White Paper

HCP Engagement Model 2.0 in Post Covid world

RAVI AKELLA, Senior Director, Digital / Technology Solutions, Middle East
DR ARUN GOWDA, Principal, Consulting Services

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Introduction

The pharmaceutical market has evolved rapidly since the last decade. The new era breeds for customer centricity, innovation and engagement with all its stakeholders in the healthcare ecosystem. The pharmaceutical industry is growing ever more complex with more customers, more touchpoints with those customers, more regulations, and higher customer expectations.

The COVID-19 pandemic has inter alia disrupted many aspects of healthcare management like, patient engagement, supply and demand, drug launches etc., organizations did not rely so heavily on digital solutions to manage their customers until now. A year into the COVID-19 pandemic, most Life Sciences companies have already implemented Digital solutions to ensure business continuity. Given the uncertainties and dynamicity, HCP preferences and behavior have compelled pharma companies to adopt significant strategy and technology changes to ensure business continuity. While this imperative need has resulted in quick and immediate adoption of new tools and technologies to support the businesses, it created more challenges in terms of balancing the new solutions with the existing infrastructure while grabbing the opportunity to improve existing technologies to ensure a meaningful customer engagement.

Given the uncertainties and dynaimicity, HCP preferences and behavior have compelled pharma companies to adopt significant strategy and technology changes to ensure business continuity.

Connecting to the customer

Pharmaceutical companies are intrinsically structured in a functional manner leading to creation of internal stakeholders that have different ambitions and motivations for stakeholder engagement. And the outreach is through the vectors available at their disposal and the requirements of the product or brand they are positioning. Sometimes it could be a particular product or the organization itself in certain cases. This leads to a slew of disparate messages reaching the healthcare professional through various channels and in a frequency that is driven by either need or availability.

The first step to address this would be to look beyond the departmental needs towards the evolving customer or target for the communications. Today's healthcare professional is a 'digital omnivore' that consumes information from not just a multitude of sources but also from two or more devices. S/he is also someone who is dabbling with time constraint, multiple communications from various organizations and driven by a personal objective which could be beyond traditional currency towards achieving social currency and status. And for this to happen, there needs to be a triangulation of information that is collected about the target from traditional and newer sources. This profile should drive the bringing together of organizational and functional objectives to interoperate leading to effective engagement.

Technology and techniques are already available that cater to the above outlined objectives. Industries across the world have known to tap into technology and understanding of their customer's persona to deliver customized experiences catering to not just the behaviour, but to the taste profiles of the end customer. Today's healthcare professional looks for frequently updated content available in easy-to-digest bite-sized information that is device agnostic. There is a hint of the old world as well in terms of preferring printed materials and valuing professional social networks rather than generic ones. Outlined below are some findings from a survey on HCP preferences for targeted content.

Successful HCP engagement in the time-constrained, hyper-connected healthcare environment means catering to the "DIGITAL OMNIVORES"

WHAT

~70%
Access **Rx strategies and guidelines** weekly and want better access

88% : 31%
HCPs accessing **diagnostic tools** : healthcare companies providing it

66%
Access **journal articles** on a weekly basis

83% & 68%
HCPs accessing **medical images** monthly and **drug data** weekly

WHERE

80%
Clinicians' value **independent educational websites**

81%
HCPs valuing **print materials**

67% : 21%
HCPs valuing **professional social networks** : general social media

>75%
HCPs valuing **information provided by REPs** in ME survey

HOW

>63%
HCPs are now **"triple screen"** users, accessing medical content using multiple channels

93%
Need **bite-sized, easy-to-digest, short-form articles** and downloadable bits of data

~95%
value ability to download versions in a **save-for-later capacity**

~100%
HCPs identify **frequent updates** to content as essential

> This is where pharmaceutical companies can set themselves apart; they need to become partners of HCPs that help them manage and extract information, rather than piling more, commercially-focused information on top."

