



NEW RESEARCH | FEBRUARY 2022

Are your field teams ready to excel in the new era?

A qualitative research approach to help you critically assess post-pandemic learnings and ignite the potential of meaningful interactions with HCPs

The context

It's no secret that the pharmaceutical landscape has changed considerably in the wake of the pandemic.

Many of the questions we face from our pharmaceutical clients and healthcare partners focus on how we adapt to this new paradigm to ensure both efficient and engaging interactions with Healthcare Professionals (HCPs).

What we hear from our clients:

future

What does the future of the field team look like?

skills

How do we upskill our field teams to handle conversations in an increasingly complex healthcare landscape?

engagement

How do we engage in an omni-channel world?

mindsets

How do we change the mindsets of our field teams to embrace multiple communication methods?

leadership

How do we help the field team leaders support their teams and measure success in today's digital world?

collaboration

How do we improve collaboration between the field teams and beyond?

Our approach

36 qualitative, in-depth
interviews with HCPs.

321 HCPs surveyed.

A mix of **oncologists,**
cardiologists and **PCPs,**
across 6 countries.*

**Insightful, revealing and honest – we’d
like to thank our participants for their
candor and time.**

Research conducted in July 2021.

*United States, United Kingdom, France, Germany, Italy and Spain.

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**We believe a deeper, human research
approach not only better illustrates what
HCPs really need, but also holds the key
to offering better engagement too.**

A great deal of commentary around HCP engagement in a digital-first world already exists.

However, the vast majority of reports are based on an approach that has been more quantitative than qualitative – and don’t provide sufficient insight into what HCPs are really thinking.

We’ve pursued a more qualitative, human form of research to help round out the data from our online survey.



Is there still a place for field teams in HCP engagement?

Understanding the value of meaningful interaction

HCPs still value interactions with pharmaceutical companies and their field teams

47% of HCPs see conversations with field teams as vital in the dissemination of new and meaningful information.



I rely on them to provide the **information** about particularly new medications or new indications, how the drug is to be used, what the potential side effects might be, etc. and in that they've been pretty effective.

Cardiologist

Through pharma reps we can **network** with other healthcare professionals that might have had **more experience in real life** with the medication they're promoting, rather than in clinical trial world.

Oncologist



How do you feel about **engaging with pharmaceutical companies?**

Engaging with pharmaceutical companies is an important way for me to keep up to date with new developments in my field.



● Highly disagree ● Neither agree or disagree ● Highly agree

There's still work to be done by the industry

We asked our HCPs how they currently felt about **engaging with pharmaceutical companies.**

60% of HCPs said they had a 'good' relationship with pharmaceutical companies...

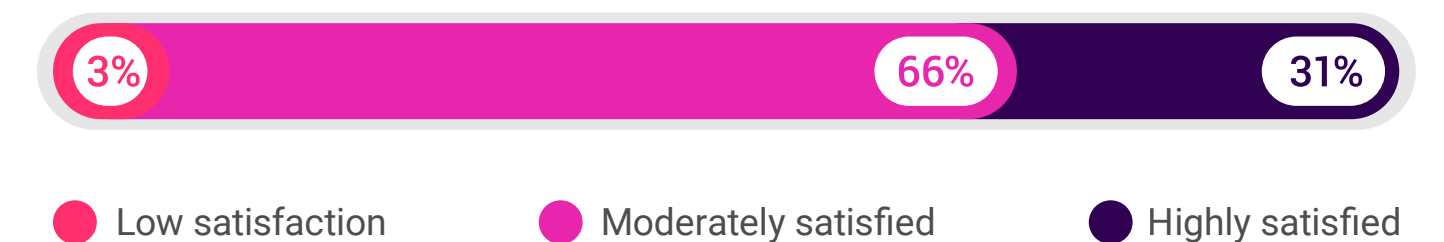
...But **40%** of HCPs revealed that they were only 'moderately satisfied' with their working relationship with pharmaceutical companies and support received.

The necessity of adopting a virtual communications approach through the pandemic has brought some clear and practical benefits, most notably greater flexibility for reps and Medical Scientific Liaisons (MSLs) to fit in with the busy work schedule of HCPs.

But, for many HCPs, the added social interaction and two-way dialogue face to face provides, is a pivotal factor in maintaining these positive relationships. A much deeper, richer connection was often established – and maintained – through a face-to-face interaction.

