

Great Expectations

Gaining clarity and cut through
with critical customers



Great Expectations

As pharma struggles with clarity and cut through with critical customers, Jane Ayton explores what we can learn from one of the greatest, enduring storytellers.



Jane Ayton
Senior Vice President

The seismic shift caused by the COVID-19 pandemic and the implications for the pharma industry will continue to be felt in 2022 and beyond. While many might cling to the hope of a return to the largely face-to-face customer engagement models that were forced to change overnight, in many cases, these changes are expected to be more permanent.

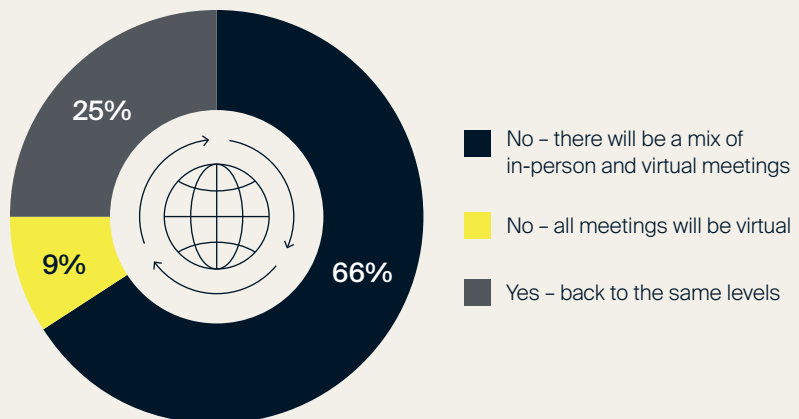
The changes shouldn't come as a surprise. For some time now, we have seen a

growing number of customers becoming inaccessible to pharma through the traditional sales model. Whether these are the influential healthcare professionals (HCPs), those with the highest patient workload, or those in Centres of Excellence or community-care systems is yet to be determined. But the model was already shifting; COVID simply accelerated the process.

According to a GlobalData poll conducted with pharmaceutical industry healthcare professionals (HCPs) in 2021, 75% of 456 respondents saw virtual interaction remaining (either as a standalone option or a mix of in-person and virtual interactions) as the COVID-19 pandemic recedes. Only 25% of HCPs believed that in-person interaction would go back to pre-pandemic levels, reiterating the change in physicians' preferences, in turn indicating that pharma companies will need to seek new ways to create meaningful connections.

Figure 1

Will in-person physician interactions with pharma reps return to pre-pandemic levels once the COVID-19 crisis recedes?



Source: GlobalData

Strategic clarity and the pitfalls of 'more data'

For all brands operating in a dynamic market with an increasing number of competitors, the need to create positioning which intuitively resonates with your stakeholders is paramount. Investing time to interrogate your proposition is a luxury few prescribers have today, so if you can't quickly connect with your customers and their realities, it doesn't matter whether you're communicating through man-powered resources or through the numerous digital channels, you're at risk of being left behind.

Worse still, you may create confusion not clarity, and confusion is the enemy of change: why would you change from your treatment of choice if newer alternatives appear riskier, or you can't confidently identify the right patient for this treatment. It's so much simpler to maintain the status quo if the path forward is unclear.

Creating clarity begins with how you think about your strategic brand challenges. Cloudy thinking here can affect your judgement on all the things you choose to prioritize, and that leads to poorer, less well targeted tactical plans, which often don't deliver the brand growth potential.

A clear example of how that cloudy thinking translates can be seen in the use of data, where brands that haven't made clear strategic choices about where to play and how to win throw every bit of data they've ever produced at stakeholders, with the hope that some part of it will resonate.

The reality, however, is that data alone won't change beliefs and behaviors. The age old 'Reason to Believe' in advertising jargon is predicated on a model that with the right data points, communicated with graphs (the more the better), will be enough to persuade HCPs to do something different. Yet this model is almost entirely functional. It doesn't consider the prescribers' history, their motivations, their goals for treatment or how they prefer to interact with patients.

