The Indigenus Forum (iF) series brings together pharmaceutical industry leaders from around the world for open debate and discussion. Hosted by the Indigenus global network, iF provides a unique venue for senior marketing and procurement professionals to share observations, insights, and strategies, helping them solve the significant challenges they face.

The first meeting in the series was held at PAN, an Indigenus agency based in Richmond, UK, and was facilitated by independent consultant Simon Rhind-Tutt from Relationship Audits Limited.

Senior marketing, procurement, and agency leaders from the EU-5, Turkey, Canada, and the US were in attendance, and examined how to find the right balance between global and local marketing needs.

Attendees discussed four key questions:

- What are the most significant changes likely to impact the global healthcare marketplace in the next 3 years?
- What are the requirements to successfully launch and maintain a global brand across multiple markets?
- What unique regional and local needs must be incorporated into a successful global marketing plan?
- How can procurement deliver value to and ensure marketing excellence for global and local marketing teams?

The views expressed in this report are the personal views of the attendees and contributors and do not necessarily reflect the views of their respective companies.

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“So let extend thy mind o’er all the world.”
— John Milton
What are the most significant changes likely to impact the global healthcare marketplace in the next 3 years?
A Shift Toward Patient-centricity

It was widely agreed that pharmaceutical companies need to focus more on patients. Prescribing habits are changing and doctors are dealing with more informed patients, who use new technology to get information about both their condition and treatment. Attendees agreed that it was the responsibility of pharmaceutical companies to make sure that this information is reliable and accurate. The pharmaceutical industry, medical associations, and doctors should all be aligned and in agreement, not from a sales but from an information point of view. In other words, they should be working together to provide medical education for the patient.

When asked for suggestions on how to improve information on the internet, attendees suggested that search engines should be optimized to ensure that accurate information is at the top of the search list. It was recommended that pharmaceutical companies engage with online publishers in the same way that they do with traditional print publishers, which would be a key step toward ensuring the accuracy of medical information online.

At the moment, global medical teams decide whether the company needs to react to perceived misinformation online. The corporate legal team will get involved in cases of product libel, but does not act on discussions in chat rooms, which are seen as a gray area of personal experience. At present, organizations have not identified the best way to address inaccurate information in this forum.

Attendees also accepted that in the future they will need to expand communication risk management programs to include patients—at the moment they have strategies for the other stakeholders but not for the patient or social media audience.

The Power of the Payer

Market access and cost-effectiveness were highlighted as fundamental areas of change, with regulatory bodies becoming more influential in how patients access medicines. In some countries there is no reimbursement and limited market access, which affects where and how products are promoted. Attendees agreed that it is now important to differentiate strategy by country and region as well as by patients.

The power of payers is increasing, and many are not willing to pay a premium for branded drugs. This is leading to late launches in some markets, or restrictions on usage. Attendees agreed that the way forward is to establish a clear strategic partnership with government bodies. While payers are looking for value in price, the industry needs to encourage a shift in focus to other advantages of the product and its potential value to the patient.

Some European countries reported a standard, year-on-year price reduction, which presents serious challenges in terms of maintaining value and sustaining budget cuts. One solution encouraged creative thinking around budgets—it was observed that too many global communications programs rely on conventional channels, and that the industry could better leverage innovative digital channels for cost-effective engagement.

Social Media Engagement Across Stakeholders

Attendees admitted that engaging with social media (to reach all stakeholder groups) is going to be necessary in the future, but that they are universally nervous about doing so. Issues such as controlling the message and staying within regulations are the main barriers. Until the industry as a whole defines how it engages with social media, companies would have difficulty deciding what to do, but attendees agreed: ‘We have to be present.’ In the meantime, attendees said they relied on their agency partners to be their ears to the ground to monitor social media.

There would also be a change in communication with healthcare professionals (HCPs) in the future. Because regulations are demanding transparency about the funding pharmaceutical companies give to HCPs, not every HCP wants to engage with pharmaceutical organizations. However, HCPs are seen to be actively engaged with and influenced by social media, and respond well to content and assets designed specifically for them. One attendee suggested that we are fast approaching the advent of ‘Doc Advisor,’ which in TripAdvisor-style might provide an opportunity for doctors to access peer-to-peer advice and relevant information on operations, procedures, and medicines.
Local Involvement in Trial Design
There has recently been a shift of power in terms of the organizations that approve drugs and control prescriptions. Many markets no longer follow what is decreed by the FDA in the US. However, their local needs for approval are not always considered by US-based pharmaceutical companies, which is leading to a slowdown in the regulatory process.