Though not impossible virtually, the quality of interactions and prevalence of a more meaningful dialogue was thought to be more likely face to face. There was clearly a balance that needed to be struck between convenience and depth, one that would be informed by understanding the individual needs of the HCP.

Since the COVID-19 pandemic began, please rate your overall level of satisfaction with the **support you've received from pharmaceutical companies.**



With only 31% prepared to say they were highly satisfied with the support received from pharmaceutical companies, there's clearly still work to be done.

We believe it's important to take a step back to understand the true impact these negative interactions may have, and how field teams may fit within this new and emerging paradigm.

An illustration of a doctor's office. In the foreground on the left, a large profile of a person's head is shown, with a hand covering their face, suggesting distress or a negative interaction. The background shows a doctor sitting at a desk with a laptop, wearing a white lab coat and a stethoscope. The office has a window with pink curtains, framed certificates on the wall, a potted plant, and a medicine cabinet filled with bottles. Two red pendant lights hang above the desk.

How prevalent are poor interactions with HCPs?

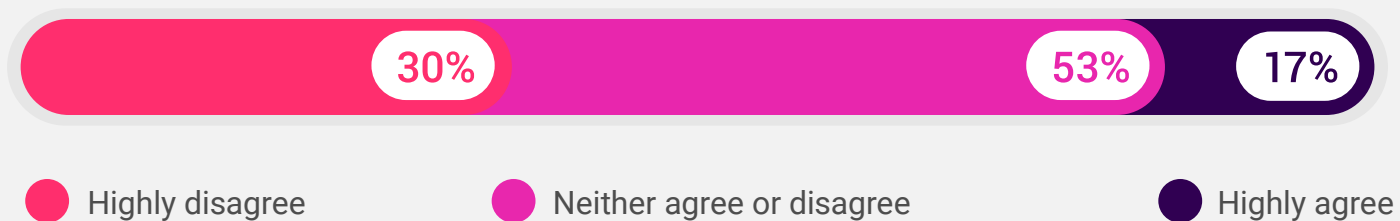
Understanding the impact of negative engagement

The negative engagement impact

Our research has shown that poor interactions between HCPs and pharmaceutical representatives are all too common, with a majority of the HCPs we spoke to having had negative experiences on a regular basis.

1 in 5 HCPs admitted to **actively restricting** their engagement with pharmaceutical representatives.

I try to restrict the number of engagements I have with pharmaceutical representatives.



When a rep shows up without an appointment, very **insistent, interrupting** when we're going to take a patient into the consultation room. Almost holding you back by the sleeve. Then, who floods us with emails and various kinds of solicitations. That's **very difficult to handle.**

Oncologist

There are always reps who are **pushy** and who just say what they want to say and basically, they don't notice that you **don't want to hear it.**

Primary Care Physician

I don't want to be talked to as though somebody's **selling me a car.**

Primary Care Physician

The negative engagement impact

27% of HCPs are **frustrated** when pharmaceutical companies arrange meetings, but have **nothing new to say**.

21% of HCPs often feel that the information they receive from pharmaceutical companies is **biased** and **one-sided**.

17% of HCPs feel that pharmaceutical representatives can be **pushy** and **demand** too much of their time.

We noticed that the poor experiences aligned with a number of notable blockers to HCP engagement. Many HCPs, for example, were able to easily recount meetings where no clear objective or content was set.

They spoke of pushy field team representatives, turning up unannounced, acting intrusively or not respecting their time. They referred to reps who have “bombarded” them with non-specific emails. These encounters – with reps driven by their own agenda and not taking time to align or consider the needs of the HCP – were all too common.

There are individual failings that should be addressed, and personal accountability on the frontline will address some of the glaring, surface-level issues. However, these HCP perspectives collectively flag the

need to address systemic and cultural failings. In the pharmaceutical industry, as with any other industry with such issues, it will require greater honesty and evaluation about the relationships between business functions and transformative solutions – not just those on the frontline.

But how do we begin to address both individual and systemic failings?