Source: HOW TO: RETHINK CLINICAL CONTENT RESHAPE PATIENT OUTCOMES. ELSEVIER; "The Secret to Engaging HCPs — Targeted Content and Digital Channels," Monocl, 2019:; *IQVIA Research

Having said that, 2020 was a watershed year on multiple fronts. The COVID-19 pandemic left in its wake a slew of changes – some knee jerk, some necessary and some accelerating the much-needed digital disruption and adoption in the healthcare domain. With an intent to test the ongoing changes and emerging engagement models in the middle-east, IQVIA conducted a survey on HCP Space, our proprietary healthcare practitioner engagement platform. The survey focused on understanding what channels have been adopted by companies in customer engagement in the post-COVID world and their perceptions and expressed need.
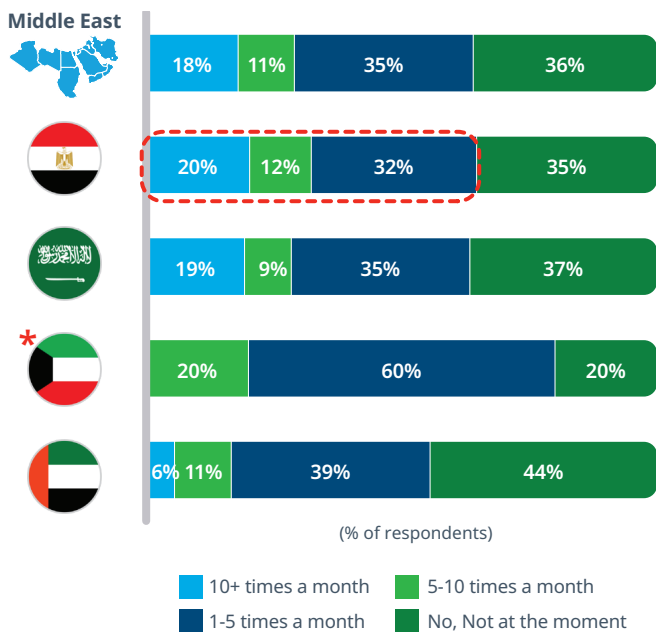
VOICE OF THE CUSTOMERS: RESPONSES FROM IQVIA'S HCP SURVEY

The survey focused on understanding the current situation on the ground in terms of how integrated pharma companies were in terms of reaching out to the HCPs and the HCP preferences on being engaged. From the responses received through December 2020 and January 2021, we isolated and analyzed all completed responses from Egypt, KSA, Kuwait and UAE for this article.

During the pandemic, owing to regulations in the country as well as restrictions imposed by both pharmacos themselves and hospitals, representatives in-person meetings were either completely absent or considerably less. In the region, 36% of the respondents claimed there were NO visits from representatives and another 35% stated that the meetings were between 1 to 5 in a month. Most of these meetings seem to be product promotional in nature and the rate is same with both GPs and specialists (48% and 51%).

Do Medical Representatives from Life Sciences companies visit you regularly?

Middle East

	10+ times a month	5-10 times a month	1-5 times a month	No, Not at the moment
Middle East	18%	11%	35%	36%
Egypt	20%	12%	32%	35%
KSA	19%	9%	35%	37%
Kuwait*		20%	60%	20%
UAE	6%	11%	39%	44%

(% of respondents)

- 🟦 10+ times a month
- 🟩 5-10 times a month
- 🟦 1-5 times a month
- 🟩 No, Not at the moment

* Low HCP Base

Sample size Egypt (99), KSA (109), Kuwait (5), UAE (18)

HCP Engagement Survey Results 2020

What is the most common type of engagement you have with these representatives?

Middle East

*GP/FM/GS: 48%, 24%, 24%, 3%

Specialists: 51%, 21%, 23%, 5%

(% of respondents)

	Pediatrics 38	IM 30	Cardio 21
Conference / Speaker Invitations	29%	17%	33%
Educational	11%	20%	29%
Product Promotional	55%	57%	33%
Samples	5%	7%	5%

