



ADVISORY BRIEF

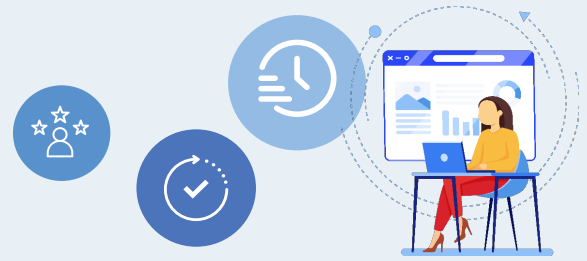
How to Avoid a Content “Stalemate”

Sue Lipinski



About the Content Excellence Series from TGaS Advisors

The content excellence series from TGaS Advisors, a division of Trinity Life Sciences provides life sciences-specific thought leadership and best practices related to content creation, development, deployment and measurement. For more information, contact Sue Lipinski at slipinski@trinitylifesciences.com.

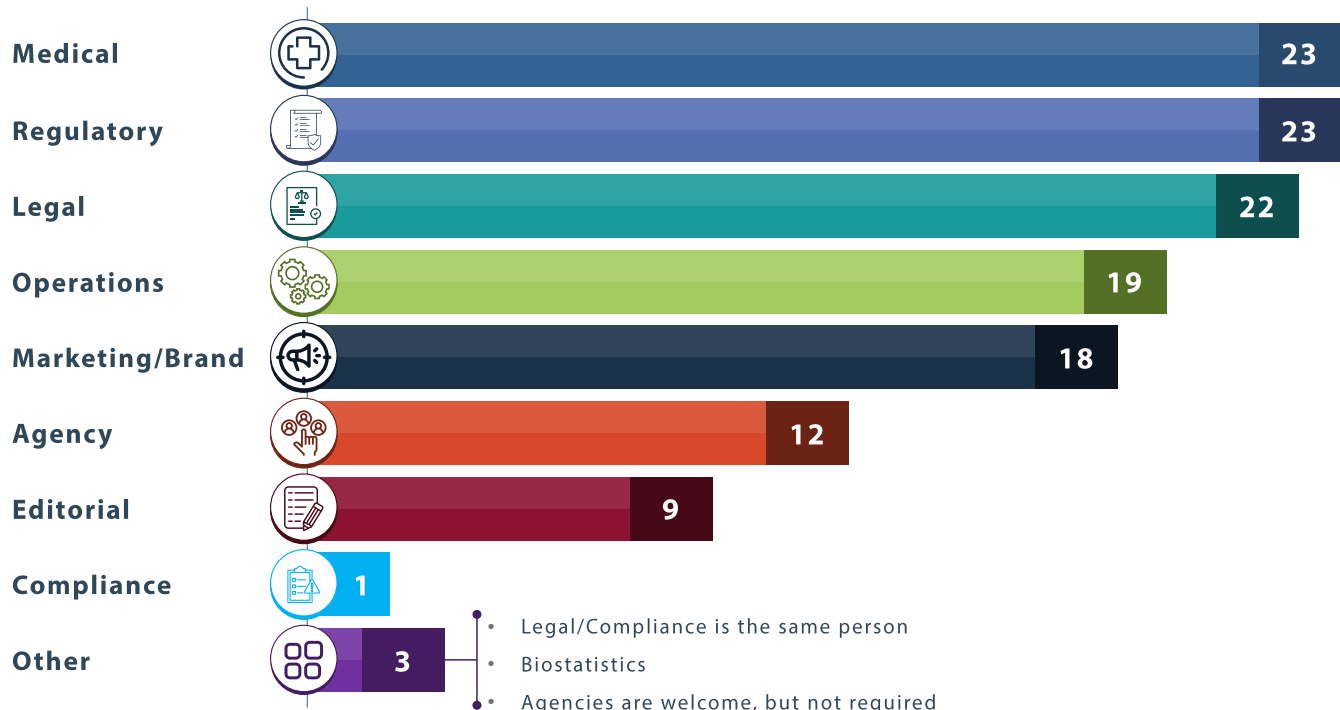


If you have participated in the promotional review process, it can be a delightful, contentious, enlightening or *[insert your own adjective here]* experience. Some of the brightest minds in the organization gather semi-weekly to provide insight and input on marketing materials that help customers understand the benefits and risks associated with prescribed products.

