferred engagement channels by HCPs.

The top preferred channels for HCPs engagement:



Reports revealed many HCPs agreed that pharma sales reps are also educating them on treating patients remotely. A media agency reports that 31 per cent HCPs agreed that engagement with digital contents such as ads increased profoundly. Pharma marketers now take this as an opportunity. They are more focused on making the contents engaging. Telehealth is also an effective and engaging solution with a call to action feature that marketers are focusing on.



RELEVANCE

Earlier reports on understanding the needs of the HCPs suggested the reason why pharma sales reps failed to achieve their sales target. The answer is lack of “relevance”. Many times it is noted in the industry that pharma sales reps fail to understand the unmet needs of the HCPs. The crisis demands sales reps to have a better understanding of the needs and expectations.

Relevant focus

HCPs are looking for more solutions than product information. Pharma sales reps need to diversify their approach and be more focussed on problems than product information.

Coronavirus has taken a toll on the elderly hence refraining them from visiting hospitals. The scenario forced them to ignore treatments due to the fear of contamination. In this scenario, pharma sale reps assist HCPs in using portals of telehealth to reach their patients and provide digital consultation. In this way, HCPs can continue their practices which were interrupted otherwise. Assisting HCPs with telehealth portals will fulfil the unmet needs.



Telehealth leveraged by pharma companies for promoting their Rx drugs has become highly successful. It makes pharma reps easy to reach out also through digital marketing tools such as banner advertising, BOTs, short video on the product can be shown to the HCPs to educate them on the drugs.

Mckinsey reports that health providers have scaled their offerings and have 50 to 175 times more patients through remote access platforms. In 2019, 11 % of consumers used telehealth. In 2020 it increased by 65% of telehealth users have been reported. The process of change has started and is going to stay therefore focus should be on security and workflow integration.

Relevant Sales Funnel

Conversion of qualified lead becomes important for pharma sales reps to achieve their target. Sales funnel defines the customer journey now the crisis demands more than a regular sales funnel. Thus, there is a need to make strategies on their sales activity and form a relevant sales funnel to which HCPs can relate.



Pharma sales reps need to use analytics to have insight into the market to understand the target prospect. Also, the market needs to be segmented based on solo clinics and research institutions. Solo-practitioners might need more product information than practitioners involved in the research. Pharma sales reps must identify the target audience and must tailor their sales pitch accordingly.

Tailored content is delivered to push the product differently. HCPs are more receptive towards customized emails than rep-triggered mails. Deploying AI to cater as per the requirements of the HCPs will enhance the effectiveness of the content. Crafting the right kind of content without using fluff words will enable the HCPs to extract maximum useful information by skimming through the content.

In the next stage of the pharma sales funnel, it is necessary to give importance to the opinions and feedback of the HCPs. Good listening skill is as important as good communication skill. Good Pharma sales reps are to be a good coach. One such technology that pharma sales reps can seek after is pharma CRM software.

Pharma CRM software can help pharma sales reps to nurture relationships with HCPs. In the pharma industry, sales cadence provides a structured framework for closing more deals and keeping the pipeline from drying out. CRM also helps in increasing operational efficiency by enriching the interaction with the HCPs and keeps them engaging with the content. The automated CRM system gives a 360-degree view and integrates the data under a cloud which can be later used by sales reps for strategizing their content. Giving weightage to the feedback creates a loyalty loop for the pharma companies.

RESILIENCE

Ongoing pandemic is a wake-up call for the pharma industry to become resilient to the unknown challenges waiting in the future market. Adoption of changes will bring resilience for future challenges. In this situation, the productivity of pharma sales reps has declined due to the learning curve. As they are adapting change by adopting a new model, the operational efficiency is decreasing. The situation demands the integration of technology and in-personal interaction to make the pharma industry resilient.



Re-train to be Resilient

Technology integration in the pre covid pharma sales activity will create resilience for the near challenges. As in-personal interaction is not possible, adoption of technology is must to be in the race. Shifting towards telemedicine portals to engage with the HCPs, optimising contents and providing tailored mails to the health care providers has become the new normal for the pharma sales reps.

But all these are new to the pharma sales reps. They were more accustomed to physical interaction than virtual interaction. They are more comfortable in delivering sales pitch face to face than creating crafted contents. To adopt digitisation means to restructure the sales force organisation. There will be re-training regarding usage of digital marketing tools. Pharmaceutical companies need to provide WFH facilities along with daily webinars regarding leveraging the adopted methods. Pharmaceutical companies must join hands with technology innovators and providers to create a marketing tool that will be convenient for the sales reps.



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Pandemic has forced many pharma companies to pass through digital transformation. Therefore during digitisation, HCPs received many digitised contents on patients, treatments, drugs and many more. Today to be resilient means to become relevant. The content should add more value to stand out.

Re-invent to be resilient



AI has helped in eliminating the multi-channel cost for promoting pharma products and has helped in identifying the HCPs with credentials. AI also tells the pharma sales reps about the channels used by that particular HCP so that pharma sales reps can target their group through the right platform at the right time.

Further AI has also helped pharma sales team in using CRM tool that automates the process of pre-sales call, e-detailing. AI helped in generating better sales outcome.

With the combination of virtual technology and traditional communication tool, pharma sales reps are redefining conferences. Augmented reality experiences at home further fill the gap of touch and feel.

Leveraging digital marketing tools for the new marketing mix is the only way to make the pharma companies resilient. Leveraging Google ads, search ads paid ads, blogs and online forums are the few digital solutions in creating more engaging content for the HCPs.

BECOMING FUTURE READY



Today the tools that are adopted by pharma companies existed pre-covid times also. But, the acceleration of the process of digitisation has begun due to COVID-19. Many pharma companies grabbed this opportunity and revamped their business. As we know, digital transformation is not easy. It requires time to pay off. There will be challenges and hence the scope for the tools to evolve. Today, HCPs want to interact with the pharma sales reps more than what they used to do. Pharma companies are adding value via interaction. Leveraging pharma sales reps interaction to understand customer insight is a new strategy to stay relevant.

The three R's will empower the sales reps with new technologies which down the line will make the pharmaceutical companies resilient. Making pharma sales reps future-ready is facing challenges and support from the companies are in dire need. Here are four take-aways that can make the pharma sales representatives ready for post covid scene:



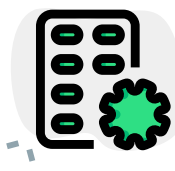
Pharma field sales reps software

Assessment enables the companies to know pharma sales reps closely. Automated solutions such as MR reporting software helps in monitoring sales activities. It provides live tracking facilities, analytics on sales performance. Further assessments will also help in providing the right kind of coaching to the MR.



Smart digital KPIs

Digital is likely to play a leading role in pharma industries post covid. Setting up digital KPIs aligned with brand strategy is a newly added success factor. Smart KPIs should be set based on the digital modules, e-detailing to enhance customer connectivity and measure sales productivity.



Able to Expand added service

Pharma sales reps must show empathy to patients, HCPs in this pandemic situation. Pharma sales reps must create a more impactful message relating to in-home care treatment facilities. The representative must also provide lab testing information as this will drive more engagement. Therefore, empowering them with the knowledge to provide expanded services to HCPs will make pharma sales reps future-ready.



Partnering with digital solution providers

Partnering with the digital solution provider will enable pharma companies and their sales reps with various solutions such as analytics and risk-based monitoring solutions, supply chain insight and sales and marketing support.

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