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What's next for HCP Engagement?

October 2023

Overview

Health Care Professional (HCP) 'engagement' describes the model of how biopharma companies engage with their customers and typically covers a broad range of synchronized front line and back-office activities.

What does it mean for a biopharma company to truly excel at HCP engagement?

This primer explores the topic in the context of a biopharma company's operating model and capabilities needed for best-in-class HCP engagement that is adaptive for the future.

Content synopsis

1 A future view of HCP engagement

Imagine a future where scientific and technology advancements such as new treatment modalities, generative AI, and augmented reality converge to create a new landscape where patients, HCPs, and biopharma companies interact in a hyper-connected way. We explore such a hypothetical scenario to set the scene of how the future of HCP engagement will change.

2 The value case for continued investment in HCP engagement

A best-in-class HCP engagement model increases HCP customer satisfaction and ultimately value to patients while accelerating top line growth and operational savings for a biopharma company. This section looks at the opportunities, benefits, and value case of initiatives that deliver better HCP engagement.

3 How can you implement a better HCP engagement model today?

A future-proof HCP engagement model prioritises user experience, harnesses insights from interactions, enables compliant and efficient processes, and ultimately builds trust. While we believe that the foundational layers are present in many biopharma companies, most are not connected in a way that will truly leap-frog current HCP engagement. We explore the implementation priorities for a best-in-class HCP model and three tactics to ensure HCP initiatives are firing in sync.

A futuristic view of HCP engagement

Let us imagine **three shifts in technology and scientific advancements that could change the nature of HCP engagement.** Some of the scenarios outlined below do not exist yet, at least not in everyday practice outside a proof-of-concept environment. Given the exponential growth of technology and scientific advancements, it is entirely possible these will become the reality of HCP engagement in the next couple of years.

Trend 1 - Generative AI will be commonplace in healthcare delivery and HCP interactions

Trend 2 - Using the augmented reality space as an engagement channel

Trend 3 - A treatment paradigm with personalized therapies

To bring this to life, we will illustrate a hypothetical ecosystem of patient, HCP and biopharma company interactions and engagement.

Joe is a 16-year-old patient with a newly diagnosed rare genetic condition. He is adventurous and active but is often limited by his health condition. Joe and his parents live far out by the coast and getting the best-in-class treatment for his condition has been difficult. Doctor Sue is the local doctor in Joe's town. There is a small and busy hospital, where the healthcare professionals have limited experience with Joe's condition. Doctor Sue wanted to educate herself and connect with other key opinion leaders and researchers in the medical field that may be able to help Joe.

Awareness

Doctor Sue actively liaised with specialists that could help Joe. She attended a very engaging virtual conference and learnt about a new clinical trial with promising early results for the treatment of Joe's condition. This is a complex cell and gene therapy treatment which could potentially be curative. The dense information delivered in the conference via a combination of interactive content and augmented reality discussion panels helped Doctor Sue feel well informed. Excited, Doctor Sue contacted the biopharma company. A medical AI-bot called 'M' with generative AI built-in answered all her initial questions about the clinical trial and disease area. Sensing the urgency, 'M' suggested a further contact point with the principal investigator of the study.

On the same day, Doctor Sue and Joe's parents joined a video-conference to speak to the principal investigator to better understand the study. 'M' the chat-bot also set up an appointment with the Medical Science Liaison (MSL) of the biopharma company so that Doctor Sue could make further scientific queries. Doctor Sue was able to use the HCP portal on the company's website to keep track of her conversations and information requests. The portal also provided the option of video-chat and even virtual reality interactions. Through these touchpoints, Doctor Sue was able to share useful and timely information to Joe's parents.

Conversion

The clinical trial's AI selection system helped to accurately identify if Joe met the inclusion criteria. Fortunately, Joe was a match, and the family were excited about his prospects! Ahead of travelling for his treatment, the clinical trial team delivered an augmented reality kit that allowed Joe and his family to experience what the hospital environment would be like, and a step-by-step walk through of the process. For example, Joe got to visualise the apheresis process, where his infusion would take place, and follow-up care. Joe was able to meet his entire clinical team in augmented reality, and a very friendly nurse walked the family through the consent process virtually.

