

What You Need To Know Now to Be Prepared for 2022

*Highlights from TGaS Advisors' 2021 Fall
Virtual Summit*



Throughout 2021, we've continued to face historic, massive challenges related to the ongoing global pandemic. Life sciences enterprises, and essentially all industries, grappled with decisions large and small. Priorities for Commercial and Medical Affairs organizations in the life sciences industry shifted as you worked feverishly to evolve virtual and digital channels to engage with customers as well as internal teams. Developing capabilities and skills in new ways of working came to the forefront, along with new challenges related to vaccinations and decisions on returning to the office.

Companies reached out to TGaS Advisors for our guidance in navigating this uncharted territory, and we stepped up to proactively support more than 1,800 individuals across 300 partner companies. The findings in this Advisory Brief are based on our work with these companies and, in particular, from key themes that emerged during our 2021 Fall Virtual Client Summit.

Critical Focus Points of This Advisory Brief



Current State of the Industry



Next Level Ways of Working



Navigating in 2022

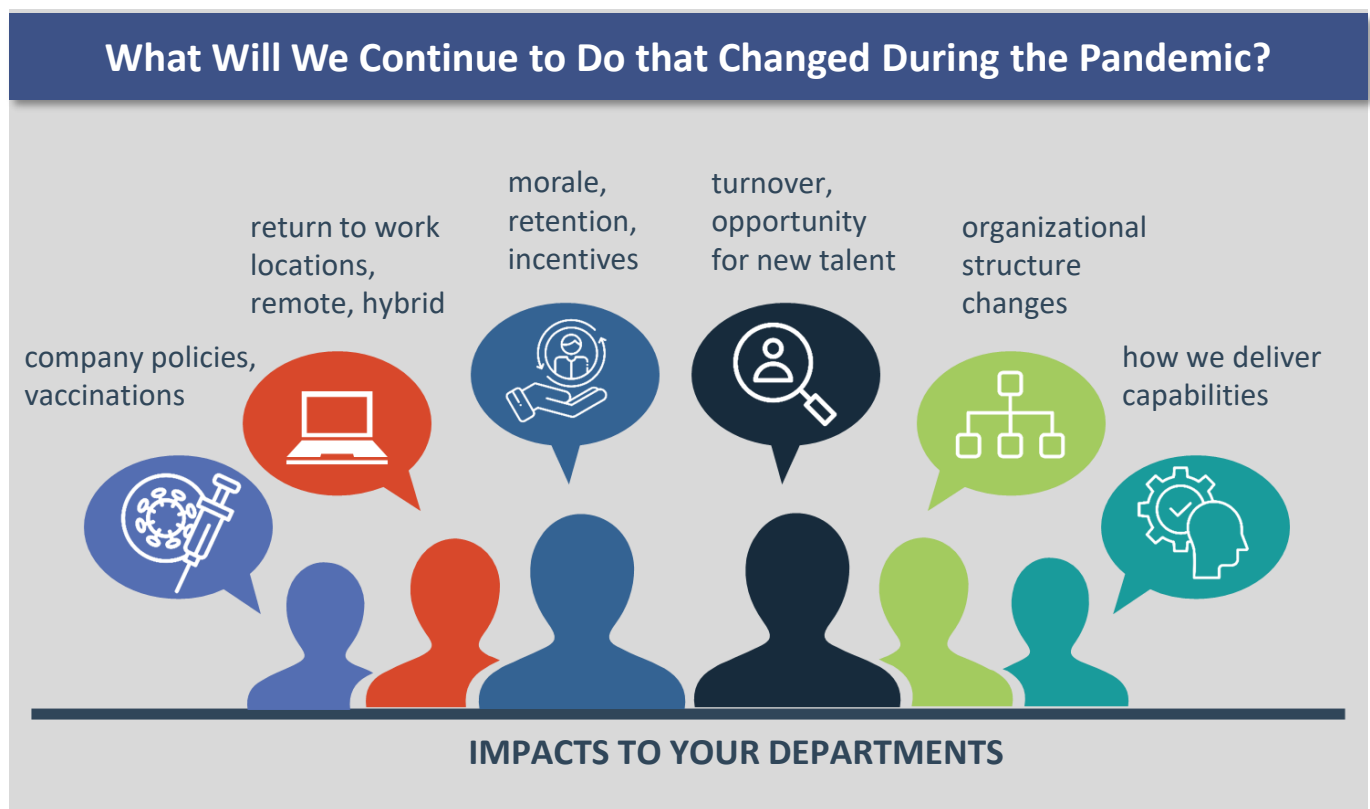
Background

The TGaS Advisors 2021 Fall Virtual Summit provided an interactive forum for Commercial and Medical Affairs leaders to engage with other members of the TGaS network. Nearly 500 individuals from 125 emerging, mid-tier and large-tier biopharmaceutical companies attended function-specific sessions across the Commercial and Medical Affairs ecosystem. Leaders shared perspectives, made recommendations and collectively thought through alternative paths forward relative to key decisions to be made for 2022 and beyond.

Key themes across the sessions included:

- Next Level Ways of Working
- Evolving Capabilities and Skills
- Talent Acquisition and Retention
- Vaccinations and Return to In-Person

