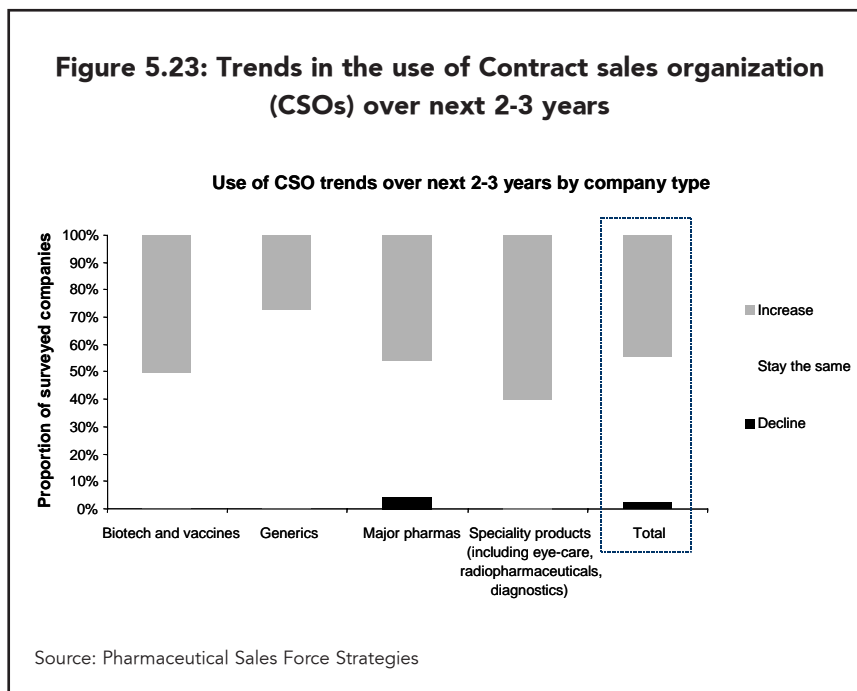


# Pharmaceutical Sales Force Strategies

Driving ROI through best practice in targeting, management, outsourcing and technologies

**Figure 5.23: Trends in the use of Contract sales organization (CSOs) over next 2-3 years**

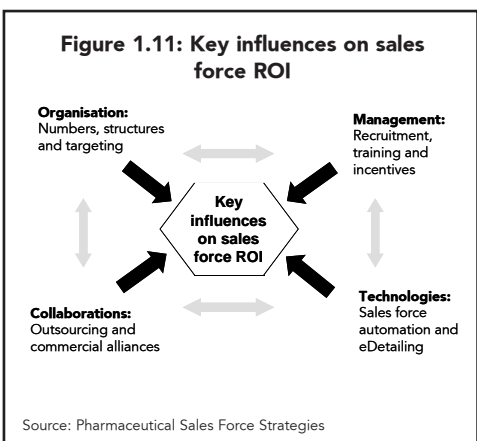


“Our detailed industry opinion survey revealed that as CSOs have professionalized their approach to recruiting and deployment. Many leading pharmaceutical companies including GSK and Eli Lilly have developed long term relationships with CSOs as a basis for driving competitive sales force effectiveness...”

**Identify key industry sales force trends and best practises highlighted by industry experts** in our in depth interviews and case studies.

# Pharmaceutical Sales Force Strategies

Driving ROI through best practice in targeting, management, outsourcing and technologies



“As a result of the changing dynamics of the pharmaceutical industry and the changing needs of the physician increasing sales force ROI will be a key driver of success in the pharmaceutical industry. The most successful sales reps will be those that can offer value added services to physicians, promoting the sales rep as a partner in the efficient running of a physician’s business...”