Joe, his parents, and Doctor Sue were given a digital app to download. This allowed them to ask questions and connect to the clinical trial team and the company AI bot 'M' 24/7. Joe liked seeing M's avatar pop up as a hologram, and he was able to have many chats about his treatment with 'M'. His parents were also able to use the digital app to keep track of the process, ask questions, and report on how Joe was reacting to his treatment. They were reassured that the reports were analysed by Joe's doctors and reviewed during their periodic check-ups.

Advocacy

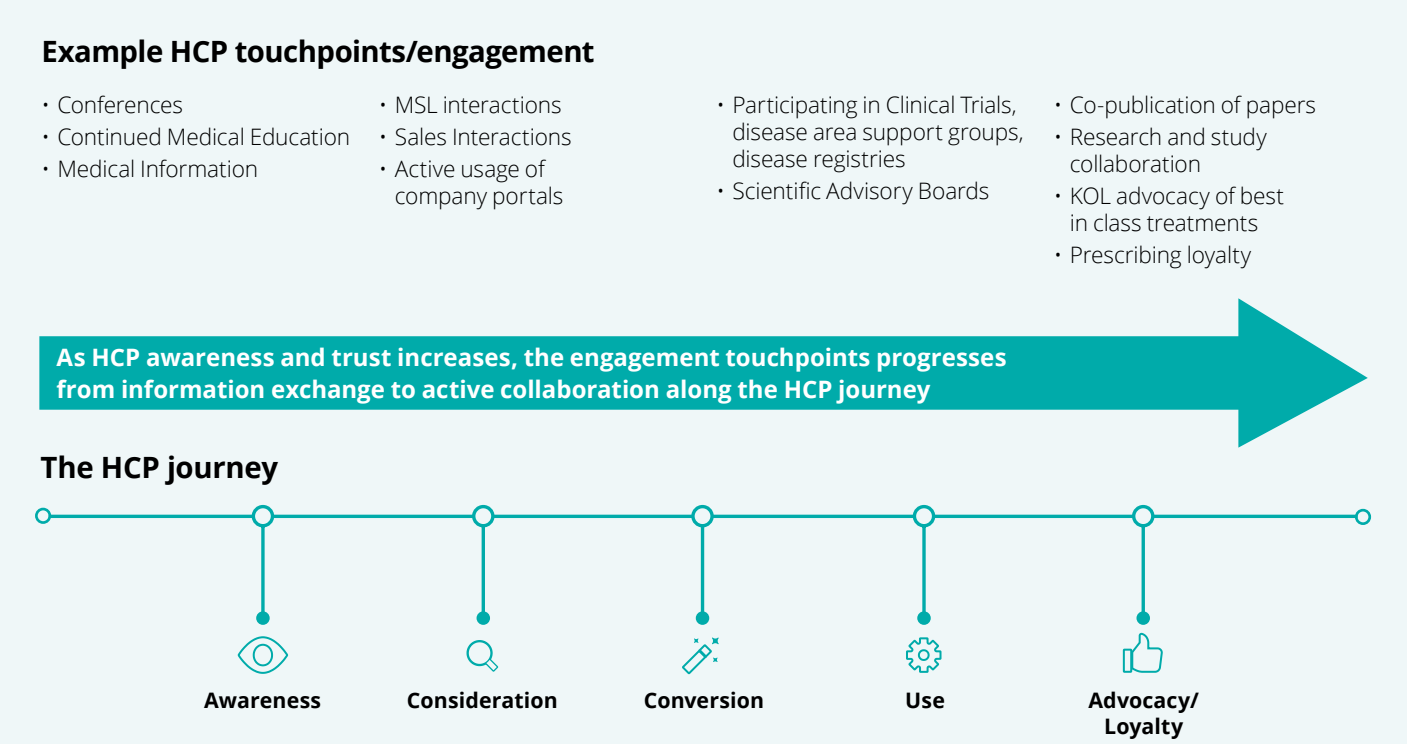
Months later, Joe completed his treatment with a positive prognosis! Joe and his parents continued to participate actively in a patient group, where families from all over the world connect through multiple channels to share their experience. Doctor Sue is now actively engaged in this disease area and participates in many scientific collaborations. Working with the company and other HCPs, she helped to develop an enhanced digital app with generative AI features that would support the long-term follow-up of cell and gene therapy patients - collecting valuable health data points from patients, providing up-to-date information and ongoing care support throughout their lifetime. She also worked with other key opinion leaders, disease support groups and biopharma companies. to create a 'one-stop shop' portal for all things related to the disease area, helping patients and families navigate all the information via a single disease portal.

