

White Paper

Promotional Darwinism: Achieving Brand Goals via Speed to Insight and Agile Execution

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Introduction

Darwin’s theories on how and why organisms adapt in the natural world remind us of the value in choosing “new” over “familiar,” that progress need not be linear, and that one-off mutations are not sufficient to survive, let alone thrive.

Today, these lessons are particularly germane to the life sciences industry as judicious promotional decision-making has never been more crucial, nor more difficult. But how does one allocate sales and marketing resources for the greatest impact when budgets are limited... prescribers expect tailored experiences... the patient journey is increasingly complex... and the market is changing underfoot?

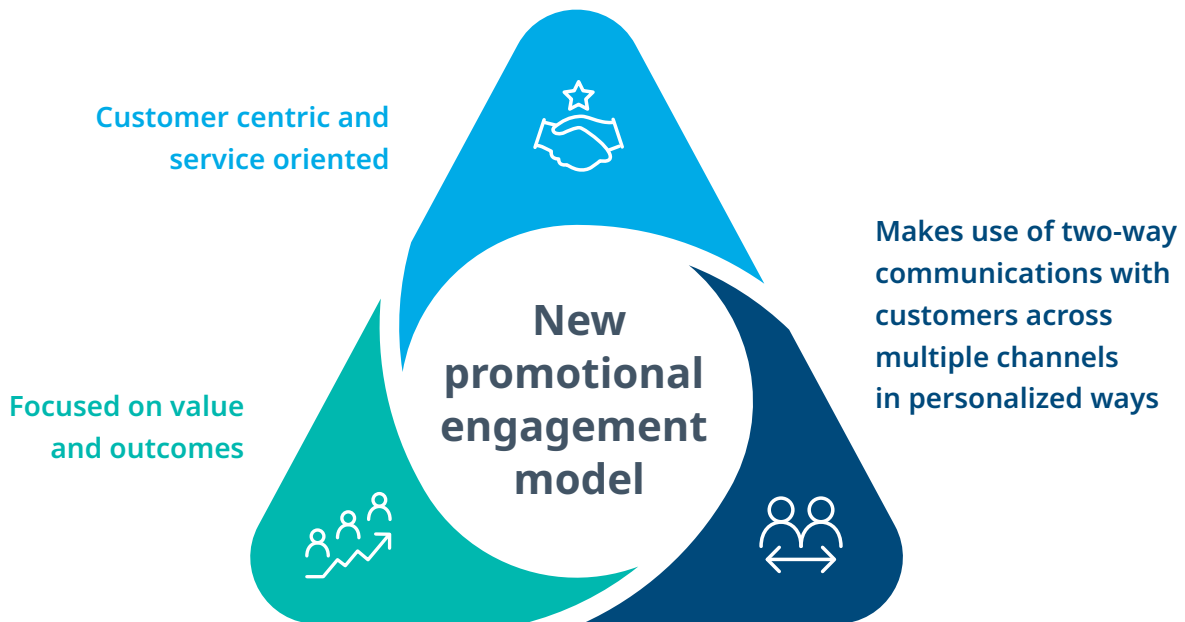
The answer is to evolve by embracing a new engagement model that:

1. Is customer centric and service oriented
2. Focuses on value and outcomes
3. Makes use of two-way communications with customers across multiple channels in personalized ways

Companies that adapt and practice Agile Brand Promotion will discover that the brass ring of care — the right patient, with the right medicine, at the right time — is within reach.

Upending years of baked-in approaches to budgeting, planning, and executing brand plans to adopt a new engagement model may feel risky. But, the alternative — failing to adjust to the new commercial reality — is perilous indeed. We believe that deploying Agile Brand Promotion is now a strategic imperative for survival.

Here we share our vision of Agile Brand Promotion and explore the fundamentals necessary to achieve it. Subsequent papers will offer advice on how to proceed and will delve into the elements essential to success.