As far as global commercialization is concerned, attendees indicated that individual countries need to get involved much earlier in Phase II and III trials to ensure that endpoints feed both the economic model and local market approval requirements. Long-term outcomes are very difficult to revisit at a late stage; thus, early planning is vital to ensure long-term health outcome data.

Ascendancy of the Corporate Brand
Attendees agreed that the day of the blockbuster has gone, and the whole industry is looking at more specialist products, which has forced organizations to reconsider how they approach marketing. With the days of big pharma and big budgets well and truly over, the bottom line remains front of mind. Sales forces are leaner than they’ve ever been, and attendees said they are challenging what they have done in the past. In this new climate, it was suggested that the company’s corporate brand would rise in importance. The relationship between the company brand and its services to stakeholders (beyond its products) could prove critical.
Attendees identified a number of ‘must do’s’ when it comes to successfully launching a brand:

- **Demonstrate cost-effectiveness to payers, with the backing of physicians.** Payers have influencers who may not be academics, and it is important to identify and engage with them prelaunch.

- **Payer needs must be ‘front of mind’ when designing clinical trials so that holistic health outcomes data are included.** A drug may appear expensive at first glance, but it may save payers money in other ways, such as number of patient visits to doctors.

- **Address any negative responses from relevant stakeholders.** It may not be possible to secure the support of every important influencer in the therapeutic area, but by directly addressing their issues, you encourage them to be neutral, not negative. Today, key influencers extend beyond the KOL sphere of influence—vocal patient advocates with a large social following can also drive early opinions about your brand.

- **Stakeholder mapping is important not only among KOLs, but also public affairs professionals who are key in influencing payers.** A strategy must be developed that integrates all of them, and local information is critical.

- **Conduct an analysis of what the competition is doing.** It’s obvious, but not always conducted and shared, at both a macro- and micro-level.

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**Building a Launch Team**

Attendees admitted that they often feel as if they do not have enough time to launch products. Ideally they would like two to three years, but invariably it is less. Often the company conducts due diligence, draws up a commercial expectation, and hands it over to marketing for a speedy launch.

There is no magic formula to marketing a global brand, but the agreed ideal would be to set up core brand teams two years before launch with input from market access, regulatory, logistics, and agencies. A cross-functional team, pulling in insights and information from beyond the marketing team was seen as important; however, it was acknowledged that ultimate accountability and decision-making lay with the commercial team. It is important that an individual is nominated as team leader, and that other team members support them—otherwise, ideas are diluted to the lowest possible denominator.

**Intersection of Global and Local**

At most companies, the global marketing team are in control of the strategic and creative development, with input from local teams. While global sets the strategy, regions are usually responsible for its implementation and for performance management. This is where responsibilities and accountability can become blurred. One attendee noted that in order to clarify this, the global and regional franchise heads at their company are required to sign off on each other’s business plans so that there is agreement on strategy and cost of launch.

Attendees agreed that the marketing approach depends on individual market size and potential. Germany and Scandinavia, for example, tend to launch early because they do not need the same market access approvals that other countries do, and consequently are often influential in driving the global approach. In some companies, European commercial teams lead the brand campaign for Europe with global collaboration. However, it is still important to investigate country differences and customer segmentation at an early stage.

With any plan, however, it is essential that there is clarity of communication between global, regional, and local teams. Most important is to communicate which areas of the campaign need to be adopted globally, which can be adapted locally, and which cannot.
If global campaigns are mandatory and imposed on local markets without consultation, bad feeling invariably develops. Even in multi-decisional teams there can be a wide variance of country reaction, with some countries able to accept and implement 90%-100% of a program and others needing to change 90%-100% of the campaign to suit their local market.

Attendees said it is important to take on board the views of the traditional key markets, but increasingly they also have to consider the Middle East, Asia Pacific, and Latin American countries. The challenge is to synthesize insights from every sector to feed strategic development, and to generate a creative approach that is relevant to them all. When asked how they can achieve this, attendees admitted that they are not sure they know. While it is a genuine goal, they do not currently have the infrastructure within their companies to go deep inside all global markets. Local insight from agency networks is therefore a genuine added value asset.

Attendees suggested that geography may not be the right way to segment markets and that cultural network clusters may be more appropriate in identifying insights that can drive behavioral change. An approach based on healthcare systems, influence mapping, access, and adaptation patterns could be much more relevant than one based purely on borders.

Sharing Brand DNA
A major challenge that pharmaceutical companies face is that brand managers change quickly, and formal handover is often non-existent or poor, so the DNA of the brand usually lies with their agency partners. Brand teams need a lead person from either the in-house team or agency with the longevity to understand and pass down the history of the brand and marketing activity.

