



SALES + MARKETING

## Doctors to Pharma: 'Let's Get Personalized'

How to deliver high-quality messaging that's tailored to physician preferences

By Malcolm Sturgis



Impact where it matters.™



AccessMonitor™ and AffinityMonitor™ capture pharmaceutical sales and marketing interactions across all channels at the level of individual physicians and other healthcare providers.

+ AccessMonitor™ looks at whether individual physicians meet with sales reps. It captures data about the activities of more than 40,000 pharmaceutical reps from both established and emerging companies, and more than 400,000 prescribers across a range of specialties.

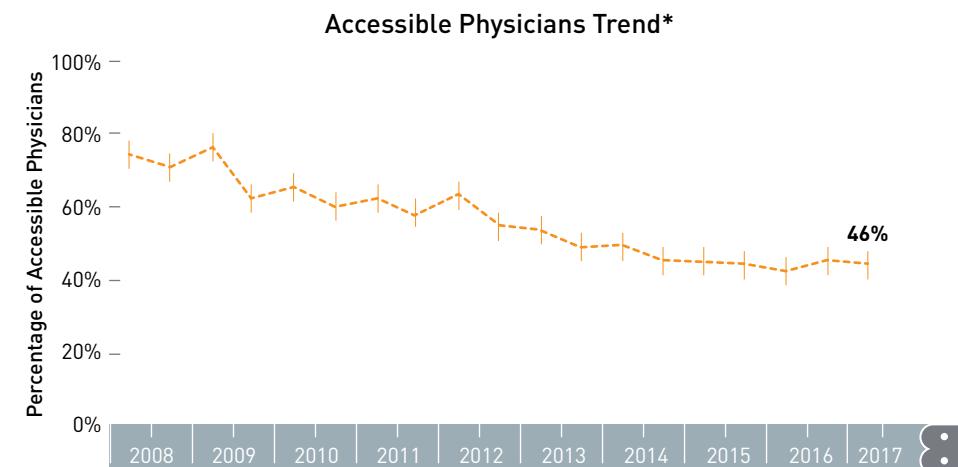
+ AffinityMonitor™ looks at how healthcare providers engage with specific marketing channels, including email, mobile alerts, websites, direct mail, telesales, and peer interactions such as speaker bureaus. It captures data from more than 250 pharmaceutical and biotech brands, 878,000 healthcare providers and 254 million individual touch points.

With far fewer physicians opening their doors to pharmaceutical sales reps than a decade ago, commercial organizations continue to turn their attention to non-personal promotional channels like email. But rather than jumping straight to digital channels for every healthcare provider—or at least jumping in feet first—pharma marketers should gather an accurate view of each doctor's preferences and learn how to maximize engagement accordingly: What information is important to her? What new knowledge does she need to improve her practice and the delivery of patient care? How and when does she want to receive messages?

That's the kind of perspective that ZS's AccessMonitor™ and AffinityMonitor™ studies serve up. "Our studies help pharma focus resources where doctors really want to engage," explains Malcolm Sturgis, a principal who leads ZS's AccessMonitor™ and AffinityMonitor™ offerings. "Because AffinityMonitor is based on doctors' actual activities, you can use empirical data to connect the dots between the promotions you're planning and the messages doctors pay the most attention to."

The studies' findings indicate that physicians' willingness to meet with pharmaceutical sales reps in the U.S. remains at a low—but steady—level following years of declining access. Despite the current steady period, sales rep access continues to be a real industry challenge. Since the second half of 2014, the proportion of "accessible" physicians—or those who met with more than 70% of the reps who called on them—has hovered around 46%, according to the AccessMonitor™ and AffinityMonitor™ studies, which examine interactions between pharmaceutical companies and healthcare providers (see figure 1).

## ON THE SALES FORCE SIDE, THE ACCESS DECLINES OF THE LAST DECADE LOOK TO BE FINALLY SLOWING DOWN



HCPs with AffinityMonitor™ No-See Rating of 8 to 10 are considered to be accessible

\*Based on 240,000 to 347,000 physicians who have been evaluated in different semesters

Figure 1: According to ZS's AccessMonitor™ study, the percentage of physicians deemed accessible to reps has stabilized for the time being.