Whilst we are a few steps away from this reality, this is a story of harnessing the power of science and technology to improve the experience for patients and HCPs.

HCPs have multiple touchpoints with a biopharma company from R&D to post-launch. The HCP journeys are diverse, and they are constantly going through a cycle of awareness at the start, through to conversion and advocacy. For example, engagement touchpoints such as conferences or continued medical education drive awareness.

However, as companies provide latest scientific insights that are beyond the brand, or help HCPs navigate understanding of novel therapies and technologies – these activities build trust and move the needle along the HCP journey from awareness through to advocacy.

Figure 1: Example HCP touchpoints and its progression along the HCP journey



Source: Deloitte analysis

In response to rapidly advancing technology and pressures on HCP workforce, the following HCP needs should be considered when designing any aspect of HCP engagement:

Support HCPs to adopt digital technologies

One of the key steps to enabling digital transformation within the healthcare system is to develop digital leadership skills and improve the digital literacy of healthcare staff and patients. Deloitte's 2019 report Shaping the future of UK healthcare found that survey respondents had a mixed view about the current level of digital skills and talent in the NHS with an average rating of 5 out of 10. Furthermore, there is still a gap between clinician's view on technologies (e.g., patient apps, at home diagnostics/monitoring devices, and point of care diagnostics) that will help to improve the quality of patient care vs. the ones they currently use, as highlighted in Deloitte's 2022 report on Sustaining the UK's clinical workforce, where a Sermo survey was conducted with 1286 clinicians.

Alleviate HCP workload pressures

There is increasing demand on the healthcare systems resulting in time constraints and administrative tasks preventing HCPs from spending quality time with patients. Deloitte's 2022 report on Sustaining the UK's clinical workforce identified that an overwhelming majority of clinicians surveyed experienced an increase in their workload, with 46 per cent of clinical staff experiencing a negative impact on their physical health and 57 per cent a negative impact on their mental health. Opportunities to further automate physician workflows beyond administrative tasks like billing and documentation will continue to free up time for physicians, as explored in Deloitte 2022 survey of US physicians and report.

Building trust for scientific and medical information dissemination

For biopharma companies, it is critical to maintain reputational integrity across all touch points within the health care ecosystem among all stakeholders – consumers, health care providers, regulators, NGOs etc. Trust is essential for the recognition of the value the industry brings to society in the way of significant improvements in life expectancy and health outcomes. Deloitte's report on Overcoming biopharma's trust deficit found that physicians and their associations are the most trusted source of health related information across surveyed countries, and pharmaceutical companies one of the least reliable sources of information.

Therefore, the following design principles that are human centric, insights driven, collaborative and trust building should be central to a biopharma company's design and implementation of all HCP engagement touchpoints.

Figure 2: Future-proof HCP model

Source: Deloitte analysis

The value case for continued investment in improving HCP engagement

According to our observations, the following business drivers typically catalyse HCP engagement improvement initiatives within a biopharma company:

- **Commercial** – driving more targeted approaches tailored to brand and market requirements (triggered by evolving brand/market dynamics)
- **Operational** – improving field force activities and driving value-add with targeted HCP segments (triggered by operational restructure, OPEX improvement)
- **Digital** – better synchronisation of medical and commercial engagements supported by digital (triggered by digital innovation agendas and productivity improvement)
- **Compliance** – optimising HCP compliance and transactional processes (triggered by audit/ inspections or global-local requirements)

Based on these business drivers, companies should think of the value case of a best-in-class HCP engagement model and any HCP initiatives as **driving three main outcomes** – improving customer satisfaction (and trust), enabling top line growth, and operational savings.

