Charting the landscape of possible advocates and prescribers of new pharmaceuticals is generally regarded as an exhaustive process, requiring the complex amalgamation of data from physician databases with input from dozens of sales reps.

This no longer need be the case, however, as a new generation of physician-mapping services are providing a greater depth and breadth of coverage than ever before. These tools can help companies to better understand how individual physicians make prescribing decisions, achieve greater market penetration, and accelerate investment returns.

This guide is intended to help those involved with the marketing of pharmaceutical therapies to understand how some of these new utilities work and how they can help companies to more efficiently reach sales targets.
1. BUILD A BETTER MAP
Before sales resources can be allocated or team strategies be firmly established, a comprehensive map of the target market must be created. Traditionally, such maps have been generated using a combination of geographic information, basic demographic profiles and a limited amount of data on the prescribing behaviours of physicians. Logically, this system will dictate that the highest volume prescribers will be assigned the greatest priority to sales reps. New mapping technologies are proving, however, that by prioritising individuals based on their influence levels as well as their prescription volumes, far more accurate and detailed stakeholder maps can be created. These provide sales teams with a depth and richness of information that is as different from previous mapping technologies as Sat-Nav systems appear from paper road maps.

Pre-launch profiling and segmentation in this manner can, for example, provide companies with insight on the local and regional influences that affect individual prescribing behaviours (including local directives, demographic environment, local disease prevalence, regulations and even information on regional peer groups) and how great an influence each doctor has within their professional circles. Advanced stakeholder maps can then provide information on regulatory obstacles that may be encountered as well as a list of local thought leaders who could help drive early adoption and support acceptance by local stakeholders.

2. DIVIDE AND CONQUER
Once a map has been established, companies can more effectively prioritise and assign sales, marketing and medical resources depending on what category of product adopter and/or influencer each stakeholder belongs to. Prescribing physicians are generally recognised to fall into four basic categories of product adoption (from earliest to latest):

- Innovators – those that are eager to explore alternatives to current treatments
- Early adopters – the first broad wave of doctors that adopt the new product
- Late adopters – the second wave of adopters, usually those that wait to hear about experiences with the new product from local peers
- Traditionalists – commonly those who wait for a substantial amount of after-market clinical data to accumulate before switching from their preferred products.

As most companies will already be familiar with, the most challenging shift in this scheme is the transition period that occurs between having a handful of innovators and opinion leaders supporting a therapy to a large number of early adopters actively prescribing it. Overcoming this market chasm can be made easier, however, through the use of mapping and customer insight software packages that can pinpoint the key influencers and gatekeepers controlling the rate of adoption of new pharmaceuticals. These influential stakeholders can be broadly segmented into three categories:

- Gatekeepers: Though not necessarily prescribing physicians themselves, gatekeepers are those persons and groups that have a say about what drugs physicians in their sphere of influence are allowed to prescribe, or which are reimbursed by public healthcare.
- National influencers: Stakeholders falling into this category are early adopters, respected in their fields, who can provide credibility to a product and support acceptance in a particular clinical area.
- Regional influencers: Although less well known on a national scale, regional influencers are those specialists and consultants that can help drive the adoption of new products on a local level. UK influence network studies have shown that regional KOLs are perceived to be more influential than national KOLs within specific therapy areas.

By sequentially targeting these groups and assigning sales and marketing resources accordingly, companies can save themselves a substantial amount of effort and create a stronger and more credible brand image before approaching their larger market.

3. OPEN THE GATES...
One of the primary complaints among all pharmaceutical sales reps is that they often lack accessibility to physicians or that the hands of their potential clients have been tied by local regulations or guidance that does not yet support the therapies they are trying to sell. The highest levels of such gatekeepers are generally federal bodies, such as the FDA in the US and the National Institute for Clinical Excellence (NICE) in the UK. However, as companies cannot directly promote their products to these bodies, second tier gatekeepers such as primary care Trusts (PCTs) and financial managers responsible for compiling hospital formularies are the most crucial candidates in this cluster. Without their support, a product will have little hope of penetrating regional markets or competing against existing therapies.

The priorities of each gatekeeper will depend on their specific roles. They may be more concerned with how a product’s clinical efficacy compares with existing therapies; whether a new product offers potential savings or if a drug affects patient compliance etc. Of course, more commonly, a combination of all of these factors will be considered. These individuals should thus be supplied with all clinically relevant materials concerning the product as well as an analysis of how the introduced product can save hospitals money, if possible. Lastly, but not least, they will be keen on receiving information on their peers’ experience with the new drug. It’s also advisable to assign only the most experienced sales and medical reps or account teams to meet with such gatekeepers and to involve them with the introduction of the drug to market at the earliest possible stages.
4. THEN START AT THE TOP...
At the same time the product is introduced to gatekeepers, it is necessary to find the key opinion leaders (KOLs) who will support the acceptance of the drug within clinical communities. These specialists tend to be high profile members within their fields and are frequent speakers at conferences and events. Although this does make these individuals generally well recognised and easy to find, it creates some challenges to approaching them as well. They will often have exceptionally heavy workloads, have been previously approached by companies attempting to market products in their areas, and they may be reticent to risk their professional reputations on a new therapy.

