MSL and Sales Strategies for the US Oncology Market

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Methodologies…

Surveys of 102 practicing US Oncologists and Hematologist-Oncologists

Length: 167 Pages, including 162 Charts and Graphs

Publication Date: Q2, 2012

Valuable for:

Pharmaceutical/Biotech
Sales / MSL Planning
Marketing
Commercial Operations
Contract Sales Organizations
Consultants

What You Will Learn?

- **How US Oncologists want to receive drug info from pharma/biotech manufacturers and which information they find most valuable**
  - **MSLs, sales reps, eDetailing, peer-based literature, payer reps?**
  - **Does practice type make a difference?**
- **Benchmark how much time your reps and MSLs spend with Oncologists vs. the industry average**
- **Prescribing power Oncologists will have in the near future**
- **The most valuable MSL traits and which pharma companies have the best MSLs**

How Can You Use This?

- **Develop smarter sales and marketing strategies**
- **Optimize MSL and sales rep effectiveness by benchmarking your messages/ content with what Oncologists want**
- **Develop targeted collateral with information oncologists want, open more doors for discussions**
- **Deliver messaging through the ideal medium(s)**
- **Focus training efforts based on the practice type, information type, and study/ data type**

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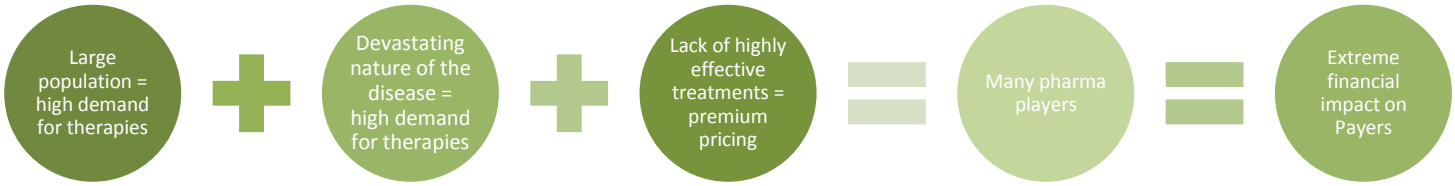
Introduction

No matter which biopharmaceutical pipeline analysis you read, one thing is for certain: Oncology dominates.

Companies have been built, sold, and failed based on trying to improve the therapy options cancer patients have at their disposal. The terminal nature of the disease and the lack of multiple, equally effective treatments results in a business model where high-priced treatments abound. Combine this with epidemiological factors (a relatively high proportion of us will get cancer) and it is no wonder the oncology landscape has many highly motivated players.



While this is not groundbreaking news to our industry, stating it out loud sets a base from which to have discussions around how the landscape of Oncology sales/ information strategies are changing and their effects on physicians and pharmaceutical companies.

The purpose of this report is to measure several aspects of how pharmaceutical companies could and should interact with Oncologists. We choose the word "interact" carefully, in that we did not restrict our testing to purely sales activities and we tested both personal and non-personal interaction methodologies.

Major Report Sections

1. **Access to Oncologists**
   a) Medical Science Liaisons (MSLs)
   b) Pharmaceutical Sales Reps
2. **Frequency and duration of visits**
3. **Impact and satisfaction with interactions**
   a) Pharma companies with best MSLs
   b) What high-performing MSLs do right
4. **The MSL interaction environment**
   a) Most valuable MSL topics and industry connections
   b) Preferred MSL interaction models (proactive vs. reactive)
   c) MSL topic appropriateness
5. **Preferred information dissemination vehicles**
   a) What information US Oncologists want from Sales Reps
   b) What information US Oncologists want from MSLs
6. **Prescribing trends**
7. **Practice setting analysis**
8. **Study data**
   a) Data from all questions in the survey

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Measurements

The report examines how Oncologists prefer to receive certain types of information from pharmaceutical and biotechnology manufacturers.

The report analyzes the following delivery mediums…

- Pharmaceutical sales representatives
- Pharmaceutical Medical Science Liaisons (MSLs)
- eDetail (a presentation on-line or on a memory stick)
- Peer-based paper literature, articles
- Payer representatives

… across the following types of information…

- New competing products
- Changes to treatment guidelines
- Clinical trial safety and efficacy data
- Academic research findings
- General product benefits and risks
- Patient education materials
- Medication adherence materials/ programs
- Medication economics, cost of care, reimbursement levels

… and across various study/data types.

