



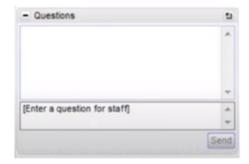


# Omnichannel Launch Excellence: Global to Local

Webinar #5 - THURSDAY 09/11

## **Ground rules**

- This webinar will take around 40 minutes, followed by questions
- You can submit questions at any time via the "Questions" box



- Please give us your feedback!
  - Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!







# Why are you here?



40% of worldwide drug launches failed to meet 2-year sales forecasts (2009–2017)<sup>1</sup>



80% of all launches have their long-term fate determined during the first six months on the market<sup>1</sup>

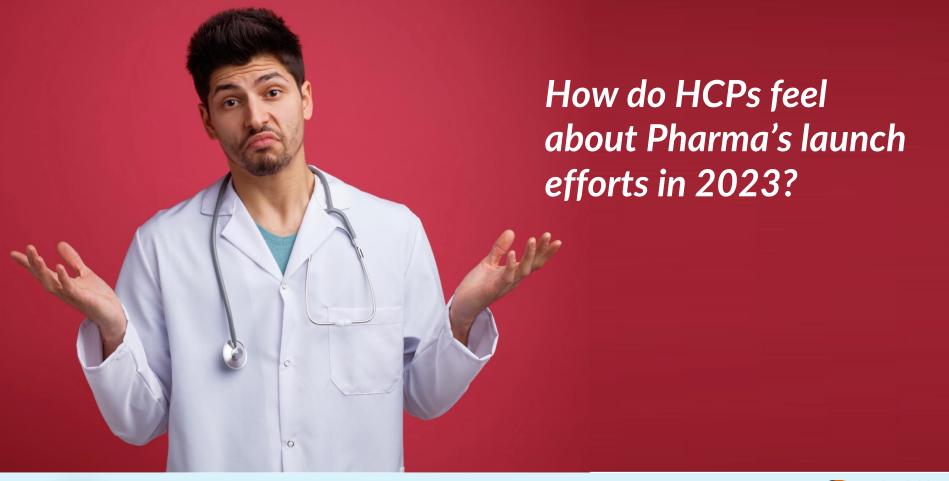


In 2022, 65% of Physicians dissatisfied or neutral with digital component at launch<sup>2</sup>

How to ensure impact and uptake of Global planning? How can local markets benefit from Global launch strategy and execution?

- 1. Source: Ready for launch: Reshaping pharma's strategy in the next normal. McKinsey & Company. 2020
- 2. Source: Navigator365<sup>TM</sup> EU5 Specialists Q3 2022 (n=40100)

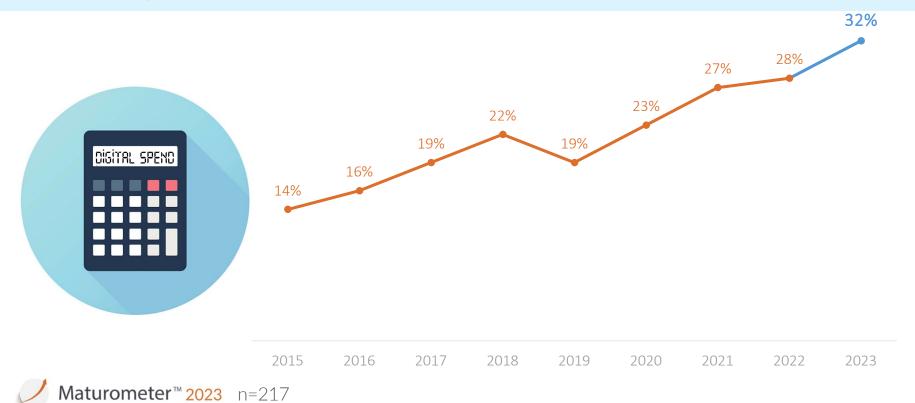








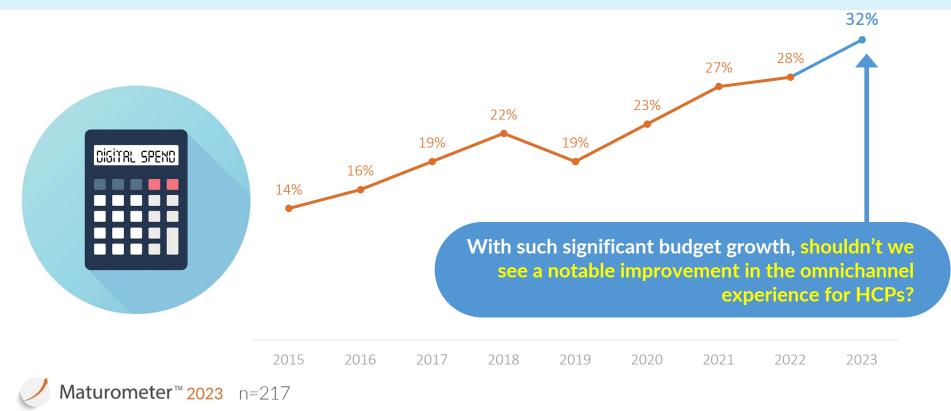
# Since 2019 the portion of pharma's budget allocated to digital has increased substantially







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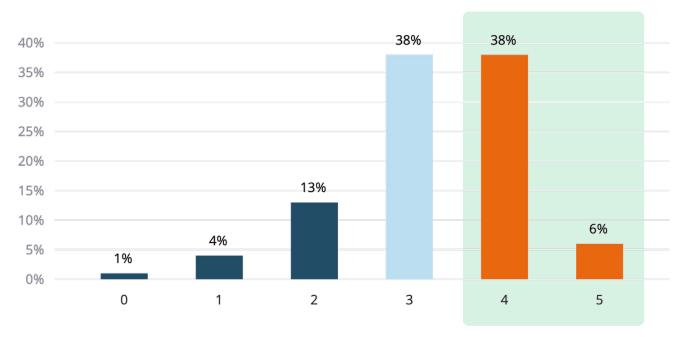


# Nope... HCP satisfaction levels with pharma digital clearly need some work!

Q: Satisfaction with digital during recent product launches?



