

2022
Life Science
Sales & Marketing
Trends

2021 has brought both challenge and opportunity to the life sciences industry. Within the commercial organization, sales and marketing functions have seen a transformation that kickstarted digital engagements into the mainstream. However, it is the ripples of this transformation and their long-term effects that shape the future trends of life sciences sales and marketing organizations.

In this paper, we will review these trends through the lens of patient engagement, digital marketing, product commercialization, and HCP engagement to help commercial leaders answer the following questions:

- **Patient Intimacy Across Clinical and Commercial:** With decentralized clinical trials leveraging digital tools operationalize clinical trials, how will the commercial and clinical organizations share learnings around patient intimacy and patient engagement moving forward?
- **Email Privacy and Pixel Tracking:** As email tracking gets removed from organization's arsenals, how will life science companies' understanding of content and how effective it is for patients and physicians be impacted?
- **Commercialization Roadmap:** What are the commercial implications of outsourcing? How and when do those decisions need to be made in preparation for commercialization?
- **Next Generation Sales:** As doctors expand no-see lists, how will the relationship between HCPs and field teams evolve towards or away from digital selling?



TREND #1

Patient Intimacy Across Clinical and Commercial

With the rise in decentralized clinical trials and associated digital tools, obtaining and sharing learnings to create a unified patient-intimate experience throughout the disease journey has become a key collaboration focus for the clinical and commercial organizations. Holistic patient engagement from diagnosis to treatment requires commercial life sciences organizations to work with their clinical partners and utilize a patient-centered approach to collaboration, while remaining cognizant of compliance standards. This means continuity across the digital engagement tools (e.g., wearables) that facilitate decentralized clinical trials and the digital tactics that facilitate education, enrollment, and adherence to treatment.

Along the healthcare pipeline, better patient engagement is beneficial for patients, providers, and life sciences organizations. Leveraging digital tools to engage with patients directly helps life sciences organizations refine commercial strategies, identify new engagement channels, create more targeted awareness campaigns, and

understand how to speak to different patient disease groups. From the clinical perspective, digital platforms can help identify potential patients for trials, connect to patients to survey during trial development, and integrate the patient support community into the patient journey during and after the trials for patients that drop out.

The consensus shows although patients are open to sharing data to improve their health or the health of others, they are concerned about their privacy. Therefore, gaining patient consent requires adequate and appropriate data protection and privacy actions such as encryption and data access auditing are in place. Furthermore, clinical organizations will look to keep the patient-physician relationship strong, even in digital settings, through the use of telemedicine. Applying the learnings from their commercial counterparts around successful digital engagements will become critical to supporting the patient / physician collaboration throughout the clinical trial.

Equally as critical, clinical organizations will look to build interoperability of patient health data to inform their end-to-end trial and treatment journey. Electronic health records have been steeply adopted around the world since the late 2010s, but its use in patient engagement has been limited due to interoperability issues.

To counteract this, the adoption of APIs in health data exchange has increased to improve interoperability and patient access to health information. Widespread adoption of APIs will allow for easy and prompt data sharing and access to data between patients, providers, and health sciences companies. APIs with access to protected health information (PHI) must also comply with the regulatory and data compliance laws of the local market.

Like APIs, artificial intelligence (AI) and machine learning (ML) will be essential to the future of patient engagement in the clinical and commercial space. Only time will tell future applications of these algorithms as there are further boundaries with AI-ML in overcoming the issue of bias and gaining the trust of patients and providers.

To learn more: *“The Trouble with Algorithms: Algorithm Ethics”*



TREND #2

Email Privacy and Pixel Tracking

As digital privacy becomes more important to consumers, key tools used by markets in the past, such as email tracking, app tracking, and web-browsing tracking, are becoming obsolete under data privacy laws. Therefore, life science companies need to pivot their investments into other existing marketing channels to remain future proof.

Emails continues to be one of the most utilized forms of communication. Emails allow life sciences organizations to connect and maintain relationships with subscribers, not limited to healthcare providers, patients, and

caregivers. Pixel tracking goes further and allows organizations to track the return on investment (ROI) of their emails and see which demographics of subscribers are interacting with which emails. As unconsented pixel tracking becomes restricted, organizations will need to redirect resources to other methods of data collection such as search engine optimization, digital action trackers, newly consented and historical data, and social media engagement.

Nearly all of web traffic goes through a search engine. Tracking what search terms are used most often, and which search words resulted in clicks of product offerings allows for a collective understanding of customers. For a more individualized approach, aimed data, such as DMD offered by IQVIA, allows organizations to understand how visitors down to a specific person interact with website pages and relevant articles.

For an active approach, effective engagement and branding on social media channels such as Facebook,

LinkedIn, and Twitter allows businesses to connect with current customers and attract potential new ones. Facebook groups has been a key source of data for rare diseases patients who use these groups to ask about symptoms and get support from other patients and the broader disease community.