Attendees acknowledged that they need to formalize a process that ensures continuity of the brand. It was recommended that all brand materials need to be captured in an actively-managed product asset system. Teams should record their thinking and decision-making process, as well as the brand strategy, essence, and creative evolution over time. It is important to detail not only what was done, but also what wasn’t and why, and company medics need to be involved in collating this information. Teams should also capture the consistency of the program across markets—and areas of difference. Sometimes there is a good rationale behind what local teams do and that needs to be captured; otherwise, elements of programs that might benefit multiple markets can get lost.

Countries need to be aware of their own accountability, while global teams should communicate with complete clarity.
Attendees admitted that they do not monitor consistency across markets as vigilantly as they might. Countries need to be aware of their own accountability, while global teams should communicate with complete clarity and spell out local responsibility for sharing of strategic and creative materials. Guidelines vary from company to company—while some adopt a very centralized and consistent approach, others operate a policy whereby nothing is prohibited, provided it is within budget, doesn’t conflict with key communications messages, and is properly evaluated.

Local Access Drivers
Attendees are looking to learn where they are likely to experience reimbursement or non-reimbursement. They would welcome insight by cultural cluster—for example, Venezuela follows the US and behaves in a similar way to other South American countries such as Ecuador and Cuba; it does not follow Brazil and Argentina, which behave quite differently. It would be wrong, therefore, to have one strategy for South America. Similarly, the implications of decisions in France are widespread, with Egypt among the countries that follow the French lead, while the Netherlands has a strong influence in some Asian countries.
Shifting Competitive Frameworks
Uniformity of brand is important from the customers’ point of view. And while it is impossible for global teams to incorporate every affiliate’s input, they can proactively share their strategy with core groups to reduce the tension when decisions are made.

Difficulties can occur when some national launches are several years after the product is first launched elsewhere, usually in a major market such as the US. Aligning a global strategy written several years before with current market needs can be a challenge. This is where reflecting the brand essence and identity is essential, even if the entire strategy has to be restructured around local needs.

Even in European campaigns, achieving commonality across markets can be a challenge—in the past there were only a limited number of European markets to reach, but now the number has expanded dramatically. Engaging with markets in country clusters and sharing materials electronically is seen as the way forward.

The Role of the Global Brand Manager
Today, the global brand manager is seen to be more of a facilitator, helping affiliates deal with the universal dilemma of being asked to do more with less money. The brand manager was also identified as the person responsible for collating and disseminating local market data for the brand, but in reality their efficiency in this role is patchy. Sometimes information is not processed and local teams do not receive feedback, and that causes tension. A lot depends on the attitude and networking skills of individuals within the organization.

The relationship between global brand manager and local brand managers can be a challenge, from both sides of the fence. For example, local brand managers can opt in or out of key activities, which means that the global brand team can propose something costly and then local brand managers can refuse to buy in.

Pull in Local Ideas and Input
A top-down and bottom-up approach can help global teams see how a campaign is evolving according to local market need, while maintaining the fundamentals in terms of brand structure and positioning. If global provides a forum for input, and explains why certain things are important so as not to have inconsistencies, then there is little push back from local and regional brand managers.

Some companies define the strategy and ambition of the brand and then send local markets a template for their national sales and marketing plan. Local markets are then invited to input their own stakeholder analysis, SWOT analysis, and patient pathways. Tools are then populated with these insights while still reflecting the overall brand vision and ambition.

The bigger markets tend to drive activities, with early launch countries more influential over materials and smaller countries often adopting materials from larger markets. One company represented used the Indigenous digital asset system where individual country materials are uploaded alongside global materials. In this way affiliates get to see and use a wider spread of materials than global would normally deliver, driving innovation sharing and ultimate cost-efficiency.

What unique regional and local needs must be incorporated into a successful global marketing plan?
If companies do not use local insights in their campaigns, they fall down very quickly. Super insights and involvement of local markets at an early stage are critical. If companies miss key countries at that stage, their campaign will soon run into trouble.

**Diversity Can Be a Good Thing**

In terms of local market flexibility, there is a need to be clear about what is strategic and what is tactical. Items that are strategically on brand but tactically very different can be good. However, if you position the product differently from the global strategy, then it is likely problematic and warrants discussion. If the message is consistently aligned, then there is no problem, and attendees agreed that you should trust your local market insight. If there is inconsistency in the alignment of the message, agencies should talk to the local brand manager and raise it as a potential issue.

Resolving conflicts between local and global teams normally occurs during regular business reviews when markets performing above plan or deviating from strategy can be questioned. However, if a country wants to deviate, there is usually a bigger, unresolved issue in the working relationship between global and local marketers.