44%



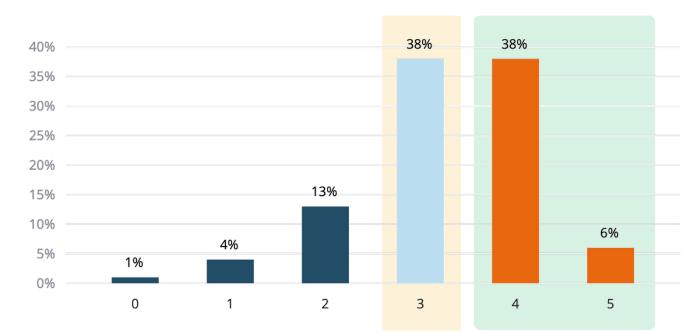
**Source:** Navigator365™ EU5 Specialists Q3 2023 (n= 4031)



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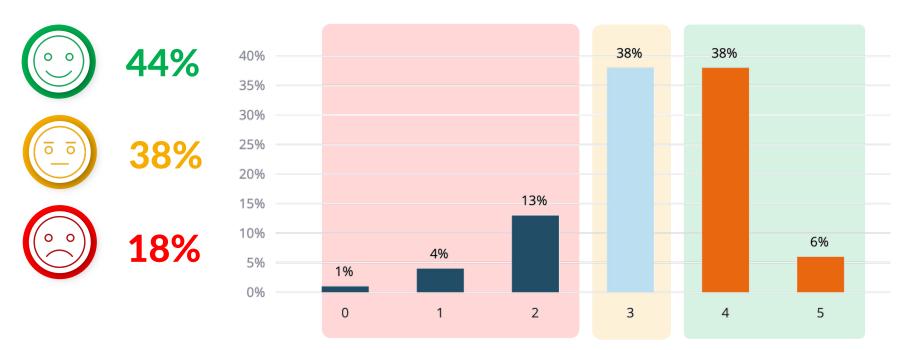
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**Source:** Navigator365<sup>TM</sup> EU5 Specialists Q3 2023 (n= 4031)





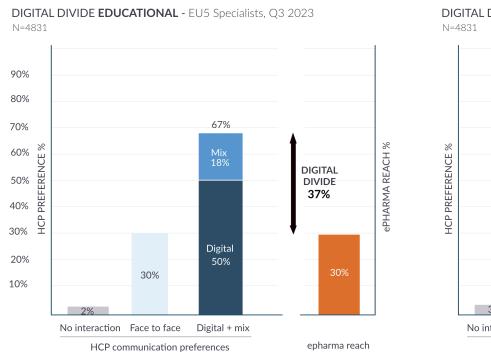


What are the potential causes for dissatisfaction at launch?

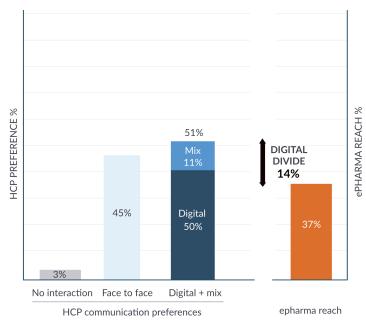




# Is Pharma's focus on the wrong topics?



**DIGITAL DIVIDE PROMOTIONAL - EU5 Specialists, Q3 2023** 

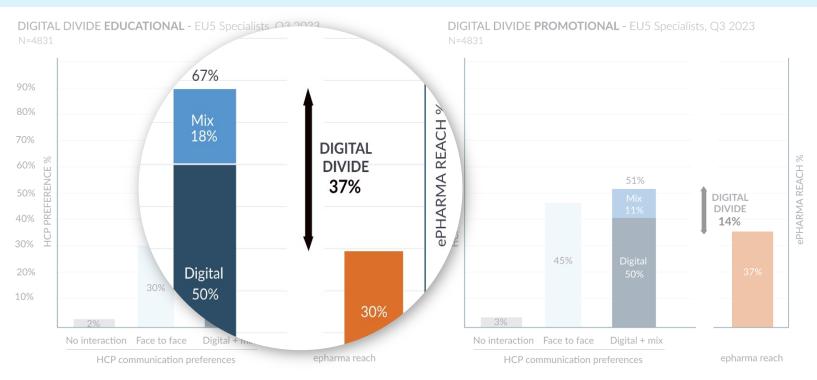


The Digital Divide is defined as the delta between the % of HCPs preferring digital or mix and the average % reach of the top 3 online educational or promo channels ('epharma reach') Source: Navigator365™ EU5 Specialists Q3 2023 (n= 4831)





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# Is Pharma investing in the wrong omnichannel tools and processes?