The facts indicate a pressing need

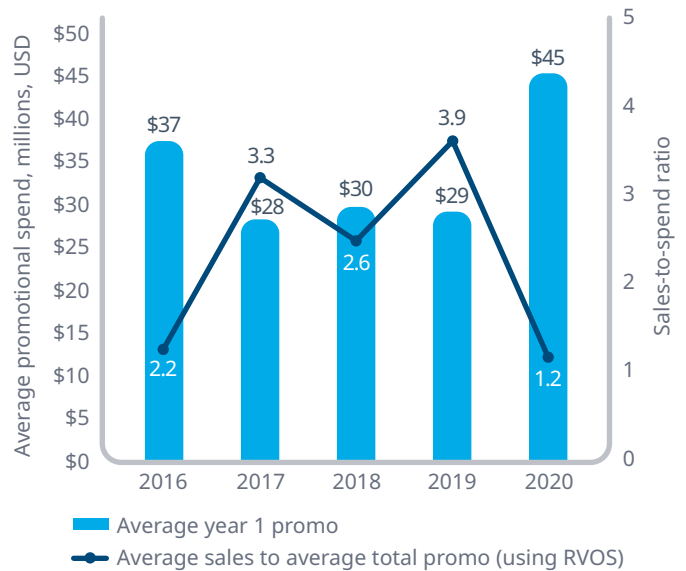
Industry insiders and observers alike are acutely aware that today’s commercial environment is different and the tried-and-true methods of reaching customers are insufficient. The facts are telling:

- Return on Investment (ROI) for product launches is declining, while spending is increasing (see Figure 1).
- 80% of the customers IQVIA surveyed (n= 100) named digital channels and omnichannel strategies as priority areas for 2022
- No therapy areas have rebounded to pre-COVID-19 levels of in-person engagement. Only 50% of therapeutic areas achieve face-to-face engagement levels above 70% of pre-COVID-19 levels.

So, what’s holding companies back?

Collectively, life sciences companies have been craving an orchestrated way to engage with customers efficiently and consistently. However, based on IQVIA’s

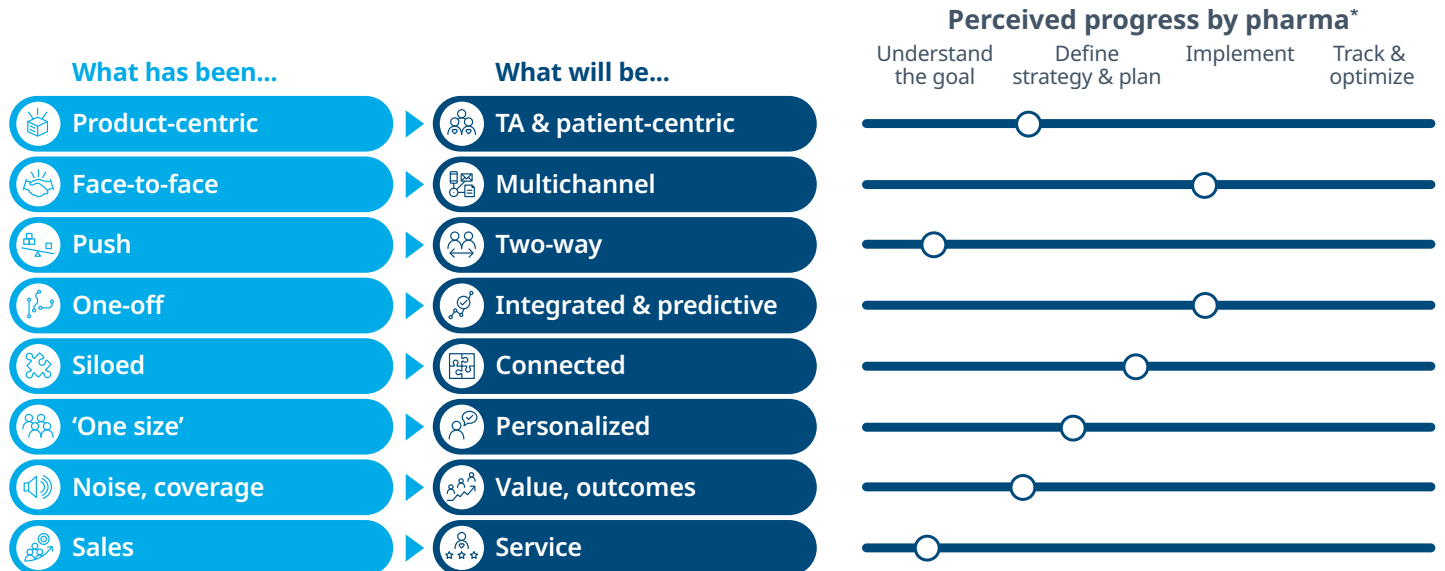
Figure 1: Promotional spend (millions) and sales to promotional spend ratios by launch year, 2016–2020



Source: National Sales Perspective, ChannelDynamics, IQVIA
 Notes: RVOS = retail value of samples; Sales to promotional spend ratio is calculated by including samples at their retail costs

assessment of their progress in adopting a new go-to-market model, no company is yet practicing truly Agile Brand Promotion (see Figure 2). Certainly, there are signs of progress, and many companies are enjoying success in selected areas, but no company has mastered every aspect of it.

