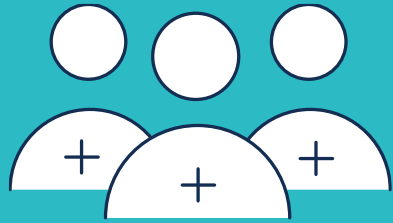


Driving Successful HCP-Sales Rep Engagements

The what and how behind the successful engagements and their trends over half a decade

December 2023





Understanding the Ever-Evolving HCP-Sales Rep Engagements

As we step into 2024, we look to understand

- How HCP-Sales Rep engagements have evolved & where is it headed?
- What aspects of conversation drive high-impact HCP-Sales Rep engagements?
- How have these aspects changed over the past 5 years?

We leveraged a part of ZoomRx's *Omnichannel Promotional and Brand Tracking benchmarks* focused on HCP-Sales Rep Engagement & conducted 20+ IDIs with Pharma Leaders. We analyzed:



ZoomRx Industry Benchmarks

- > 4,000,000+ data points on HCP-Sales Rep interactions
- >500,000 HCP-Sales Rep interactions
- >10000 HCPs responding
- >1000 Brand interactions
- >150 Pharma Manufacturers



20+ interviews with the Pharma Marketers & Commercial Team Leaders




Other third-party reports


Dive in to understand the key trends, opportunities, and challenges to optimize your HCP-Sales Rep engagement strategies going into 2024





HCP-Sales Rep engagements are changing back to in-person interactions

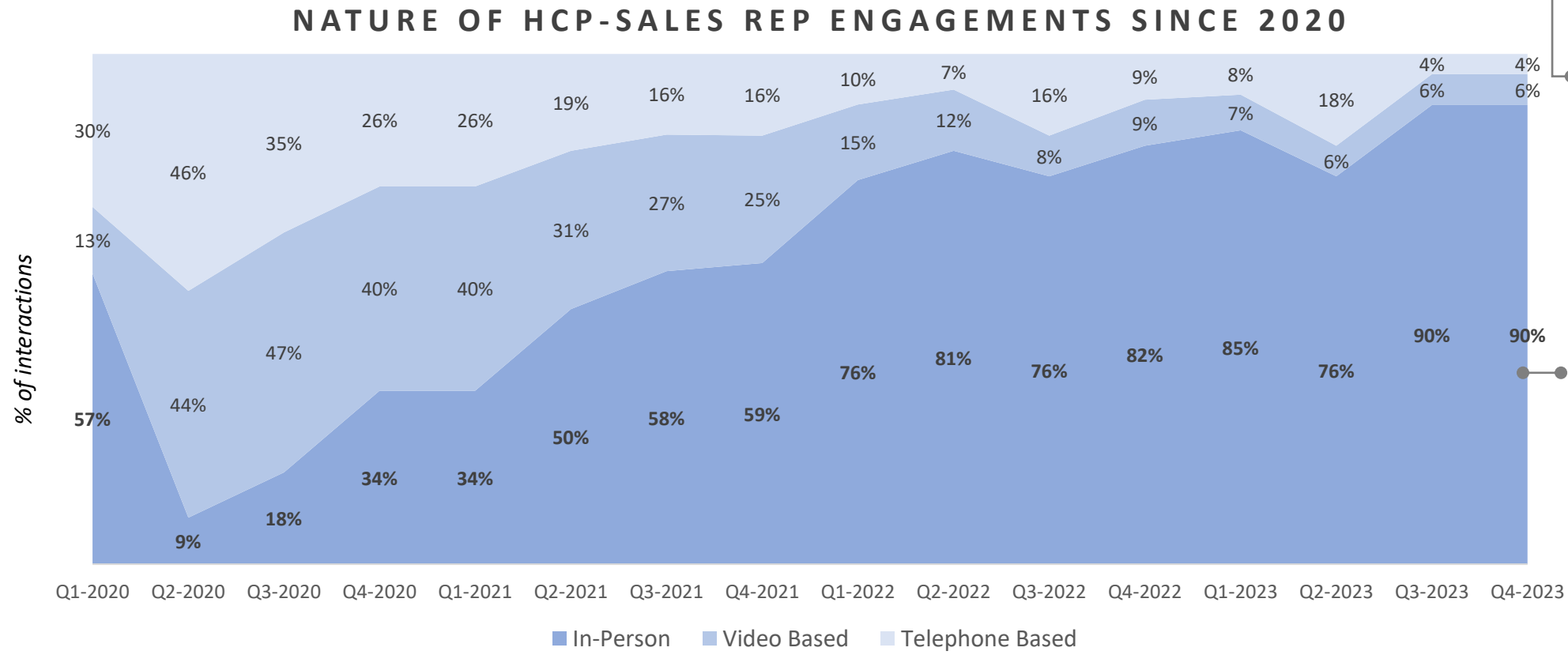
 An increasing **uptick toward in-person** engagements over virtual (video & telephone): 90% of engagements have been in-person in the last two quarters