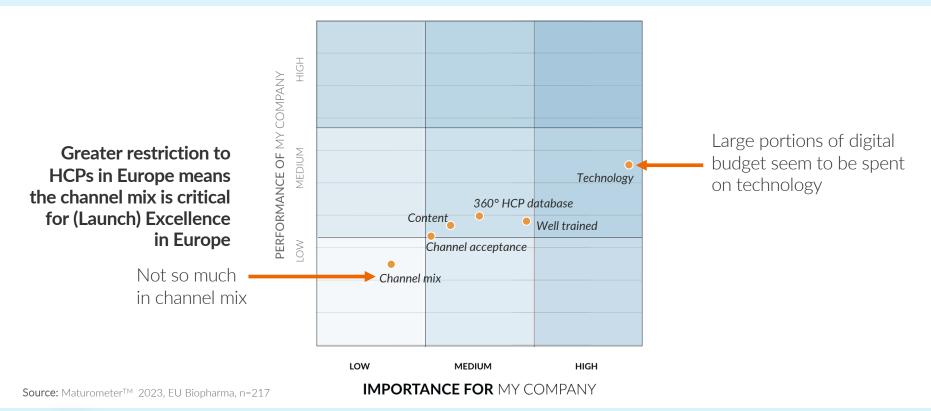


Source: Maturometer™ 2023, EU Biopharma, n=217





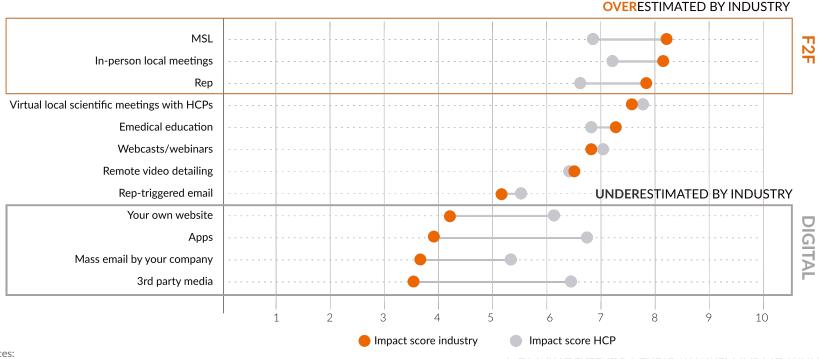
# Is Pharma investing in the wrong omnichannel tools and processes?







# Is Pharma still overestimating the impact of F2F?



Sources: Across Health Maturometer™ 2022, EU Biopharma (n=127), and Navigator365™ Core Specialists 2021 (n=4661)

Q: TO WHAT EXTENT DO THESE CHANNELS IMPACT CLINICAL DESICON MAKING BEHAVIOUR? - EU PHARMA INDUSTRY VS. EU SPECIALIST HCPS







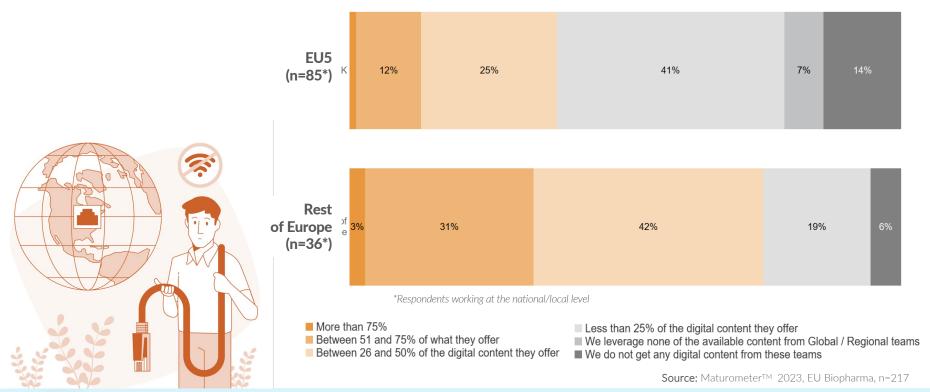
How can Global better support Local markets for a successful launch?





# The disconnect between HQ and local is an age-old problem

? To what extent do you leverage digital content from the Global/Regional teams?







# Lack of resources/budget/time Compliance restrictions Timing Relevance of channels, content and speakers NIH syndrome (not invented here)

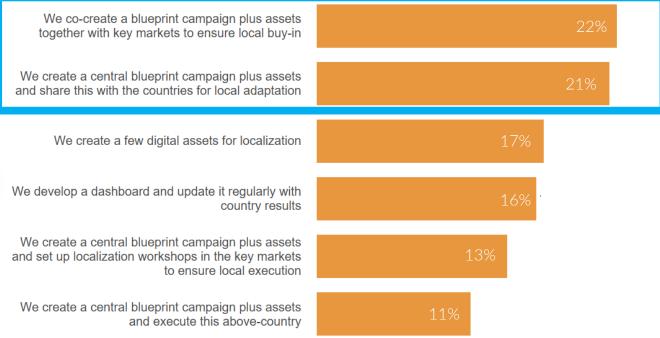




# Co-creation and central blueprints lead the way

? How do you involve key local markets in your digital planning?





Source: Maturometer™ 2023, EU Biopharma, n=217





# What does good look like?



## Global to Local omnichannel launch blueprint steps

STRATEGIC AUDIENCE OBJECTIVES SEGMENTATION

COMMUNICATION PRIORITIES

CONTENT ALIGNMENT CHANNEL ORCHESTRATION

MEASURE AND ADAPT

-(11)











WHAT is the launch objective

WHO are the key launch stakeholders?

WHAT do we need to communicate?

WHAT content is important to our different audiences?

WHAT channels should we use?

WHICH activities should we start, stop or continue?















WHAT is the launch objective

WHO are the key aunch stakeholders?

what do we need to communicate?

important to our ifferent audiences?

VHAT channels should we use?

which activities hould we start, stop or continue?



Tactics without strategy is the noise before defeat

Sun Tzu

What's the problem we are trying to solve at launch?

From the perspective of the HCP or the patient (NOT the perspective of your company)





#### AUDIENCE SEGMENTATION

OMMUNICATION PRIORITIES

CONTENT ALIGNMENT CHANNEL ORCHESTRATION

MEASURE AND ADAPT















### POTENTIAL:

How important are they to us?

Behavioural: Product adoption

Level of Rx vs total patients (low/no, switch, loyal)

Demographic: Potential

Practice size, IQVIA potential data, ...

**Demographic**: Personal profile

Contact information, age, gender, specialty, ...



### ATTITUDES AND BEHAVIOURS:

What do they think about the disease area, the product and the company?

Attitudinal: Personas

Evidence based, perceptive to patient preference, guidelines follower

Attitudinal: Product & Company mindset

Perceptions and beliefs on the service, product or company



#### DIGITAL AFFINITY:

How do they want to communicate with us?