Figure 2: IQVIA assessment of pharma progress



*Represents IQVIA view regarding average large pharma

It would seem that there are several factors that are holding companies back and making the transition difficult for companies. These include:

- **Organizational silos.** The functions responsible for engaging customers operate independently of one another, and each creates its own budget, strategy, and tactics. Thus, no single function is motivated to look at the situation holistically or to argue for a reallocation of resources across functions or channels. It is unlikely, for example, that any head of sales has ever declared, “We should use more digital channels.”
- **Annual brand planning.** Typically, companies create their brand plans once a year, and, most often, call plans are revisited every six months (although in some companies, this is done three or four times a year). This infrequency does not lend itself to being responsive to new information or changing market dynamics.
- **Protracted decision cycles.** In general, companies take too long to digest the data available to them on product performance, so that brand teams are often getting feedback six months after the fact. Arriving at measures of promotional effectiveness involves getting a statistically significant sample and then analyzing the data across channels. By the time teams understand what is working and what is not, the window for change has passed. The default is thus to do nothing and maintain the *status quo*. (It must be noted, however, that with the proper resources and processes, what currently takes six months could take less than a month.)
- **Anti-kickback concerns.** The anti-kickback statute and related regulations that were finalized in late 2020 have made companies even more cautious about their promotional activities. All promotional activities have to, in effect, be scrutinized through an anti-kickback filter to ensure that they are not giving or offering anything of value to induce the use of a product.

IQVIA’s vision of Agile Brand Promotion

Very simply, IQVIA’s vision for the industry’s new customer engagement model is that it be insight driven and responsive to customer needs and preferences. In the idealized world of Agile Brand Promotion, the right stakeholder for a given brand is reached by the right channel at the right time and place — akin to what the best marketers in the consumer goods sector have mastered.

Perhaps it’s easiest to understand how the concept of Agile Brand Promotion would translate into actual practice through a realistic example. In a rare disease therapy area, the goal is to find potential patients and accelerate their path to therapy; the promotional objective is, therefore, as much about triggering the physician to recognize a patient with treatment potential based on historic treatment and testing as it is about awareness building. It requires precision targeting (both personal and non-personal), especially for emerging biopharma companies who must “get it right the first time.”