- 👥 Conference / Speaker Invitations
- 📦 Educational
- 🔊 Product Promotional
- 💊 Samples
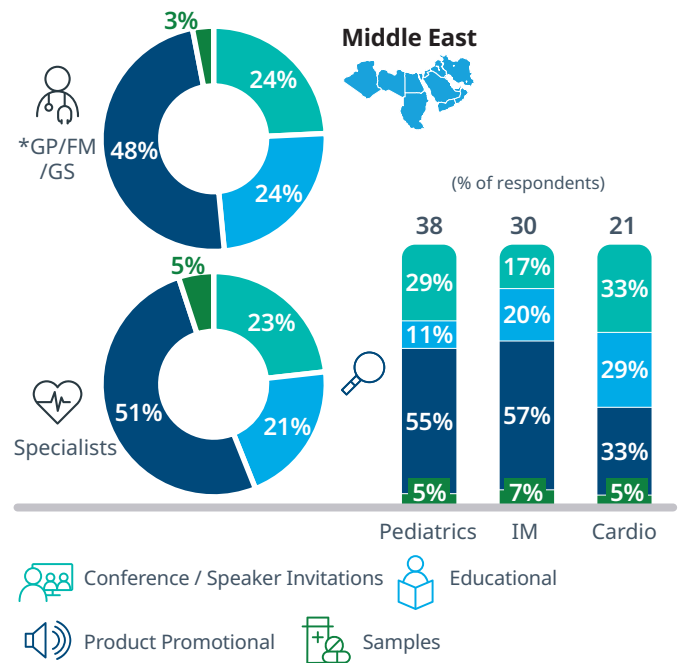
*GP/FM/GS = General Phy/ Family Medicine/ General Surgeon Middle East GPs and SPs consist of KSA, UAE, Kuwait and Egypt

Sample size Egypt (99), KSA (109), Kuwait (5), UAE (18)

During the pandemic, ~40% of the responding physicians stated that the proportion of mainly digital interactions have increased while one-fifth of these engagements are multi-person engagements occurring at least thrice a month.

What is the ratio between face to face vs Digital Interactions?

Middle East

	100% Digital	Mostly Digital with one or two Face to Face interactions a month	100% Face to Face	Mostly Face to Face with one or two Digital interactions
Middle East	13%	27%	11%	50%
Egypt	11%	28%	9%	52%
KSA	14%	25%	12%	50%
Kuwait *		40%		60%
UAE	17%	28%	17%	39%

39% ... 39%

(% of respondents)

- 100% Digital
- 100% Face to Face
- Mostly Digital with one or two Face to Face interactions a month
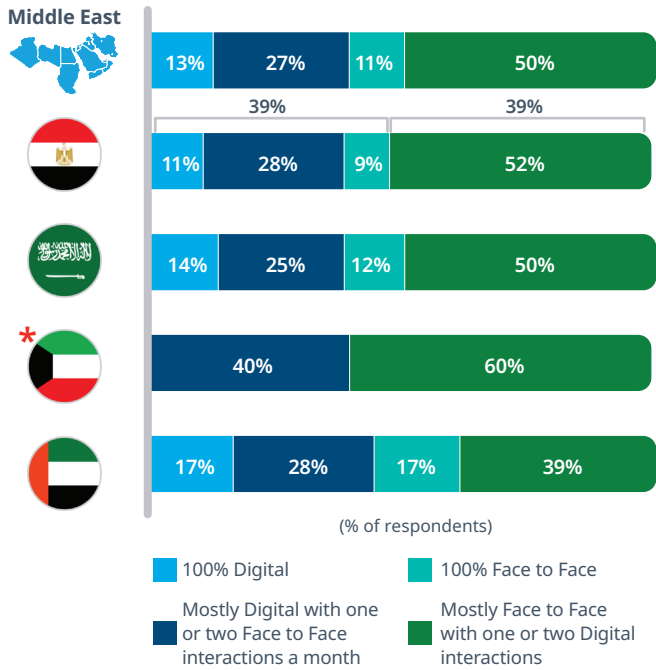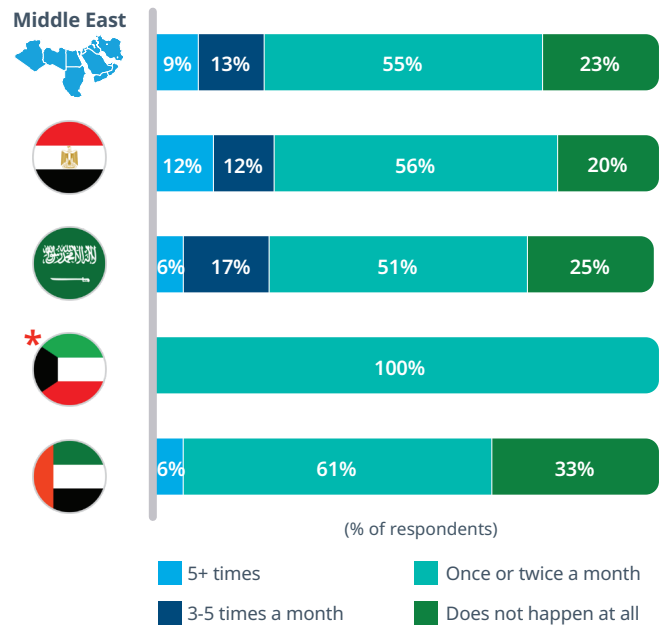- Mostly Face to Face with one or two Digital interactions