 Opportunity exists for pharma firms to **embrace a more optimal mix of engagements** by appropriately investing in 2024 and beyond

 *BCG 2023 report indicate in-person is back, but the acceptance of virtual engagements among HCPs remains high.*

 *ZoomRx study with HCPs indicate that only ~1 in 2 HCPs indicated that virtual interactions to be as effective as in-person*

 *MM+M/Swoop 2023 Healthcare Marketers Survey reveals an increase of 12% in In-person sales force budgets in 2023*



Please select the type of your most recent interaction that you had with each of the following company representatives | Q4-2023 data is till November 2023

Pharma leaders assert their current promotions are centered on sales rep engagements



ZoomRx interviewed Pharma leaders, revealing that sales rep conversations enable them to build trust and collaborate with HCPs. They believe in becoming truly Omnichannel over the next 5 years

NOW

Marketers use in-person interactions as **the primary promotional channel** to:

- Answer HCPs questions and/or solving HCPs problems
- Deliver newer data, such as product launch
- Discuss products' differentiability

Pharma marketers envision these interactions as **fostering trust and relationships with HCPs** through a human touch.

EPG Health's 2023 report says that only 15% of pharma consider their HCP engagement to be omnichannel



"In in-person (promotions), you can tether the conversation to focus on what you believe are the key attributes to differentiate your product. So, I think obviously in person is much more effective"

Executive Director, Marketing & New Product Planning



"Anything new. Like if you have a new product launch, significant new data. [] Essentially, the things that are going to drive more questions or more controversy, and if you can accurately predict what those items are, I think that's where you target your personal field."

Global Marketing Director, Top 20 Pharma

2024 and Beyond

Pharma leaders anticipate the following as the top 3 changes in 2024 and beyond :

1. Shifting from a product-centric approach to a customer-centric approach
2. A personalized promotional strategy that aligns with HCPs' needs & interests.
3. The rise of AI/ML, along with newer software and data management tools, will soon integrate promotional channels

Reuter's Pharma survey indicated 88% of pharma marketers to expect an increase in expenditure on Omnichannel promotions over the next three years



"We can identify the types of content that the customers are having the most engagement with. And then alert the field about the customer interactions with a specific insight. We could also use it to re-target the customers with other piece of content"

Senior Director, Head of Customer Engagement



"If they (reps) are using the digital aids, the aids can automatically capture how much time they're spending on specific pages to really determine what the messaging is and what the interest level is from a customer around specific content."

VP, Sales & Commercial Strategy, Top 20 Pharma

Top 5 aspects of HCP-Sales Rep Engagement that moved the needle in 2023



Understanding Aspects that lead to Impact: High Impact[^] vs. Other Interactions

MONOLOGUE vs. DIALOGUE



80% vs. 70%

% of interactions as dialogues

REP CLOSING



52% vs. 36%

% of interactions where rep actively asked to prescribe

TOPICS DISCUSSED

Top 3 Clinical Topics

Efficacy : **69%** vs. 51%

Safety : **44%** vs. 33%

Guidelines : **40%** vs. 24%

Top 3 Non-Clinical Topics

Patient Support: **40%** vs. 23%

Copay : **36%** vs. 18%

OOP Cost : **35%** vs. 18%

VISUAL AIDS USAGE



43% vs. 35%

% of interactions with a visual aid

TIME SPENT



17 mins vs. 14 mins

of minutes the HCP-Sales Rep engagement

[^] High Impact interactions = HCP rating Overall Sales Quality High (6,7) AND Indicating High Likelihood to Prescribe the Product (6,7)