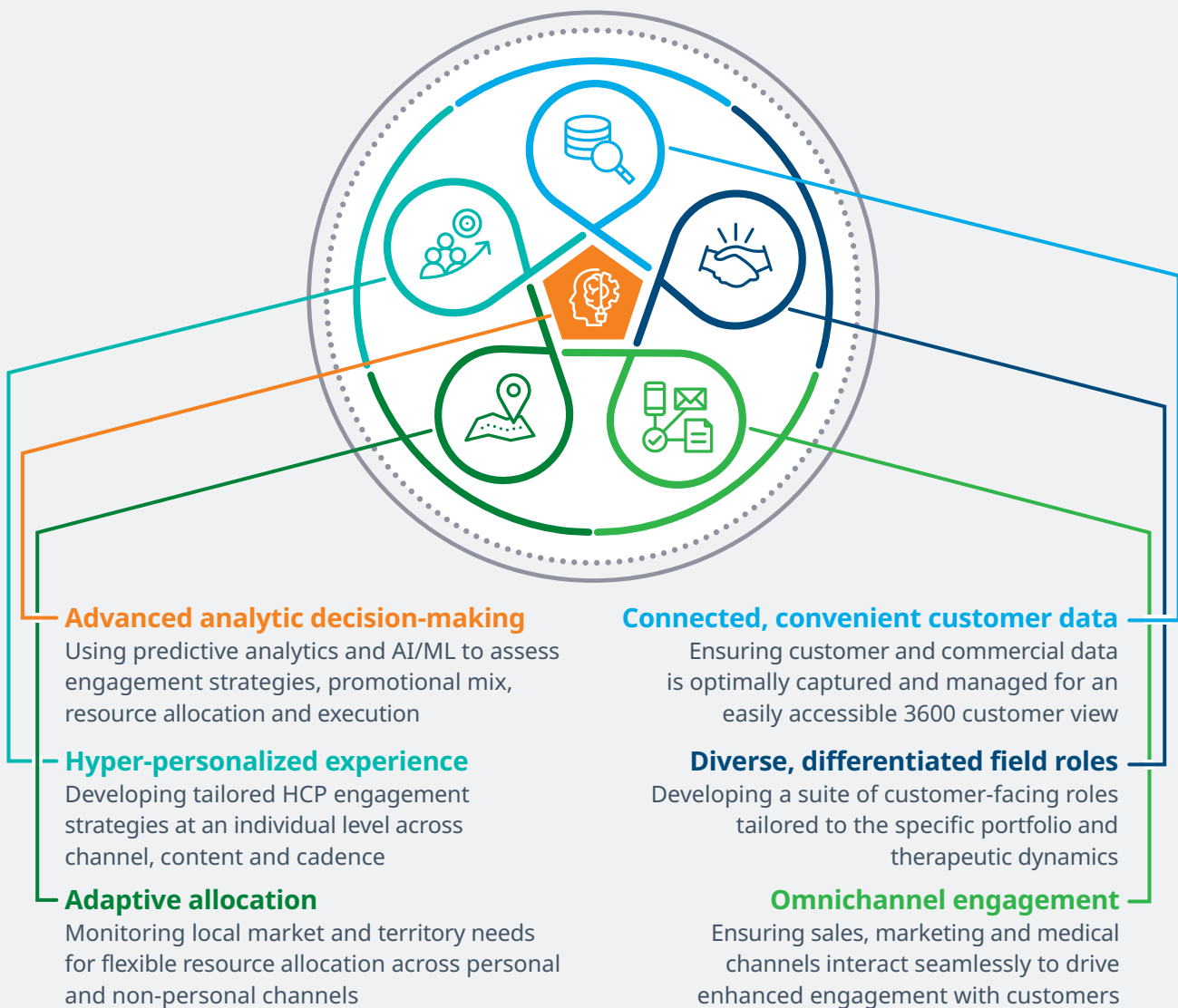
So, the best personal promotion approach would factor in how to deliver the right scientific perspective and then how to provide the right sequence of supporting details from reps and educators — all based on when patients are presenting to the right physician. The most effective non-personal approach would consider how the healthcare provider conducts his or her research and seeks out information from scientific journals, peers, and key opinion leaders (KOLs). It would then build the right sequence of promotional tactics to dovetail with that research.

Companies that adapt and practice Agile Brand Promotion will discover that the brass ring of care — the right patient, with the right medicine, at the right time — is within reach.

The building blocks of Agile Brand Promotion

There are six components, or pre-requisites, to achieving agile brand promotion as illustrated below. Note that these elements need not all be operating at 100%, but rather may — and indeed should — be “dialed” up or down to suit the situation. The visual depicting these six tenets is circular intentionally, as this is not a sequential or linear process; each component intertwines with another and considerations for one component necessarily impact others.

The aim is to have a dynamic model that can be adjusted as needed. The biggest challenge lies in this fine tuning, which will need to reflect environmental factors (the market landscape, the access environment, and geographic variation); the company’s specific capabilities; and portfolio, franchise, and product factors (clinical attributes, patient journey, product lifecycle, and behavioral triggers).



Let's explore the six components in more detail...



CONNECTED, CONVENIENT CUSTOMER DATA — THE BEDROCK OF HEALTHCARE PROFESSIONAL (HCP) ENGAGEMENT

While we reiterate that the process is not linear, amassing the right data is an appropriate and natural place to begin the journey toward Agile Brand Promotion. In the absence of complete and accessible data, speed and flexibility will be of little benefit. Resulting insights will be wrong, and it will be impossible to leverage the attributes that are now needed to be innovative in one's promotional approach.

The data must provide a 360-degree view of the customer, meaning that it reveals not just HCPs' prescription volume, but also their intent to write, the information they consume (for the brand of interest AND the market and competition), the order of how they seek data, and the interactions they have with peers, reps, and KOLs. Their affiliations, their patient profiles, their credentials, and their office behavior also all help determine if they are a valuable target.