Behavioural: Channel affinity

Known channel usage/interest & prediction of other channel

interests + per adoption journey stage





#### AUDIENCE SEGMENTATION

OMMUNICATION PRIORITIES



CHANNEL ORCHESTRATION

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POTENTIAL ow important are they to us Behavioural: Product adoption

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DIGITAL AFFINITY

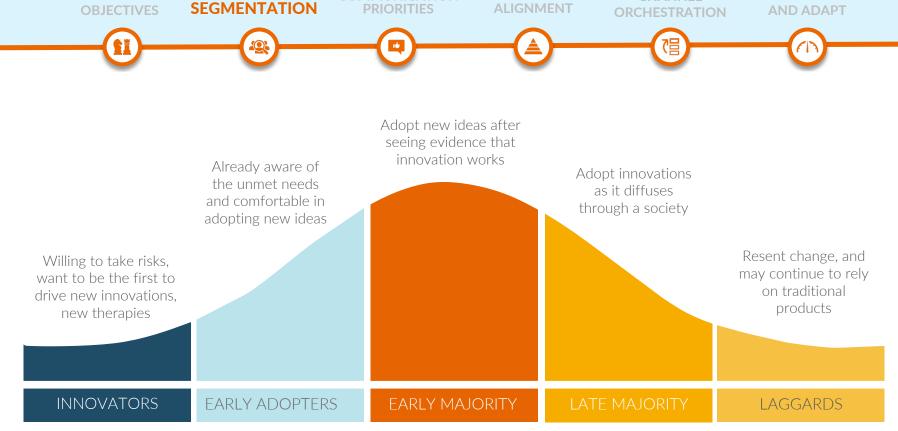
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CONTENT

COMMUNICATION

**AUDIENCE** 

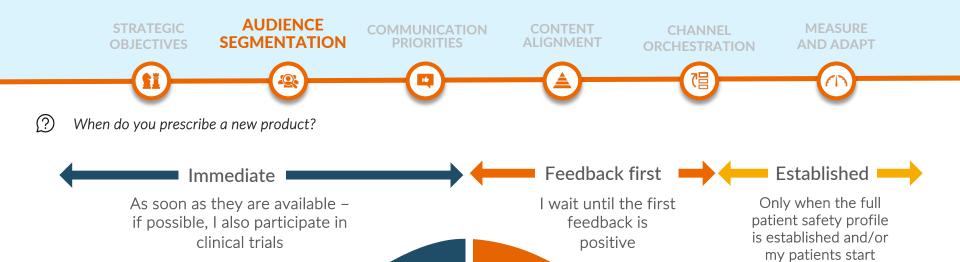
**STRATEGIC** 

The diffusion of innovation curve E.M Rogers 1962





**MEASURE** 



Source: Navigator365<sup>TM</sup> EU4 + UK Specialists Q3 2023 (n= 4831)



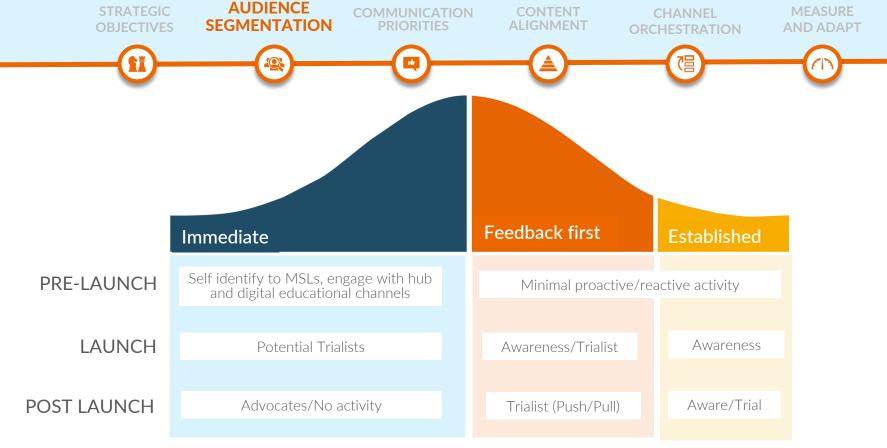
47%



asking for it

14%

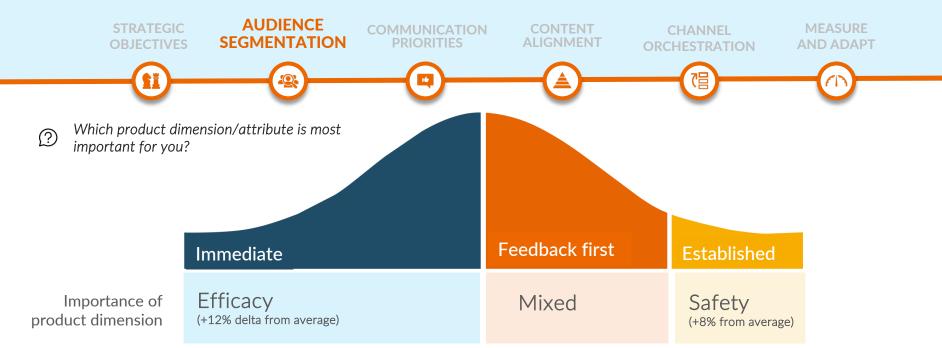
38%



Source: Navigator365™ EU4 + UK Specialists Q3 2023 (n= 4831)



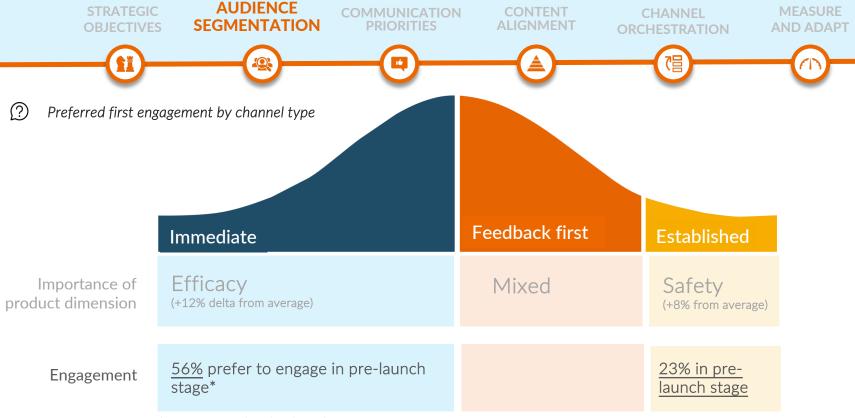




Source: Navigator365™ EU4 + UK Specialists Q3 2023 (n= 4831)