Considering that physician burnout is a prominent concern across healthcare, pharma companies may need to assess whether their interactions are a contributing factor.

Study findings also indicate a decrease in the number of calls that the average rep is delivering, which reflects a change in the way that pharma companies are working. As the primary care model gives way to more specialty products, pharma companies are implementing changes to their sales force planning and targeting models to better target physicians. Specialty reps are spending more time on each physician call with a greater emphasis on account activities, whereas the primary care sales model emphasized product detailing.

While access to physicians may not be improving, it's also not continuing to decline at the rate we've seen in recent years. That means it's unlikely that doctors' office doors will close to reps permanently. ZS's findings indicate that current market forces such as healthier product pipelines and refreshed sales force management strategies may have improved access rates slightly. However, it's probably not the time for pharma to hang a celebratory banner as many of the underlying market dynamics responsible for access declines in the first place—including HCP time constraints and ongoing provider consolidation—are now permanent fixtures. The trick is to adjust marketing strategies to work within today's parameters while acknowledging that future access recalibrations are likely.

## Making a Greater Impact

Although it's important to pay attention to face-to-face interaction rates, the sales rep is, of course, just one avenue for delivering relevant content to physicians. Pharma's level of interaction with healthcare professionals across all marketing channels is about the same as in the previous few years, but status quo isn't always a good thing. In this case, pharma's outreach may be overdoing it as high-value prescribers continue to be targeted once every hour of the workday via a variety of marketing channels. Considering that physician burnout is a prominent concern across healthcare, pharma companies may need to assess whether their interactions are a contributing factor.

Knowledge of how receptive doctors are to their promotional campaigns can help pharma firms allocate resources effectively, deliver more targeted messages and build stronger customer relationships. And with fewer opportunities to communicate with physicians and other key decision makers in person, commercial organizations are extending their reach by using promotional channels such as email, websites and mobile alerts.

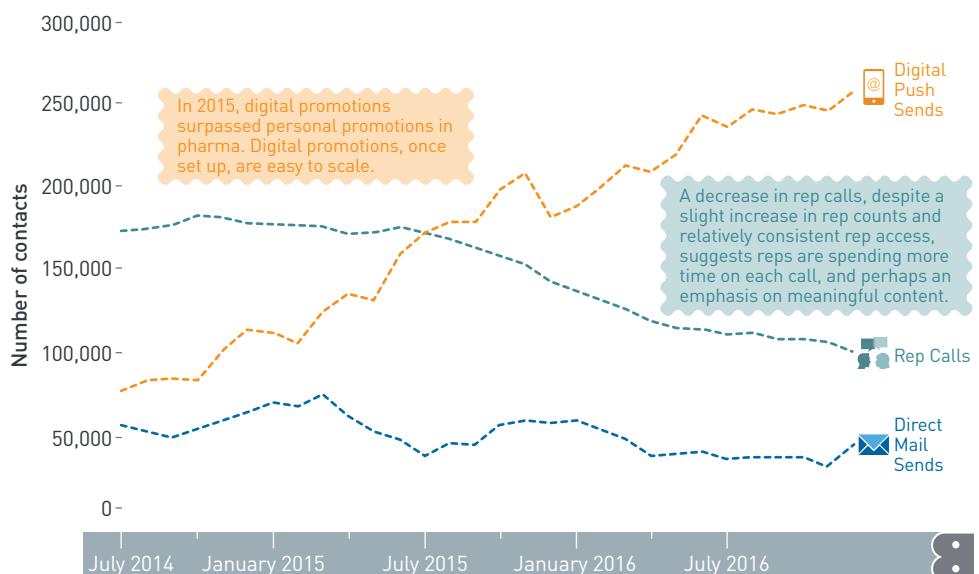
Offsetting in-person physician access challenges with digital channels isn't a new tactic for pharma, of course, but digital volume recently has increased. In fact, digital promotion continues to gain favor among pharma companies, in contrast to the emphasis on personal promotional channels just a few years ago (see figure 2). The problem is that pharma companies continue to pour resources into digital campaigns without improving delivery methods. "They haven't gotten more successful at this tactic," Sturgis says. "There's an imperative to sharpen their approach."