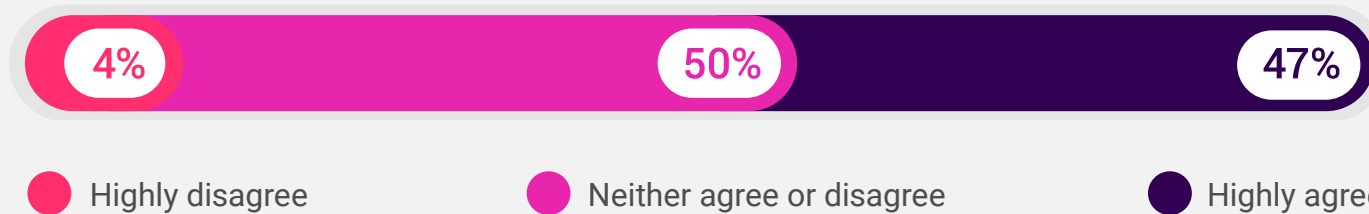
How do we improve HCP interactions?

The evolution of traditional sales skills to create better engagement

The evolution of traditional sales skills

The necessary elevation of virtual working has meant the need to consider its impact on the depth of personal interactions on the frontline too. For many HCPs, social interaction represents a key aspect in building a positive relationship with pharmaceutical representatives.

I enjoy the social interaction with pharmaceutical representatives.



Anecdotal evidence from our own clients and partners revealed that during the pandemic, sales reps and MSLS often provided a much needed link between HCPs themselves.

The absence of in-real-life congress, advisory boards and industry events resulted in some consultants feeling isolated and disconnected from their colleagues and peers – with field teams in some cases providing a role as social glue.

With the remote format, it's that **we lose the whole interpersonal aspect**, all the conviviality, **all the spontaneity**.

Oncologist

I believe the availability and ability to plan things is better (with virtual) but you lose a lot of **emotional contact** and follow-up questions. When you are sitting across from one another, looking at each other eye-to-eye, then other things will be broached compared to a **halfway sterile online conversations**.

Oncologist

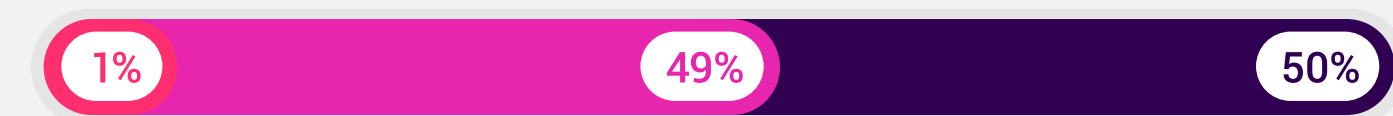
Interacting with your peers, **interacting** with your colleagues, **interacting** with pharma, and interacting with the key opinion leaders. That sort of interaction is something which you find is **lacking in a virtual environment**.

Primary Care Physician

mindsets

The evolution of traditional sales skills

I gain the most value from pharmaceutical representatives who truly understand my local area.



● Highly disagree ● Neither agree or disagree ● Highly agree

HCP discussions need to be truly patient-centric, focusing on patient efficacy, safety, simplicity and adherence.

If an organization wants to be recognized by HCPs as providing educational value – its field team must ultimately be perceived as serving the goals of the HCP.

Our participants felt they gained the most value from field team representatives that understood their individual circumstances, who acknowledged patient demographics, as well as local nuances around guidelines and prescribing.

Using such information to tailor discussions and going above and beyond in providing support and solutions to address specific barriers and problems they may face carried great weight with our participants.

I'm not looking for really rare or cutting-edge scientific information if it's of **no use to me**. What I want are **useful** things.

Primary Care Physician



Make the most out of the reasons HCPs engage

“New” information is also a clear driver for HCPs and acknowledging that information can not only become stale, but well-worn will be a keystone in driving increased engagement for the future.

41% of HCPs stated that it's most valuable to engage with pharmaceutical reps when a company's new drug becomes available.

Organizations need to empower teams to improve performance in a continuously evolving marketplace – through tailoring content, tone and method of interaction to the HCP.



As long as it didn't take over, because we don't need to see 5 reps in one day. But if there were 2-3 reps per week, that was **a nice change**. Because you then felt that it gets you **ahead a little bit**. That you're **not standing still**, but that you get new information.

Primary Care Physician



It always motivates me when a pharma **rep really knows their stuff**, when they are **up to date**.

Cardiologist

What mix of channels do HCPs prefer?

Helping our field team to communicate more effectively



Right channel, right time

46% of HCPs are keen to return to **in-real-life** meetings.

43% saw clear value in a **hybrid approach** that could leverage the best aspects of both virtual and in-real-life engagement.

Just 11% were interested in a full-blown switch to **virtual-only** engagement.

Successful hybrid engagement requires careful thought. Pharma field teams need to choose the engagement method, time and tools that sustain mutually beneficial conversations.

