

indegene

Omni**presence**™

HCP

ACTIVATION



We are living in the age of

A TOTAL TRANSFORMATION OF THE GLOBAL HCP MARKETPLACE

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PHYSICIANS ARE WILLING TO SHARE PERSONAL INFORMATION

WITH INDUSTRY MARKETERS IN EXCHANGE FOR MORE
TAILORED, PATIENT-CENTRIC COMMUNICATIONS.



THE OPPORTUNITY IN THE HEALTHCARE INDUSTRY

Physicians are migrating from industry medical information sources to 3rd-party sources that can provide fast and free solutions in their desired content formats. The healthcare sales rep (HSR) is losing value, and industry websites are among the least trusted sources for medical advice.

However, physicians are still concerned about the trustworthiness of digital 3rd-party sources that are not government or university sites, even though most still use them. The healthcare community is eager to form partnerships with the industry that align engagement and communication formats to contemporary needs and desires.

A major opportunity exists for the healthcare industry to become a partner in co-executing patient outcomes;



meanwhile, physicians are willing to share personal information with industry marketers in exchange for more tailored, patient-centric communications – a win-win situation for both parties.

Healthcare providers (HCPs) will continue to be empowered with non-industry sources, and those who switch from persuasion marketing to inbound, or invitational, marketing can expect physicians to return the favor.

The demand generated by HCPs searching for content is strong; it is time to activate HCPs.



UNSATISFIED HCPs

The modern HCP has been experiencing a steady decline in targeted and desired communications from the healthcare industry. Heavy in-person approaches are missing the mark on value delivery, communication pieces are slowly declining in quality, and trust is at an all-time low. HCPs are noticing that desired content formats are not improving over time, resulting in fewer reasons to solicit industry sources for support. Meanwhile, as physicians administer more complex treatments and specialized solutions, the content provided by the industry continues to remain generic and less than valuable for the evolving needs of the HCP.

Physicians are migrating to content pieces that add value to contemporary challenges, and healthcare companies that continue to focus on product-centric and promotional communications will continue to lose trust and face-time with physicians.

The result is a physician community that sees Healthcare Sales Reps (HSRs) as less valuable. A gap exists between the content that healthcare industry marketers are creating and the value that the physicians desire. A sales integrated marketing system that ensures continued value delivery is a must-have for future healthcare sales success.

HCPs ARE NOTICING THAT DESIRED CONTENT FORMATS ARE NOT IMPROVING
OVER TIME, RESULTING IN FEWER REASONS TO SOLICIT INDUSTRY SOURCES FOR SUPPORT.

LOOK AT THE FACTS

A circular infographic with a dark blue background and a green border. The number 84% is displayed in white text inside a dark blue square.

PROMOTIONAL MATERIALS ARE OVERUSED

84% of physicians have stated that the industry is heavily focused on branded promotional materials, with 55% of respondents stating that they "rarely" or "never" access this information and a majority stating they DO NOT want more of this content.¹

QUALITY OF DESIRED CONTENT IS WORSENING

Satisfaction with highly desired content types such as information about new drugs, drug costs, patient education materials, clinical data, and direct drug comparisons has declined by 25% to 70% over the past 5 years. Half of the respondents complained that the material never changes and two-thirds felt that the content is not customized or tailored to their practice and patients.²

A circular infographic with a dark blue background and a green border. The number 70% is displayed in white text inside a dark blue square.A circular infographic with a dark blue background and a green border. The number 63% is displayed in white text inside a dark blue square.

INDUSTRY CONTENT IS INCREASINGLY MISMATCHED TO HCP DESIRES

Consider these popular content types; 78% of HCPs report accessing CME Material, 31% of industry respondents do not provide it; 83% of HCPs report accessing Medical Images, 43% of industry respondents do not provide it; 88% of HCPs access Diagnostic Tools, 31% of industry respondents do not provide it. Meanwhile, 63% of industry respondents reported providing the same amount or more promotional content as the previous year, which is shocking because most HCPs do not access this content.³

PHYSICIANS ARE LESS TRUSTING OF INDUSTRY COMMUNICATIONS

In 2015, Deloitte found that 75% of physicians do not trust the information being provided to them by the Healthcare Industry.⁴ While pharma industry respondents believe reps to be among the most significant delivery channels, over half of physicians felt that reps are of "no" or "limited" value for medical information,⁵ and only 11% preferred an in-person sales approach.⁶

A circular infographic with a dark blue background and a green border. The number 75% is displayed in white text inside a dark blue square.A circular infographic with a dark blue background and a green border. The number 41% is displayed in white text inside a dark blue square.