Top 5 aspects of HCP-Sales Rep Engagement that moved the needle in 2023



5 Year Trends of Key Aspects of HCP – Sales Rep Engagements

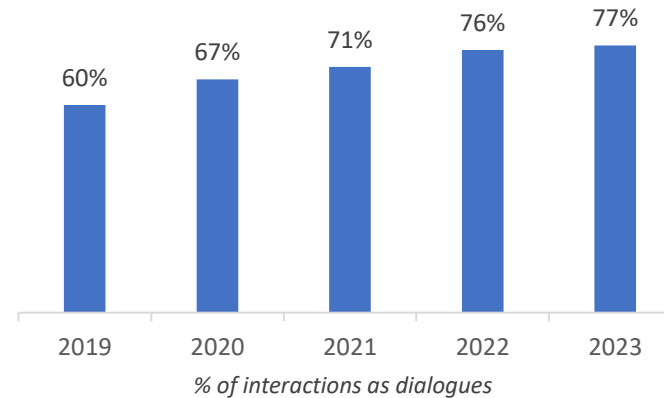
MONOLOGUE vs. DIALOGUE



Pharma field teams are driving more conversations with the HCPs than delivering monologues, which is a great sign



Continue dialogue-driven engagements & coach the teams to answer HCP questions compliantly and assertively



“What we tend to do with reps in competitive spaces is **answer doctor’s questions compliantly** and be able to have that interaction”



HCPs rating on sales rep’s ability to answer question declined from 73% to 68% in the last 5 years

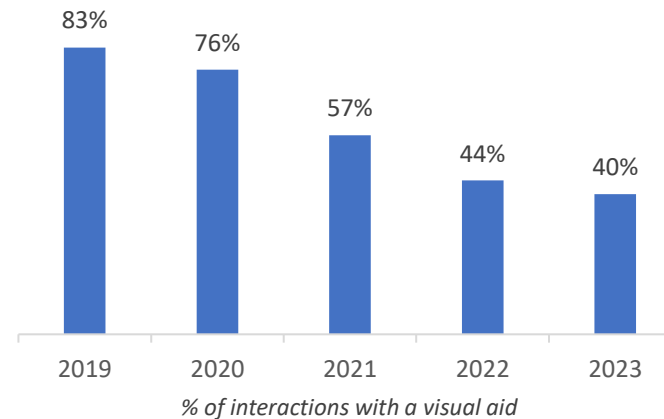
VISUAL AIDS USE



Usage of visual aids is a crucial component to deliver a strong story but has been declining since the pandemic



Increase the usage visual aids usage with newer technologies that **enable personalization of content** based on HCP’s preferences



“**New technologies enable field force can customize the presentation** based of what we know of the customer(HCP)”



EPG Health report shows less than 20% of HCPs are **getting personalized experiences**.

Top 5 aspects of HCP-Sales Rep Engagement that moved the needle in 2023



5 Year Trends of Key Aspects of HCP – Sales Rep Engagements

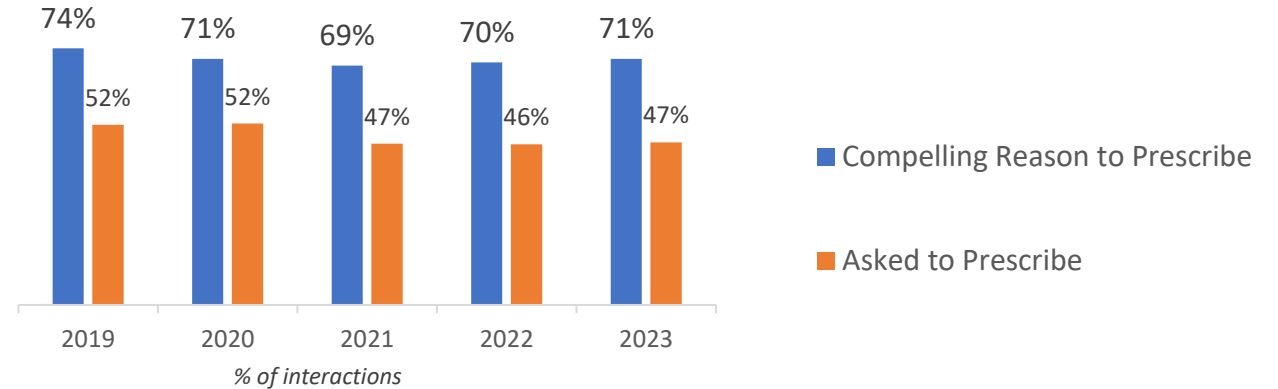
REP CLOSING



Only ~50% of sales interactions result in an active closing, while HCPs rate ~70% of interactions to have provided a compelling reason to prescribe



Dialogues and appropriate personalization are crucial, and so is asking HCPs directly to prescribe - a **key step** toward a successful interaction.