So how can pharma get closer to building stronger brands, and execute better strategies built on clear choices, with compelling narrative for customers that resonates, drives recall and ultimately helps build brand differentiation? How can pharma create a brand that connects to generations of prescribers, year after year? Step forward Charles Dickens, master craftsman whose stories continue to connect to generations of readers.



Protagonists, and their motivations

Everyone talks about customer-centricity, but it's still too easy to lose connectivity with our customers: the prescribers who provide access to products day after day.

To create compelling strategy that really connects our brand with our customer, we need to develop a much deeper understanding of our prescribing community, and not just what they do but WHY they make the choices they make.

The WHY is critical. Readers know that Miss Havisham grew old in her wedding dress. WHY she did this, her motivations, give us a much stronger understanding of what informed those behaviors. Dickens

helps us understand the WHY better. It's part of her backstory, it brings depth to her character, and it creates empathy.

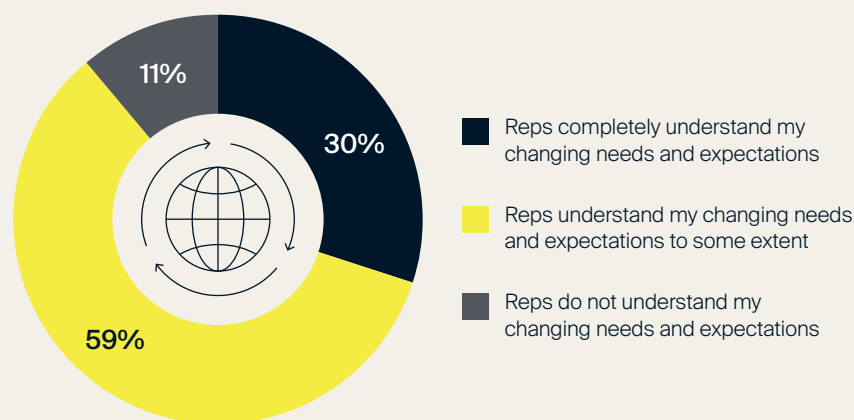
Pip's story, or motivation, could be summarized as a search for identity. Perhaps our prescribers' choices are in part driven by their sense of identity – who they are, what they hold to be most important, and how they prioritize and 'offset' decisions.

Really effective brand strategy truly understands the motivations behind treatment choices and the goals of those prescribers and the values they hold to be true. That depth of understanding requires brand teams to really want to explore prescribers and, to quote Stephen Covey, to 'seek first to understand'. That level of understanding has to be clear in the minds of the entire brand team, it can't just reside in the business intelligence teams, as it is fundamental to building brand success.

HCPs are not sure that pharma representatives understand their requirements completely

Figure 2

How do HCPs feel about pharma representatives' understanding of HCPs requirements during COVID-19?



Source: Future Ready Healthcare

Managing cast complexity

Complexity and confusion characterize much of Great Expectations. While it may not have a cast of thousands, the connectivity between the characters builds dimension and a richness to the narrative.

That connectivity in the healthcare system and amongst the 'cast' is critical. While the patient may not be the ultimate decision maker (yet!), increasingly we see the role they can play in helping inform prescriber choices.

Patient-centricity has become 'jargonized' unfortunately, but underpinning it is that need to make sure that patient voice is heard, understood and reacted to: often we listen but don't implement a fresh and better course of action.

Patients shouldn't be regarded as a final destination; the rich insights and strategic potential of a patient journey shouldn't be referenced as a tick box component in brand plans, and then be excluded in the narrative throughout the rest of the year.

Understanding that connection between the patient and the prescriber, the conversations they have, how topics are discussed, and where decisions are made can transform how we think about 'adding value' beyond the pill.

With a deeper understanding of values and preferences, pharma can build a more

compelling narrative that can help enrich the conversation between patient and prescriber, prescriber and peer, prescriber and payer. It's then possible to understand where the fault lines in the healthcare system lie, and identify real opportunities to add value.