In the next section of this article, we will look at practical, actionable levers to start building or enhancing the current foundations of HCP engagement and to prepare for a future of innovative engagement models, like the one experienced by patient Joe and his HCP, Dr Sue.

Figure 3: Value case for HCP engagement

	Customer satisfaction	Top line growth	Operational savings
Opportunity	• Increase in share of voice, retention, and growth through omnichannel reach • More relevant communications and content targeted to HCP and patient needs • Consistent message and material, levering global reach without losing local nuance	• Reach larger customer base via omnichannel • Move customers towards desired behavior • Increased awareness of medical value of brand in market	• Streamlined technology platform strategy across markets and brands • Single view of customer (HCP) across the enterprise leading to effective engagement and analytics • Improved compliance and MLR efficiency for assets and content
Example Benefit	• **Increase in share amongst HCPs** who were engaged through triggers vs those who were not • **% Increase in Digital & F2F engagement rates by HCPs** across brands • **Trusted partner** for scientific collaboration	• **Increase in HCP prescribing volume** for those receiving AI driven rep triggers • **NBRx share growth** amongst non-target HCPs who received rep-driven emails • **NBE driving lift in sales** with reduction of the lift from field call activity	• **Reduction in average spend per brand** from managing transactional and compliance activities • **Increase in digital engagement** with a decline in promotional expenses • **Accelerated time-to-market** for approved and high-quality content due to streamlined review and approval process
Estimated value	**1 – 2 %** **Net-promoter score and HCP retention rates**	**2 – 5 %** **Top line growth**	**20 – 25 %** **Operational cost saving**

Source: Deloitte analysis

How can you implement a better HCP engagement model today?

Over the last five years, many companies have been investing heavily in improving HCP engagement, primarily in Customer Relationship Management (CRM) and omnichannel platforms. For example, according to a Deloitte Medical Affairs benchmark survey with 20 small to large biopharma companies, 89 per cent implemented or are implementing a medical-specific CRM, and 83 per cent implemented or are implementing a physician-only medical information platform, and 65 per cent are implementing digital omnichannel capabilities.
While we believe that the foundations are mostly there, there are still opportunities to connect and implement them in a way that will truly leap-frog HCP engagement. Based on our experience from working with leading biopharma companies, we have distilled the success factors for implementation which also forms the three foundational layers for any successful HCP engagement model:

1. **Devising an engagement strategy that is human centric and prioritises user experience**
2. **Creating data and platforms that harness strategic and operational insights**
3. **Building compliant and efficient processes that promote trust with internal and external stakeholders**

A connected HCP engagement model has the potential to unlock the full value case to realise improved HCP satisfaction and trust, top-line growth, and Operational savings. In this section of the paper, we share our recommendations and observations of the strategic and operational tactics that are being adopted across industry.

Figure 4: Connected HCP operating model

A future-proof HCP interaction model for pharma companies prioritises user experience, harnesses insights and enables compliant and efficient processes that builds trust.

Engagement strategy that is human centric and prioritises user experience

- HCP-centric
- Mind-set driven
- Seamless, omnichannel, personalised
- Customised, high quality content and communication

Example mind-sets

I'm an advocate and frequent prescriber

I like to have all information so I can best serve my patients

I dislike being emailed and prefer infrequent, but f2f meetings

Engagement Channels

Social & Mobile	Email	F2F, Conferences
Print	Audio visual	Websites/Portals/bots

Data & Platforms that harnesses strategic & operational insights

- Interoperable and drives 360 insights of HCP needs
- Strategic OKRs

Omnichannel insights

R&D data platforms	Medical platforms	Commerical platforms	Support platforms
• Clinical trial investigator information • Research collaborations	• Medical Information • Content management • KOL management/ CRM • Conference platforms	• KAM/CRM • Campaign Orchestration • DAM/MLR • Web Content Mgmt.	• Disclosure systems • Procurement, invoicing and expense system • Intelligence Hubs

Compliant & efficient processes that promotes trust with internal and external stakeholders

- Cross-functional and agile processes along all HCP touchpoints
- Reduces transactional burden
- Compliance by design

Cross-functional/Cross-TA agile collaboration models for HCPs	Compliance by design
Centre of Excellence (CoE) and process ownership	Process automation, workflows and technology enablement

Source: Deloitte analysis

Building the foundations and success factors for implementation

Devising an engagement strategy that is human centric and prioritises user experience – the engagement layer brings together an in-depth understanding of HCP segments and their preferred content and insights, all delivered via the most relevant channel to drive awareness and adoption.