LESS IMPORTANCE IS PLACED ON THE SALES REP

A recent report (2015) found that compared with 3 years ago, 25% fewer physicians and surgeons identify sales reps as a top information source. Only 41% stated they were in their top 3 sources of information. Overall, healthcare sales reps are no longer a significant concern for physicians.⁷



**THE MAJORITY OF
PHYSICIANS TODAY ARE
DIGITAL NATIVES, AND THEY
WANT OPEN
COMMUNICATION SIMILAR
TO THE EXPERIENCES
OFFERED BY OTHER
INDUSTRIES**



PHYSICIANS WANT MORE FROM THE INDUSTRY



While physicians are losing faith with industry communications and engagement tactics, they are not against them; in fact, they are eager for a change that includes greater patient-outcome support and engagement formats that align with their increasingly demanding schedules.

The majority of physicians today are digital natives, and they want open communication similar to the experiences offered by other industries. A majority already prefer to be contacted via email, and those who have participated in a digital sales engagement favored the format, spent

longer during the call, and wanted follow-ups in the same format.

The reality is that physicians need help, and they will focus their limited resources on the sources that help them co-execute solutions for enhanced patient outcomes. Healthcare Sales Reps (HSRs) need communications that are micro-marketed to the physician's specific needs, yet summarized, focused, and timely enough to position the sales rep as a reliable source for actionable information.

LOOK AT THE FACTS

1/2

PHYSICIANS WANT REPS AS PARTNERS

More HCPs are expecting their HSRs to play the role of a valuable partner throughout the patient care process, and almost half of them wish that communications were timelier.⁸

MOST PHYSICIANS ARE DIGITAL NATIVES

15% of all physicians are under the age of 35⁹ and the majority of physicians, as of 2014, can be considered as digital natives – this is expected to increase to 67% by 2020.¹⁰

67%

68%

PHYSICIANS WANT DIGITAL ENGAGEMENT

68% of physicians have stated that they preferred an email-based approach for sales, with more than half seeing the value of social media for sales rep engagement,¹¹ and 70% are completely open to live digital detailing. Wockhardt USA reported an average of 8 to 10 details per rep per day and an average call duration of 18.3 minutes through digital sales engagement.¹² Unfortunately, most are not utilizing digital inbound tactics for healthcare sales.

AUTHENTIC, REAL-WORLD, END-TO-END EVIDENCE IS A MUST-HAVE

Physicians want new and innovative research that enables effective decision-making. Phase 4 studies, molecular and drug data, risks and benefits of combinations, tolerance levels, antibiotic development, rare diseases,¹³ journal articles, treatment guidelines and strategies, and expert medical opinions are accessed on a daily or weekly basis by most HCPs.¹⁴

ACCESSED
DAILY

1/2

SUMMARIZED, ACCESSIBLE, AND TAILORED CONTENT ARE NEEDED

Almost half of all HCPs consider visual illustrations, synopses, and comprehensive search tools that sort by diseases, conditions, etc. to be very important. Meanwhile, only 25% to 40% of sources facilitate these needs. HCPs share a common concern that the most “valuable” content available online must be paid for, too many are locked behind form walls, and it is time consuming and difficult to find relevant content for their needs.¹⁵



GREATER ACCESS TO OUTSIDE RESOURCES

As the gap between industry communications and physician needs widens, 3rd-party sources will occupy the space to satisfy the demand. The value and trustworthiness of these sources have steadily risen over the years, and today professional and specialty websites are the primary search tool for most physicians, who prefer them over Google search results, and access them on a daily basis.

Meanwhile, industry sites are the least preferred sources for medical information, and consequently, the least trusted. Many physicians access these sites once a year or less. However, trust is not the core driver leading physicians away from industry sources, as most reveal that knowing which sources to trust is still a major concern, with the top 2 drivers being ease and speed of access, and costs. The majority of HCPs access online medical content outside of work hours and across multiple devices. They are willing to share their personal information with companies that will use it to deliver tailored content.



**IF PHYSICIANS CAN TRUST
HEALTHCARE INDUSTRY SALES REPS,
AND IF THE INFORMATION CAN BE
DELIVERED IN A TIMELY FASHION
WITH VALUE-ADDED BENEFITS,
A MORE INTEGRATED AND PROFITABLE
HEALTHCARE NETWORK CAN BE REALIZED.**

There is a major opportunity available for those in the industry to reposition themselves as trusted and reliable sources of patient-centric communications that return valuable care time to physicians by collaborating on outcomes. If physicians can trust healthcare industry sales reps, and if the information can be delivered in a timely fashion with value-added benefits, a more integrated and profitable healthcare network can be realized.

