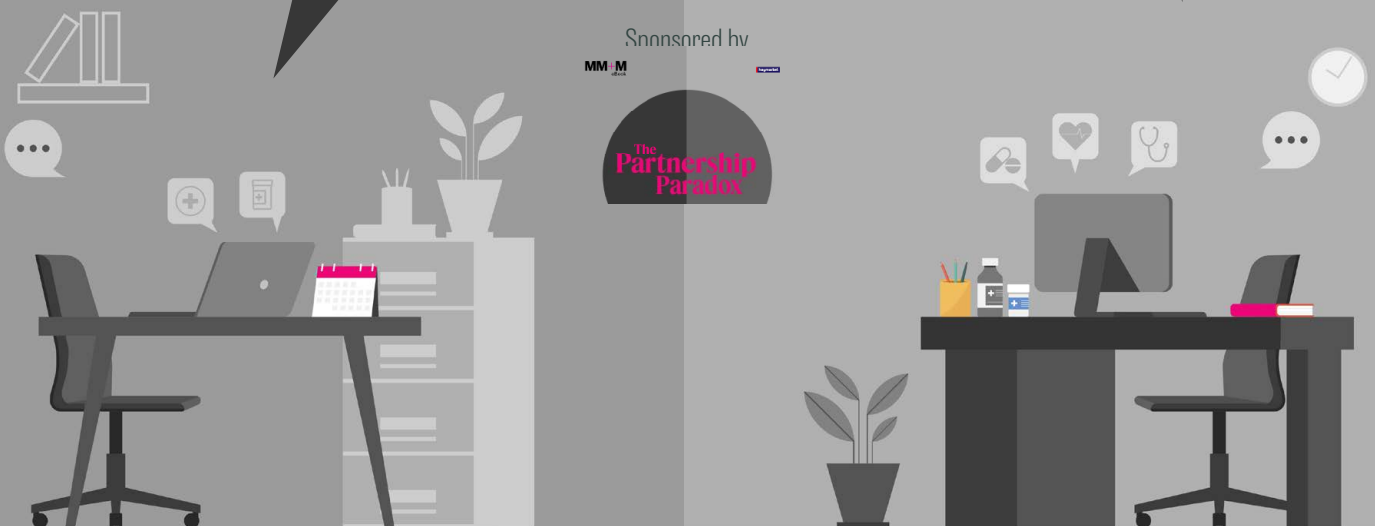


The Partnership Paradox

GETTING CLOSER TO DOCTORS
WHEN WE'RE FURTHER APART

Sponsored by





Rethinking the Needs of the Modern HCP

Earlier this year, Razorfish Health, in collaboration with MM+M, surveyed HCPs to gain insight into their changing needs and attitudes in today's environment.

The results, garnered from almost 1,000 responses, show that fundamental shifts are occurring in the ways in which we need to engage with the modern HCP.

78%

of HCPs believe that patient access to information has improved since they started practicing medicine — and most view the shift as a positive change



In a world where responsiveness and relevance are expectations, the pharma industry has an opportunity for improvement. Which is why it's essential that pharma personalizes its nonpersonal communications to the unique needs of physicians.

A wealth of data and analytics makes that goal attainable. "Data and technology have enormous potential to help marketers re-energize physicians. We've always known physicians' prescribing behavior, or 'white coat' moments, but now we know what we call their 'blue jean' moments and can amend that prescribing behavior with their lifestyle data," said Kara Dugan, president of Razorfish Health.

It's time to move from moments of personalization to personalization across moments. Pharma can identify the individual points in physicians' journeys with a client's product and use data to personalize communications in the ecosystem across space and time. And with the right data engine, this personalization approach can be applied at scale.

However, it's not just about gaining technology and data; it's what we do with it. Expectations have changed; work/life boundaries are being erased. The physician's day is a blend of virtual and analog. We need to shift in and out of the virtual to get the right physicians the right messages at the right time, the way they want it.

Relationships can be solidified not just with more frequent communications but with more meaningful ones. Although more

than 50% of respondents expressed satisfaction with how often they see their reps, many would like to be called on more often.