\*12mo -3mo ahead of launch

Source: Navigator365™ EU4 + UK Specialists Q3 2023 (n= 4831)







Enhance existing Field Medical engagement with high channel mix

Data-led scientific exchange

- Actively looking for data make sure its there!
- Scientific innovation
- Assertive therapeutic strategy
- Provide tools and access to data to enable them to become advocates

Medical play a critical role here – ensure cross-functional planning starts early





STRATEGIC OR IFCTIVES AUDIENCE SEGMENTATION COMMUNICATION PRIORITIES

**CONTENT ALIGNMENT** 

CHANNEL ORCHESTRATION

MEASURE AND ADAPT













WHAT content is important to our different audiences?

# Content is King Bill Gates • 1996









COMMUNICATION PRIORITIES



CHANNEL ORCHESTRATION

MEASURE AND ADAPT















# Scientific Platform sits at the core of all launch communication

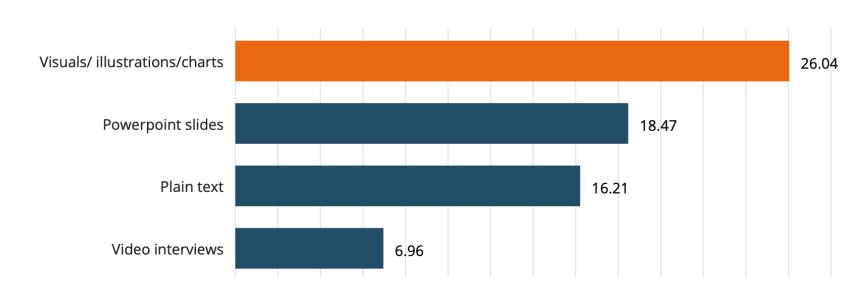
Compelling, differentiating, robust and consistent story is essential when multiple internal stakeholders and external local agencies are involved







Q: Which formats do you prefer for online engagements with pharma content?"



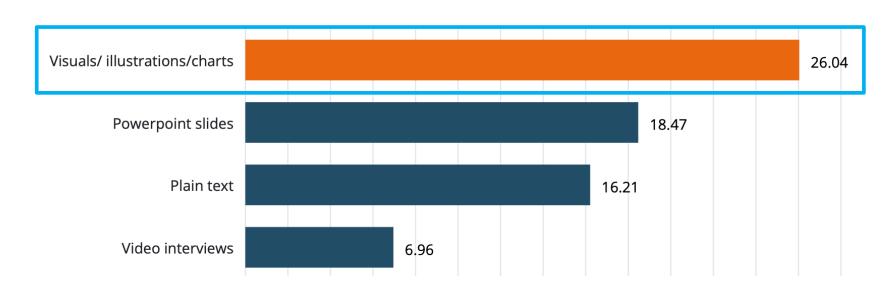
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AUDIENCE SEGMENTATION COMMUNICATION PRIORITIES CONTENT ALIGNMENT

CHANNEL DRCHESTRATION

MEASURE AND ADAPT













# Exponential data

Data is expanding faster than our ability to assimilate and apply it effectively

The doubling time of medical knowledge in 1960 was 50 years; in 1980: 7 years; and in 2010: 3.5 years.

In 2020, it was projected to be just 73 days<sup>1</sup>

1. Denson et al. Trans Am Clin Climatol Assoc. 2011; 122: 48–58

**Source**: Navigator365<sup>TM</sup> EU5 Specialists, Q3 2023, n=40327









#### OPEN ACCESS Beverage consumption and mortality among adults with type 2 diabetes: prospective cohort study

Le Ma, <sup>1,2,3</sup> Yang Hu, <sup>1</sup> Derrick J Alperet, <sup>1</sup> Gang Liu, <sup>4</sup> Vasanti Malik, <sup>1,5</sup> JoAnn E Manson, <sup>6,7,8,9</sup> Eric B Rimm, <sup>1,6,7</sup> Frank B Hu, <sup>1,6,7</sup> Qi Sun <sup>1,6,7</sup>

#### For numbered affiliations see end of the article Correspondence to: O Sun

nisun@bsnh harvard edu (ORCID 0000-0002-8480-1563 Additional material is published online only. To view please visit the journal online. Cite this as: BMJ 2023;381:e07340

http://dx.doi.org/10.1136/ bmi-2022-073406

Accepted: 07 March 2023

#### ABSTRACT OBJECTIVE

To investigate the intake of specific types of beverages in relation to mortality and cardiovascular disease (CVD) outcomes among adults with type 2 diabetes.

Prospective cohort study. SETTING

Health professionals in the United States. PARTICIPANTS

15 486 men and women with a diagnosis of type 2 diabetes at baseline and during follow-up (Nurses' Health Study: 1980-2018; and Health Professionals Follow-Up Study: 1986-2018). Beverage consumption was assessed using a validated food frequency questionnaire and updated every two to four years.

#### MAIN OUTCOME MEASURES The main outcome was all cause mortality. Secondary

outcomes were CVD incidence and mortality.

