Pharma TeleWeb e-Detailing
A New Media Role for Sales Reps

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The US pharmaceutical industry spent $28 billion in 2010 promoting drugs to prescribers, down about 10 percent from the previous year, according to Cegedim Strategic Data, which surveys physicians to estimate spending. Pharmaceutical companies are cutting back mostly in detailing and sampling, while spending in mailings and print advertising grew in 2010 (see Figure 1, below).

Promotional Mix Depends on the Brand
The promotional mix for top-selling Rx brands illustrates the variation among brands in how money is allocated to different channels (see Figure 2, page 3). Some brands spend more than 50% of their total physician and consumer promotional budget on detailing. Forest Laboratories markets two drugs in this category: Bystolic, a drug for the treatment of high blood pressure, and Lexapro, an antidepressant. Those two drugs have practically no direct-to-consumer (DTC) promotional budget. Crestor, BMS’s drug for the treatment of high cholesterol, also allocates more than 50% of its budget to detailing, but also spends 18% on DTC promotion—equivalent to the value of free samples given to physicians. Celebrex—Pfizer’s drug for pain—splits its promotional budget mainly between detailing and samples with a smidgen (less than 10%) allocated to DTC advertising.

There is also a variation in channel spending by different companies. Table 1, page 2, shows the top companies by spend in each of the growth channels identified in Figure 1.

New Media Promotion Increasing
Physician detailing remains a dominant channel for drug promotion. It accounts for 55% of the total spend (69% if you take samples out of the equation). Although the total spend on detailing is decreasing, there is a continued shift from traditional detailing to e-detailing. “Traditional forms of promotion, such as face-to-face detailing and meetings, are becoming less commonplace, while internet media such as e-detailing and e-meetings are growing at a fast and steady pace,” according to Cegedim. Figure 3, page 4, shows the trend.

Tele-Detailing is Prevalent
In the U.S., physician-targeted promotional spending totaled $24 billion between October 2009 and September 2010. Of the $24 billion spent in promotion of pharmaceutical products, $327 million was invested in “new media.” New forms of detailing made up 84 percent, or $276 million, of new-media spending. "Tele-detailing" accounts for 49% of the new media

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Figure 2. Top Brands in Promotion Spending. Source: Cegedim

Table 1. Top Companies in Growing Channels (2010). Source: Cegedim.
channel physician promotional spend, whereas "Internet Detailing" is only 35% and Web advertising is a meager 1% (see Table 2 and Figure 4, page 5).

"TeleWeb e-Detailing" refers to a pharma sales rep communicating with a doctor (or other healthcare professional) via phone while the doctor is simultaneously connected to a secure internet site. Once connected, the doctor is then guided by the sales rep who navigates for the doctor and comments on the content of the web-pages via the phone line. The sales rep and the doctor see on their individual screens the same information (text, images, animations, videos, etc.) at the same time.

Fabbri presented interesting data demonstrating the effectiveness of this approach. But before we get to the case study results, let’s talk a little more about how the TeleWeb e-detail is arranged and the technology required.

The Doctor Determines When
The TeleWeb sales rep first makes an appointment by phone with a doctor who is invited to connect to a secure internet website at a specific time decided by doctor. Once connected, the doctor is then guided by the sales rep to navigate the website via desktop sharing technology. The rep is able to share PowerPoint presentations, PDF articles, website content, videos, Flash animations, and so on.

At the moment, Lilly in Italy partners with Netviewer, a German company that supplies the desktop sharing technology required for TeleWeb e-details. By using this technology, the rep can easily share the content of his desktop with the doctor.

Physician access is as big a problem in Europe as it is in the US, said Fabbri. “Let me highlight a very important point,” said Fabbri. “When you meet a doctor in a face-to-face call, you have the chance to improve, to increase, and to optimize the relationship, but you have a lot of difficulty delivering the message due to time restrictions.”

A sales rep may spend 3 to 5 minutes or at maximum 10 minutes with a doctor to deliver the message to a face-to-face call. “By using TeleWeb,” said Fabbri, “the rep has the chance to spend 25, 30 minutes, or more with the doctor, and can increase the quality of the message while improving message retention.”

