

Pharmaceutical Sales Force of the Future

How the role of the Pharma Sales Representative changes towards providing insights instead of information and how the interaction with the Healthcare Professional (HCP) intensifies for individual steps of the HCP journey.

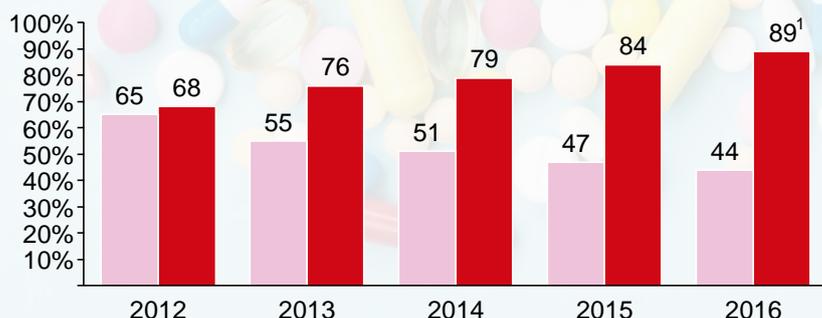
The Pharmaceutical industry continues to experience shifts from managing diseases to managing patients' health, from payment for drugs to payment for outcomes, from one-drug-fits-all to precision medicine – in short: The Pharma industry continues to become more patient-centric.

These developments offer the potential for Pharma companies to disrupt current business models and achieve functional excellence. As important component of Pharma companies, the Marketing & Sales function will also be affected. On the following pages, we would like to share our thinking regarding how the above-mentioned developments impact the Marketing & Sales function and more specifically shape the future Pharmaceutical Sales Force.

The role of the Sales Force will change as information is easily available and willingness to see Sales Reps decreases

Change in HCP accessibility and obtainment of online information

Insights



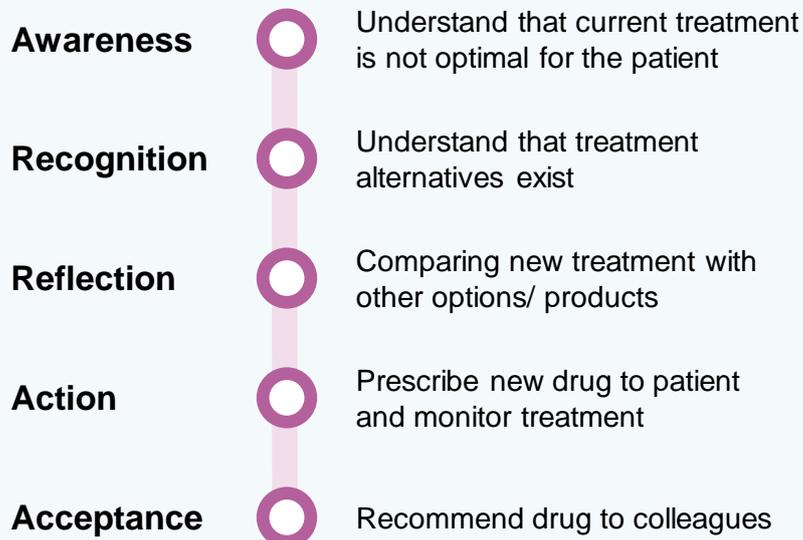
- Accessibility of HCPs decreases as HCPs increasingly obtain information online
- The Sales Force of the future will need to provide more than just information to increase HCP's willingness to see Sales Reps
- The current role of the Sales Force needs to progress

■ Percent of accessible HCPs

■ Percent of HCPs obtaining information via smartphone

1) Extrapolated using previous years' growth rate
Source Year: 2017 & 2015, US focus

The HCP journey consists of the following steps



Along the journey, pharmaceutical companies engage the HCP across multiple channels.