ZS's findings indicate that there's a disconnect between what physicians want to hear and what pharma is serving up.

While it's logical that pharma companies would update their methods of reaching physicians to offset reduced access, ZS's findings indicate that there's a disconnect between what physicians want to hear and what pharma is serving up. Even though fewer reps are knocking on their doors, physicians now are tasked with wading through promotional emails to find the credible and relevant information that they need. With nearly all of the pharma industry making deep investments in digital tactics, there's a great need for companies to differentiate their strategies so that physicians will click on their content. This requires a two-pronged approach: Create high-value, personalized content, and deliver it at the right time and frequency.

Efforts along these lines may already be in the works. During the last year, we've noted a decrease in the number of rep calls despite a slightly higher number of reps in the field and about the same access to physicians as in 2016. These findings suggest that reps are spending more time on individual calls and delivering more meaningful content as the industry shifts its focus to align with the specialty therapeutics model.

#### PHARMA CONTACTS PER AFFINITYMONITOR™ CONTRIBUTOR\*



\*Six-month moving average

Figure 2: ZS's AffinityMonitor™ reveals an increase in digital promotion efforts in recent years.

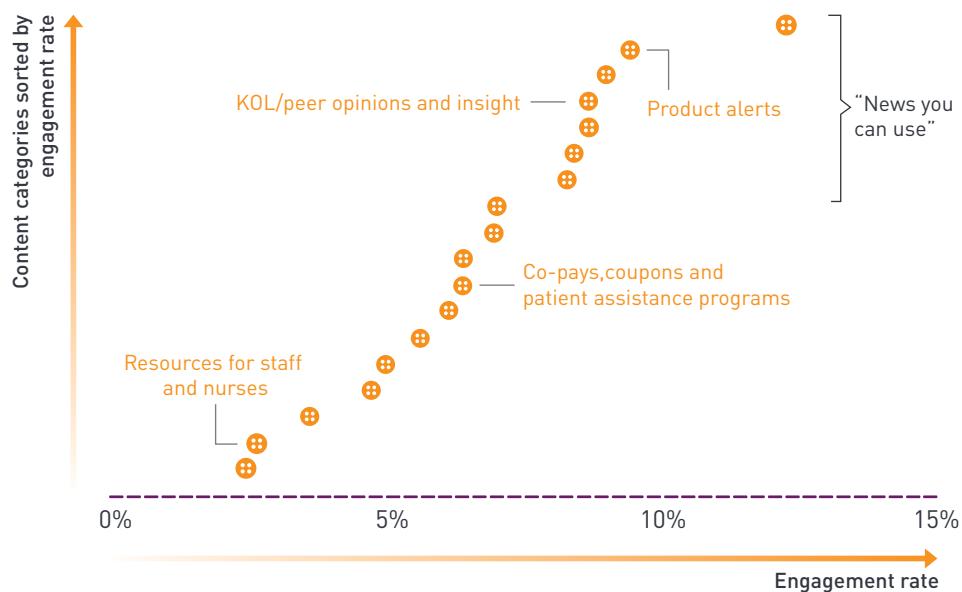
The content that garners the highest engagement rates is “news you can use,” or information that’s immediately applicable to physicians’ daily clinical practice.

## In With the News

While many pharmaceutical marketers know that they should be developing tailored marketing messages, it can be difficult to assess what’s going to hit the mark. The AffinityMonitor™ study results stress the importance of personalizing content—while also taking into account what content each company has available—so that individual physician preferences are met or even exceeded. “The engagement data can help marketers sharpen their execution by learning how to use physicians’ behaviors and preferences to elevate the customer experience,” Sturgis says.