During an average of 18.5 years of follow-up, 3447 (22.3%) participants with incident CVD and 7638 (49.3%) deaths were documented. After multivariable adjustment, when comparing the categories of lowest intake of beverages with the highest intake, the pooled hazard ratios for all cause mortality were 1.20 (95% confidence interval 1.04 to 1.37) for sugar sweetened beverages (SSBs), 0.96 (0.86 to 1.07) for artificially sweetened beverages (ASBs), 0.98 (0.90 to 1.06) for fruit juice, 0.74 (0.63 to 0.86) for coffee, 0.79 (0.71 to 0.89) for tea. 0.77 (0.70 to 0.85) for plain water, 0.88 (0.80 to 0.96) for low fat milk, and 1.20 (0.99 to 1.44) for full fat milk. Similar associations

#### WHAT IS ALREADY KNOWN ON THIS TOPIC

Depending on the content of sugar and other constituents, different types of beverages may have distinct health effects The prevailing dietary recommendations are largely based on findings in the

Evidence is limited among adults with type 2 diabetes, who have altered metabolism of energy and macronutrients

#### WHAT THIS STUDY ADDS

Among adults with type 2 diabetes, higher intake of sugar sweetened beverages (SSBs) was associated with higher all cause mortality and incidence of cardiovascular disease, whereas intakes of coffee, tea, plain water, or low fat milk were inversely associated with all cause mortality

Greater increase in coffee and tea consumption from before to after a diabetes diagnosis was significantly associated with lower all cause mortality Replacing SSBs with coffee, tea, or plain water was statistically significantly associated with lower all cause mortality among adults with diabetes

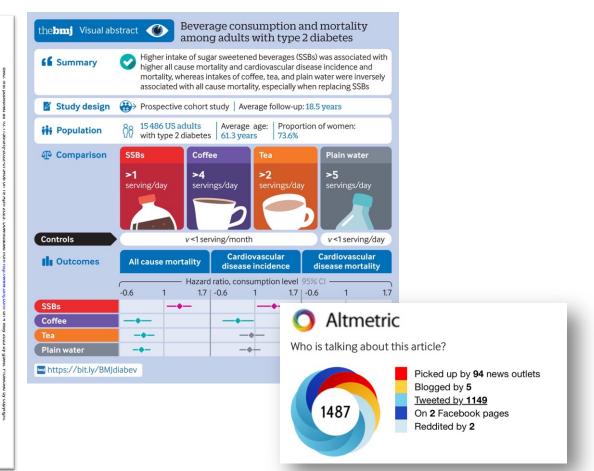
were observed between the individual beverages and CVD incidence and mortality. In particular, SSB intake was associated with a higher risk of incident CVD (hazard ratio 1.25, 95% confidence interval 1.03 to 1.51) and CVD mortality (1.29, 1.02 to 1.63), whereas significant inverse associations were observed between intake of coffee and low fat milk and CVD incidence. Additionally, compared with those who did not change their consumption of coffee in the period after a diabetes diagnosis, a lower all cause mortality was observed in those who increased their consumption of coffee, A similar pattern of association with all cause mortality was also observed for tea. and low fat milk. Replacing SSBs with ABSs was significantly associated with lower all cause mortality and CVD mortality, and replacing SSBs, ASBs, fruit juice, or full fat milk with coffee, tea, or plain water was consistently associated with lower all cause mortality.

#### CONCLUSIONS

Individual beverages showed divergent associations with all cause mortality and CVD outcomes among adults with type 2 diabetes. Higher intake of SSBs was associated with higher all cause mortality and CVD incidence and mortality, whereas intakes of coffee, tea, plain water, and low fat milk were inversely associated with all cause mortality. These findings emphasize the notential role of healthy choices of beverages in managing the risk of CVD and premature death overall in adults with type 2

In 2021 about 537 million adults worldwide had diabetes and this number is projected to rise to 783 million by 2045.1 The risk of cardiovascular disease (CVD), other morbidities, and premature death is particularly increased in adults with type 2 diabetes.2 Dietary interventions play a fundamental role in the glycemic management of adults with type 2 diabetes, although the prevailing dietary recommendations and nutritional guidelines for the general population may not necessarily be directly relevant to adults with diabetes because of their altered metabolism of carbohydrates and other macronutrients.3 4 It is therefore important to evaluate various dietary intakes, such as beverages, in relation to disease outcomes and mortality among adults with diabetes.

That different types of beverages may have distinct health effects depending on the contents of sugar and other constituents has been well documented.56 Several meta-analyses of prospective cohort studies have shown that high intake of beverages with a low energy density, such as plain water, low fat milk, and

































How will it be viewed? (print/mobile/desktop/social)

What will HCPs do with it? (nothing in isolation!)

Where will it be hosted? (indexed/unindexed?)

How will it be distributed? (MSL/KAM/3P/DM)





COMMUNICATION **PRIORITIES** 

CONTENT **ALIGNMENT** 

**CHANNEL ORCHESTRATION** 

**MEASURE AND ADAPT** 



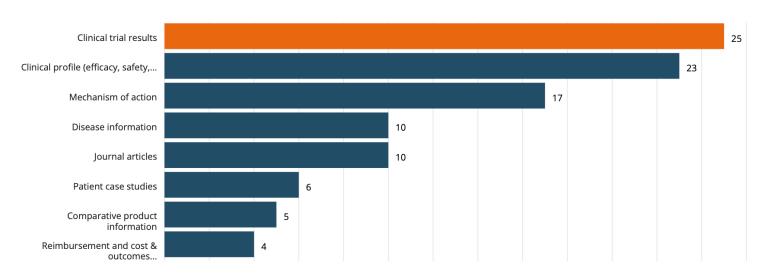








Q: What types of product content do you find most important in a launch situation?"