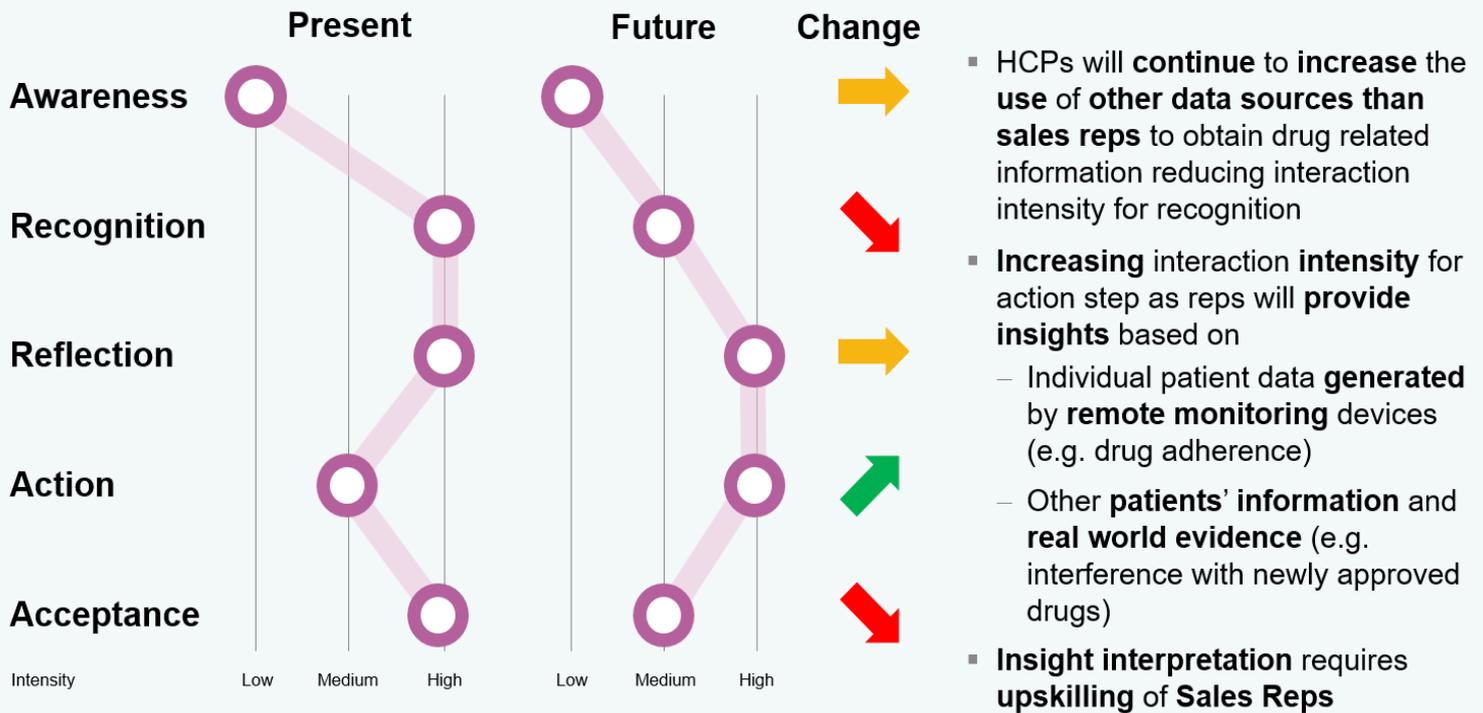
For example, the HCP could come to the awareness that the current treatment option is not ideal by accessing clinical trial results on the pharma company's website.

Following that awareness, the HCP could deepen his/her understanding of treatment alternatives by attending a Key Opinion Leader talk.