- Randomized controlled trials with a comparator product
- Randomized controlled trials without a comparator product
- Prospective observational studies (registry)
- Retrospective observational studies (database analysis, health claims)
- Meta-analysis of data sets (usually data from randomized controlled studies)
- Health economic outcomes research
- Patient-centric studies (QoL, adherence, functional measures, ease of use)

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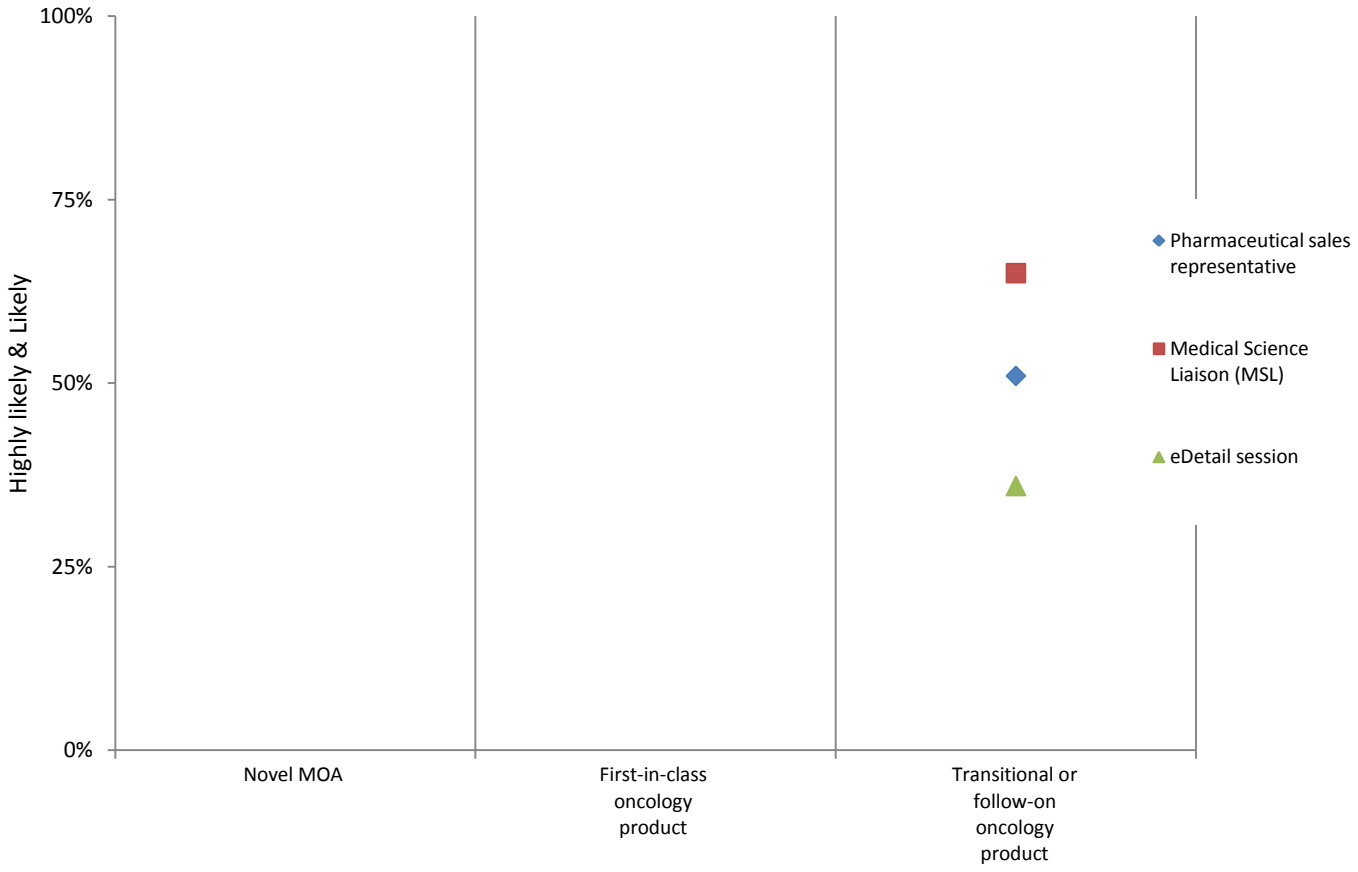
Sample Pages

From the section titled "Access to Oncologists"...