But patients aren't the only cast members left out of the story. Multi-disciplinary teams, nurses, payors, caregivers can all contribute, providing insights, depth of understanding and, ultimately, direction for brand strategy.

Assumptions

Back to Dickens for a moment, perhaps one of Pip's greatest weaknesses was his assumption that his benefactor was Miss Havisham, versus the mysterious Magwitch. That assumption, which Havisham did nothing to dispel, allows Pip to develop a sense of pride and entitlement which ultimately is part of the journey he goes on as his world, or his understanding of his world, unravels.

Getting beyond the assumption is vital, yet this requires a different mindset, particularly when we are looking beyond the functional understanding of our customers.

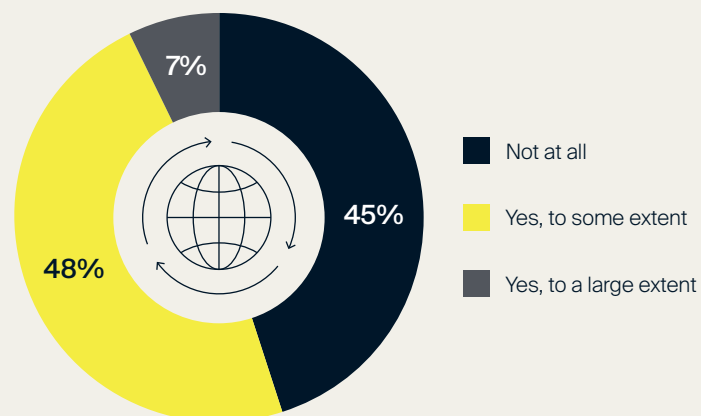
Frequently we see suggestions that prescribers make decisions to continue using therapy X due to habit and lack of desire to break that habit and switch their prescribing to therapy Y. Understanding that 'habit' is critical to unlocking that switch. After all, who wants to raise their hand to a prescribing decision based on habit? Habit feels transactional, a process, without due consideration or any emotional investment: an automation.

Go deeper however, and we can explore what informed that habit, where the rituals started, what has solidified those early experiences and how they have become the norms of treatment. To do this we have to throw off assumptions and develop that appetite for uncovering more than the superficial.

HCPs are overwhelmed with promotional content

Figure 3

How overwhelmed do HCPs feel with content shared by pharma companies in the past 12 months?



Source: Future Ready Healthcare

Building better brands

Creating a successful brand today requires a shift in mindset. The environment is noisy and dynamic and simply shouting more loudly is likely to work against the story and success of brands. As face-to-face access continues to become more challenging, bombarding customers with digital interactions may drive them away. They will develop more robust screening skills or may simply turn away from certain channels altogether to cut out the noise.

Brands that make better strategic choices, with great stories, who can connect better patient outcomes simply to prescriber values, who look beyond the obvious, and understand the connected cast that impact success, can stand the test of time.

They will continue to differentiate themselves and build a lasting legacy that delivers hope: the ultimate great expectation.

Changing expectations

01



Better brands

Building a great brand is about making clearer choices on where to play and how to win. Everything to everyone is not a strategy, and few drugs are a panacea.

02



Protagonist rules

Everyone in the team needs to have a real depth of understanding of key stakeholders; armed with the right insights, the rights strategic choices become much easier.

03



Clarity is critical

Less could be more in confused, dynamic therapy areas, with time-pressured stakeholders.

04



Enduring stories

A great brand story is not just a series of data points.



Lumanity applies incisive thinking and decisive action to cut through complex situations and deliver transformative outcomes to accelerate and optimize access to medical advances. With deep experience in medical, commercial, and regulatory affairs, Lumanity transforms data and information into real-world insights and evidence that powers successful commercialization and empowers patients, providers, payers, and regulators to take timely and decisive action.

Contact us to learn more about how Lumanity can support your unique challenge.

lumanity.com