Commercial Operations leaders shared perspectives on what the past 18 months has taught us, and considered how the life sciences industry, in general, and people, specifically, have changed during this time. Which learnings are most critical to retain and develop further? And where are the remaining gaps that must be filled to be successful in 2022?



2021 Has Been a Year of Continuous Change

Quarter 1



Digital enablement



Upskill reps in digital engagement



Job profile for reps



Role of first line managers



Meeting customers where they are



Sales Force Effectiveness



Adapting call planning and targeting to a COVID world



Field Force of the Future



Multi-Channel Customer Engagement



Delivering Value



Virtual Variability

Quarter 2



First Line Manager Evolution



Continuing COVID Impact



Managing Innovation



Returning Call Volumes



Resetting Engagement Expectations



Field Force Effectiveness

Quarter 3



Field Rep Role Remains, Training Changes



Reach and Frequency Lives On



Focus on Optimizing Field Engagement



Competition for Talent Increasing



New Commercial Model Challenges



Delta Variant Drives Changes



Learning from Hindsight over Pandemic



Scheduling Apps Welcome Only in Oncology



Field Resourcing Options and Incentives

Quarter 4



Reach and Frequency are Diagnostic not KPI



Pharma Must Match How HCPs Consume Information



2022 Engagement Will Evolve Again



2021 Has Been a Year of Continuous Change

With the start of 2021, a question emerged in the life sciences industry about what changes driven by the pandemic would continue to evolve. Upskilling reps in digital engagement became increasingly important, and the job profile of the rep continued to change with discussion around the field force of the future. Companies also noted changes in the role of first line managers with district managers participating in virtual calls with HCPs and coaching to virtual engagement effectiveness. The importance of “meeting customers where they are” was a resounding theme in the industry, and there was interest in a deeper understanding of the HCP interaction, best practices for digital engagement and measuring the impact of various types of interactions.

