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Pharma Sales World 2007:

*Advanced Sales Force
Remodelling Strategies in a
Multi-Channel Environment*

PharmaSALES
WORLD 07

*in-depth report from a
Worldwide Business Research conference*

held in Prague, 5–6 November 2007

by Dr Andrée Bates



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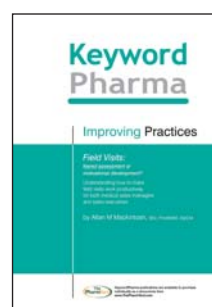
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Pharma Sales World 2007: Advanced Sales Force Remodelling Strategies in a Multi-Channel Environment

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Pharma Sales World 2007: Advanced Sales Force Remodelling Strategies in a Multi-Channel Environment

*in-depth report from a
Worldwide Business Research conference*

Dr Andrée Bates

Executive summary

The current environment for pharmaceutical companies can seem a hostile one, with major declines in sales, industry reputation and customer knowledge. However, to tackle these challenges, pharmaceutical companies are developing better processes, enhancing productivity and increasing sales force effectiveness.

The Worldwide Business Research conference, Pharma Sales World 2007: Advanced Sales Force Remodelling Strategies in a Multi-Channel Environment, held in Prague on 5–6 November 2007, focused on best practices within the industry, providing examples and inspiration for companies struggling with the status quo. The conference looked at the changing market dynamics, potential methods of sales force remodelling and the use of data in effective change. It also explored innovative training and development, performance measurement and multi-channel strategies.

This *Conference Insights* review looks at how the pharmaceutical industry is responding to increasing market pressure and changing customer influence. The report uses case studies and industry leader recommendations to examine the means and methods of success in today's pharma industry. It also outlines the practical advice and insights offered by the presenters at the conference, and provides a glimpse of the future, with details on and discussions of the most effective systems for representatives and sales. The report concludes with an outsider's view of the market, which illustrates how other industries faced similar roadblocks but found their way to the other side.

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Pharma Sales World 2007 – Programme

Organised by Worldwide Business Research, Prague, 5–6 November 2007

Day one

Chair:

Martin Fagan, *CEO, Infozyme*

CHANGING MARKET DYNAMICS

Integrating your sales and reputation management strategies to ensure long-term profitability

Dudley Ferguson, *MD, Astellas Pharma Ltd*

Maximising the effectiveness of your asset in an increasingly competitive pharmaceuticals market

Ian Talmage, *VP Marketing, Bayer Healthcare*

SALES FORCE REMODELLING

An update on global pharma and the continuing role of ROI

Stewart Adkins, *Director, Stewart Adkins Advisors*

Reshaping essential practices to increase the strength of your sales force model consistently across the globe

David De Vidi, *Head of International Sales Force Excellence, Business Planning and Services, Almirall*

Managing the migration to a key account model to drive relationship-based selling

Esther van Hulst, *Senior Director Global Sales Development, Cegedim Dendrite*

How can you right-size your marketing promotional resources to effectively drive market share in a changing pharma environment?

David Gascoigne, *VP Global Promotion Management, IMS Health*

USING INFORMATION TO GENERATE CUSTOMER INSIGHTS

Extracting the right data from a range of sources to build in-depth customer insights

Stefan Langthaler, *Head of Business Systems, Actavis*

Generating effective customer insights in emerging markets to deliver added value to stakeholders and drive revenue

Piotr Markiewicz, *Head of CV Risk Management Group, Bayer-Schering*

Day two

Chair:

Stewart Adkins, *Director, Stewart Adkins Advisors*

SALES FORCE TRAINING AND DEVELOPMENT

Driving the development of the first-line sales manager to maximise productivity in a constantly changing healthcare environment

Mirek Lubecki, *Marketing and Sales Director, Astellas*

Effectively up-skilling your sales force to ensure your business thrives within a highly competitive, multi-stakeholder, multi-channel environment

Martin Symons, *General Manager, Recordati UK*

Panel session: Developing a high-impact training programme to maximise results and ROI

Panellists: Mirek Lubecki, *Marketing and Sales Director, Astellas*, Martin Symons, *General Manager, Recordati UK*, Jason Stone, *Sales Operations Manager, Wyeth*

SALES FORCE PERFORMANCE MEASUREMENT

Mapping out an appropriate set of KPIs to measure the performance of your sales force in a multi-channel multi-prescriber environment

Damian Colehan, *SFE Director, Actis Sales Technologies*

Panel session: Leveraging increased competition in the market to drive innovation in sales force development

Chair: Damian Colehan, *SFE Director, Actis Sales Technologies*

Panellists: Stewart Adkins, *Director, Stewart Adkins Advisors*, David De Vidi, *Head of International Sales Force Excellence, Business Planning and Services, Almirall*

MULTI-CHANNEL STRATEGIES TO OPTIMISE FACE-TO-FACE TIME

Exploiting online techniques to boost the effectiveness of face-to-face time – e-detailing, e-visits and other online approaches

Bart Vannieuwenhuysse, *Executive Director, CRM, Janssen-Cilag*

Driving creativity and innovation in the use of multi-channel strategies – drawing from experiences in FMCG

Isabell Remus, *Head of Therapeutic Franchise, Novartis Pharma AG*

NEW REPORT ON SFE METRICS SPECIAL DISCOUNT FOR PHARMA SALES WORLD



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Eularis (www.eularis.com) have unparalleled years of experience in pharmaceutical marketing analytics and predictive algorithm analyses of pharmaceutical marketing activities. Their analyses quantify the financial impact of individual sales and marketing activity - as well as recommending the optimal synergistic combination of activities (and budgets) for an individual brand to have maximum market share growth. Eularis offers brands the bottom line facts: what messages and which specific sales and marketing activities are truly impacting a brand's prescription sales - by how much - and what elements within each activity need to change (and how) for increased results.