The data must be sourced in a consistent format and linked across business domains, which requires robust, enterprise-wide integration, data management, and governance policies and practices. The infrastructure, platforms, and systems must be capable of providing insight quickly and with transparency to business users. It must also be able to flex to accommodate the volume, need, and user with ease and speed.

On the back end, reporting tools must produce answers beyond "what happened" to include "why" and "what next." This requires embedded artificial intelligence (AI) and predictive analytic capabilities.

This is all only possible and of value when the company fosters a data-driven culture that recognizes a clear purpose of consistently generating customer-centric insights and ensuring that everyone treats customer data as a strategic asset.



DIVERSE, DIFFERENTIATED FIELD ROLES

Practicing Agile Brand Promotion draws on a suite of customer-facing roles that are connected and coordinated so that outreach to customers is appropriate and maximally efficient. Staff in each of these roles must have a deep, intuitive understanding of the customer and the customer's need. This will inform a more consultative and problem-solving approach, with resources better trained and upskilled to deliver against those needs.

Field resources must be responsive to the product's lifecycle, the patient profile, and prescriber adoption curves, as well as tailored at national, sub-national, and local levels. At the same time, the roles deployed must be grounded in the realities of the business's maturity, therapeutic area focus, and product lifecycle dynamics — balanced with an understanding of the customer need.

Case study

A large multi-franchise global organization utilizes a nuanced deployment strategy for key med-surg items in their portfolio. Local representatives are utilized for time-sensitive tasks related to stocking and setting up surgical coverage. Meanwhile, more senior resources are utilized to cover the surgery. Nurse educators are available to provide direct support of the patients in both an in person and remote environment. Inside sales is utilized to cover needs outside of the hospitals and surgi-centers.

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OMNICHANNEL ENGAGEMENT, INCLUSIVE OF PERSONAL AND NON-PERSONAL PROMOTION

Companies that excel at omnichannel engagement continuously leverage and harness a wider set of channel capabilities to interact and engage with customers on their terms, in a manner that feels authentic. For this new model to work, the budget must be developed holistically across all channels with a clear focus on ROI and an eye on HCP engagement metrics. Allocation decisions and tactics should be driven by the customer journey and where pain points and moments of truth occur. This requires insights into where, when, how, and why decisions are made.

The result should be that HCP engagement efforts have clearly defined connections and intersections with the patient pathway and support acceleration of patient activation and persistent treatment of their disease.

Case study

A growing rare disease organization harnesses connected, customer data and AI-predictive decision engines to deliver personalized experiences to HCPs. Field and account teams receive contextualized recommendations regarding customer preferences to inform the future interactions. Non-personal, digital marketing engagement is also coordinated via the decision engines and interconnected marketing automation platforms.

ADAPTIVE RESOURCE ALLOCATION, WITH WELL-DEFINED THRESHOLDS FOR ACTION

Adaptive resource allocation is, in essence, the ability to adjust funding and engagement strategies based on what the market and customers are revealing. This demands a continuous feedback loop, derived from continuously monitoring HCP channel and message preferences. Ultimately, these insights can predict and pre-empt next-best actions.

Key performance indicators (KPIs) should be aligned with actions across promotional content, cadence, and channels. A process should clearly connect customer needs with business impact as well as define the thresholds for acting in order to minimize disruption to the customer and customer-facing colleagues. Finally, increased efficiency and flexibility can be gained through the appropriate use of, and focus on, contract sales and outsourcing models.

Case study

A Top 10 global pharma company utilizes an innovative customer engagement model, centered on the HCP and empowered by an integrated orchestration across field facing roles. Representative, MSL, FRM, and TLL responsibilities have been refocused across all pharma TAs to balance brand strategy with customer engagement needs and preferences, at national and sub-national levels. Virtual and in-person resources are flexed across markets and brands, to enable optimal allocation to support product launches and strategic customer accounts.

Deploying Agile Brand Promotion is now a strategic imperative for survival.

HYPER-PERSONALIZED EXPERIENCES UNDERPINNED BY MORE REAL-TIME INTERACTION

To be truly personalized, HCP engagement must extend beyond channel considerations; it must be triggered in real time by customers' actions and events. These can be identified with the help of AI and machine learning (ML) performed by marketing automation platforms.

The goal is to provide consistent experiences across all touchpoints — experiences that are tailored by segments, channels, and content types. They must also be personalized at the individual HCP preference level in a manner similar to consumer experiences.