* Low HCP Base
Sample size Egypt (99), KSA (109), Kuwait (5), UAE (18)
HCP Engagement Survey Results 2020

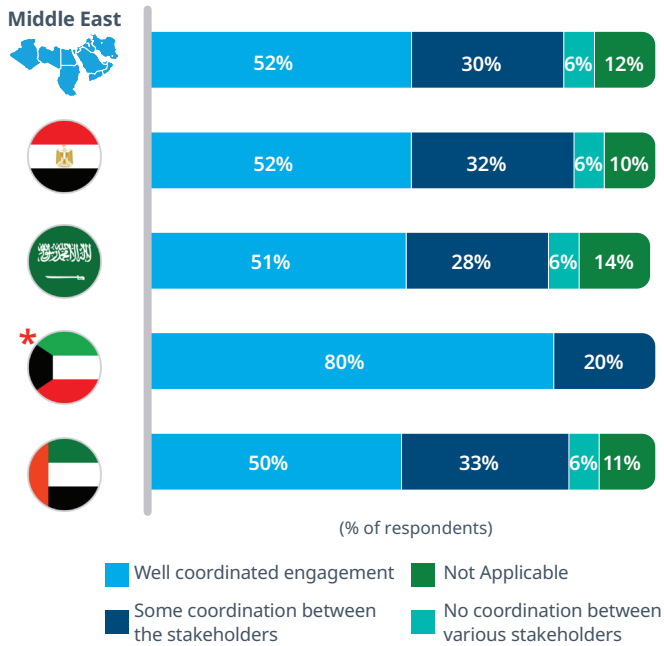## Do you interact with more than one person (Rep, Sales Manager, Key Account Manager, MSL etc)

Middle East

	5+ times	3-5 times a month	Once or twice a month	Does not happen at all
Middle East	9%	13%	55%	23%
Egypt	12%	12%	56%	20%
KSA	6%	17%	51%	25%
Kuwait *			100%	
UAE	6%		61%	33%

(% of respondents)

- 5+ times
- 3-5 times a month
- Once or twice a month
- Does not happen at all

* Low HCP Base
Sample size Egypt (99), KSA (109), Kuwait (5), UAE (18)
HCP Engagement Survey Results 2020

A point to note from the results emerging from the survey is that the pharmacos seem to have adapted quickly to the current requirement, but there is scope for improvement in the coordination between these visits. Only 31% of the respondents that there was a well-coordinated engagement with them.
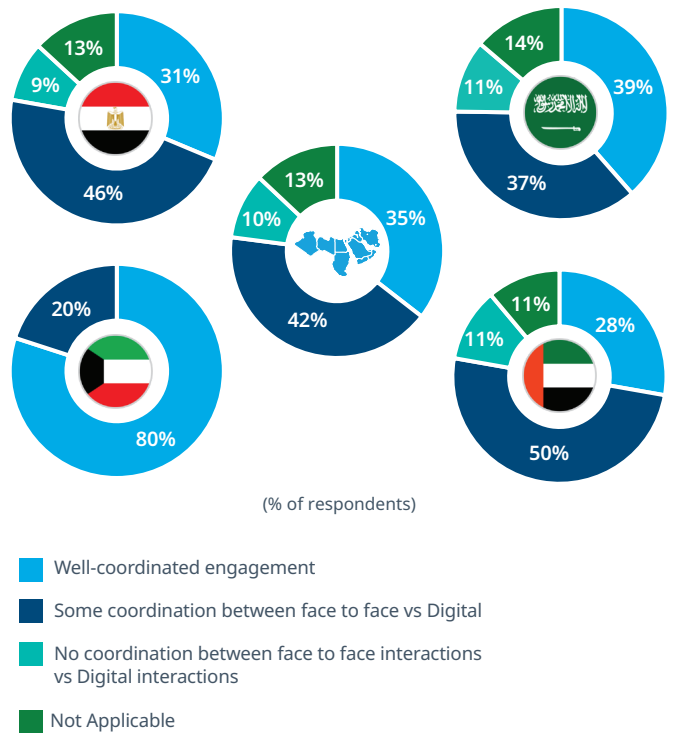
For face to face interactions, how do you rate coordination between the pharma companies reps