Likelihood of taking a meeting

"Overall, how likely are you to accept a meeting with a pharmaceutical sales representative and with a pharmaceutical Medical Science Liaison (MSL) and/ or complete an electronic detail session to discuss a (insert product classification)? (Base = 102 respondents)

Oncologists are more likely to accept a meeting with MSLs and still prefer traditional sales representatives over eDetail sessions, regardless of the product classification. Given the scientific nature of oncology treatments, the fact that more than one-third of Oncologists would be highly likely or likely to receive an eDetail about any of the three product classifications tested indicates this medium is a viable option for pharmaceutical sales and marketing operations.



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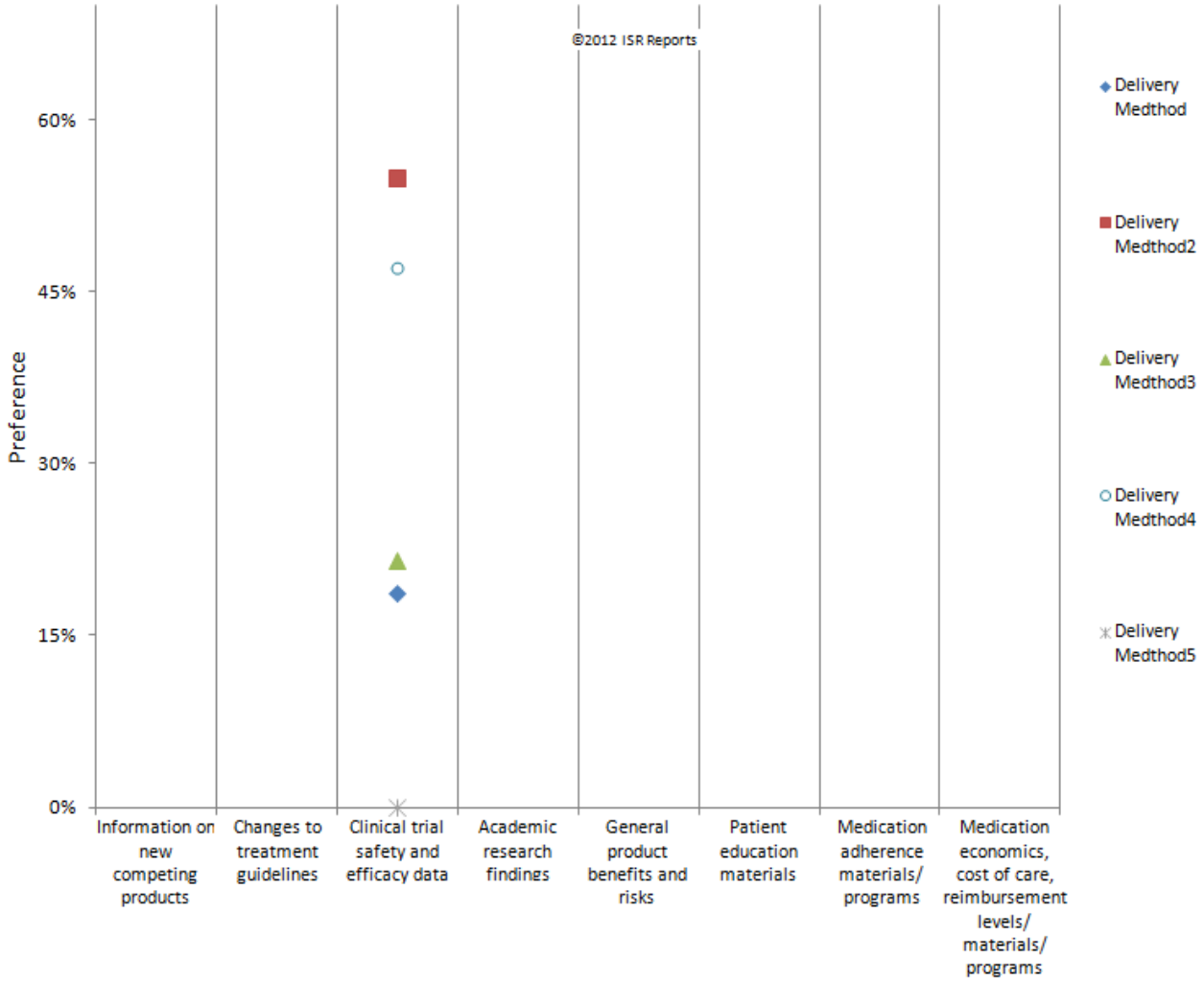
Sample Pages

From the section titled "Preferred Information Dissemination Vehicles"...

