

# Discover 9 Key Insights for Life Sciences Commercial Models

*IQVIA's John Procter, Vice President Offering Development, Contract Sales and Medical Solutions, shares his expert insights on the impact of COVID-19 on commercial models, along with expectations for the future.*



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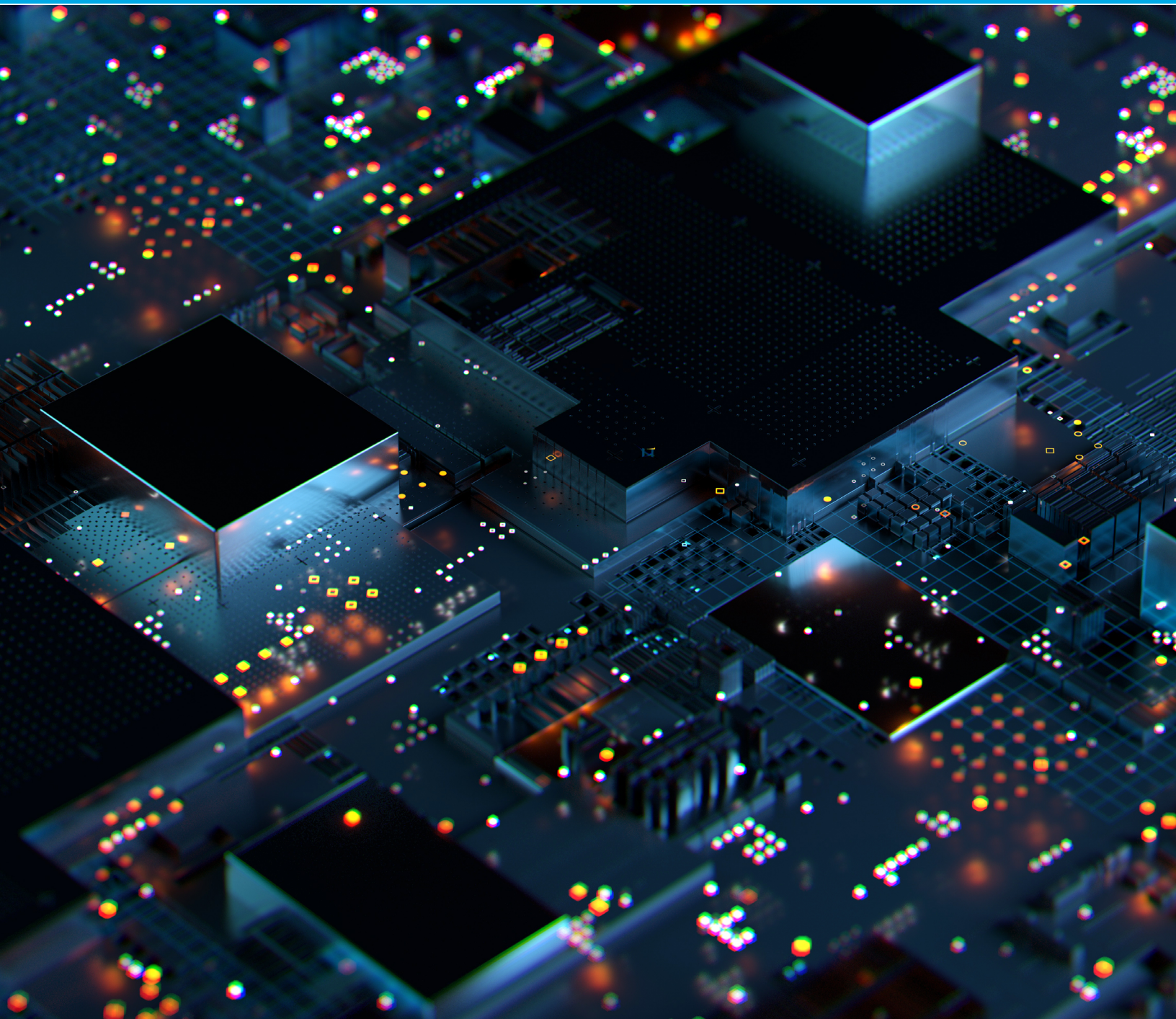


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# Trends in commercial activities have accelerated

Commercial models have changed rapidly, and will continue to change, as a result of the COVID-19 pandemic. So, how well has the industry responded, are there any components that life sciences companies need to focus more on, and what does the future hold?



# The accelerated evolution of life sciences commercial models

Inevitably, the COVID-19 pandemic changed the way that people work across many industries. For the life sciences industry, commercial teams had to switch their predominantly face-to-face working model to a remote engagement model in a very short period of time, which meant finding innovative ways to interact with their customers digitally, while still ensuring their communications were personal and relevant to meet their customers' needs.

That being said, IQVIA's John Procter describes the impact of the pandemic as an "accelerated evolution". Many of the changes seen throughout the pandemic were already slowly emerging, and they have now been accelerated. For example, we were already beginning to see:

- A significant growth on spending in digital channels for commercial models.
- An increasing focus on patient centricity within the industry.