The content that garners the highest engagement rates is “news you can use,” or information that’s immediately applicable to physicians’ daily clinical practice. In fact, the average physician is three times as likely to open messages containing peer opinions and insights or direct patient education materials than those containing resources for staff and nurses (see figure 3).

### AVERAGE ENGAGEMENT BY CONTENT TYPE



Source: 2016 AffinityMonitor™ data

Figure 3: AffinityMonitor™ data shows that physicians are much more likely to open an email containing product alerts than a message containing resources for staff and nurses.

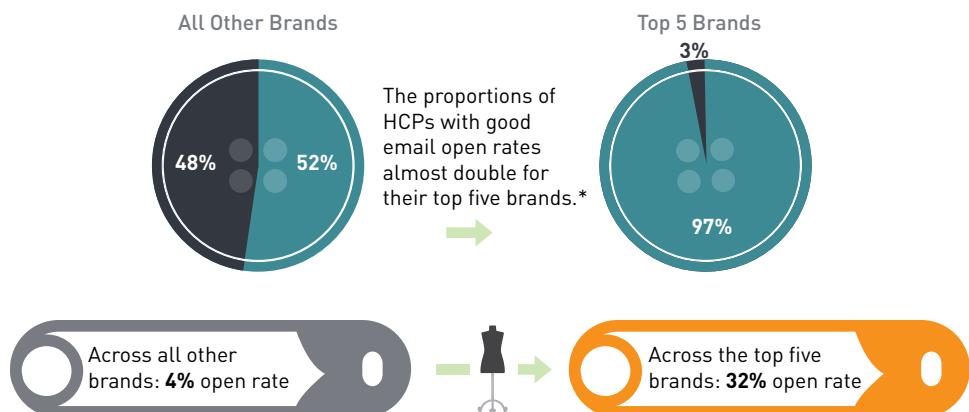


"Saying that content matters is a truism. Every good marketer knows it," Sturgis says. "Pharma companies need to start looking at what specific doctors do with their content, and then tailor campaigns around that intel."

Why do other types of content miss the mark with doctors? Marketers are sharing content that's offer-heavy—information on co-pays, coupons and vouchers—in part because it's tangible and easy to prepare for distribution. And while some doctors do engage with and appreciate this content, others would prefer receiving news and information that's more relevant to their practice.

Keeping in mind that there's no one-size-fits-all solution, the key here is to be more mindful of what messages are being delivered to which physicians: In fact, most individual physicians engage with a certain set of brands much more often than other brands, even after controlling for factors like the channel and the number of exposures (see figure 4). "Saying that content matters is a truism. Every good marketer knows it," Sturgis says. "Pharma companies need to start looking at what specific doctors do with their content, and then tailor campaigns around that intel."

#### DISTRIBUTION OF HCPS WITH EMAIL OPEN RATES OVER 5%



Distribution shown for HCPs that opened one or more emails according to 2017 AffinityMonitor™ data

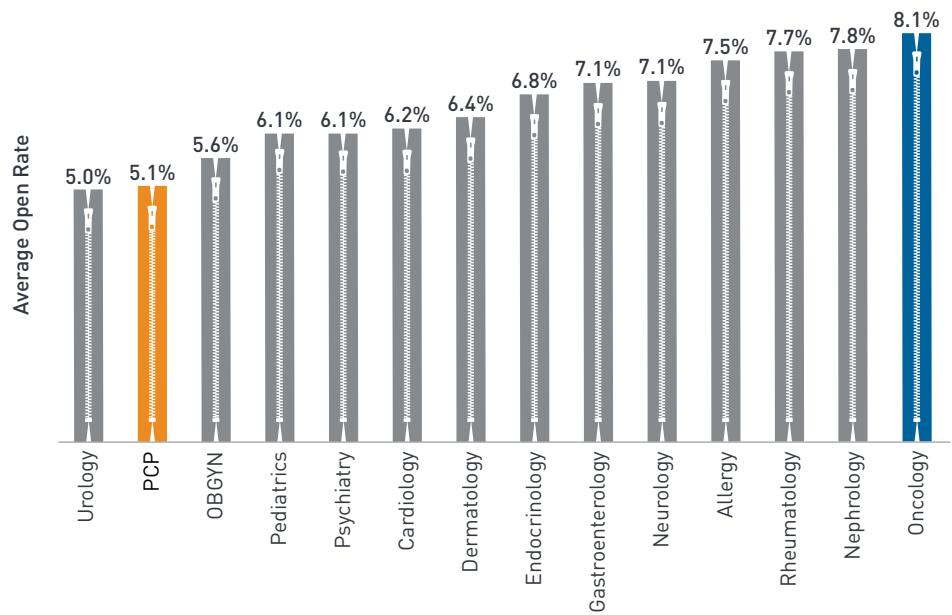
\*Good defined as open rates greater than 5%