Preferred Information Dissemination Vehicles

Oncologists can receive information from a variety of sources; peers, scholarly articles, the pharmaceutical industry, payers, and web-based applications. There are certain types of information they prefer to receive from specific communication vehicles/ sources. Oncologists perceive traditional pharmaceutical sales representatives to be the best source of [redacted] and look to peer-based literature and MSLs for [redacted]. It is interesting to note that for general product information, Oncologists slightly prefer [redacted] over [redacted], [redacted], and [redacted].



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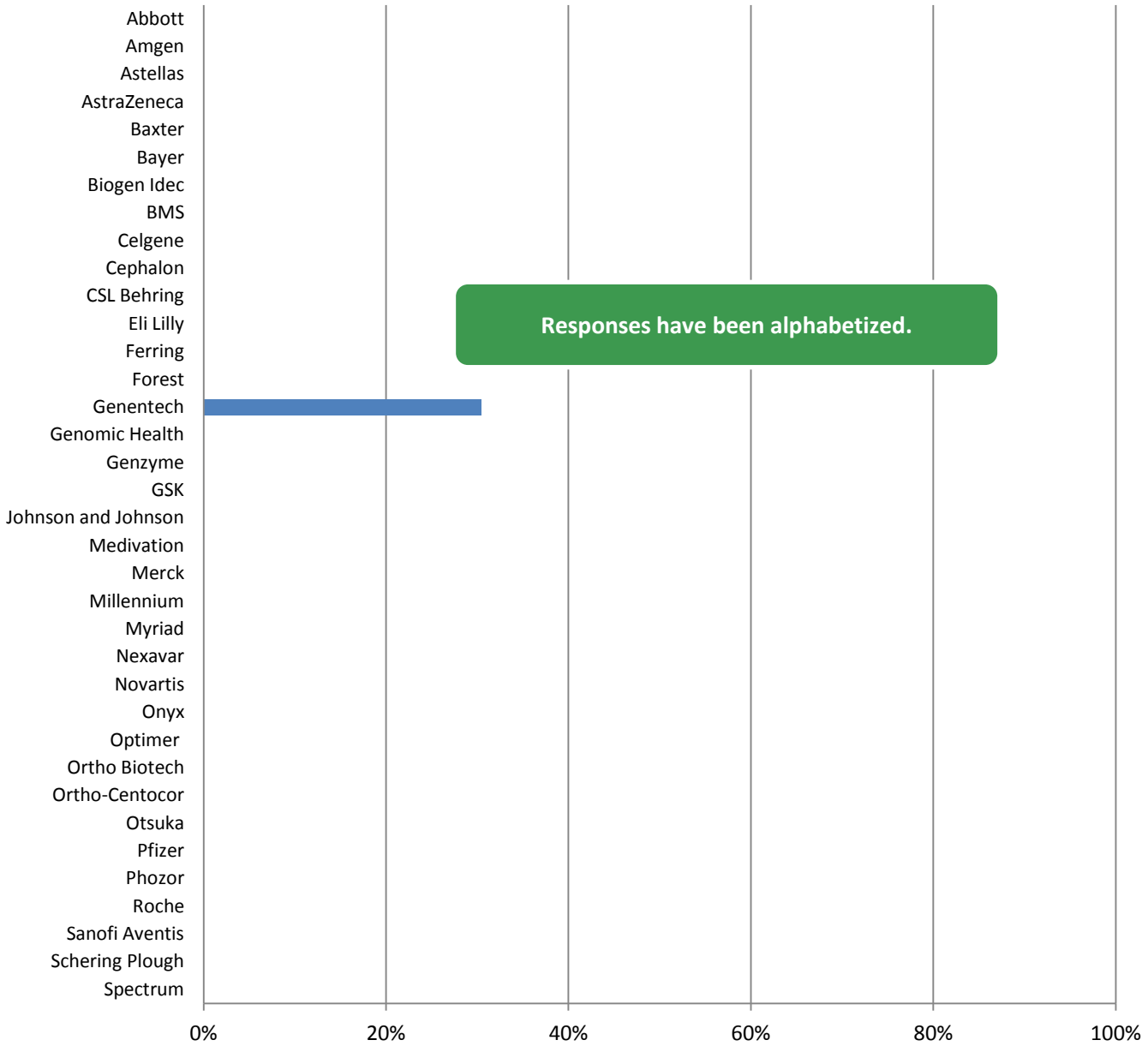
Sample Pages

From the section titled "Impact and Satisfaction with Interactions"...