Physicians said that for those brands they most often prescribe, they would be interested in learning more through peer-to-peer education (67.2%), virtual or digital information (61.8%) or their rep (56.7%). Reps should step up their strategies to remain critical orchestrators of information for physicians and be connectors for physicians who want to hear more from their peers.

The survey results also revealed that when it comes to recently launched products, physicians are most interested in learning about patient support programs and samples. HCPs noted that patient support programs have a significant impact on their ability to practice medicine.

Offering holistic patient support to complement clinical approaches is another area of interest for some physicians. Because less than 40% feel that the pharma industry has done a good job thinking beyond the clinical to help patients, pharmaceutical companies might find it beneficial to explore how they can offer additional support to patients in these areas.

The most beneficial reps will be those who help HCPs enhance their practices across a variety of areas. One physician summed it up: "We need to be updated on real-life issues. We need to know how to get help to cover cost. We need to know when a new indication or warnings come out. We need to be educated on longitudinal studies."

TO GAIN CONTROL, GIVE CONTROL

In a major shift, HCPs have a new respect for the informed patient. They are embracing patient education and have come to believe that when patients are empowered, it leads to better partnerships and better outcomes. This shift in power can only help both doctors and patients.

The explosion of information is overwhelming for HCPs. Knowledgeable patients ease this burden, and HCPs have learned that better care comes when they engage in two-sided conversations even when the patient is citing misinformation.

With new medicines, chronic diseases are being pushed into remission; but in order to achieve this, patients need to be active participants in their own care. Empowered, informed patients move from being "compliant" to being truly adherent to their treatment regimens.

"In a study we did a few years ago, we found a shift from what we call paternalism to partnership and that's evolving even further," said Dugan. "I remember a story of a patient who brought in a 14-page printout from a medical website, and the physician admitted thinking, 'I'm going to have to debunk all the myths in that paper.' That has now shifted to, 'I've read that, too. What did you take away from that article? Let me share the impact I think this has on your treatment plan.' There really is a shared appreciation of that information, and that the physician can get to the heart of the matter."

Survey results revealed that more than 78% of HCPs believe that patient access to information has improved since they started practicing medicine, and most view the shift as positive. This finding is supported by a 2000 Harris poll that concluded that 98 million adults have used the internet to look up health information—up 81% from two years earlier.

What’s more, a recent *JAMA* study found that physicians report many of their patients are asking them health information they’ve found online. Physicians are being asked to recommend the best websites for their patients’ conditions, and they’re even being asked for their email addresses.

As patients continue to search online for information, the demand for providers to communicate electronically with their patients will increase. HCPs who include email as part of their patient communication strategies have found the channel offers several benefits. “Emailing saves time and makes me more accessible to my patients, making it easy to provide better guidance and support than ever before,” according to one recent report.

With telemedicine gaining wide acceptance among HCPs, pharma can help support them in this new method of patient/physician interaction. “We’ve seen in telehealth visits that patients may be willing to challenge their physician in a way that might be uncomfortable when sitting three feet apart. Or they may be more truthful about symptomatology. The anonymity telehealth provides can yield a more honest conversation. In certain disease states and certain therapeutic areas, telehealth has served physicians extremely well. In other cases, we need a bridge. Reps can help us with that bridge by relating what’s worked well and we should continue to employ going forward,” said Dugan.

Dugan expects the patient-empowerment trend to accelerate in the future. “Gen Z has grown up with the data and technology that they’re going to expect us as marketers to leverage. It feels like there is a galvanizing of our communities behind healthcare. The focus on healthcare and on medicine will create a golden age supported by data and technology,” she said.