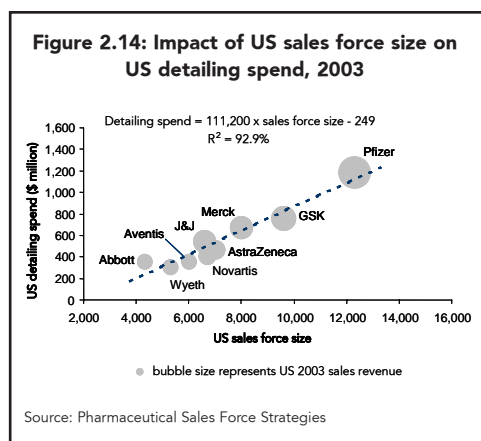
The management report '**Pharmaceutical Sales Force Strategies: Driving ROI through best practice in targeting, management, outsourcing and technologies**' provides a detailed analysis of current trends in commercial ROI across the pharmaceutical, biotechnology and specialty pharmaceutical industries.

Continued sales force growth has resulted in increasingly aggressive promotion to physicians, reducing the average duration of detailing visits and diluting 'share of voice' with the physician. Changes in physicians' information needs across a product's lifecycle has resulted in requirements for more responsive and flexible promotional efforts.

New sales force tactics are being considered within Europe, US and Japan, such as the implementation of new CRM approaches, investment into new technologies and partnering with commercial alliance partners.

**This report’s case studies and primary research with current industry leaders provides unique strategic insight. Examine the best practises that will help you drive ROI in your pharmaceutical sales force and will boost your product up-take, with the help of this report.**

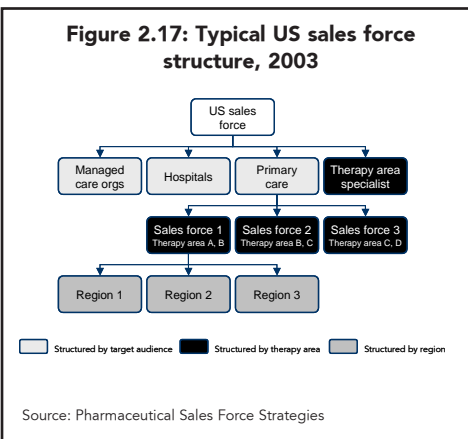
## Key findings of this report



“Companies such as Pfizer and J&J were able to generate an ROI on promotional and detailing spend at least as good as the industry average. However, Figure 2.14 shows that both companies used fewer sales force reps relative to their detailing spend compared with the industry average, suggesting both companies deliver greater sales effectiveness than the industry average...”

- The use of new technologies such as **eDetailing will have the greatest impact on pharmaceutical sales force effectiveness** over the next 2-3 years.
- **Increased use of CSOs and collaborative commercial alliances will result in more flexible and responsive sales forces** more able to meet the changing needs of the physician.
- **A patient-centric approach to detailing and promotion, utilizing organisation-wide CRM techniques, is fast becoming the model of choice for smaller, more flexible companies** looking for a source of competitive advantage.
- While the number of detailing visits per sales rep is unlikely to change significantly **over the next 2-3 years the length of time per visit is set to fall putting pressure on the traditional 'three-product' detailing model.**
- **Non-cash benefits are becoming critical levers of sales force behavior.**

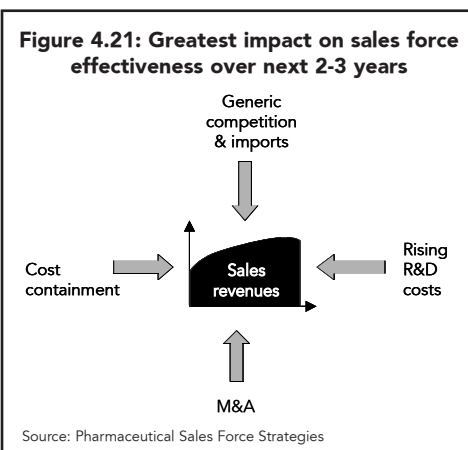
## The answers to your questions



"All leading US pharmaceutical companies tend to organize their sales forces by customer type, with separate groups detailing primary care, specialist physicians and managed care organizations (MCOs). In the US MCOs have grown in their relative importance currently controlling around 70% of prescriptions. Pfizer now direct more than 10% of its sales and marketing force towards MCOs..."