Although satisfaction with MSLs is relatively high, there is evidence that some pharmaceutical companies have stronger ones than others. On average, respondents were able to name roughly three companies they considered as having the best MSLs.

"Which biopharmaceutical companies have the best MSLs?" (Base = 76 respondents - Open-ended question, Multiple responses allowed)

Coded responses (207 total responses from 76 respondents)



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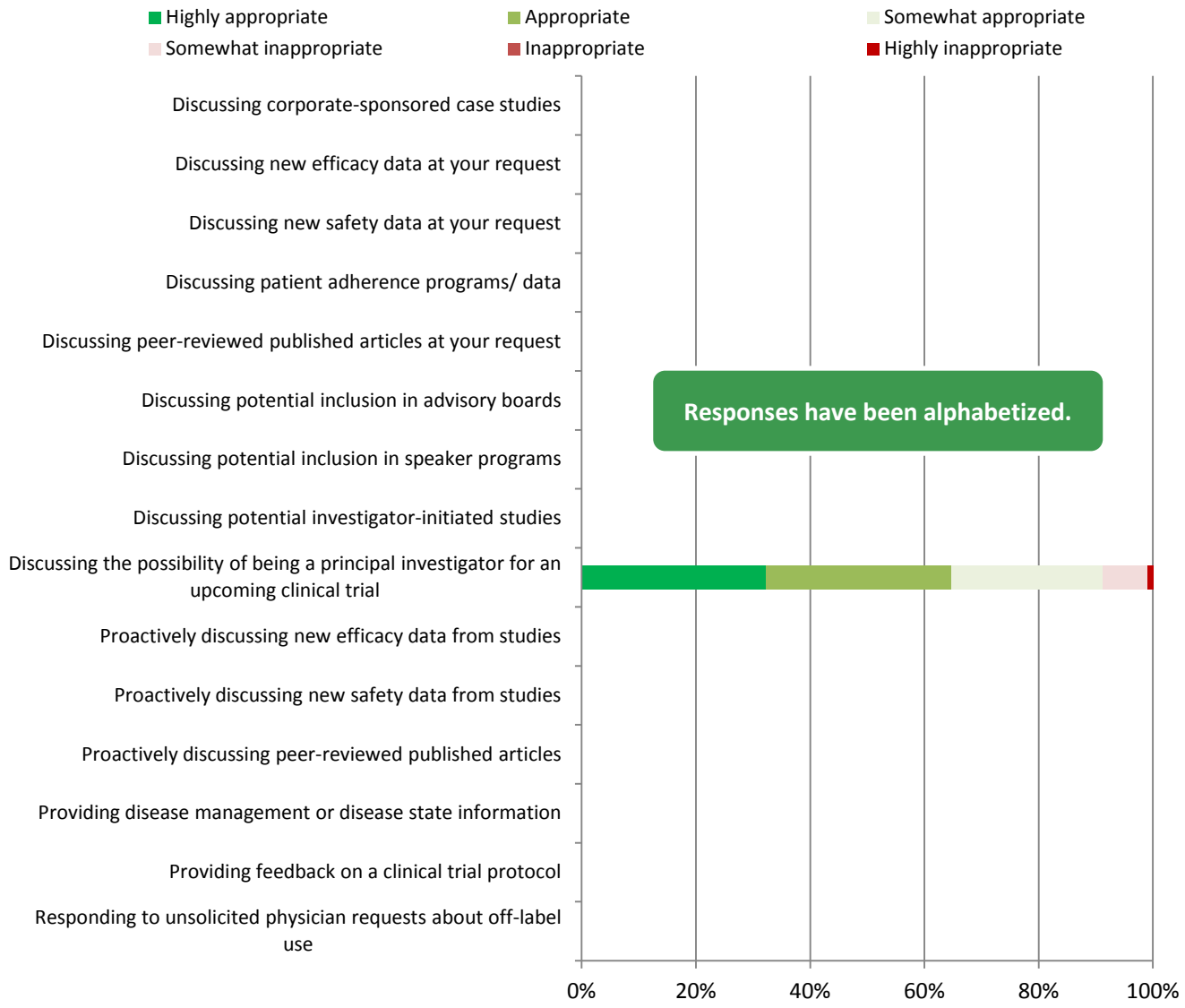
Sample Pages

From the section titled "MSL Interaction Environment"...