NEW SALES FORCE EFFECTIVENESS METRICS REPORT from Eularis

Pharmaceutical Sales Force Effectiveness Metrics:

Are You Measuring the Wrong Things?

Written by Dr Andrée K Bates. Published Nov 2007

Special 30% discount available from: www.PharmaIndustrySFE.com - quote ref "praguesfe07"

Overview

With the ever-increasing pressure to ensure maximum return on investment, sales force effectiveness is becoming a high priority area in the global pharmaceutical industry. Sales force represents the largest spend in sales and marketing, and yet study after study shows that the returns gained from this spend are not particularly strong. A recent IMS report found that pharma sales force effectiveness declined by 23% in the recent period of 2004 to 2005. Written by Eularis for CEOs, marketing executives and sales executives, and with market data and case studies as evidence, "Pharmaceutical Sales Force Effectiveness Metrics: Are You Measuring the Wrong Things?" examines this alarming issue. The startling discovery that this new, comprehensive report uncovers is that the very metrics currently being used to assess sales force effectiveness are in fact the ones aiding its decline.

The report dissects current SFE metrics and their limitations in the pharmaceutical industries of the United States, Europe and Japan, and offers appropriate metrics to solve these problems. "A pharmaceutical organization's sales force represents the largest source of spend, second only to research and development. Better metrics must be used to measure both the effectiveness and the financial impact of this very significant budget area because the effectiveness measurements used by most top pharma today actually contribute to the decline in effectiveness of the field force," commented the author of the report, Dr. Andrée K. Bates, president of Eularis. The report discusses appropriate metrics to solve these problems, and demonstrates implementation methods and issues. Sales force effectiveness is a difficult concept to measure, but doing so can push pharmaceutical companies past today's hurdles and into increased productivity and sales.

Topics include:

- **Background: The Scale of the Sales Force Effectiveness Problem**
- **Assessment: Current Metrics Used and their Contribution to the Problem**
 - a. Sales Force Size and Share of Voice
 - b. Sales Calls per Day
 - c. What's Missing
 - d. Future Measures
- **The Problem with Sales Tools**
- **Changing the Focus**
 - a. Customer Focus
 - i. Targeting
 - 1. United States
 - 2. Europe
 - ii. Relationships
 - iii. Call Quality
 - b. Message Focus
 - c. Continuous Monitoring
 - **Problems Specific to Europe with Sales Force Effectiveness**
 - a. Western Europe
 - b. Central and Eastern Europe
 - **The Japanese Market: Sales Force Effectiveness Issues**
 - **The Right Metrics to Solve the Problems**
 - a. Efficiency versus Effectiveness
 - b. Targeting
 - c. Effectiveness Measurement: Moving Beyond 'Recall' and 'Intent to Prescribe'
 - d. Sales Forces Optimisation
- **Implementation Issues**
 - a. Productivity
 - b. Action Plan
 - c. Emotional Buy In
 - d. Where does 'e' fit in: The Role of eDetailing
 - e. CRM and other Technologies
- **Results Analysis**
 - a. Case studies
- **Ongoing Monitoring**
- **The Future?**

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Introduction



The pharmaceutical market is rife with change, and much of it is a direct threat to the longevity and bottom lines of individual companies. However, out of this shifting market comes opportunities for valuable adaptation, better processes and enhanced productivity.

Pharma Sales World 2007: Advanced Sales Force Remodelling Strategies in a Multi-Channel Environment, organised by Worldwide Business Research, not only reminded attendees of the significant challenges the industry faces today, but also introduced new ones. It described declining sales, the changing influence of customers and the deteriorating reputation of the industry. It also detailed many of the industry's attempts at fixing these problems while introducing new complexities, particularly with sales force effectiveness (SFE) programmes.

So how are pharmaceutical companies responding? This conference demonstrated how sharing best practices can provide the inspiration to meet and overcome these challenges. Presenters with experience at Astellas, AstraZeneca, Novartis and Bayer Schering Pharma advocated new methods for improved productivity that may, in the process, increase sales, satisfaction and synergy.

Collectively, speakers proposed a number of potential solutions. They showed how the integration of processes can eliminate many problems within sales and marketing, and how simplicity of activity, measurement and strategy can remove headaches and increase sales. In addition, they highlighted how effective training built on true motivation and proper measurement can provide a leaner, more productive sales force, and how multi-channel methods can reach an evolving customer base with more appropriate and targeted messages.

Presentations also focused on the use of data in effective change and the need for partnerships with customers, branding and evolved sales models that create what we all seek: accountability and responsibility in productive representatives.

Dr Andrée Bates
January 2008

About the author

Dr Andrée Bates is the Managing Director of Eularis. Her career has encompassed academic, clinical and pharmaceutical positions throughout the world. She has gained wide recognition within the international healthcare industry for her work on return on investment (ROI) and marketing effectiveness measures in pharmaceutical marketing, and is the author of many publications on this topic in peer-reviewed journals. In addition, Andrée has been invited to lecture on e-detailing ROI in the Pharmaceutical MBA programme at INSEAD Business School, and on marketing ROI at the Center for Pharmaceutical Marketing Studies, Erivan K. Haub School of Business, St. Joseph's University, Philadelphia, PA, USA.

Eularis applies sophisticated analytical processes to quantify the sales impact of specific marketing programmes for pharmaceutical brands. These analyses determine the financial return for individual sales and marketing activities, as well as the optimal synergistic combination of activities (and budgets) for maximum market share growth.

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