This requires having a perspective above and across brands to ensure coordination of product needs and a truly outside-in lens that is oriented around customers rather than individual brands. Also, behind the scenes administration is important here. Content must be reviewed and approved in modules to enable easier reuse and repurposing, and appropriately tagged and stored in a content library to allow for easy access and searchability.

ADVANCED ANALYTICAL CAPABILITIES TO ASSESS AND OPTIMIZE EVERY FACET OF ENGAGEMENT

This component is in the center of Figure 3 because advanced analytical capabilities are needed to assess and optimize every facet of customer engagement. To provide a connected view of comprehensive insights across organizational silos, analyses must be grounded in multiple datasets. What is more, in order to shed light on the implications of any action, data on promotional activities must be linked to outcomes.

Rather than merely providing descriptive or diagnostic analytics, the analytical engine must inform what should change to improve engagement or deliver business value, given clear thresholds of when change is needed. Deploying predictive and cognitive analytics requires an appropriate investment in AI/ML to inform decision engines and trigger next best actions with customers.



Success factors

The path to truly agile brand promotion will not be the same for every organization, but companies that are successful will all have shared common steps along the way. We recommend that companies:

- Prioritize amassing complete, holistic, and connected data. It is the key to getting the rest right.
- Understand that time to insights is the metric of agility and that confidence in those insights is a prerequisite to taking action. Many decision makers fail to act because they lack confidence in what the data are telling them. Therefore, companies must find the points in the information ecosystem that need the most improvement and that the organization is most willing/most risk tolerant to address, and focus on them in Phase I of the undertaking.
- Identify where they want to take risks... then take them and learn from them. In a different spin on analysis paralysis, companies too often suffer from pilot perpetuation. Customer engagement can't be treated as a playground with a myriad of pilots and proof of concept exercises that play at the periphery of the larger goal. As a matter of course, every brand leader should question what might be done better and run a pilot to test any promising new approach, collecting the appropriate metrics. They should then expand what works without succumbing to the temptation to experiment further.

Conclusion

Successfully putting all six components of, or pre-requisites for, Agile Brand Promotion in place is a sweeping undertaking (even though it can be done in stages). Then, once all the elements are in place, knowing how best to adjust the levers in any given situation, brand by brand, is a higher-order challenge. It is, however, one that the industry can and must meet. As Charles Darwin observed, "It is not the strongest of the species that survives, not the most intelligent that survives. It is the one that is most adaptable to change."

THE FRANCHISE LEAD OF THE FUTURE

Much of developing and executing an adaptive brand plan will fall to franchise leads, and those who excel in this new environment will have a special skillset that departs from the traditional competencies associated with franchise leads. In general, the franchise lead of the future will need to have a broad set of experiences, be creative, and risk tolerant. More specifically, ideal candidates will:

- **Be change agents.** The transformation will require senior sponsorship and broad, genuine commitment and buy-in from multiple functions, all marshalled by the franchise lead.
- **Have a strategic mindset.** This will allow them to apply problem-solving tactics from a systemic view while knowing the right questions to ask understand the nuanced needs for each brand.
- **Be willing to take risks.** The risks should be calculated, of course, based on an understanding of what worked in a prior role and on a hypothesis of what could work in the current situation. Franchise leads will need to make tough calls on resourcing based on evidence — without prejudices or preferences.
- **Have a broad background.** Ideally, they will bring to their role experience from a variety of roles, and potentially companies. This broad framework will help them adapt to each brand's unique needs.

A core team (internal and external) should be assembled to analyze the data and derive insights that can be used to align actions to results at both the brand AND franchise level.

About the authors



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Christie has 25+ years of experience in a variety of roles within the life sciences industry building consulting-based solutions and leading go-to-market teams in the large and emerging biopharma sectors. She is highly experienced at delivering and implementing recommendations covering a variety of strategic marketing issues, with focus on marketing insights, integrating solutions to solve complex commercial issues, promotional effectiveness, patient-based analytics, and AI/ML driven decision planning analysis.



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About IQVIA Connected Intelligence™

IQVIA Connected Intelligence brings together IQVIA's unique portfolio of capabilities to create intelligent connections across its unparalleled healthcare data, advanced analytics, innovative technologies and healthcare expertise to speed the development and commercialization of innovative medicines that improve patients' lives.



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