

OCTOBER 2009
www.PM360online.com

PM360

THE FULL SPECTRUM OF
PRODUCT MANAGEMENT

VOTE!
OUR 2009
PHARMA
CHOICE
AWARDS
(p.9)

MARKET DRILL-DOWN

New Column!
Data Analysis Reveals
What's Really Driving
the Market

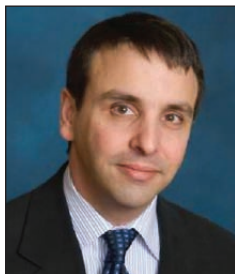
MEDICAL SCIENCE LIAISONS

Scientific Expertise Is
Just the Beginning

SPECIAL AWARDS ISSUE

TRAILBLAZER COMPANY OF THE YEAR WINNER

Bristol-Myers Squibb
Anthony C. Hooper
President for the Americas



Gary Bartolacci is Senior Director of KantarHealth, a healthcare-focused consultancy with more than 40 offices around the world. He can be emailed at Gary.Bartolacci@KantarHealth.com.

Pharmaceutical marketing is undergoing a fundamental transformation as it adapts to new trends. These changes are providing fresh opportunities for market research to contribute to brand success. By pursuing a more holistic approach—one that includes new market and brand factors in its analysis—market research can help brand managers gain a competitive edge.

REFERENCES

1. Mittman BS, Tonesk X, Jacobson JD, *Implementing clinical practice guidelines: social influence strategies and practitioner behavior change*. *Qual Rev Bull* 1992;413-422.
2. Zimbardo PG, Leippe MR, *The Psychology of Attitude Change and Social Influence*. Philadelphia, Temple University Press, 1991.
3. Soumerai SB, McLaughlin TJ, Gurwitz JH, Guadamogli E, Hauptman PJ, Borbas C, et al. *Effect of Local Medical Opinion Leaders on Quality of Care for Acute Myocardial Infarction, A Randomized Controlled Trial*. *JAMA* 1998. 279_1358-1363.
4. Jeremy M. Grimshaw, Martin P. Eccles, Jeny Greener, Graeme MacLennan, Tracy Ibbotson, James P. Kahan and Frank Sullivan, *Is the Involvement of Opinion Leaders in the Implementation of Research Findings a Feasible Strategy?* *Implementation Science* 2006. 1:3.

INFLUENTIAL DOCTORS

Identifying and tracking marketing effectiveness with this high-impact segment.

BY CARY BARTOLACCI

More than 90% of pharmaceutical executives now say they are adopting service models, shifting their focus from measuring internal sales processes to motivating external sales drivers: the physicians writing prescriptions and the stakeholders influencing them.

The list of influential stakeholders is a long and diverse one, including patients, payers, media (for example, online, offline, journals, and DTC), key opinion leaders (KOLs), and other influential doctors. The influences being exerted are not only many and eclectic, they are also dynamic.

This article focuses on one group of stakeholders exerting influence—KOLs and other influential doctors—explaining why it is crucial to identify and profile them. The article also describes a proven method for identifying influential physicians, as well as an innovative approach to measuring and tracking a company's performance among these important targets.

Identifying Key MDs

Diffusion research in healthcare has proven there are physicians who have the potential to influence and even change the clinical practice of other doctors.¹ While this influential group certainly includes those traditionally thought of as KOLs—such as those who are frequent presenters or prolific authors—it also includes other physicians, not necessarily well known or well published. These other physicians can exert tremendous influence on their peers, particularly at the local community and regional levels. Their influence is especially strong in times of uncertainty,² such as when a new product or technology is first introduced and only limited definitive clinical information is available.

During these uncertain periods, doctors truly rely on the experiences of trusted colleagues or respected peers to guide their decisions on product adoption. Knowing who these physicians are can provide rich targets for critical product uptake in the early stages of product launch.

So how can these influential doctors be identified? A traditional bibliometric approach will certainly yield a large number of KOLs. Looking for physicians who have been widely published or gained national

attention, however, does not reveal or make the distinction between doctors who are truly influential and those who are merely highly visible through self-promotion.

What characterizes the influencers? These influential physicians are often described as possessing one or more of the following traits: clinically competent,³ caring,³ good listeners,³ socially accessible,⁴ and conformers to system norms.⁴ There is really only one effective method for identifying those physicians who fit this description and have earned the trust and respect of their colleagues—peer nomination. Their colleagues must identify whom they rely on when they need advice on trying a new product or therapy or when they have a particularly difficult patient.

Implementing Peer Nomination

The ideal approach to peer nomination would be to survey as large a group of key customers as possible—for example, all those treating high volumes of patients for a specific disease, identified either through prescribing patterns or through internal company databases. The goal of such a large survey sample is to identify as many influencers as possible.

Multiple fielding approaches effectively accomplish that goal, from reaching out to the universe with a mail or CATI survey to using online physician panels. Time and budget constraints are usually the factors determining which route gets taken. Ultimately, either approach will yield tremendously useful information, albeit with variations in the amount and robustness of the business intelligence generated.

One added bonus of peer nomination is that—in addition to validating existing KOL lists—it reveals geographic spheres of influence for KOLs. That detail on spheres of influence is not easily obtained from any other methods, such as secondary research means or internal groups with knowledge of influential doctors.

A peer nomination process ensures the results are relevant to a project's objectives. It also avoids some of the assumptions and hypotheses associated with approaches that mine secondary data alone.

Tracking Satisfaction Levels

After identifying influential doctors, two issues remain:

- 1) How can companies track their progress and the effectiveness of their marketing or information diffusion programs with these doctors?
- 2) How do companies determine whether these doctors are advocates or detractors of their brands?