Middle East

Country	Well coordinated	Some coordination	No coordination	Not Applicable
Middle East	52%	30%	6%	12%
Egypt	52%	32%	6%	10%
KSA	51%	28%	6%	14%
Kuwait *	80%	20%		
UAE	50%	33%	6%	11%

(% of respondents)

- ■ Well coordinated engagement
- ■ Some coordination between the stakeholders
- ■ Not Applicable
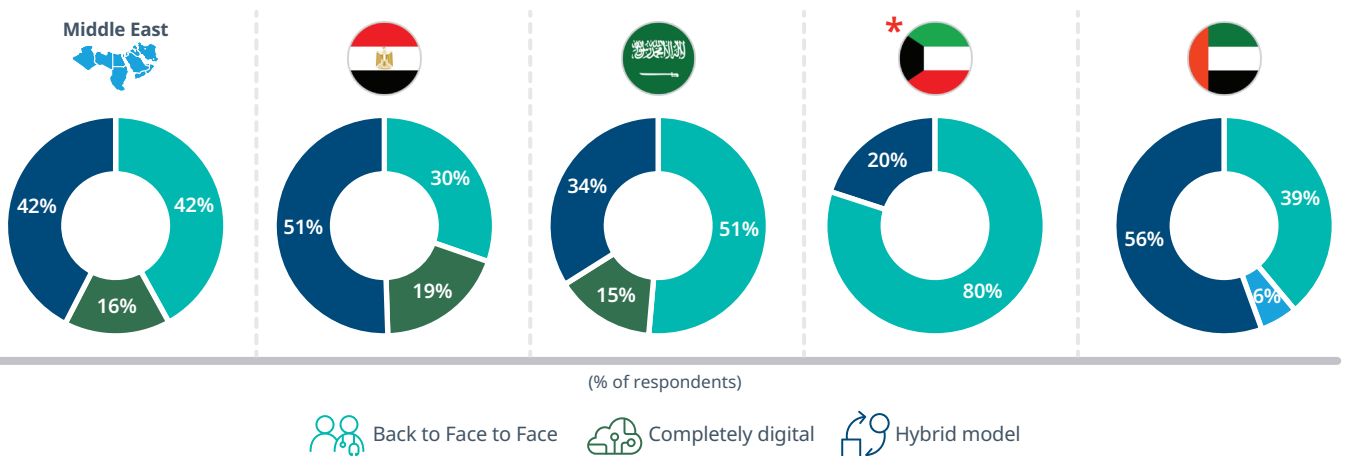- ■ No coordination between various stakeholders

* Low HCP Base

Sample size Egypt (99), KSA (109), Kuwait (5), UAE (18)

HCP Engagement Survey Results 2020

How do you rate the coordination between the face to face interactions vs digital?

Egypt: 31% Well-coordinated, 46% Some, 9% No, 13% Not Applicable

Middle East: 35% Well-coordinated, 42% Some, 10% No, 13% Not Applicable

KSA: 39% Well-coordinated, 37% Some, 11% No, 14% Not Applicable

Kuwait: 80% Well-coordinated, 20% Some

UAE: 28% Well-coordinated, 50% Some, 11% No, 11% Not Applicable

(% of respondents)

- ■ Well-coordinated engagement
- ■ Some coordination between face to face vs Digital
- ■ No coordination between face to face interactions vs Digital interactions
- ■ Not Applicable

In terms of future outlook, the respondents in the region believe there is scope for a hybrid engagement model (46%) in the future.