Figure 4: AffinityMonitor™ data reveals that most HCps engage with a certain set of brands more often than other brands.

#### Looking Across Specialties

The data reveals patterns in how often physicians across various specialties interact with the content that pharmaceutical companies produce. Behavior variances are most evident when comparing a specialty with high digital engagement, like oncology, with lower engagers like primary care physicians (PCPs). A clear example is that oncologists, in general, open pharma companies' promotional emails more frequently than urologists and PCPs (see figure 5).

## EMAIL OPEN RATE BY SPECIALTY



Source: 2017 AffinityMonitor™ Data

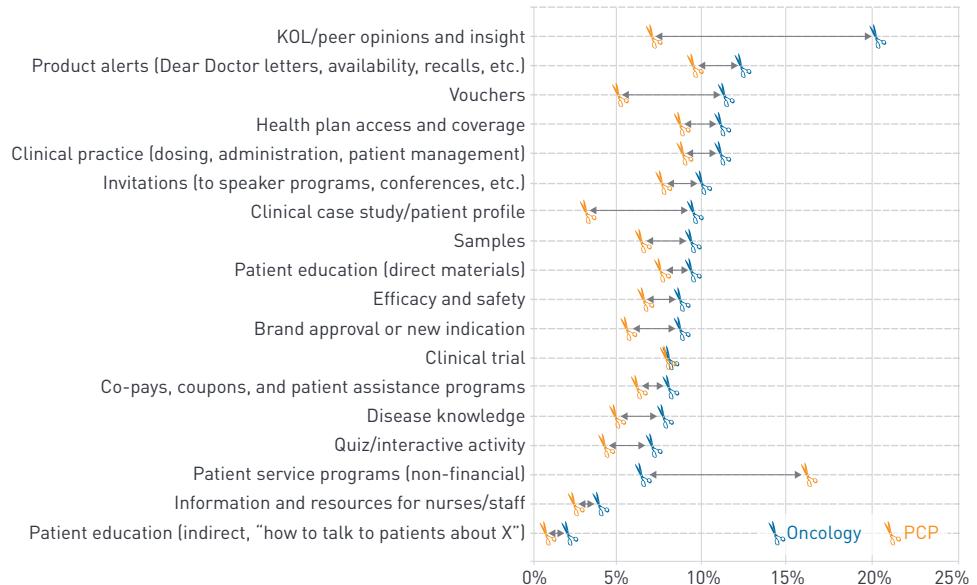
*Figure 5: AffinityMonitor™ results reveal that engagement varies by specialty. Oncology has the highest engagement rate for digital and email promotional campaigns versus specialties like primary care and urology.*

"We knew there would be some variation between specialties, but the differences are pretty dramatic," Sturgis says. "We expected the oncologists to spend a little more time on the non-personal promotions partly because they're often too busy to see reps but also because they're academic."

The type of content that oncologists choose to engage with the most is pretty telling. Oncologists are more likely—sometimes even twice as likely—than PCPs to open email messages about product safety and efficacy, disease knowledge and clinical practice information. As it so happens, the type of content that pharma companies have available matches up with what oncologists find valuable (see figure 6).