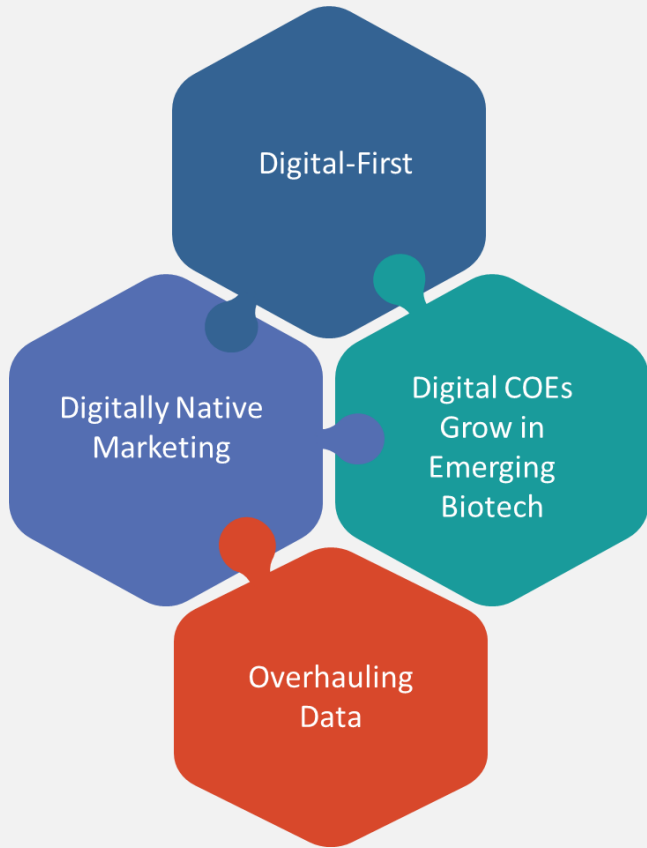
In the second quarter of 2021, it became apparent that innovation in the customer engagement model brought new opportunities for companies to learn, pivot and implement. There was a desire for innovation, but implementation timelines varied among companies. Artificial intelligence/machine learning (AIML) was a topic of interest, and TGaS network members agreed that skill sets to support AIML projects needed to be developed and hired. Companies had different perspectives on taking an outsourcing vs. insourcing approach; however, there was general agreement that in the long term AIML will be an internal capability. As vaccinations increased in Q2, in-person calls slowly increased, and it became evident that pre-COVID call levels would not be reached for quite some time. Companies also expanded traditional roles to support the evolving customer engagement model, such as dedicated field force effectiveness resources to bridge the conversation between Marketing and Sales.

A common theme TGaS heard in Q3 2021 was that the field force of the future may look very similar to the field force of today with small adjustments. The TGaS network was not altering job descriptions for sales representatives to reflect new demands of the role. Instead, they were addressing changes through training programs and learning opportunities. Additionally, despite trying to introduce alternate metrics, reach and frequency were still the most requested stats by Sales leadership. In Q3, the competition for talent increased. Companies found it difficult to retain existing and attract new talent, and some reinforced and prioritized corporate culture and employee engagement. TGaS network members found it challenging to implement new commercial models from both an internal skill set and field adoption perspective. Companies also faced challenges with live interactions with customers and meetings due to the emergence of the COVID-19 Delta variant.

As 2021 closes, companies continue to question the customer engagement approach with little consensus on best practices. There is recognition that the field is only one channel among many for customer engagement, and a more holistic approach is needed.

Next Level Ways of Working

Digital Macro Industry Trends



Commercial Analytics & Insights Department Priorities



- ✓ *Actionable insights and storytelling*
- ✓ *Digital analytics/ measurement*
- ✓ *Retaining talent*

Next Best Action – Best Practices

Maintain a stable target list for the field force

Use Next Best Action on top tier HCPs only

HCP propensity to prescribe should be part of the algorithm

Initial Challenge

Phased Approach

Change Management Best Practices

Gain Commitment

Measuring Success

**DYNAMIC TARGETING:
THINGS TO THINK ABOUT**



Next Level Ways of Working

As organizations have adapted their commercial capabilities to operate in the wake of a global pandemic, there have been significant changes to the commercial model. With virtual interactions a necessity, prioritization of digital capabilities escalated. The world was forced to move virtually and rapidly. Pharma's engagement with their customers followed suit.

Senior leaders are expecting commercial leaders to be more digitally-savvy and have a digital-first mindset. Increased capabilities and subject matter expertise are driving more digital centralization in emerging biotech. Regardless of role or therapeutic area, Business Unit leaders agree that digitally native marketers are the next best hire.