What do you see as the future of engagement with pharma companies?

Middle East: 42% Hybrid, 42% Completely digital, 16% Back to Face to Face

Egypt: 51% Hybrid, 30% Completely digital, 19% Back to Face to Face

KSA: 34% Hybrid, 51% Completely digital, 15% Back to Face to Face

Kuwait *: 20% Hybrid, 80% Completely digital

UAE: 56% Hybrid, 39% Completely digital, 6% Back to Face to Face

(% of respondents)

- Back to Face to Face
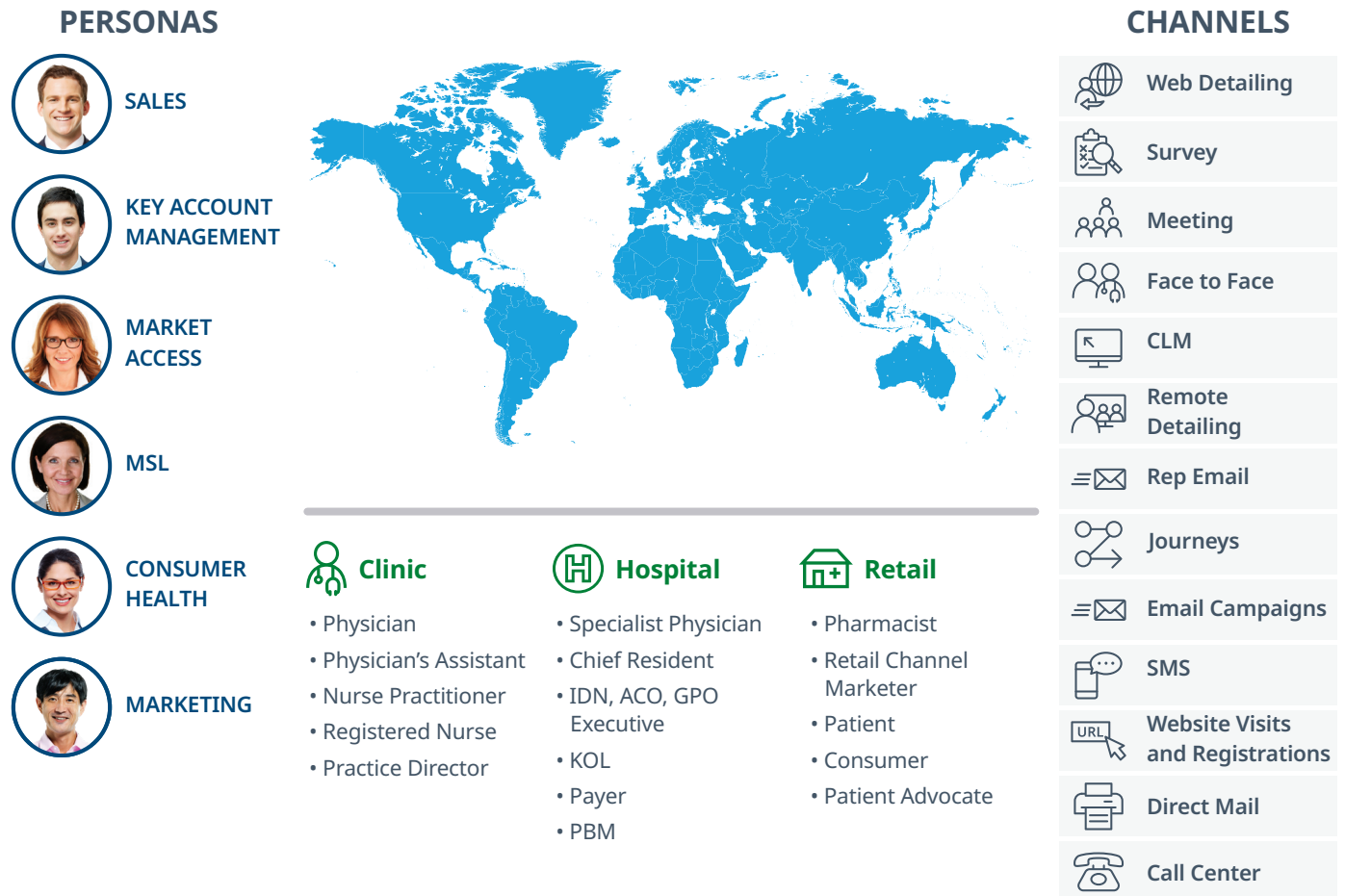- Completely digital
- Hybrid model