HCPs were asked to distribute 100 points to no more than 3 options Score = sum of points averaged among HCPs

**Source**: Navigator365<sup>TM</sup> EU5 Specialists, Q3 2023, n=4031)





STRATEGIC OBJECTIVES

AUDIENCE SEGMENTATION COMMUNICATION PRIORITIES

**CONTENT ALIGNMENT** 

CHANNEL ORCHESTRATION

MEASURE AND ADAPT



(Q)

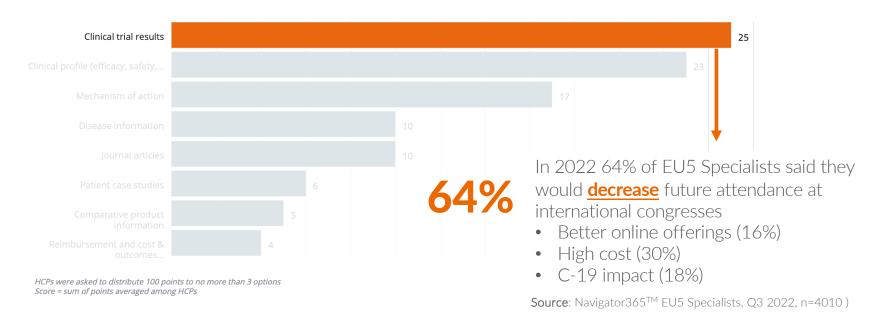








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Source: Navigator365<sup>TM</sup> EU5 Specialists, Q3 2023, n=4031)











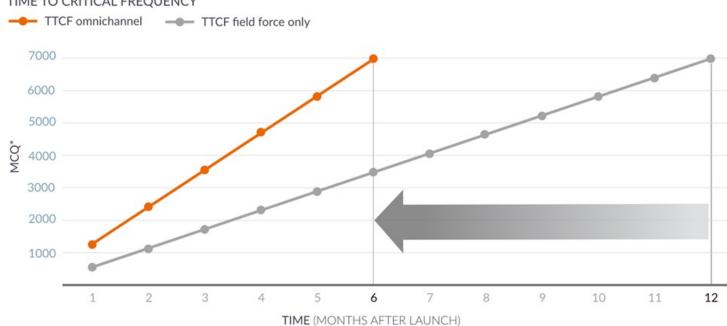






#### WHAT channels should we use?

#### TIME TO CRITICAL FREQUENCY



















WHAT channels should we use?

## Global to local?

## Channel preference differences in local markets

(hospital system set-up, regulatory environment, digital maturity....)











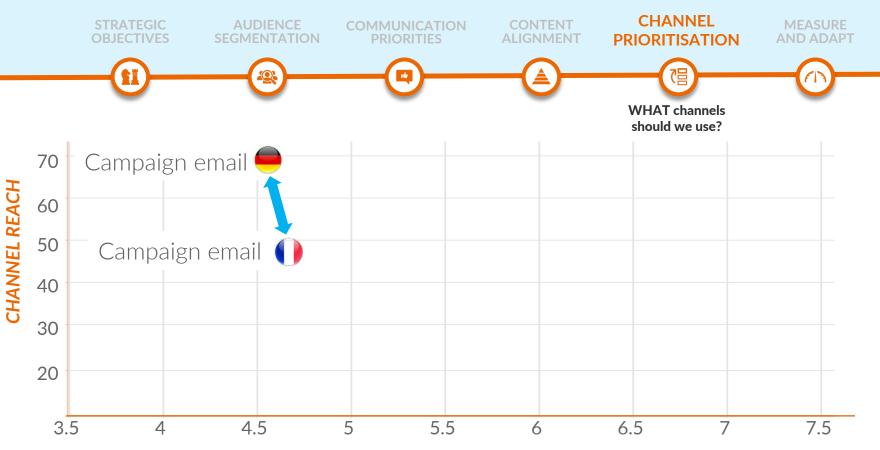










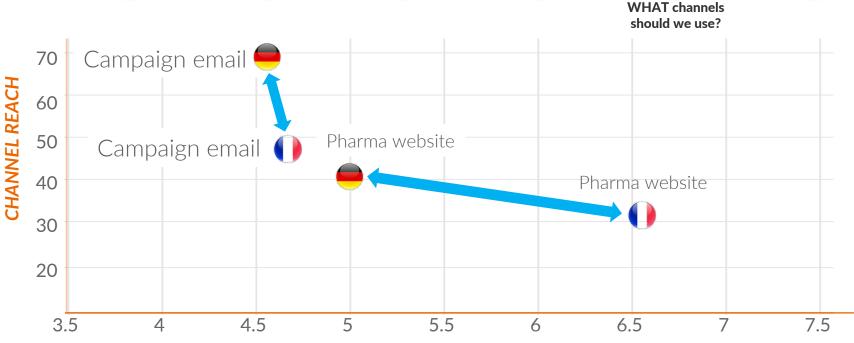


**Source**: Navigator365<sup>TM</sup> FR and DE Single TA,, Q3 2023, n=200)







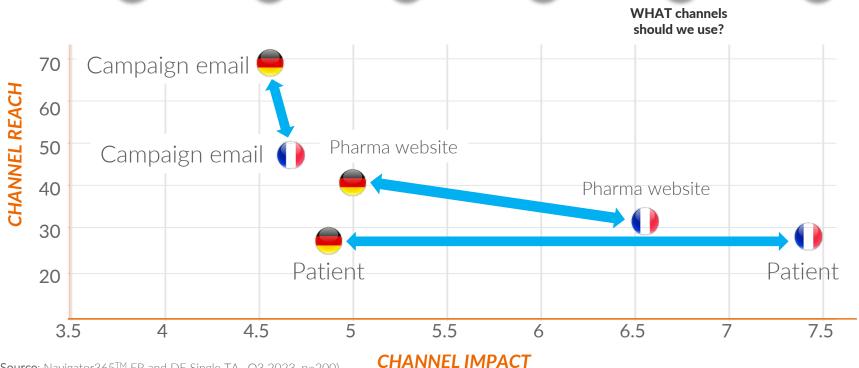


Source: Navigator365<sup>TM</sup> FR and DE Single TA,, Q3 2023, n=200)





**CHANNEL IMPACT** 



**Source**: Navigator365<sup>TM</sup> FR and DE Single TA,, Q3 2023, n=200)











COMMUNICATION PRIORITIES

CONTENT ALIGNMENT CHANNEL ORCHESTRATION

MEASURE AND ADAPT



<u>Q</u>









WHAT channels should we use?