- What key factors are driving the increasing attention paid to improving sales force effectiveness in the pharmaceutical industry?
- What are the key levers of sales force effectiveness in the pharmaceutical industry and what will deliver the greatest ROI?
- What are the key trends in sales force size and detailing frequency?
- What are the key drivers of sales force effectiveness in the future?
- Which companies are using best practise to deliver sales force effectiveness?
- What are the key trends in the use of CSOs and commercial alliances as potential sources of improved sales force effectiveness?
- How can new technologies deliver benefits to pharmaceutical sales forces?

## Why you should order your copy today



'Four main resistors to pharmaceutical sales growth have been highlighted which have resulted in significant pressure on the sales force to deliver. These include cost containment in major healthcare markets, competition from generic companies and parallel importers, high R&D costs and falling productivity; and the costs and complexities associated with M&A activity...'

- **Identify the most suitable cost effective strategies** that will optimize your company's sales force performance.
- **Analyze leading companies' strategies, such as Allergan and Pfizer,** with detailed case studies.
- **Determine your optimal strategy by utilizing ROI evaluations which provide a framework for** different companies in different contexts.
- **Evaluate your internal sales force effectiveness program** by benchmarking your company against competitors, with studies from Pfizer, AstraZeneca, Allergan and Takeda.
- **Benefit from targeted recommendations** on targeting, magement, outsourcing and technologies
- **Examine the current best practises** that senior pharmaceutical sales executives have identified within our survey.

# Pharmaceutical Sales Force Strategies

Driving ROI through best practice in targeting, management, outsourcing and technologies

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## CHAPTER 1: PHARMACEUTICAL SALES FORCE

### LANDSCAPE

- Changing dynamics of the pharmaceutical industry
  - Resistors to pharmaceutical sales growth
  - Rising commercial expenses
  - Commercial ROI
- Changing needs of the physician
  - Detailing trends
  - Content not frequency
  - The PhRMA code of conduct
- Impact on the shape and role of the pharmaceutical sales force
  - Organisation, management, technologies and collaborations

## CHAPTER 2: SIZING, STRUCTURING & TARGETING

- Sales force numbers
  - Trends in headcount
  - US sales force numbers
  - European sales force numbers
  - Japanese sales force numbers
  - Case study: Pfizer
- Sales force structures
  - Trends in structure
  - US sales force structures
  - European sales force structures
  - Japanese sales force structures
- Segmenting and targeting
  - Product prioritisation
  - Primary care versus specialty

## CHAPTER 3: RECRUITING, TRAINING AND

### REWARDING

- Recruiting talent
  - Internal versus external HR
- Training and development
  - Benchmarking detailing performance
  - Training versus coaching
  - Case study: AstraZeneca
- Incentives and rewards
  - Trends in remuneration structure

- Incentive programs
- Non-cash incentives

## CHAPTER 4: ENABLING TECHNOLOGIES

- Sales force automation
  - Trends across markets and impact of new technologies
  - Case study: Allergan
- eDetailing
  - Trends in eDetailing and eSampling
  - Integrated web-based solutions
- Other technologies
  - Laptop
  - PDA
  - Smart phone

## CHAPTER 5: OUTSOURCING AND PARTNERING

- CSOs
  - Trends in use of CSOs
  - Add-on versus replacement
  - Case study: Takeda
- Commercial alliances
  - Trends in use of collaborative partnerships
  - Co-promotion
  - Co-marketing
  - Strategic partnerships

## CHAPTER 6: STRATEGIES FOR INCREASING PROMOTIONAL ROI

- Measuring ROI
  - Field force productivity
  - Sales force ROI
- CRM
  - Physician perception
  - Lasting physician relationships
  - Partnering with the patient
- Best practices
  - Meetings and events
  - Mid-level practitioners
  - Permission-based sales model
  - Case study: Pharma's top-ranked sales force