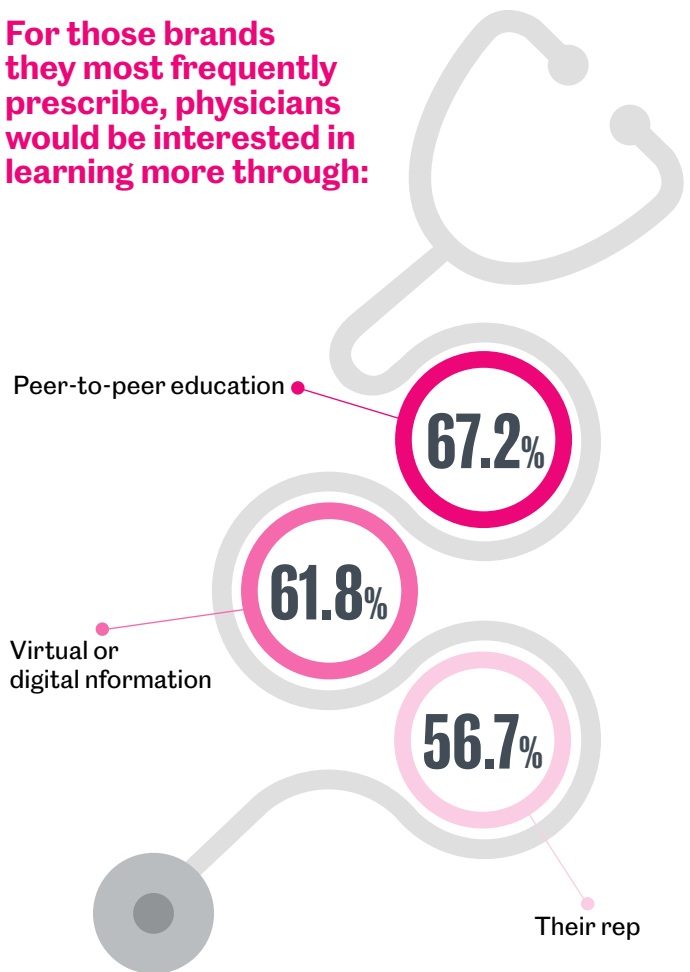
Increased patient and physician collaboration will lead to optimized outcomes, fueling patient satisfaction and physician success.

THE LESS YOU TALK, THE MORE THEY WILL LISTEN

The pandemic has led to greater acceptance of technology and social media, helping accelerate the role of real-world evidence and peer-to-peer influence in decision-making. But academic thought leaders aren’t the only source of peer influence.

Once limited to just consumer brands, influencers are now emerging as a highly relevant source of information for HCPs. Community physicians are taking to Twitter and TikTok to share their knowledge and experiences. Technology has allowed HCPs to connect with peer practitioners across the country to share information, disseminate articles, and discuss helpful clinical insights. No longer is there just one trusted source when it comes to gathering pertinent data. Now physicians can get multiple opinions on most topics.

For those brands they most frequently prescribe, physicians would be interested in learning more through:



Physicians are also contending with the “Yelp-ification” of medicine. Just like restaurants or books, they are receiving ratings from their practice populations. Patients are rating medicines online and advising each other about treatments and side effects. The influence of social media and influencers has pitfalls but also benefits, in terms of providing this new form of real-world evidence.

Several survey respondents specifically mentioned a desire for more real-world data and real-world evidence. “We need to be updated on real-life issues. We need to know how to get help to cover cost. We need to know when a new indication or warnings come out. We need to be educated on longitudinal studies,” said one physician.

“Our data revealed that a majority of physicians were interested in more peer-to-peer education, and they are turning to the influencers online to get what they are lacking,” said Dugan. “The next generation of involvement with these influencers is co-creation of content, which may have certain rules attached to it in pharma.”

The industry is increasingly focused on developing ways to leverage new data sources to improve practices. With decreased rep access, those professionals who can share real-world exam-

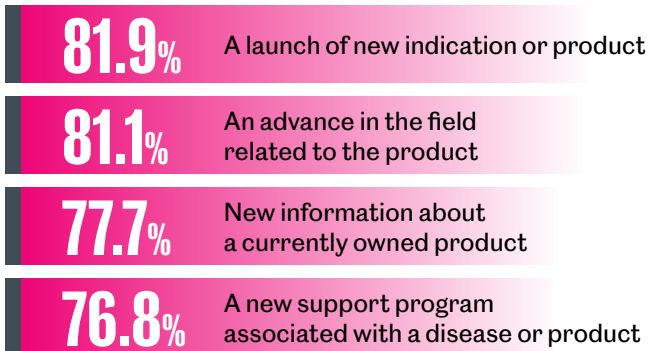
ples with their HCP clients will greatly increase their value as trusted partners.