Therefore, today's commercial models are different in the way they've been shaped by the pandemic, but not *fundamentally* different, as these themes were already emerging in commercial models prior to the impacts of COVID-19.

Despite these changes not coming as too much of a surprise, there were two aspects of the responses to the pandemic that were striking.

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## Two aspects of the responses to the pandemic were striking.

1. The degree of variation in how countries have begun to emerge into their future commercial state. For example:
  - » Italy moved very quickly back to a predominantly face-to-face interaction model once restrictions lifted.
  - » In the United Kingdom, face-to-face activity almost dropped to zero through initial lockdowns, which has hardly recovered.
  - » Spain has maintained a high level of remote e-detailing approaches as part of their promotional mix compared to pre-pandemic.
  - » The United States gradually decreased the use of remote e-detailing activity, and are now moving back to face-to-face interactions.
2. The resilience and appreciation for face-to-face meetings. 
  - » The death of the salesforce and face-to-face model has been predicted in the industry for a long time now. However, the pandemic did not accelerate this process as some might have expected. We have seen great resilience, as face-to-face activities have bounced back in many countries, and many HCPs have developed a better understanding of the value they get from in-person interactions.



*"There's some way to go, but from what we've seen, the industry is getting better placed to have the right long-term solutions to support their commercial business."*

*— John Procter, Vice President Offering Development, IQVIA CSMS.*



# How has the industry responded across various countries?

It's clear that the markets across different countries and regions have responded differently to the COVID-19 pandemic. IQVIA's John Procter shared the key drivers of these differences based on recent research: ✨

- **Cultural elements.** Some countries, for example Italy, have existing strong relationships between HCPs and industry representatives on a face-to-face basis. Research showed that these in-person interactions were missed during lockdowns and therefore returned quickly once restrictions lifted.
- **Changed perceptions due to experience.** The uptake of remote engagement in the industry has been slow up until now, with many companies showing scepticism around its effectiveness compared to face-to-face interactions. Now, with more experience, many of these doubts have disappeared and some countries have wanted to continue with remote e-detailing (for example, Spain).
- **Different health system responses.** For example, in the UK, many HCPs have become more comfortable in doing remote patient consultations and see the benefits in terms of managing their workload. Therefore, the UK hasn't seen much rise in face-to-face interactions within the pharmaceutical industry compared with other countries.
- **Sample activity.** In the U.S., sampling activity is still a key part of the promotional mix and may be a contributing factor in the gradual return of face-to-face interactions.



## What is the current commercial reality for the industry?

Only time will tell how well the industry has responded to the COVID-19 pandemic.

However, it's clear that while the industry struggled in the first 6 months, life sciences companies have emerged from the uncertainty — they now have more confidence and a clearer understanding on what their sales engagement and commercial activities should look like to adapt to this changing promotional landscape. Overall, many companies are now:

- **Actively embracing hybrid roles.**
- **Showing more willingness to consider alternative sales models.**
- **Recognising there is a way to go and taking a learning approach.**







# What does the future hold for your team?

As the promotional landscape continues to evolve, the future will hold slight changes for sales representatives and medical science liaisons, but also great opportunities. The overriding feature for field-based teams that will shape the way commercial models are developed over time, is the need for greater flexibility and agility in how resources are deployed. ✨

## SALES REPRESENTATIVES

### DIFFERENT SKILLSETS AND CAPABILITIES

- The hybrid model will require different skillsets to communicate successfully. This may change the traditional sales role profile, such as moving towards an “engagement manager” role, rather than a traditional sales representative role.
- Engagement teams will increasingly need to focus on how to add value, including how to personalise their communication to meet their customers’ needs.

## MEDICAL SCIENCE LIAISONS

### CONTINUED EVOLUTION AND AN INCREASING IMPORTANCE

- With more specialist products coming to the market, there is a more complex scientific discussion to have with customers.
- Therefore, the MSL role will continue to evolve to provide a more balanced portfolio of activities to meet the needs of HCPs.

With these changing roles, it’s also expected that there will be different key performance indicators and incentives coming into play. Previously, it was somewhat easy to measure and assess the correlation between salesforce activity and product performance.

However, with a broader set of channels and messaging now being used, this will become more challenging, and the metrics used will evolve over time.



## Is there more value in commercial outsourcing partnerships?

The industry has a long history of working with external partners on its commercial models, and the COVID-19 pandemic certainly created an opportunity for commercial outsourcing companies to demonstrate their value when working in partnership, and how they can support customers to adapt their commercial models.

For example, throughout the early stages of the pandemic, life sciences companies and commercial outsourcing companies had to quickly put together an emergency response as countries locked down, in terms of how to manage field forces and equip them with remote skills to enable them to successfully operate. Ultimately, companies such as IQVIA were able to show additional value, as they were able to help companies quickly solve a problem that they weren't expecting.

Commercial outsourcing companies also provide a lot of value in bringing a broader sense of industry insights. With their expertise and data-driven insights, including valuable feedback from HCPs, they can help companies to make more informed decisions.