* Low HCP Base

Sample size Egypt (99), KSA (109), Kuwait (5), UAE (18)

HCP Engagement Survey Results 2020

SCALE ACROSS PERSONAS, CHANNELS, AND AUDIENCES

In order to get a 360^0 view of Healthcare Professionals, an orchestrated engagement of Pharma personas across multiple channels is essential. Personas need to be able to coordinate their efforts to ensure that they are handing off activities from one another to provide a seamless experience to the audiences. This will help understand HCP preferences better, strengthen HCPs engagement and provide a personalized experience to the HCPs.

PERSONAS

- SALES
- KEY ACCOUNT MANAGEMENT
- MARKET ACCESS
- MSL
- CONSUMER HEALTH
- MARKETING

CHANNELS

- Web Detailing
- Survey
- Meeting
- Face to Face
- CLM
- Remote Detailing
- Rep Email
- Journeys
- Email Campaigns
- SMS
- Website Visits and Registrations
- Direct Mail
- Call Center

Clinic
- Physician
- Physician's Assistant
- Nurse Practitioner
- Registered Nurse
- Practice Director

Hospital
- Specialist Physician
- Chief Resident
- IDN, ACO, GPO Executive
- KOL
- Payer
- PBM

Retail
- Pharmacist
- Retail Channel Marketer
- Patient
- Consumer
- Patient Advocate

Balancing digital and personal engagements and the path ahead

The industry is continuing to become more digital than ever before. With the unique situation created by the recent pandemic, it has become imperative for all the businesses to adopt and assimilate digital technologies in various aspects of their operations. Often it would have taken months or years to make such a transition, but it has become immediate in the current circumstances. Remote engagement has seen traction in the last decade with the rapidly changing commercial needs demanding for new solutions. Analysis shows that pharma companies have increased their spending on digital and moving towards a blended engagement with their customers.

These remote engagements come with their share of challenges, low context in digital engagements, the interoperability across functions and channels of engagement are a few. Hence, there is a need for interconnectivity to ensure the solutions work together with the existing infrastructure to effectively orchestrate meaningful customer engagement.

Remote engagements are rising significantly, this immediate and quick transition needs effective coordination between Face to Face and remote interactions for an efficient and effective engagement with the stakeholders. As shown in the survey, F2F interactions are still not out of business and for few the remote engagement is a temporary fix. Hence, the challenge lies in balancing of channels and technologies while ensuring a smooth adoption and transition for the stakeholders. Though digital is precise it is context deaf, while personal engagement has high context it lacks precision. It is important to balance these two to create an improved customer experience. It is also important to keep in mind that HCPs primary role is towards their patients and flooding them with digital engagements as this is the trends risks 'digital fatigue' and turning away from such engagements.

Many companies have already increased their investments in new technology solutions to reap the benefits of virtual engagements while the challenge continues in terms of integrating these to their overall customer engagement strategies. The balance needed can be achieved through orchestrated technology solutions that integrate the data with interconnectivity across functions. Orchestration is needed to not just space the engagement and messaging, but also to ensure that the digital engagements are catered when the HCPs are most receptive to it at a personal level.

With the potential for leverage of AI and ML to better define target persons and the kind of data available currently, the potential is huge for materializing such orchestrated engagements.