The most effective way to get such high-profile users interested in prescribing a new therapy is, therefore, to involve them in product trialling and pre-marketing, allowing them to have input on the project and raising their interest in its success. This also provides KOLs with the opportunity to publish clinical results, which can then be used in future marketing, such as case studies in trade press or the company’s own marketing literature.

5. AND WORK YOUR WAY DOWN
While KOLs may drive awareness, the vast majority of potential prescribers only begin to truly adopt a product when they feel comfortable with its acceptance within their local peer communities. Regional influencers are typically those consultants and specialists that physicians will refer to when dealing with complex cases. Local physicians will be far more likely to adopt new therapies and products if they are aware of such specialists prescribing them.

When compared to national influencers, these regional KOLs will be much harder to locate and, should their prescription volumes be low, sales reps may not be aware of them at all (despite the impact they may have on their local communities). In these cases, it is necessary to employ physician identification and location utilities capable of the most granular level of analysis. As shown in figure 1, by identifying only a few of these key regional players, a much larger market impact can be achieved, allowing companies to better prioritise their sales objectives while enabling sales reps to more efficiently allocate their time.

6. KNOW HOW YOUR CUSTOMERS’ ENVIRONMENT AFFECTS THEIR PURCHASING DECISIONS
Beyond specialists and consultants, today’s peer influence networks also extend to include other professionals in physicians’ local environments that can greatly affect their prescribing behaviours. In secondary care facilities, for example, the hospital or Trust pharmacy will play a significant role in determining which drugs are on the ‘short-list’ or stocked, particularly if their staff is involved with the development of the Trust’s formularies. In primary care (though to a lesser extent), nursing staff may also have an influence on a GP’s purchasing decisions or act in a gate-keeping capacity to screen visits from sales reps. In such cases, these tertiary influencers should be

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accommodated with same amount of clinical data and marketing information as the GPs themselves to increase profile of the new product within local peer groups.

7. TURN QUALITATIVE INFORMATION INTO QUANTITATIVE DATA

In most cases, the only quantitative information companies will be able to access on physicians regarding their prescription behaviours are the absolute volumes of treatments given or patients seen over a given time period. Although this provides an easily digested foundation for the analysis of markets and prioritisation of sales reps, it provides little information on how physicians arrive at their prescribing and purchasing decisions.

Helping companies better understand these processes, new generation physician profiling systems can score individual stakeholders based on different marketing considerations including their receptiveness to promotional channels, meeting attendances and other variables. Such systems then assign physicians a code or score that reflects the receptiveness to different channel and message approaches when compared to their peers. Knowing these metrics can help companies personalise their sales strategies to individual physicians, determining the most tactful approaches while avoiding those that they may find inconvenient or bothersome.

New generation physician profiling systems can score individual stakeholders based on different marketing considerations

Once the chosen market has been sufficiently mapped with details on regional influence and peer networks, as well as quantitative information on prescribing behaviours and motivations, the allocation of sales and marketing resources becomes a much less complicated task. Traditional approaches have been to assign the most experienced sales reps to the highest volume prescribers or simply to have reps cover certain geographical areas. Yet when detailed metrics on influence levels, peer groups and prescribing profiles are considered, a more personalised approach to sales can be taken. For example, if two physicians have a near equal volume of patients per month, they previously would have been considered of equal importance from a sales perspective. If, however, physician profiling and analysis software shows one to be at the centre of a regional peer group or be susceptible to prescribing a particular drug, they will be given greater priority for sales teams.

8. PRIORITISE YOUR RESOURCES

Although possibly one of the most important benefits of modern mapping technologies is the ability to locate and access physicians outside a company’s traditional areas of sales coverage. Stakeholder maps can readily pinpoint those individuals and organisations that influence or are in regular contact with others in geographic regions where a company may not normally send its sales reps. Depending on their potential size, companies may choose to reprioritise or recruit a new sales rep to tap into these markets. If the potential market is limited, however, companies can instead opt to use nearby influence groups or those in their collegial sphere, to approach them indirectly. By maximising the use of information generated from a mapping tool, companies can in effect, have their market work them, extending their geographical reach and raising their brand profile.

9. ALWAYS STAY UP TO DATE WITH REGULATORY CHANGES

Although possibly one of the most important aspects of intelligent marketing in the pharmaceutical industry, only a few companies involved in market analysis offer clients services to keep up to date with changes and reforms in the NHS and how these might affect the marketing of their products. In-depth information on regulatory changes within the NHS such as the quality and outcomes framework, disease prevalence, practice based commissioning and financial & health episode statistics are all vital issues that may be relevant to a newly introduced drug. By integrating this information with customer relationship management (CRM) utilities, service providers can then produce a single-stop library of information on both national and local regulations that can affect or limit prescription options.

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