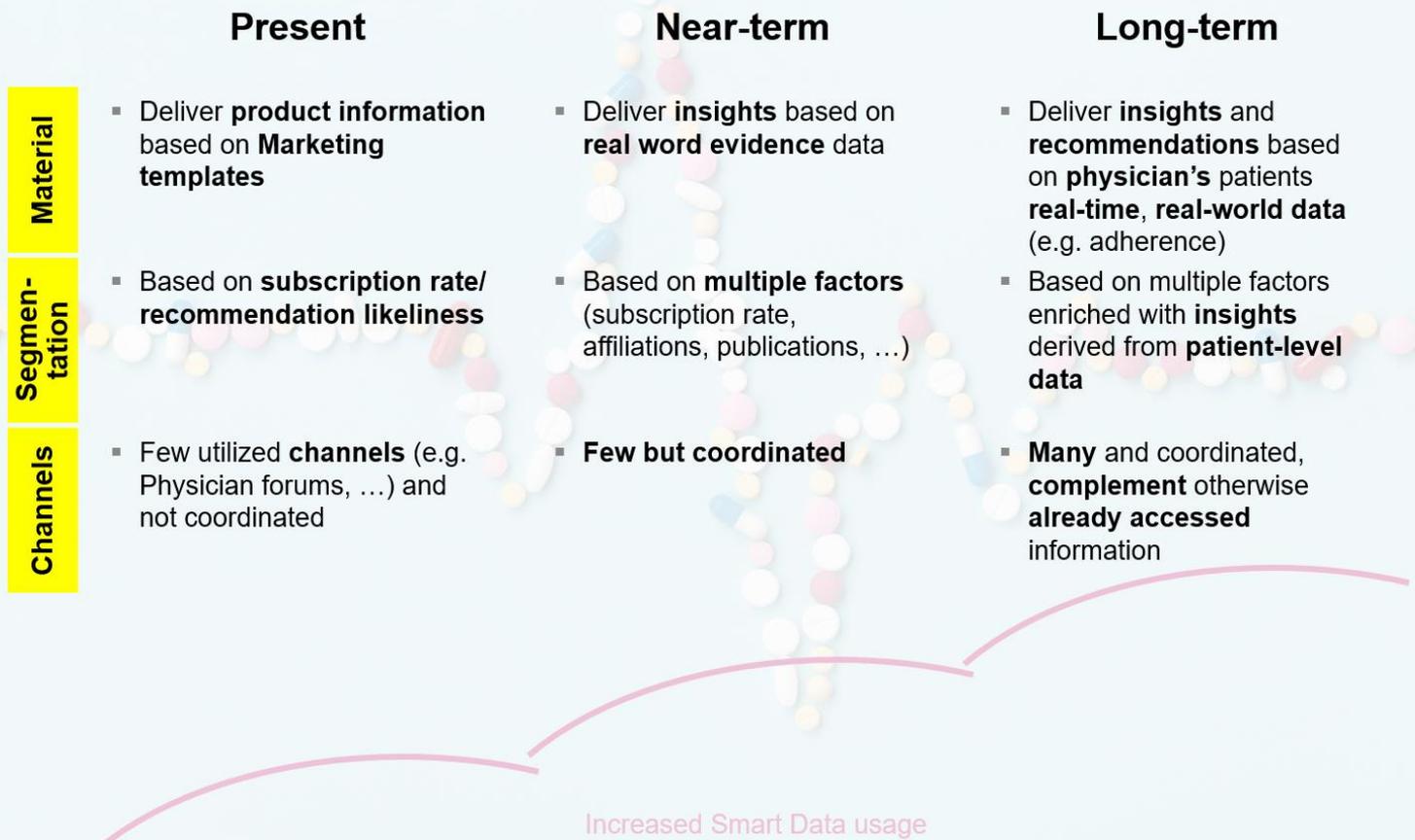
During the Acceptance step the recommendation to colleagues could occur via the online HCP network platform supplied by the pharma company.

Sales Reps will need to provide insights instead of information; insight interpretation requires upskilling

Interaction intensity between the Sales Rep and the Healthcare Professional (HCP)



Sales Reps require personalized information at the right time to satisfy changing HCP requirements



In conclusion, we believe that the **Pharmaceutical Sales Force will continue to exist but interaction with the Healthcare Professional (HCP) will change**. Instead of **creating awareness** about the individual company's **products** and their **benefits**, the **Sales Representative will provide insights** and thereby interact more intensively with the HCP. This means that **interaction intensity decreases during earlier steps of the HCP journey and increases for the action step**.

In the long-term, we foresee that the **Sales Representative provides the HCP with patient insights based on real-world data**. For example, the Sales Representative could provide patient specific **insights on adherence** (obtained from remote monitoring devices), and what might cause **patients to skip drug regimens**.

As detailing calls of the Sales Representative will change, so will requirements of detailing materials, created by Marketing departments. We believe that detailing **materials** will be generated cloud based and in **real-time during the call**. Taking into account patient data and **considering** which **information** the **HCP** has **already accessed/received via different channels** such as Social Media and HCP platforms.

Around **patient data, its ownership and security**, a lot of **questions remain unanswered**. We believe that **Pharma companies** have to be **extremely aware** about **non-Pharma competitors pushing into the value chain** and securing valuable data. Consequently, Pharma companies have to be aware about not becoming the commodity provider. However, we believe that **Pharma companies are uniquely positioned to orchestrate the future collaboration between healthcare stakeholders** such as physicians, patients, payors, regulators and researchers focused around data. The Pharma industry is already well connected with stakeholders (e.g. for pricing discussions or research collaborations) and is highly experienced with the regulated environment it operates in.

Did we spark your interest? We would be pleased to exchange ideas!

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