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*"I think anyone who works in an outsourcing environment would always say the best type of relationship you can have with a customer is one where you work in partnership."*

*— John Procter, Vice President Offering Development, IQVIA CSMS.*





## What to expect from successful commercial outsourcing companies over the next 5 years

As industry models are changing, the role of external outsourcing companies will also change. So, what can we expect to see in 5 years' time? IQVIA's John Procter explains 3 key elements that we can expect to see from IQVIA:

1. Bringing a range of capabilities that will help to build a flexible, agile approach, using more data and analytics to support decision making and commercial strategy development.
2. Providing support for emerging biopharma and biotech companies who may be launching for the first time, helping them to bring specialist/rare disease medicines to market effectively in a more fluid environment than they were expecting.
3. Spending more time with companies in launch and preparation phases, to support them in how to best invest in their commercial strategies.

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***IQVIA will offer support with flexibility and agility.***



# The industry can play a key part in improving HCP and patient engagement

We're beginning to see some common trends emerging and key opportunities for commercial models, which will play an important part in improving HCP and patient engagement moving forward.

## COMMON TRENDS AND KEY OPPORTUNITIES FOR HCP AND PATIENT ENGAGEMENT

### HCP ENGAGEMENT

- The biggest trend is the importance of digital engagement in the promotional mix.
- Having a strong digital and multi-channel strategy is important.
- Understanding how to co-ordinate multiple channels, ensure content is personalised, and measuring the impact will be a key opportunity to being successful in a more digitally enabled engagement model.
- Delivering better customer experiences.
- There will be increasing importance in training and equipping sales representatives with the tools they need to be successful in this new engagement model.

### PATIENT ENGAGEMENT

- **One of the opportunities for the industry will be helping patients and health systems to overcome some of the recent and ongoing challenges.** For example, addressing the backlog of care and **supporting innovation in patient pathways and care models** (such as improving efficiency, shortening the time to care, and improving diagnoses of rare diseases).
- From a U.S. perspective, while activities to support patient financial access will continue, the pandemic has created a different in view in that companies are now thinking about how to add value for HCPs, and ultimately improve patient outcomes in the long run. This is a key opportunity for the industry to provide support in these long-term solutions.





# Is there an opportunity for the industry to change the optic?

## Key opportunities when launching new products

### CREATING A STRONG DIGITAL STRATEGY



There will be key opportunities for life sciences companies during the launch stage, and many of these rely on having a successful digital strategy — there is a lot of room for innovation and for companies to stand out if they get it right.

To ensure success, it's important that the digital strategy is continuously evolving, and informed by experience in the field.

*"Pre-pandemic, we would have said to any customer going into a launch that a digital strategy is important. Now, we would say a digital strategy is fundamental."*

— John Procter, Vice President Offering Development, IQVIA CSMS.

### UNDERSTANDING PATIENT JOURNEYS



Many upcoming launches in the next 5 years are in the rare disease and specialist areas, and patient journeys look very different now. Therefore, it's going to be increasingly important for companies to focus on what has changed, and how to accelerate the improvement in care pathways.

### UNDERSTANDING THE DIFFERENCE BETWEEN MULTI-CHANNEL AND OMNICHANNEL

It's very important for companies to co-ordinate their channels of engagement, as well as their people resourcing. This means taking a more "omnichannel" approach, to ensure a seamless experience and successful interaction with HCPs.

## Key opportunities outside of the launch environment post-COVID

### OPPORTUNITY TO CHANGE THE OPTIC



Throughout the pandemic, the industry has shown real value to society and demonstrated what it can do when working in partnership with health systems. Therefore, the industry has the opportunity moving forward to change the dialogue.

### MORE SCOPE TO SUPPORT HEALTH SYSTEMS



As a result of the demonstrated value, there will be more scope now to offer different services and support to health systems. The industry should embrace this, and be more confident in talking to health systems about what we can do to support them with their everyday practice.



# A greater focus on team skills and capabilities is necessary

Engagement models are changing, but it is not solely the modes of interaction. The teams who are delivering the messages will also need different skills and capabilities. For example, it's important to understand the different channels and the mechanics of how to engage, but this alone will not deliver the expected results. The need for different skillsets in the people deployed must be recognised, and every team must be well-equipped in order to be successful.

Therefore, the key takeaway here is that life sciences companies must focus on their teams' capabilities, what to equip them with, and how to continuously support them effectively for a successful engagement model that delivers excellent customer experiences.

To find out more about how IQVIA CSMS can support life sciences commercial models in this evolving landscape, contact us today.

To hear more about the key themes we expect to be prevalent in 2022, watch our short video clips as IQVIA's John Procter shares his insights [here](#).



*Helping you to re-design your engagement models for better experiences, better results*

**IQVIA CSMS is involved in delivering more than 500 commercial or patient support services globally. Evidence from these projects gives good insight into how life sciences companies across the spectrum of size and therapy areas are responding. We will continue sharing further insights as they emerge. If you would like to know more about IQVIA CSMS, please contact us.**

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