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Creating data and platforms that harnesses strategic and operational insights – For the past five years, AI-enabled technologies have been transforming the different parts of the biopharma value chain, from drug discovery to post market surveillance. These technologies are fundamentally fed by and generate new data. The Deloitte paper on data governance in life sciences explores the role of data governance as a foundational capability in life sciences. In the context of HCP engagement – the principle of data governance extends to the data/technology strategy, interoperability of HCP related data and platforms, and the ability to harness both strategic and operational insights.

Click for more details | Case Study 2

Building compliant and efficient processes that promote trust with internal & external stakeholders – Focus on optimising biopharma's internal processes to reduce administrative burden to employees and HCPs to focus on value-add work. Front of mind is also the evolving regulations of AI, for example the European Medicines Agency has recently published a 2023 draft reflection paper on the use of AI in the lifecycle of medicines. Biopharma companies need to be agile and adaptive in face of changing regulations and workforce demands to deliver efficient, transparent, and compliant processes that will build trust with stakeholders.

Click for more details | Case Study 3

Conclusions

What's next and how to super-charge your HCP efforts?

If you are already doing multiple or all the tactics called out, we recommend three simple approaches to test and challenge ongoing or new efforts of HCP engagement:

1 Assess the impact of your initiatives

Quite often, companies put in place solutions that are short term or quick fixes. The upfront investment to build an integrated HCP data platform will serve as the foundation for enabling many other opportunities to improve insights and engagement. Similarly, whilst new technologies like generative AI may seem like long-term opportunities, experimenting and piloting in targeted areas or with targeted HCP audiences will build the capabilities and roadmap for the future. Having a long-term strategic roadmap with a clear value case across the enterprise for HCP engagement, data and platforms will be key to optimising return on investment.

2 Break down functionally siloed approaches to HCP engagement

Taking an enterprise approach to HCP improvement initiatives, adopting a cross-functional, cross-brand mindset. This includes sharing of HCP insights across R&D, Medical, and Commercial (where permissible). Given regulations and codes of conduct governing HCP interactions for example the ABPI Code of Practice in the UK, compliance plays a critical role and should be engaged from the beginning to advice, shape and influence policies that will support innovative and ethical HCP engagement approaches and build trust with the health systems, HCPs, and patients.

3 Embrace HCPs as innovation partners

Voice of the customer continues to be a fundamental criterion for any successful engagement model. Beyond just having HCP segmentation and HCP journeys, biopharma companies need to actively seek real time feedback from HCPs through multiple touchpoints, partner with HCPs in the co-creation of innovative engagement models and play a role in supporting the digital awareness and education of HCPs.

The relationship and dynamic between HCPs, patients and biopharma companies will change with evolving technology. Companies need to step-up the collaboration to create an adaptive HCP engagement model that harnesses the best of technology (speed, scale, analytical powers) and human interaction (judgement, experience, empathy).

End Notes

1. Deloitte – Shaping the future of UK healthcare, closing the digital gap
2. Deloitte – Time to change, Sustaining UK's clinical workforce
3. Deloitte – Giving physicians more time for patient care
4 Deloitte – Overcoming biopharma's trust deficit
5. Deloitte – Medical Affairs benchmark study summary
6. Deloitte – Advanced digital HCP segmentation
7. Deloitte – Data governance in life sciences: Build solid data foundations to address key challenges across the industry's value chain
8. Deloitte – Summer 2023 Fortune/Deloitte CEO Survey Insights
9. The AI Revolution in Medicine, GPT-4 and Beyond. Peter Lee, Carey Goldberg, Isaac Kohane
10. EMA – Reflection paper on the use of Artificial Intelligence in the medicinal product lifecycle
11. Deloitte – interactRx™: Identifying fair market value for physician compensation
12. ABPI 2021 Code of Practice

Key contacts

Interested to learn more?