# Pharmaceutical Sales Force Strategies

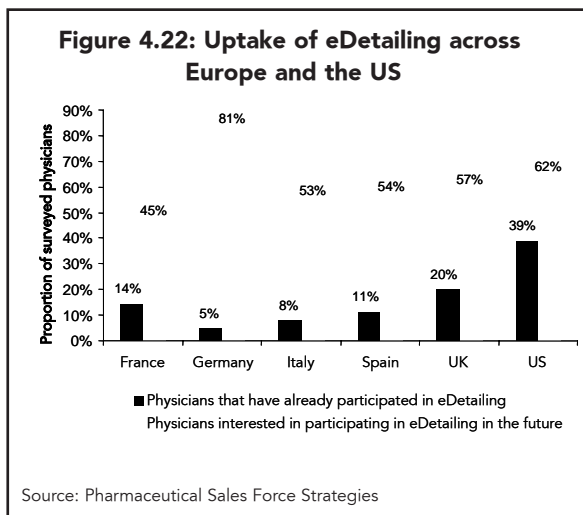
Sample information from the report

## CHAPTER 4: ENABLING TECHNOLOGIES

### eDetailing

While there is increased pressure for sales reps to maximize detailing time, there is an equal emphasis on optimizing the quality of promotional contact with a product's target audience. This increase in quality requires the adoption of technologies that present the rep as a product educator, rather than a mere promotional agent. Additionally, technology can enhance and extend the relationships reps have established with physicians through using new medium applications such as electronic and video detailing. However, such investments can only be justified by effectively targeting the right technologies towards different physician prescribing patterns.

eDetailing describes detailing activities conducted electronically, most often online via the Internet, sometimes with personal computing devices or via Internet-enabled video conferencing. eDetailing provides an opportunity to maximize access to physicians by allowing the prescriber to initiate the detailing process. This reach can be extended irrespective of geographic limitations. eDetailing also provides future opportunities for physicians to interact with online communities and also provides pharmaceutical companies with quantifiable tracking data relating to physicians' responses and queries about pre-launched or launched products. Furthermore, matching the eDetailing format and program to a physician's prescribing behavior further increases the ROI of the promotional effort. This is achieved largely through an increased number of rep calls.



Video eDetailing has the potential to increase both the level and quality of detailing, and maintains a closer relationship with traditional detailing than other technology-based forms of rep/physician interaction such as eDetailing. The growing awareness shown by physicians towards eDetailing has generated a great deal of interest from the pharmaceutical industry in video-based detailing. Video detailing offers pharmaceutical companies the advantage of a guaranteed, pre-arranged face-to-face meeting with a physician, minimizing the time spent by reps in setting up meetings. As a result, companies including AstraZeneca, Aventis, Bristol-Myers Squibb Eli Lilly, Novartis and Wyeth have signed deals with a leading technology vendor, iPhysicianNet, to distribute video conferencing equipment to select physicians. Furthermore a recent pilot study conducted by Novartis demonstrated the true effectiveness of video detailing compared to live detailing.

Novartis reported that reps using the iPhysicianNet live video detailing system were able to complete 13 calls per day (versus 8 calls for field reps), spent an average of 9 minutes per call (versus 3 minutes for field reps) and delivered 2.7 details per call (versus 1.6 details with field reps). The cost of Novartis' in-house reps was \$18,000 less per year than for field reps, yielding a total cost per video detail of \$48 (versus \$106 per field detail). Measuring by impact on prescribing results indicated that the ROI for video detailing was 20% higher than with a field force. As a result of these improvements in ROI, Novartis is continuing to use video detailing to support its field force activities. This example shows how video detailing has helped enhance the performance of Novartis' sales force. Following on from these positive results, Novartis has turned to measuring the value of web-based virtual detailing services that do not use live reps at all.

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