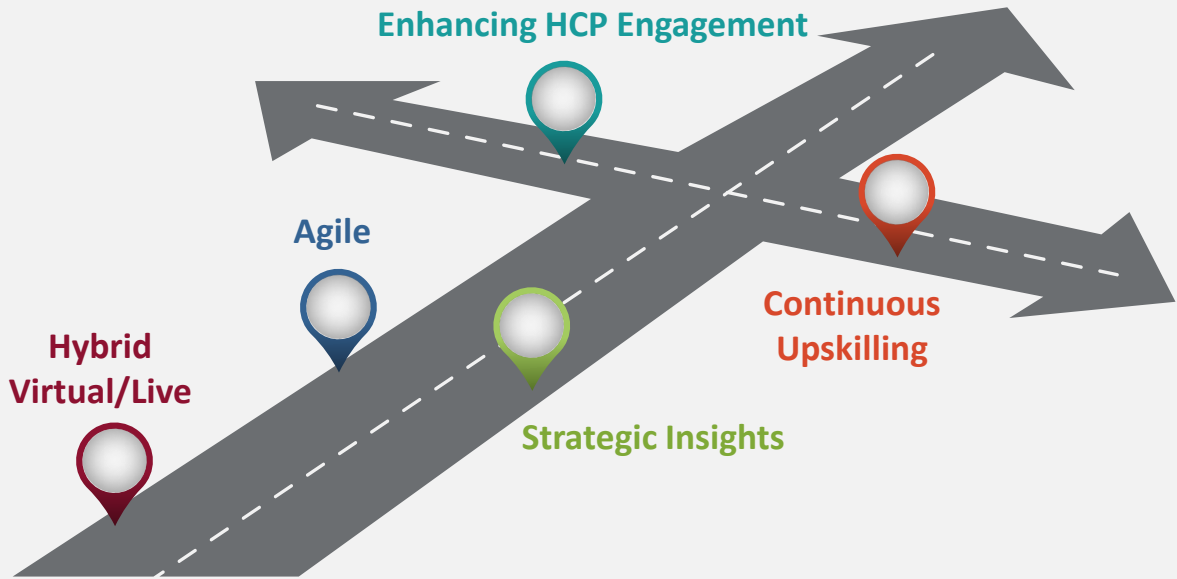
Within the Commercial Analytics & Insights space, leaders are addressing the challenges of developing predictive analytics, adopting BI tools, developing commercial analytics platforms for first product launch, evaluating multiple data sources and determining the optimal source for different diseases. As a result, actionable insights and "storytelling" are of increasing importance because they show the "why" of analytics, what it means to the business. Communication is critical. And, like leaders across the organization, they're grappling with upskilling, acquiring and retaining talent. People are looking for remote positions, higher compensation and/or greater opportunity.

Next Best Action (NBA) has become a hot topic in commercial organizations. To implement it successfully, it's important to maintain a stable target list for the field force. Use NBA on top tier HCPs only. Don't waste time and resources by analyzing NBA on lower value HCPs. Also, HCP propensity to prescribe should be a part of the NBA algorithm. As mentioned, the importance of communication skills in advanced analytics shouldn't be underestimated. Some senior data scientists are spending more time "explaining" or "selling-in" analytics than actually doing analytics. Once implemented, Marketing reaps the benefits of Next Best Action because it shortens the cycle time to understand what is working and increases the number of levers it has to move brand performance.

As well, there are some important things to think about when implementing Dynamic Targeting. Sponsorship and clear communication of value are essential. Take a phased approach to implementation and scale to other promotional channels. Start small and use lessons learned from each phase to inform enhancements and expansion. Expect an initial challenge from sales reps that they know better than the AI. Celebrate wins when the most doubting reps find value in the results and insights generated through the approach. Incorporate change management best practices focusing on the value to the field and building field engagement. And, importantly, it's essential to measure the success of the methodology. Calculate and communicate how often the platform is used, the time saved by using the dynamic targeting recommendations, the value delivered and the data leveraged to make better decisions.