The engagement discrepancy can be attributed to the oncology field's innovative and academic nature, with more complex investigative products coming to market that send doctors in pursuit of new information. The challenge is determining which physicians—on an individual level—in every specialty area are likely to engage with each type of content. "It's a win-win in oncology

## EMAIL OPEN RATE BY SPECIALTY AND CONTENT TYPE



Source: 2016 AffinityMonitor™ data

Figure 6: The AffinityMonitor™ study reveals that oncologists and primary care physicians prefer different types of content.

because pharma companies have more content to share and oncologists are open to receiving new and relevant information,” Sturgis says. “The average oncologist reads a lot of science-oriented content and engages more when you have compelling clinical news and insights to share.”

The task for pharma marketers is to figure out how to reach the specialty physicians at the low end of the engagement spectrum with more targeted digital communications. In the past, OBGYNs, PCPs and other specialists were more rep-accessible than they are today, which helped companies deliver their messages on a more consistent basis. The specialties being targeted with the greatest volume of emails don’t necessarily correspond with how accessible the specialty may be. For example, PCPs receive far more emails than most other specialties but are among the least likely to engage with digital messages.

“You may not have control over the product you’re promoting, but you can better customize the approach for certain specialties,” Sturgis says. “There’s room to grow within those specialties even if completely bridging the gap between low and high engagers is out of the question.”



## More Isn't Always Better

Developing a strategy for creating relevant, targeted messages that will engage physicians is just one challenge for digital marketers. While the right content is key, the frequency and timing of email messages also should be carefully considered. “Pharma is increasing the number of messages it sends, but physicians aren’t opening more emails,” Sturgis says. “What does that mean? It’s a noise issue.”

To counter dips in engagement and to build stronger customer relationships, one strategy is to coordinate email campaigns with rep visits. For example, when a pharmaceutical company sends a promotional email in the same timeframe as a rep visit, the HCP is more likely to open the email. The data suggests that the approach may work inversely as well, meaning that emails have greater impact when followed up by a rep meeting.

In general, physicians respond best to home office and rep-triggered messages. Physicians are three times as likely to open a rep-triggered email than one sent by a third-party vendor, confirming that the personalized approach of a familiar sender is effective.

There’s evidence, however, that some third-party vendors are getting physicians to open their messages by developing more targeted content, better coordinating with other digital activities, or moving toward a “less is more” approach rather than initiating a volume-based messaging campaign. Either way, physicians are sending a clear message: The more emails they receive, the less they engage.

## Is the Tide Turning?

When positioning promotional messaging, brand marketers should heed doctors’ preferences to balance digital outreach with in-person meetings for the greatest impact. With a clear view of doctors’ behaviors and their affinity for certain promotional channels, pharmaceutical companies can save money on promotions that aren’t working and improve the customer experience by sending fewer—but more targeted—emails.

“When pharma companies do get the content right, it makes a pretty dramatic difference in how likely doctors are to engage,” Sturgis says. “While this sounds obvious, very few in the industry have hard data to say, ‘Here’s exactly why, how, where and what matters.’ We’re at the beginning of the journey, but we’re seeing some exciting things.”

## About the Author



Malcolm Sturgis is a principal in ZS's Evanston, Ill., office and leader of the firm's AccessMonitor™ and AffinityMonitor™ offerings. He has advised pharmaceutical and biotech clients on a range of strategic marketing issues, including brand strategy, opportunity assessment, investment optimization, multichannel planning and sales force design.



## About ZS

ZS is the world's largest firm focused exclusively on helping companies improve overall performance and grow revenue and market share, through end-to-end sales and marketing solutions—from customer insights and strategy to analytics, operations and technology. More than 5,000 ZS professionals in 22 offices worldwide draw on deep industry and domain expertise to deliver impact for clients across multiple industries. To learn more, visit [www.zs.com](http://www.zs.com) or follow us on Twitter and LinkedIn.



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