In an environment where simply gaining access to physicians is becoming more difficult, there is some good news regarding what topics Oncologists believe are appropriate and inappropriate for pharma-physician discussions:

"Because Medical Science Liaisons (MSLs) are regarded as peer-level personnel whose main job is not to sell a product but rather to foster scientific and medical discussion and be a point of reference for disease education and management, many pharmaceutical companies have varying points of view as to what topics are in-bounds and out-of-bounds for MSL-to-physician discussions. Given the following potential discussion topics, please give us your opinion as to the appropriateness of the discussion between you and a MSL." (Base = 102 respondents)



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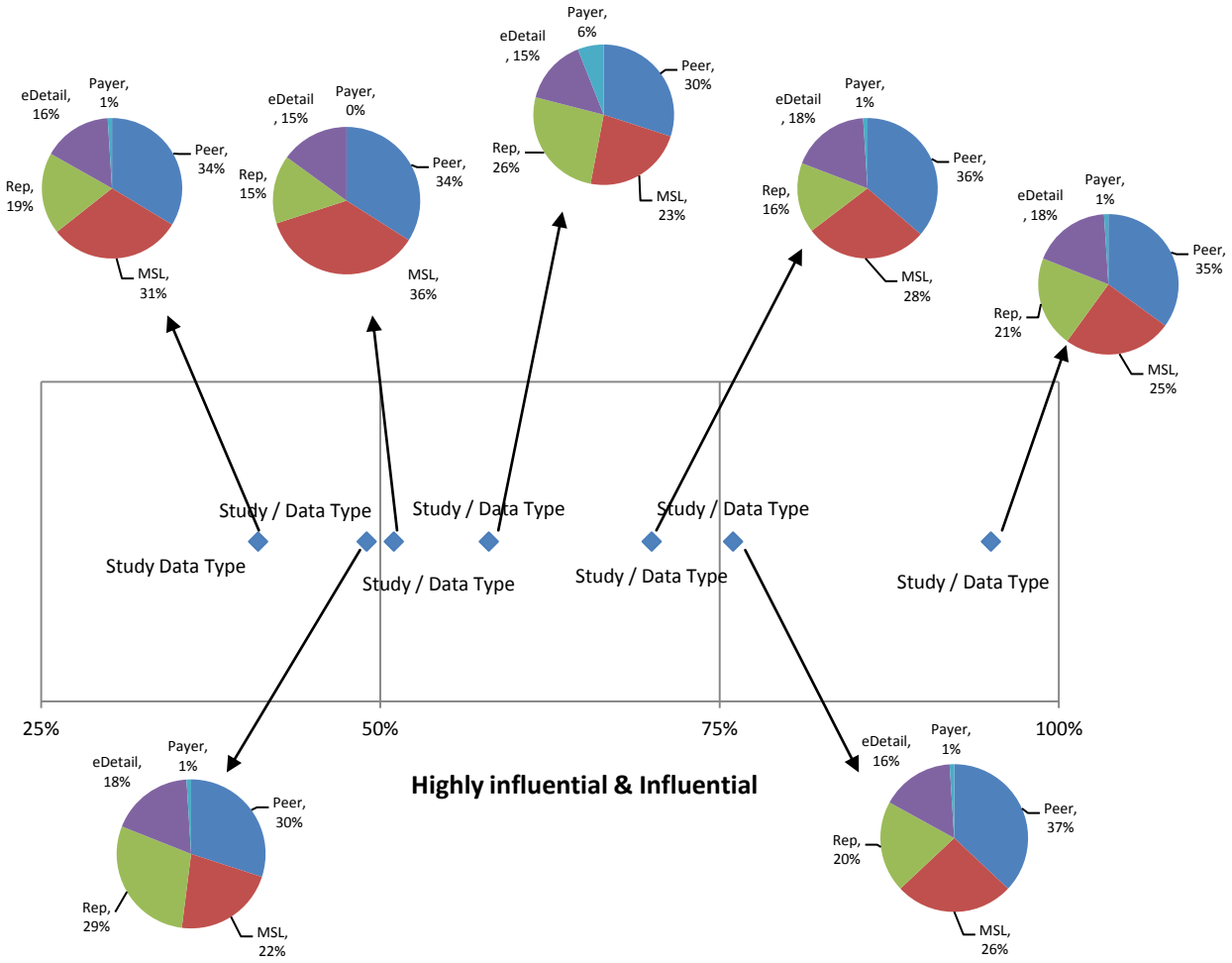
Sample Pages

From the section titled "Preferred Information Dissemination Vehicles "...

The graphic below is a representation that maps the importance that specific study/ data types play in Oncologists' prescribing decisions and overlays the communication vehicle from which they would like to receive that information.



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