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BACK

Building the foundations and success factors for implementation

Devising an engagement strategy that is human centric and prioritises user experience

Customer segmentation

- Adopt in depth segmentation approaches, using multiple data-points, and moving away from traditional qualitative approaches based on field force evaluation. Increasingly, data analytics, AI and machine learning is adopted to identify patterns from a wide range of HCP data sources beyond just the CRM systems.
- Implement HCP segmentation to inform channel preferences, for example three tier approach with Deloitte's advanced digital segmentation
    - sales-driven – identifying sales potential and sphere of influence
    - behavioural – differentiating HCPs based on specific behaviour or beliefs
    - channel and content preference – how HCPs like to engage and their level of engagement

Omnichannel

- Move away from 'add and integrate' approach to reduce cost to serve, focus on high value channels to enhance customer experience so HCPs have a seamless experience across channels and extending to customer-care and support.
- Implement user-friendly front-end HCP Portals. Companies have versions of HCP portals and chat-bots that enables HCPs to access company and disease area content in a personalised manner.

Content targeting

- Apply HCP segmentation to content targeting through customisation (typically for an HCP segment), and personalisation (typically at an individual level).
- Leverage technology such as AI to help identify content consumption patterns (e.g., type of content, sharing frequencies, number of mentions in scientific sources) to better tailor relevant content to HCP needs and preferences.

Content factory

- Reduce operational costs associated with content creation and Medical Legal Review process by adopting modular content creation, enable increased content reusability across different HCP segments, applying machine-learning and automation to optimise workflows for non-promotional vs. promotional content.
- Implement the data and operational backbone of a content factory through a well-structured content library, meta-data tagging, data ontologies, content authoring and review process with streamlined workflows.

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Case Study 1

Multi-country, multi-brand HCP strategy for product expansion

Situation

A top global pharmaceutical company had an ambitious product expansion plan across eight countries and seven brands. One of the key goals was to enhance medical value through higher prescription rates and better patient adherence with HCPs across the target markets.

Solution

Deloitte worked with the client in partnership with their Brand, Field, Sales Operations, Analytic Translators, Transformation Leads, Data Science and IT teams to develop a unique modelling methodology to better predict and identify next best actions for HCPs.

Outcome

- Higher customers satisfaction: 50 – 70% HCP acceptance rate of calls and emails from field force
- Improved engagement: 22% increase in adherence to suggestions
- Higher value: 3% increase in sales uplift for a brand
- Better predictions: 20% improvement in forecast model

Building the foundations and success factors for implementation

Creating data and platforms that harnesses strategic and operational

Investment in key technology platforms enabling HCP engagement

- Have a clear technology strategy and the connected platforms that will enhance engagement with HCPs and optimise processes such as:
    - state-of-the-art technology stack integrated where compliant with medical and commercial, and cuts across channels, CRM systems, order management, contracting, content management, reporting tools, etc.
    - medical Information platforms with enhanced automation and AI-bots
    - structured content management platforms
    - workflow automation and service management tools
- Invest in generative AI use cases. The Summer 2023 Fortune / Deloitte CEO survey reported that 'while still early in its adoption, 55 per cent are evaluating and experimenting with generative AI, and 79 per cent believe generative AI will increase efficiencies'. The generative AI capabilities of GPT-4 have already advanced beyond its predecessor of Davinci3 system, as illustrated in the book AI Revolution in Medicine which also highlights some promising use cases in the healthcare setting. Similarly, HCP use cases leveraging generative AI in biopharma can significantly transform HCP experience and productivity. Examples:
    - customised content generation for medical information responses, conference posters, scientific summaries
    - predicting next best actions for the field force
    - personalising HCP engagement through intuitive search, summaries and conversational platforms

HCP Master Data management

- Harmonise multiple business unit or regional instances of CRM / enterprise solutions that captures HCP information, creating a single source of truth for HCP data with set data standards across systems, unique identifiers that allows traceability of HCP across systems and processes.
- Adopt a federated data approach to enable consolidation of end-to-end commercial data (sales, marketing, support), integration where possible with medical data and external data sources (e.g., RWD, social media) leveraging data aggregation / anonymisation for sensitive data and data protection.