Mark Gleason, Executive Vice President, Corporate Development at Direct Medical Data, LP, concurs that the combination of audio and Web visuals are key to improving retention. "Many years of teledetailing have shown that audio is not sufficient for covering complex clinical data," said Gleason. “Adding the interactive web visuals has led to 8-10 minute interactions for PCPs and about 15 minutes for specialists. It also allows the rep to be a ‘concierge’ and bring up additional services like eSampling, patient ed downloads, and links to other online video presentations.”

Key Performance Indicators
About 25% to 30% of the doctors asked to participate in a TeleWeb session by Lilly sales reps accepted the invitation (see Figure 5, page 6). “Specialists like orthopedics, psychiatrists, are more likely to partici-
Table 2 and Figure 4. Breakdown of “New Media” Physician Promotional Spending (October 2009 to September 2010). “Telephone Detailing” refers to a teleconference by phone with multiple participants.

<table>
<thead>
<tr>
<th>New Media Channel</th>
<th>Spending ($ Mil)</th>
<th>% of New Media Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone Detailing</td>
<td>$ 160</td>
<td>49%</td>
</tr>
<tr>
<td>Internet Detailing</td>
<td>$ 116</td>
<td>35%</td>
</tr>
<tr>
<td>E-Meeting (Internet)</td>
<td>$ 48</td>
<td>15%</td>
</tr>
<tr>
<td>Web Advertising to Physicians</td>
<td>$ 4</td>
<td>1%</td>
</tr>
</tbody>
</table>

Some Questions Discussed in Podcast Interview of Luca Fabbri

1. Describe TeleWeb e-detailing and how Lilly conducts TeleWeb e-detailing in Europe. How is this different from “traditional” e-detailing?
2. Do you have reps who are dedicated to TeleWeb activities?
3. What are the Key Performance Indicators (KPIs) for your TeleWeb activities and how do these compare with traditional detailing?
4. How do doctors feel about TeleWeb e-detailing? What percentage of their calls would they like to be done this way?
5. Is TeleWeb e-detailing appropriate for marketing all drugs to physicians?
"For TeleWeb to work, it needs to be an opt-in, said Fabbri. Specialists also spend more time with the rep on TeleWeb calls, which averaged about 23 minutes with GPs and 29 minutes with specialists. This is much longer than the average field call, which averages only 3 to 5 minutes. Lilly surveyed physicians who participated in TeleWeb calls to measure their evaluation of the TeleWeb experience. On a scale of 1 to 5, with 5 being the highest satisfaction rating, doctors rated their TeleWeb experience a 4.8. Fabbri feels that both the quality of the information and the convenience of scheduling according to the doctors’ preference rather than rep’s preference were primarily responsible for the high ratings.

TeleWeb and Face-to-Face Call Synergies

Fabbri pointed out that combining TeleWeb calls with field visits can be leveraged beyond merely increasing the frequency of contacts. The TeleWeb reps, for example, can handle more complex issues such as dosing and side effects as a followup to the office visit. A TeleWeb call can devote more time to these issues using reps who have special knowledge. A TeleWeb call can also help prepare the doctor for the field call by presenting detailed information about a new indication for a drug. The physician can then receive samples from the rep during the filed call.

In a typical field call scenario, only about 15% to 20% of physicians can recall the key message elements at the end of the interview. Fabbri cited a hypothetical, typical field call at the end of which three simple messages were delivered: the efficacy in acute phase, the efficacy in the main-tenance phase, and the high scalability of the drug. "One week after receiving several field calls," said Fabbri, "we evaluated the spontaneous recall of these messages by the doctors. Normally, only 15% to 20% of the doctors were able to recall these core message elements. In contrast, after TeleWeb calls, 60% or 70% of the doctors were able to recall the key messages. The efficiency of this channel is much higher than field calls due to the additional time spent with the doctor who is focused on the screen and on the conversation."

Will TeleWeb Calls Replace Field Calls?

Fabbri shared some market research Lilly performed in France and Germany about how receptive physicians were to TeleWeb details. Doctors in these countries were asked: “Among six field calls that you received this year, how many could be replaced with remote live e-Detailing calls by your field reps?” In France 55% of GPs and 75% of GPs in Germany were ready to adopt the hybrid model and are okay to exchange more than 50% of their field calls with the remote calls.

Fabbri summed up the advantages of TeleWeb calls in these words: “By using TeleWeb e-Detailing we have the chance to increase the efficiency of our sales force and decrease the cost of the channel.”