Illustration of HCP Engagement Hyper-personalization
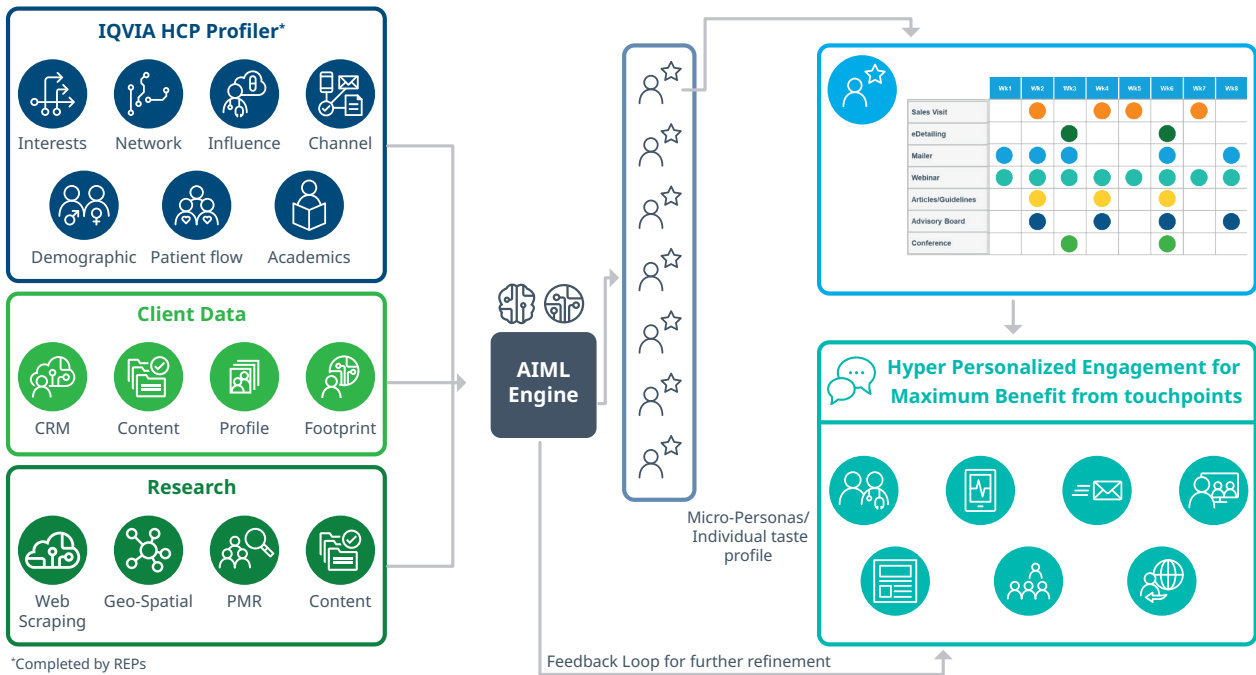
Conclusion

With the unique situation created by the recent pandemic, it has become imperative for all the businesses to adopt digital technologies and evolve HCP engagement models. It is important that the various personas of Pharmacos need to orchestrate their engagement with healthcare professionals to provide a tailored experience for them. Pharmacos should also look to leverage AI and ML to personalize content and experience for healthcare professionals.

About the authors

RAVI AKELLA
Senior Director for Digital / Technology Solutions, Middle East at IQVIA

Ravi Akella is a Senior Director for Digital / Technology Solutions, Middle East at IQVIA since 2016 and he is passionate about helping life sciences companies and healthcare stakeholders in their digital transformation journeys. Trained as a Computer Science Engineer, he has 20 years of experience in Technology Consulting, Large Scale Enterprise Product Development and People Leadership.

Prior to this role, he established and led the 450+ product engineering team for QuintilesIMS in India, Implemented the organization's first global SaaS Platform for Business Intelligence, a platform that connects pharmaceutical sales people to the latest critical performance and market analysis information anytime, anywhere.

DR ARUN GOWDA
Principal, Technology, Analytics and Consulting, IQVIA Middle-East, IQVIA

Arun is a physician by training and has over 20 years of experience across various health sectors ranging from analytics, consulting, research, mHealth, writing and stakeholder engagement. He is a well published writer with ~30 publications in peerreviewed journals. His primary area of work in the last decade has been in stakeholder engagement and realworld evidence in the AMESA region. He is also actively involved in AI-based projects as well as digital and tech interventions at a target customer and community level. He believes in the philosophy that the dynamicity of the high-growth economies necessitates novel and creative solutions.

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