LE REP EST MORT, VIVE LE REP!

To paraphrase Mark Twain, reports of the death of the rep have been greatly exaggerated. HCPs still view the pharmaceutical industry and its reps as important pieces of the healthcare delivery puzzle.

In fact, more than 70% of physicians surveyed see the pharmaceutical industry as an important part of a successful practice. Whether it’s providing information on new products or updates on new indications, physicians view reps as a critical channel for connection on medications. “Having an insider who can translate between pharma and providers and answer my questions is essential,” said one physician.

It’s important to engage personally with reps when there is:



An overwhelming majority of respondents said they believe it’s important to engage personally with reps when there is a launch of new indication or product (81.9%), an advance in the field related to the product (81.1%), new information about a currently owned product (77.7%) or when a new support program associated with a disease or product is launched (76.8%).

Dermatologists were most likely to derive value from information-focused visits from reps. They rated the importance of rep visits four times greater than the ratings given by HCPs in pediatrics and in family medicine.

Pharma can enhance the role of reps by giving them new tools. Reps are more than just the relationship, and they are more than just their detail materials. They are in a sense an organic-digital interface, and can choreograph the right message at the right time in the right way.

Although the pandemic has caused a shift away from in-person visits toward virtual contact, Dugan said reps can still find effective ways to communicate their messages. “I think of the rep now as an orchestrator. They can’t always be there physically, but they can anticipate the needs of the physician and get creative by managing the content without the physical contact.”

Physicians expect transparency, and they want reps to listen to their concerns and provide honest responses, not “company propaganda.” To truly add value, reps need to be “honest, open-minded and give real-world examples,” said one HCP.

“Physicians like the interaction of learning from the rep and want their rep to communicate their needs, in terms of adherence programs and patient support, to the home office,” said Dugan.

To ensure that they continue to be viewed as a valuable resource, reps need to stress service over sales. Although a large percentage of physicians said that patient support programs have a significant impact on their ability to practice good medicine, only 60% feel that the pharmaceutical industry has strong patient support services.

This is a key area of opportunity because two-thirds of those surveyed said that they want even more information about patient support from their reps. Physicians cited “consistent, easy-to-read information for patients on treatments” as well as “more patient support services that include reminders to take meds” as key types of support material they would like to see generated by pharma companies.




Only 60.8% of physicians feel the pharmaceutical industry has strong patient support services.

THE NEW AGE OF MODERN MEDICINE IS HERE

There’s no question that this past year has made us reevaluate everything in the healthcare landscape. But maybe it took the worst of times for us to see that the best of times is just on the horizon. The changes needed to improve outcomes certainly won’t happen overnight, but many of them are already underway.

Marketers and pharma reps are finding engaging and innovative ways to personalize detailed messages to physicians when they can’t be there in person. And HCPs are learning that a well-informed patient can often mean the difference between complications and compliance. Physicians are also realizing that technology and social media can now play a major role in how they discover, digest, and differentiate the latest data.

We hope this look at perceived realities, and what’s really happening, has shed light on tomorrow’s impact, and how the pharma industry can respond to these vital shifts. Perhaps the new practice of medicine is best summed up by what one physician said: “The fact that patients are now more motivated than ever to empower themselves and partner in the care that we provide them means it’s no longer a totalitarian dictatorial relationship but one of mutual respect, which is very exciting.” ●



Complacency doesn't cut it

Razorfish Health is a full-service agency built for the modern age of medicine. That means deep science. Data-driven strategy. Creative storytelling. All to move your brand to the forefront of your customers' minds. Together, we can shape how medicine is practiced today, for a better and healthier tomorrow.

We are Razorfish Health.

Modern healthcare for a modern world.

To join the modern healthcare movement, email info@razorfishhealth.com or visit us at razorfishhealth.com

NEW YORK + CHICAGO + PHILADELPHIA + LONDON

RFH
RAZORFISH HEALTH