LOOK AT THE FACTS

79%

Physicians Turn to Online Sources for Medical Information

PHYSICIANS TURN TO ONLINE SOURCES FOR MEDICAL INFORMATION

79% of HCPs “usually” or “always” initiate their online searches for medical information through professional and specialty websites. This percentage is greater than those who begin their search using a search engine like Google (53%).¹⁶ Meanwhile, Independent, Government, and Medical Society sources are accessed on a daily and weekly basis by more than half of all HCPs.

23%

Very Few Consider Using an Industry-Owned Source

VERY FEW CONSIDER USING AN INDUSTRY-OWNED SOURCE

Only 23% of HCPs stated that they initiate their online search for medical information using an industry website.¹⁷ Overall, 40% of HCPs access industry branded sites and industry branded educational sites once a year, or never.¹⁸

4x

Industry Sources Are Among the Least Credible

INDUSTRY SOURCES ARE AMONG THE LEAST CREDIBLE

Almost half of HCPs consider industry sources to be of “low” or “very low” credibility. 4x as many HCPs feel that these sources lack credibility compared to other resources.¹⁹

57%

Knowing Who to Trust Is Still a Challenge

KNOWING WHO TO TRUST IS STILL A CHALLENGE

While HCPs are accessing outside sources more often than industry sources, 57% of HCPs stated that “knowing which sources to trust” is still a major barrier to sourcing medical information online.²⁰

70%

Content Engagement Occurs Outside of Work on Multiple Devices

HCP CONSTRAINTS DRIVE KEY CONTENT BEHAVIOR

Because of the strain of less time and greater workloads,²¹ convenience (ease and speed of access) and cost (fee or free) are the most influential factors for determining whether HCPs choose to access a piece of content online.²²

CONTENT ENGAGEMENT OCCURS OUTSIDE OF WORK ON MULTIPLE DEVICES

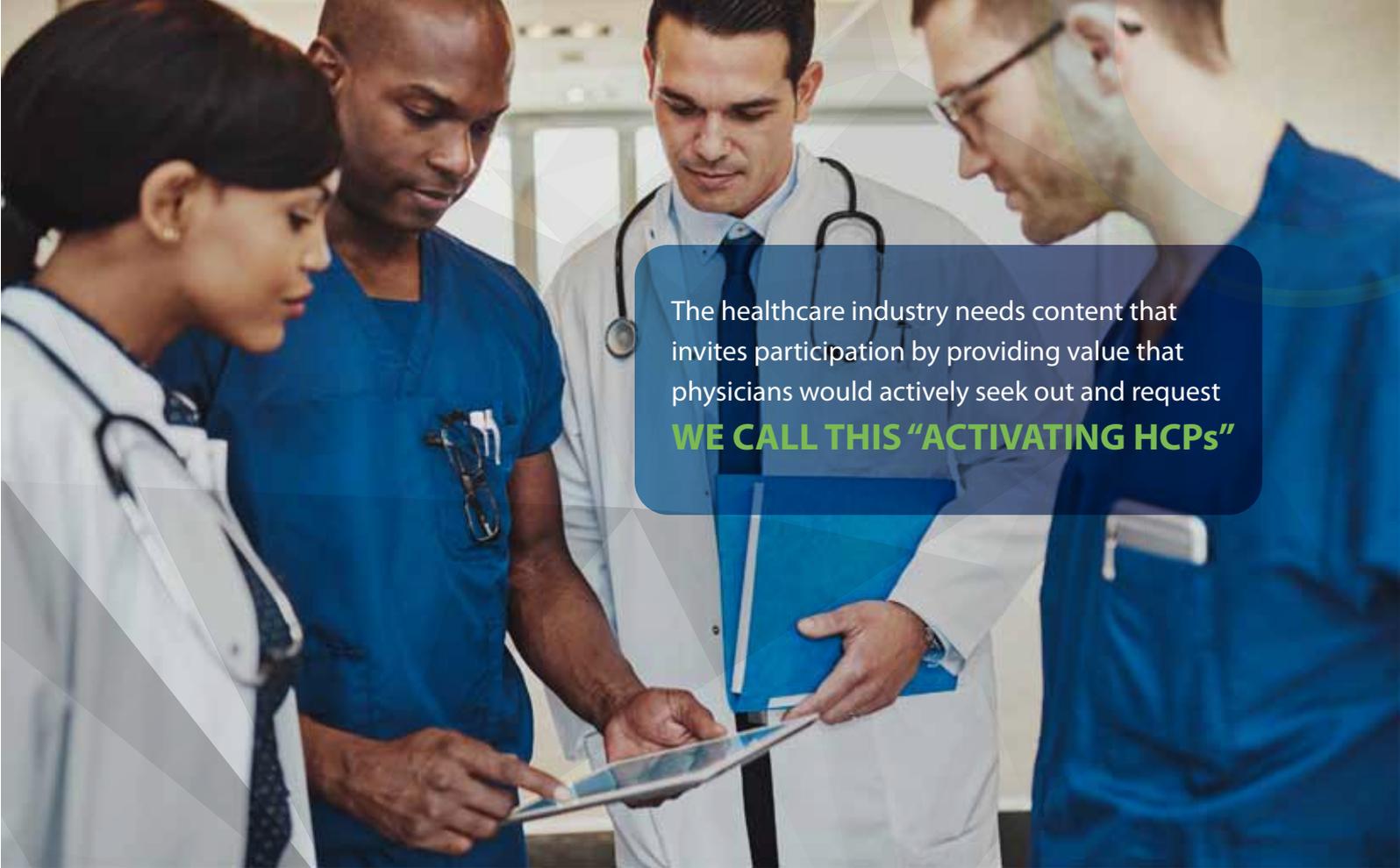
70% of HCPs stated that they frequently (daily and weekly) access online medical information on their own time outside of work. 30% rarely or never set aside scheduled time at work for online medical content, whereas over half frequently access medical information just after a patient consultation.²³