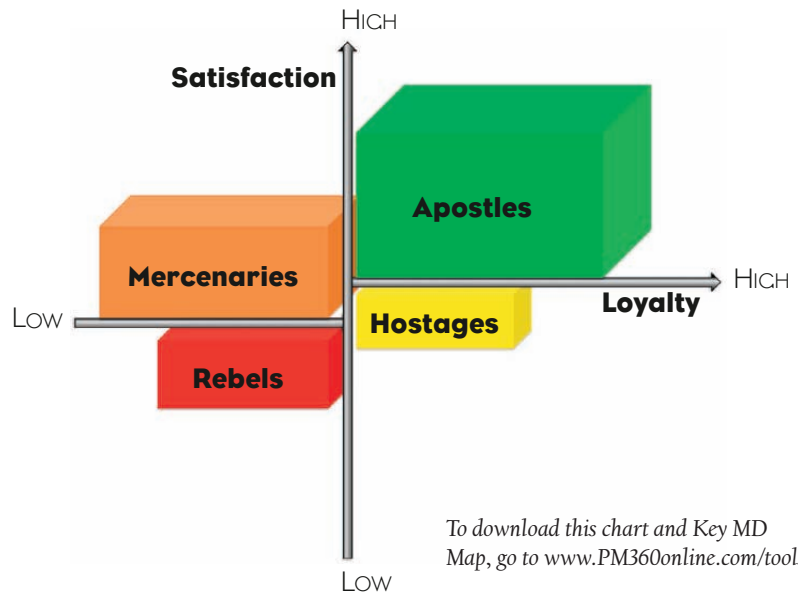
New research this year by TNS Healthcare (now part of KantarHealth) reveals that the percentage of doctors who are dissatisfied and actively generating negative word of mouth has risen from 12% to 19% in the United States. Clearly, it is increasingly important to understand how influential doctors are receiving and reacting to brand messages.

To address the first issue of tracking effectiveness, one could analyze prescription data over time among influential doctors and those they impact versus a control group, for proof that marketing or other programs are working. However, the lack of availability of prescription data in many markets—such as in countries outside the U.S. or states banning physician-level prescribing information, as well as in hospital-based or most oncology markets—make this approach unworkable in many situations.

To address the second issue of determining advocates versus detractors, one could use literature reviews or ask the sales force to identify influential doctors who are brand champions or brand detractors. This approach would be highly resource intensive. It also is not practical because not all doctors will comment publicly about a brand. Another method is clearly needed.

One solution that could address both issues is applying a relationship measurement score such as TRI*M, developed by TNS. TRI*M has been applied across multiple sectors to help

TRI*M Customer Typology



To download this chart and Key MD Map, go to www.PM360online.com/tools

companies measure and monitor their relationships with key stakeholders.

In this case, companies should target influential physicians identified through a peer nomination process. Targeting a combination of both key customers and identified influential physicians would allow for analysis across three groups—influential doctors and KOLs, key customers, and those who are both.

The stakeholder research would be conducted immediately following the influential physician identification work to ascertain the proportion of influential physicians who fall into a particular relationship segment, such as one of the four TRI*M categories:

- **Apostles**—customers who are satisfied and actively generating positive word of mouth
- **Rebels**—customers who are dissatisfied and actively generating negative word of mouth
- **Hostages**—customers who do not want to stay with a company but feel they have no other choices
- **Mercenaries**—customers with low loyalty who will quickly move on to what they see as the next “best deal”

The analysis would also reveal similar information for key competitors. While companies won't know specifically which doctors fall into each category because all respondent names are

blinded, they will have a read on where they stand versus their competitors in the minds of influential doctors.

Essentially, a company's goal is to maximize the ratio of “apostles” to “rebels,” or what is called the Market Resistance Index, among these doctors.

Outputs from the study also would uncover areas where a company is performing strongly, as well as where it needs improvement. In addition, the results would establish a benchmark against which a company can measure itself by repeating the study at regular intervals. This would provide an effective way to measure the impact of programs targeted to influential physicians.

Conclusions

The current state of the industry demands the efficient use of costly resources, guided by rigorous and well-designed market intelligence. Instituting a program using peer nomination for identifying the truly influential doctors can advantage marketers over their competitors who may be using traditional methods for targeting prescribers. Once companies enhance their targeting, implementing a tool such as TRI*M can help them measure and monitor their brand or corporate reputation with this influential group over time to maintain satisfaction and loyalty, ultimately driving brand and corporate performance. ○



He Has Never Spoken at a Conference, Earned Acclaim for His Research or Published an Article. But He Is Having a Profound Impact on Your Business.

How Can You Reach Him?

Only KantarHealth's KeyMD Nfluence™ Mapping Suite Takes You to the Doctors Who Are Not Just Highly Visible but Truly Influential—Down to the Local Level.

Influential physicians are critical to your brand's success—but finding them isn't easy. Even doctors who are frequent presenters and prolific authors may just be great self promoters—not strong influencers. Understanding who influences therapy decisions requires speaking directly to physicians.

That's why KantarHealth offers the KeyMD Nfluence Mapping Suite—a unique portfolio of custom and multi-client offerings that reveals peer-identified thought leaders. Most KOL services use publication searches weighted toward nationally-published doctors, missing local and regional leaders who may have stronger impact on physician behavior. KantarHealth incorporates a peer-to-peer approach with secondary research, providing a complete view of influence at every geographic level.

You can identify **who** is influencing clinical decisions. **What** the scope and strength is of each influencer's network. And **where** each doctor is exerting influence. Plus, with offices in 40+ countries, we give you global reach—with a full understanding of local privacy laws.

Whatever your target country or category, you can build the right service for your needs. To see how KeyMD uncovers the true influencers—around the corner or across the globe—**call Gary Bartolacci at 914-909-4255.**