PART 1

RIGHT CHANNELS RIGHT CUSTOMER

PART 2



PART 3

RIGHT 3<sup>rd</sup> PARTY MEDIA PART 4







COMMUNICATION PRIORITIES

CONTENT ALIGNMENT CHANNEL PRIORITISATION

MEASURE AND ADAPT



**Q** 

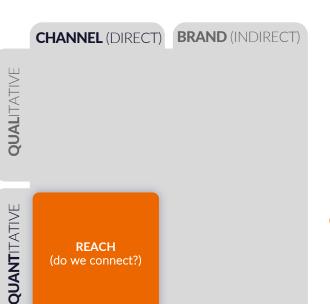








WHICH activities should we start, stop or continue?



Reach & Interaction — The foundation of any campaign — are we generating the right number of touchpoints to achieve our behavioural objectives?

| Email              | Web                | Rep               |
|--------------------|--------------------|-------------------|
| Open rate          | # of visitors      | Calls             |
| Conversion rate    | Time spent on site | Meetings attended |
| Opt-out rate       | % page scroll      | Event             |
| Click-through rate | Time spent on site | # invited         |
| Delivery rate      | Downloads          | # invite accepted |
| Subscribers        | Bounce rate        | % attended        |







COMMUNICATION PRIORITIES

**CONTENT ALIGNMENT** 

CHANNEL PRIORITISATION

MEASURE AND ADAPT



(Q)

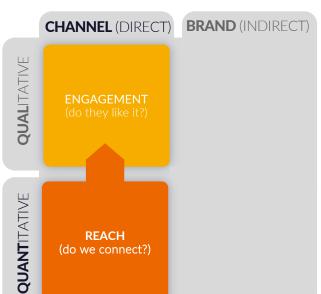








WHICH activities should we start, stop or continue?



Engagement – Is our content appreciated and valuable for our audience?















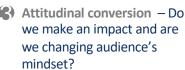






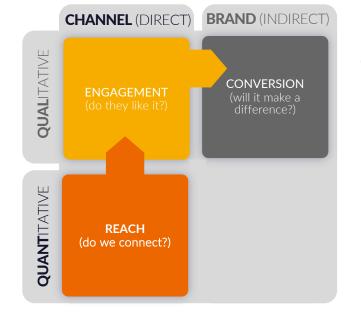
WHICH activities should we start, stop or continue?

□ Impact of a



- Impact of educational event on clinical practice
- ☐ Intent to apply learning to clinical practice
- Intend to prescribe
- NPS of company
- NPS of educational campaign

T-12m ->T-6m>T0m > T6m







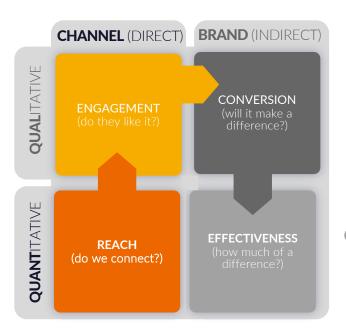








WHICH activities should we start, stop or continue?



ROI – How were we able to increase reach & impact at a lower cost, using Omnichannel?

#### New indication launch FORXIGA (diabetes)

Key drivers for launch success: :

- 1. High NPS
- Digital variety ("richness of mix")
- 3. **Digital share** of overall brand mix and vs other products in same class
- 4. Quality of rep engagement (knowledgeable, value-add)

IQVIA: no-more-surprises-understanding-predictors-of-launch-success (2021)





#### Development of a pragmatic playbook

The playbook needs to form the 'backbone' of the Omnichannel ambition and vision



Use UX/UI best practices to craft a playbook that is both intuitive and straightforward, ensuring seamless adoption by local markets

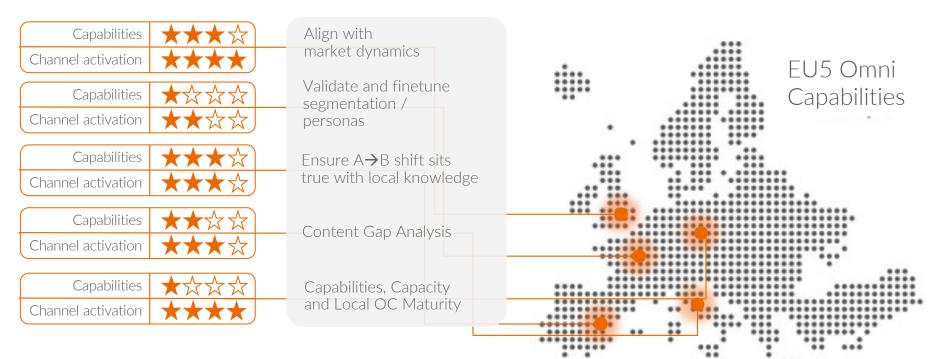
Include local market adoption features like a 'workshop-in-a-box' section for immediate implementation

Supported by clear communications roll-out/plan





#### Tip: Ensure to run LOC Omni readiness ahead of framework roll-out



If you can - pick a pilot market to iterate from





#### Summary take aways

- 1. Half of HCPs neutral/dissatisfied with Pharma efforts at launch
- 2. "Immediates" are critical to launch success in the pre/peri-launch phase they are hungry for content and data prior to launch make sure they can access it across multiple owned, earned and paid channels
- 3. Co-creation and buy-in is critical to increase uptake of plans
- 4. Ensure you take an evidence-based approach for channel selection
- 5. Ensure a robust set of KPIs early-on to measure launch success
- 6. Learn from your pilot markets
- 7. Eventual launch campaign/tactics need to scalable based on market needs and capabilities





## How can we support your launch?















#### Stay tuned!





across.health/newsletter



### Stay tuned!

# Watch out for our **Global Trends Report 2023**

Available in January

Watch out for our newsletter

to receive your free copy

Not subscribed yet?

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#### Please give us your feedback!

Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!