Navigating in 2022

Future of Commercial Operations Themes



Field Surveys Provide Important Insight



Field force effectiveness is informed by feedback from the field and benchmarks from other organizations

Field feedback informs sales training topics, digital format and content, engagement strategies and more...

What Are Doctors Saying and How Do We Respond?

People



- What skills need to be developed or insourced?
- What is the optimal organizational design to drive impact?

Process



- How do you drive efficiency with less resources?
- How do you achieve content velocity and increase speed to market?

Platforms



- Do your current platforms enable your business vision?
- Are there other platforms/ technology you should considering?



Navigating in 2022

As the commercial model continues to evolve, companies are capitalizing on opportunities to expand and enhance their capabilities. The new normal is an array of hybrid/virtual/live engagements. Among the impacts are virtual speaker training, virtual/hybrid learning & development, virtual meetings & events, and flexible HCP engagements. Marketing channels and media are as crucial as the content being created. Website and mobile engagement, social media and personalized content, in addition to the sales team as channel, are all critically important.

It's no surprise that advanced analytics and digital capabilities are top priorities in driving transformation in the life sciences industry.

In the advanced analytics space, strategies are focused on:

- How are companies implementing Next Best Action?
- How can Dynamic Targeting drive personalized customer engagement and accelerate call planning?
- What are the benefits of Patient Finding, and how should it be implemented to optimize customer targeting?

In the digital space, we have witnessed an accelerating race to evolve digital and data capabilities through enhancement of tech stacks to make organizations more analytically driven and connected moving forward. With issues such as data privacy and a cookie-less world at the forefront, it is now incumbent upon brands to unify data and to understand how independent efforts come together to impact customers. In concert with these market dynamics, TGaS has analyzed biopharma brands to understand which brands and respective companies are excelling in order to assess trends into 2022 and beyond, creating a Digital Competency measurement for each brand.

While there are uncertainties as we look ahead to 2022, what is certain is that Commercial organizations will need to be agile, flexible and pivot rapidly to be successful. This encompasses not only your externally focused business goals but also, very importantly, your people. Building and enhancing capabilities, upskilling, increasing team performance, acquiring and retaining the right talent and creating a culture that embraces change are critical success factors.

Leaders' Greatest Fears Going Into 2022 Shared During the Summit

Talent shortage will create large challenges in 2022

Shift to our new Global Role and impact on budget & expectations

Not implementing the learnings from the virtual environment, we have been in. Going back to status quo.

Integrating live & virtual capabilities across differentiated parts of the globe

One fear going into 2022...

Not being able to incorporate new and innovative ways of learning

Managing the mix of live and virtual meetings as some return to office and others remain virtual

Reduced budgets and our need to redesign our new hire training program

My biggest fear is that I won't get more headcount



Are You Ready for 2022?

In conclusion...

What a paradigm shift 2021 has been, particularly for the life sciences industry. The pandemic has driven an unprecedented transformation to the Pharma commercial model, and much uncertainty remains as we move into 2022. Achieving an optimal balance of client facing resources and digital/virtual client engagement will be a critical priority while organizations continue to evolve their digital capabilities and advanced analytics. TGaS Advisors remains engaged with our clients every step of the way as together we successfully tackle the opportunities and challenges ahead.

Leveraging 2021 learnings to innovate and evolve the Commercial Model

- Balancing customer engagement methods to be nimbler in responding to client business needs
- Expanding digital excellence to enable best in class customer engagement as the commercial model evolves
- Implementing Next Level Ways of Working, including Next Best Action and Agile
- Evolving skills and capabilities
- Retaining and acquiring critical talent



PARTNERSHIP

About TGaS Advisors

TGaS Advisors, a division of Trinity Life Sciences is the leading benchmarking and advisory services firm for commercial organizations in the life sciences industry. With a roster of large, emerging and precommercial life sciences companies, TGaS provides robust comparative intelligence and collaborative network membership services. The team includes more than 50 experienced professionals, most with senior-level experience in the life sciences and related industries.

For more information, please contact TGaS at contact@tgas.com.