How can procurement deliver value to and ensure marketing excellence for global and local marketing teams?

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How can procurement deliver value to and ensure marketing excellence for global and local marketing teams?

Deliver Innovative As Well As Economic Value

Attendees from procurement and purchasing departments were asked what they understood by ‘value.’ It was quickly identified as bringing innovation to the marketing process in order to move the business forward. When procurement assesses potential suppliers, innovation is rated as ‘very important.’ Through taking part in business forums, procurement professionals take a holistic approach to supplier management to prevent it from becoming all about cost.

This challenges the reputation of procurement as existing to drive price down. Attendees saw their role as understanding what the brand team wants to achieve and getting it for them at the best price. This means that they will look at alternative ways of doing things and welcome innovative approaches. Jointed-up thinking between agency affiliates in order to secure good value is the preferred route. Attendees described their role as ‘a fine balance,’ having to be innovative in achieving what they want while at the same time saving budget. The more they understand what is important to each brand, the more they can help brand teams meet their objectives.

Ultimately, though, procurement departments are judged on what they can bring back to the bottom line. Not so long ago, they would be brought in to get more projects done on the budget, but now the goal is a budget cut. However, procurement attendees pointed out that they often work with brand teams to develop a business case for spending the money on specific marketing activities.

Selecting New Agency Partners

While rate-card is a factor in selecting an agency partner, evaluation is not just about price. Attendees said they look beyond the initial quotation from suppliers, to assess what expertise the agency’s people will bring to the business compared with those from another agency. As well as expertise and experience, they want evidence that agencies are ahead of the curve and have new ideas, new innovations, and new insights. Sometimes procurement looks at the performance of previous campaigns run by the agency and questions them about efficiencies in what they do, looking for innovative solutions to achieving financial targets.

When it comes to rate cards, there are inconsistencies between agencies, and procurement employs several criteria to level the playing field and make a proper comparison. Initially, they review market rates through a combination of industry benchmarking surveys and rates from all the agencies who have previously pitched for the company. One company defines a small scope of work, which all competing agencies are asked to provide a quote on, so that costs can be compared directly. Others explore the people in the team in more depth. Procurement may ask agencies to define the role of, say, an Account Director or Account Manager and provide a job profile so that they can compare the teams.

Attendees from both procurement and marketing teams agreed that the pitch process should begin with a good-quality brief, which should include details of how the team intends to measure the competing agencies. Procurement often edits the pitch briefing document to make sure that the right questions are being asked and that there are set criteria by which to judge the agencies. It is important to provide clarity and equity in the process, so that agencies have the same amount of time to consider the brief and make follow-up calls.

Rosters are used to rationalize supplier choice, with incumbent agencies encouraged to discuss what other skills they can offer. The challenge for procurement is trying to pre-empt any barriers to hiring an agency before the pitch, which means talking to all the different purchasing managers and affiliates in advance.
Building Partner Relationships

It was admitted that sometimes pharmaceutical companies can be guilty of concentrating on their stakeholders and forgetting about their agency/suppliers, but it was agreed that a two-way information flow is essential. One attendee advocated having an agency team members’ ‘hot desk’ in the pharmaceutical company’s offices so that they become a more integral part of the marketing team. Another said that the relationship depends on more than physically being near each other—it is about developing a true team approach and not working in silos.

Because there are so many agencies involved in an individual brand, attendees said they concentrate on the ones who are most important to the business. As part of their supplier management system, they will sometimes bring agencies into the company to run or present at workshops that look at the broader marketing picture or focus on case studies and best practices. Such events are a good opportunity for brand teams to hear how the agency views their business and to discuss any differences of perception as to how programs are progressing.

So can agencies ever really be business partners? Attendees felt they can, but it takes time. Brand managers can be defensive if partnered with a new agency that they have not chosen. Good chemistry between the teams is the key—procurement will ask whether agency and in-house teams gel, and one delegate likened it to a marriage. Purchasing is often seen as a mediator at the beginning to help broker the relationship or to smooth things over if there is tension.

Sometimes the rapport is simply not right and there is not a lot either side can do. When you have it, it’s a flexible, understanding relationship, but when you don’t, it’s brittle. Sometimes an agency is simply not the right fit for the brand team. Attendees said it was important that agencies understand the culture of their company. They should know the limits brand teams don’t want to cross, what they are prepared to do, and what they are not.

The additional challenge of co-promotion agreement relationships was also mentioned. With an increasing number of co-promoted brands, companies have to agree who leads on what project, so that agencies do not get caught between inter-company disagreements.

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To learn more about Indigenus, or to register for the next Indigenus Forum, please contact Bárbara Büchel at bbluechel@indigenus.net.
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