Make the most of in-real-life moments

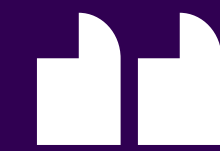
For face-to-face meetings, pharmaceutical field teams need to select the content that brings the social element back, stimulates discussion, generates shared empathy and builds trust.

Whilst going virtual might seem like it provides the chance to speed up the process (and it does serve up real time customer intelligence that can be fed back to the team)...

...Be mindful of bombarding HCPs with emails and digital content.

You need to show us that you've got **something new**, something that we don't already know... a sort of **sneak preview** to something that isn't available on the website yet. You've got to capture the excitement for the rest of the meeting!

Cardiologist



23% of HCPs sometimes feel overwhelmed by the number of emails they receive from pharmaceutical companies

What does the future of field teams look like?

The need for systemic change to better serve HCPs within an ever-changing healthcare environment



leadership

collaboration

What needs to be done

The main thrust of our findings points to a growing need for an evolved field team – one more able to focus on what HCPs truly value.

The old way, where marketing share of voice was king, and the field team a purely sales force, needs to be reconfigured.

Today we need a field team that is patient-centric and works in partnership with HCPs to achieve shared goals.

A field team isn't only sales reps and MSLs, but your diagnostic managers, clinical nurse educators, access managers etc. too.

Responsibility falls on the many to make things better, not the few. And not just within field-based functions.

So what does a **future fit** field team look like?

Some might naturally start with improving **skills**. Do your people have the scientific knowledge and communications techniques? Have you created a culture of continuous learning?

But it also involves changing **mindsets**. Do your teams understand their role in adding value for HCPs? Are they inquisitive and proactive to uncover the needs of HCPs and tailor their approach?

Are you empowering your teams with great guidance, content and tools to create effective **engagement** and meaningful interactions in a hybrid environment?

Excellence should no longer be measured through traditional means of contact frequency. **Leadership** also needs to evolve to help teams and individuals unlock their potential.

Greater cross-functional **collaboration** and a significant cultural shift is needed from all areas of the pharmaceutical environment.

How ready is your organization?

Here are some of the key questions we ask our clients to uncover the unmet needs of a field team:

1) What does success look like?

What are the tangible outcomes that you want to achieve? What does achieving excellence really mean?

Success doesn't look the same for everyone. Spend time to understand your stakeholders' goals and how the performance of your field team impacts other functions.

5) Are your teams confident in selecting the right communications method?

Pharmaceutical field teams choose the engagement method, time and tools to reach their HCPs. Are they set up to choose effectively? How does the organization support and guide these decisions?

2) Are you giving your HCPs what they value?

Do you understand the unmet needs of HCPs? Successful engagement relies on regularly updated plans, content and formats using real-time feedback from HCPs and KOLs.

6) Are you engaging the humans behind the job titles?

Whether it's your employees, HCPs, KOLs or patients, to achieve change you need to create conversations and experiences that matter to them.

Apply behavioral science thinking to shift from a task-centric approach to a people-centric one.

3) Do your frontline teams have the required knowledge and skills?

How do your field teams engage in deeper, patient-centric conversations? Do they co-create solutions with HCPs?

Identify the gaps in knowledge and skills e.g. embracing new types of detailing, AI driven personalized calls.

7) Do your field teams have a collaborative mindset?

How easy is it for your field teams to share best practice and learn from each other? And not just in your teams, but with other departments?

Is being open, curious and proactive part of your company culture?

4) As a leader, are you helping your teams to thrive in this new environment?

Being future-proof means communicating what excellence means, investigating needs, breaking habits and changing behaviors.

How can you better support and coach your team through this change?

8) Do you have the right systems and tools to measure success?

Whilst meeting frequency and digital click-throughs might be a useful start, measuring against the business goals requires deeper analysis. As well as tools, cross-functional collaboration and transparency are crucial to tracking behavior change.

Time to change

As a **strategic field excellence partner**, we combine:

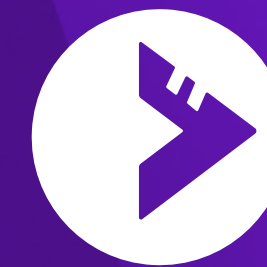
- **Knowledge and skills development**
- **Mindset and behavior change**
- **Engaging contents and formats**

Our Insight & Strategy Team are ready to help you identify what's holding your field team back.

Engage with us:

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