Health tech companies such as Apple are giving consumers the power to see what data is collected from them so they can play a more active role in their care.

It's important to note that as data privacy laws become stricter, there is also a rise in personalized digital medicine. Health tech companies such as Apple are giving consumers the power to see what data is collected from them so they can play a more active role in their care. Alongside, consumers can decide what data to

share and with whom to share it. Life science companies are losing important data tracking sources, but they can make up for it with investment into other existing marketing channels and gaining the trust and consent of current subscribers with transparency.

To learn more about how Clarkston helps life sciences clients understand physicians and patients with the HCP 360 tool: *"Enhancing Healthcare Provider Engagement with Advanced Analytics."*

TREND #3

Commercialization Roadmap

It's no news that more and more pharmaceutical companies are outsourcing operations on their road to commercialization. However, as these decisions get made, their impact outside supply chain and manufacturing areas can be overlooked causing commercial organizations to play catch up later in the process. As the industry continues to grow, small pharmaceutical companies on the road to commercialization can better engage their commercial counterparts in outsourcing decisions weighing loss/gain of control with the minimal obligations that will need to be met for even fully outsourced commercial functions.

As the commercial organization evaluates outsourcing, consider that compliance and regulatory risks will be owned by the parent company; therefore, data reporting and process documentation is critical to have on-hand and available from the outsourced organization. Just as when outsourcing supply chain operations, it's critical to maintain integrations and data feeds from the third-party logistics provider (3PL) for visibility to supply. Outsourcing select commercial sales and marketing operations requires similar rigor to integrate and report inputs for targeting, transparency, and demand.

While the pros of outsourcing commercial functions – marketing, field force, and HCP targeting – can include cost efficiency, ability to rapidly scale up and down operations, and leverage expertise from without, the minimal obligations must be considered when developing contracting agreements with the outsourced party. When it comes to outsourcing marketing functions, alignment on ownership of digital marketing platforms and approval of marketing content is critical. Considerations for outsourcing the field force or field force enablement functions require clarity around ownership of promotional and medical material management as well as inputs agreement around field force compensations, obligations for transparency reporting and commercial signal reporting to refine forecasting.

Finally, considering to outsource HCP targeting functions can alleviate the parent organization from developing processes for field force sizing and territory structuring as well as target data refinement for HCP targeting – however, input mechanisms will be required to give the parent organization level of access for strategic decision making.

Keep in mind that efficiency requires oversight. Each company has their own local and federal compliance regulations to follow, but also a moral obligation to ensure the product feedback is incorporated and the information presented is safe for the public. Commercial functions will look to partner with the medical and safety counterparts to ensure accurate reporting of information when services are outsourced via adverse events management and complaint management. Mechanisms for proper data collection and headcount that can complete audit activities in a timely manner of outsourced functions will be pivotal especially for outsourced front-line functions engaging with patients and physicians.



TREND #4

Next Generation Sales

Over the course of the pandemic, a historically face-to-face activity - pharmaceutical sales – went digital. As physicians closed down their offices and expanded no-see lists, field teams became faced with the reality that digital was the only way for outreach for a period of time.

So how did it go? What we see two years into the pandemic is a mixed bag – some physicians appreciated the digital methods that allowed for separation between education and their in-office time, others were overwhelmed by digital fatigue. Some field teams, especially medical teams focused on disease awareness and spread thin across territories, embraced the reach digital programs provide, others struggled with relying on digital only means that changed their way of working.

As doctors' offices begin to open up, the industry has potential to fall into a dead zone where field teams are no longer reaching for digital but have not yet spun up in person programs to take their place. In the long-term, similar resistance to adopting a digital first mentality remains as a barrier to what's perceived by some as more effective face-to-face selling. Commercial leaders will need decide whether to set some stake for their organization to preserve digital adoption even if it's couched through the lens of digital enablement for the field.

Some barriers we see on the horizon stem from perception. Anecdotal industry feedback point to the perception of a two-tier society – field reps who will be seen by doctors in person vs. those that will only be seen digitally. Digital leaders will need to continuously drive for digital enablement by providing evidence of the return on investment for digital activities and head-to-head comparison around digital vs. in person sales tactics. Commercial executives can also consider connecting field compensation to use of digital tactics to further incent the teams to preserve long-term digital engagement. Over time, the value of digital's reach and targeting opportunity has merit to turn the tide and become a standard part of every field team's toolkit. Commercial leaders will determine the roadmap to get there.

To learn more about the impact of *"Next Generation Sales on Analytics"*

Conclusion

As with much of the life sciences industry and broader business landscape, disruption is rampant in commercial operations. Sales and marketing organizations are rehauling tried-and-true methods for engaging patients, HCPs, and other stakeholders in place of digital tools and new capabilities. Like any transformation, this shift will require a holistic view of the end-to-end patient experience and an adaptive mindset to overcome preconceived barriers.

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