63%

HCPs Are Willing to Share Personal Info for Tailored Communications

HCPs ARE WILLING TO SHARE PERSONAL INFO FOR TAILORED COMMUNICATIONS

63% of HCPs have stated they are willing to supply providers of medical content with information about themselves if it results in content that is tailored to their specific needs.



The healthcare industry needs content that invites participation by providing value that physicians would actively seek out and request
WE CALL THIS “ACTIVATING HCPs”



ACTIVATING HCPs

Traditional tactics and product-centric communications will not work for much longer, and as online sources of information continue to grow in value and reach, the industry needs to push the envelope on tactics that provide the value and engagement that physicians are looking for.

It is not enough to use “persuasion” marketing. Physicians are looking for support, and they are not finding it through traditional channels. The healthcare industry needs content that invites participation by providing value that physicians would actively seek out and request – we call this “activating HCPs.”

SUCCESSFULLY ACTIVATING HCPs WILL REQUIRE FOUR THINGS



INTEGRATED SALES AND MARKETING

1

Sales and marketing alignment is a crucial element to successful content utilization. Since marketers create the content that healthcare sales teams use in the field, they must have field-level insights to inform new rounds of content development. Whether by scheduled meeting or automated closed loop marketing system, marketing teams need field-level awareness to guide home office content investments.



INBOUND MARKETING TACTICS

2

Physicians are searching for content, and the demand is growing. Many have given up using a Google search and focus their attention on a few sources. Physicians have stated that they are willing to share information about themselves in exchange for valuable communications. This is a major opportunity that can be filled by industry marketing teams. If the industry can position itself as a valuable support asset, physicians will return the favor in kind.



RESPONSIVE AND SUPPORTIVE FIELD REPS

3

The key drivers pushing physicians to 3rd-party sources are the ease and speed of access, and cost. A responsive, patient-focused sales rep who can pivot on value delivery in real time can become a trusted concierge when physicians are in need. The key is to have the right content on hand and have the capacity to find answers and deliver solutions promptly. Healthcare global asset management tools are a must-have for field reps.



OMNI CHANNEL REACH

4

The right content, however responsive and tailored, still needs to reach physicians in a format that is useful to them. It is not enough to send emails and pop in for a visit, physicians need a seamless process where any experience with any sales rep or company website aligns with previous engagements. There is no time for repeat interactions; the company must become one entity with consistent interactions and an integrated digital system for physician value delivery.



THE OMNIPRESENT HEALTHCARE INDUSTRY



The challenges are clear; physicians are unsatisfied with industry communications. However, as products become increasingly complex, physicians need tailored and relevant support more than ever before. As a vacuum begins to form, physicians disregard the value of industry channels, and instead resort to 3rd-party sources for medical advice.

There is incredible demand for prompt, cost-effective, and relevant support along the CareFlow that is driven by physicians, rather than by sales reps.

Activating HCPs is about rebuilding trust and showing physicians that the industry is ready and willing to provide support at the

moment it is needed, and without the fluff of promotional pitches. An omnipresent healthcare industry is one that is responsive 24/7, mobilizes resources in real time, and provides solutions to patient care as a value-added differentiator, rather than a disguised sales pitch.

The solution starts with technology that creates one seamless operating environment, accessible by everyone in the company, and flexible enough to address global challenges in a local context.

If your healthcare solutions are not omnipresent, send us an email or give us a call, and let us show you why 2017 will be a renaissance in healthcare.



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