Analytics and Objectives, Key Results (OKRs)

- Link strategic objectives (e.g., drive HCP awareness by 20 per cent in a brand) to both operational metrics (e.g., call volume, response times) and outcome-based metrics (e.g., net promoter score, increase in share of voice, sentiment surveys).
- Improve quality of analytics and insights by building in a continuous feedback loop that allows validation and refinement of insights based on quantitative and qualitative sources.

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Case Study 2

Customer 360 data platform

Situation

A top global pharmaceutical company wanted to deliver enhanced customer experience and differentiate against its peers through an expanded customer engagement ecosystem across markets.

Solution

Deloitte worked with the client to develop the data foundation element of customer information that is consumed for better customer engagement and downstream platforms that enable enhanced insights and rapid response to customer inquiries. The combined process and data/technology solution enabled a holistic view of the customer and their behaviours via insights from large, aggregated data sets and interoperability of systems.

Outcome

- A 'customer data hub' which formed the backbone for 360 analytics to inform engagement channels and activities
- Better personalisation of HCP journey and consequently patient impact
- Improved compliance with unique customer IDs and GDPR build-in
- Cost avoidance and cost savings by removing duplication, enhancing data re-use and more efficient data analytic processes.

Building the foundations and success factors for implementation

Building compliant and efficient processes that promote trust with internal & external stakeholders

Harmonised organisation capabilities / incentive structures

- Build team incentives around customer experience outcomes, not just operational outcomes e.g., number of visits, number of clicks.
- Build capability building around customer journey mapping, customer experience design, data analytics – with closer collaboration of similar enablement roles across Medical and Commercial / Brand teams with tightly integrated Sales and Marketing ecosystems.
- Early involvement of legal, compliance and other adjacent teams with the right balance of global and local efforts to develop ethical frameworks for emerging technologies e.g., use of A.I.I in omnichannel and guardrails for HCP interactions.

Agile ways of working

Form agile team structures that collectively deliver across the HCP journey and experience. This includes adopting the practice of agile compliance and risk governance so that HCP compliance risks are captured early and resolved in a timely way that supports, not impedes business agility and innovation. Agile team structures should be able to flex across membership of relevant teams, e.g., R&D, Medical, Commercial, Technology, Risk and Compliance etc. to tackle relevant topics and enable more proactive, predictive interactions with HCPs.

Process excellence

- Implement workflow optimisation to improve efficiency and hand-offs across multiple CRM, procurement, regulatory systems etc. that impacts HCP transactions such as fee-for-service transactions.
- Apply the concept of Global Process Ownership for core HCP processes and Centres of Excellence (CoE) to support transactional HCP processes such as fair market value assessment, HCP onboarding, payments and disclosures.
- Implement process automation for calculation and tracking of fair market value payments to HCPs for better transparency and consistencies globally. For example, the interactRx™ solution provides a centralized on-demand access to a company's fair market value rates, with workflows for routing and approval and reporting analytics.

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Case Study 3

HCP fee for service transactions workflow optimisation

Situation

HCP fee for service transactions covers a range of activities where payment ('transfer of value') is made to a HCP in exchange of scientific services such as speaking at a conference, or collaboration for a publication. These activities are stipulated in the pharmaceutical codes of conduct and requires appropriate reporting and disclosures. A top global pharmaceutical company wanted to improve its operational process governing end to end HCP fee for service transactions, from intake and onboarding to invoicing, payment and disclosures. The current process is reliant on multiple systems and hand-off points which causes delays, potential risks, and poor user experience.

Solution

Deloitte worked with the client to identify the pain points and developed a future state blueprint of opportunities.

Outcome

A phased roll-out of prioritised initiatives starting with the R&D function

1. Implemented the role of a HCP process owner, supporting different therapeutic area teams to navigate HCP transactions via a streamlined process.
2. Design streamlined processes and implemented ServiceNow as a workflow tool on top of 6 different systems to manage hand-offs and reduce manual interactions via emails. This resulted in:
   - Improvement in operational efficiency
   - Unified and consistent user experience
   - Process adherence
   - Improvement in R&D compliance
3. Contributed to HCP master data requirements to ensure a single source of truth for HCP data