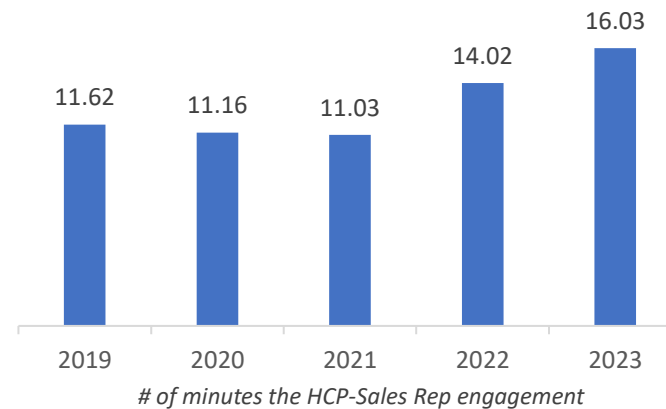
TIME SPENT



Time spent by HCPs with Pharma sales reps has witnessed a steep increase over the last couple of years. It is likely to regress to nominal levels soon



Pharma field teams can develop a strong relationship by **adding more value to HCPs** and their practices



Q3 2023 pulse report indicates the HCP Engage time in the US to be higher than the global average at **~18 minutes**



Rep's making valuable use of HCP's time declined from 74% to 68% in the past 5 years

Over the years, MDs recall the discussion of efficacy the most



5 Year Trends of Key Aspects of HCP – Sales Rep Engagements



HCPs care most about two things: Is it effective? And is it safe?

Successful sales teams understand this and bolster their [messages](#) with clinical data. On the non-clinical aspects, they discuss patient support and Co-pay the most

~2/3rd of HCP-Sales Rep Engagements have had discussions on efficacy through the last 5 years

Most Recalled Topics Over Years

Topics	2019	2020	2021	2022	2023
Efficacy	64%	61%	64%	64%	66%
Safety	41%	42%	41%	44%	41%
MoA	30%	28%	27%	27%	38%
Dosing Administration	42%	36%	36%	34%	35%
Tolerability	35%	37%	30%	33%	35%
Patient Support	29%	31%	24%	30%	30%
Co-pay	25%	24%	25%	23%	25%
Access	31%	23%	22%	24%	24%
Insurance	32%	30%	27%	28%	22%
OOP Cost	21%	20%	25%	20%	12%

Clinical Topics

Non-Clinical Topics

● Efficacy and Safety data, followed by clinical data as the most crucial data for HCPs globally



Despite being the most recalled, when enquired about topics HCPs would like to hear more, efficacy and safety are the top two topics they would like to hear more.



Phressia 2021 reports only 3% of potentially eligible patients are currently using support programs

% of interactions

Evolve your HCP-Sales Rep Engagements in 2024 & Beyond



In-person engagements are back & increasing

Anticipate omnichannel promotions to take shape over the next 3 years



- In the near term, find the optimal mix of In-person and virtual interactions
- In the medium term, move to customer-centric omnichannel promotions by leveraging the latest technologies



Build relationships through collaborative dialogues

Move away from a fixated presentation to a conversation



- Coach sales teams to listen more and answer HCPs' questions
- Work on customizing the conversation based on HCPs needs to increase trust



Sales rep spend higher time with HCPs

More than ever, the engagement time with an HCP is the highest in 2023



- Focus on adding more value to the HCPs by solving their problems



Discuss efficacy and safety topics

HCPs continue to care the most about the clinical aspects



- Back efficacy and safety topics with clinical data
- Keep the messages short and to the point



Questions? Get in touch

manoj.hariharaputhiran@zoomrx.com
keerthivasan.kumar@zoomrx.com
varsha.Sundaram@zoomrx.com