All participants have an important role in shaping content, and not unlike a game of chess, it can move swiftly, or it can last for months or longer. There is a lot of give and take, repositioning of pieces and unexpected twists and turns, all played out in a fixed, familiar environment. We will explore some offensive and defensive strategies, data and best practices to help you avoid a content stalemate on your way to becoming a Content Grandmaster.

Most Common Participants in Promotional Review

Companies participating in a recent study conducted by TGaS Advisors were asked to specify which review functions are “Core”/“Standing” members of their MRL promotional review meetings. All responding companies indicated that Medical and Regulatory are “Core”/“Standing” members of their promotional review.



Source: Medical/Regulatory/Legal (MRL) Promotional Review Industry Landscape: Resources, Process, & Administration, December 2022, n=23

Note: Respondant were asked to select all that apply.

Opening Moves

Even before a piece is moved, you first need to decide which color piece you would like to be, and if you want to be the one to make the first move. This may seem like a clear cut decision, but your style of play, the opponents style, previous match results and a whole other host of factors can come into play. A simple decision can become a bit murky. At times it can seem that promotional review should be a clear choice of a black or white piece, but it’s **within the shades of grey** where we spend most of our time.

Why areas of grey? Although the trial data and label are relatively clear, how to make highly scientific information engaging, understandable and compliant is where we spend most of our time. For example, we know when the brand and indication are present, then fair balance also needs to be present. But how much? And the fair balance may be treated differently if the spatial relationship between an interactive visual aid and a TikTok ad is different. As the project owner, you have been working with your creative agency to push forward new ideas and are the subject matter expert on how your brand will be represented in the channel. Especially if it’s a new channel, there is a pretty good chance that the reviewer has limited experience with it.

Another area of grey? A mind change. A piece that has already been reviewed with limited comments comes in a second time and there are a lot more comments. It can be frustrating, but it is part of the process. It is not black and white, it requires nuances, further thought and sometimes reflection. If it is “sometime,” that is completely understandable. If it’s most of the time, then either the process needs to be evaluated, or the review environment needs to be recalibrated.

GRANDMASTER TIPS:

Project owners should schedule time outside of the Medical, Regulatory, Legal (MRL) meeting to onboard reviewers to a new tool or channel via a demo. Review teams should establish at least one person in the group to be the knowledge expert on that channel. It’s a two-way street and reviewing a PDF screenshot doesn’t provide a 360-degree experience.




Learn the Rules

Close your eyes and imagine someone is telling you how to play chess. There is this pointy guy, he’s called a bishop, but he can only move diagonally, sometimes on white spaces, sometimes on black, IF there isn’t anything in his way. The pawn can move one space, but sometimes two, and then he can only take a piece if it is diagonally adjacent. And the knight, well, he looks like a horsey...and, now imagine someone is doing it with the chess board in front of you, and probably written instructions, and an app, and lots of “open” play.

Across the industry, an initial submission is usually about five days before the live meeting.

Having observed dozens of live promotional review meetings, for uncommon pieces, the project owner usually starts with “before we get started, let me give you a backdrop for this piece.” It is best practice to align all stakeholders before the discussion of the piece. The challenge with that approach is it may be too late. The reviewers, if they followed the process, have already provided their comments, and honestly, most of the decisions have been made. Although organizations do include metadata in their system, the taxonomy and space limitations don’t allow for the expanded view.



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GRANDMASTER TIPS:

Add an attachment to the submission in addition to the creative to provide an overview of the piece including intended audience, goals and delivery channels. Ensure that the submission description directs reviewers to look at the attachment prior to review, so it does not get overlooked. Second tip – leverage office hours, an industry best practice, to walk through ideas to save promotional review time. Don’t let the first time you discuss this new piece happen during a live Promotional Review Committee (PRC) meeting, after comments have been submitted.



Every Piece Matters

In chess, there is a reason that all of the pieces don’t have the same moves. The pieces play an important role in both the protection of the king, as well as offensive strategy to capture the opponent’s pieces.

Promotional review also employs the same approach, to protect the customer and company by providing clear communications that do not overstate product benefits. However, it is also important to the organization that the customers are aware of the product and how it can help patients impacted by their particular condition.

Notably, promotional review – whether live or offline – is not how the core team of participants spends 100% of its time. **For Promotional Review Operations and Regulatory, promotional review is typically >75% of their overall workload, but for other functions, like Legal and Medical, it can be roughly about half of their responsibility... or less.** As a project owner, a successful review meeting starts by pre-reviewing all comments on the piece before live review and coming in with solutions and alternate options for significant discussion items.

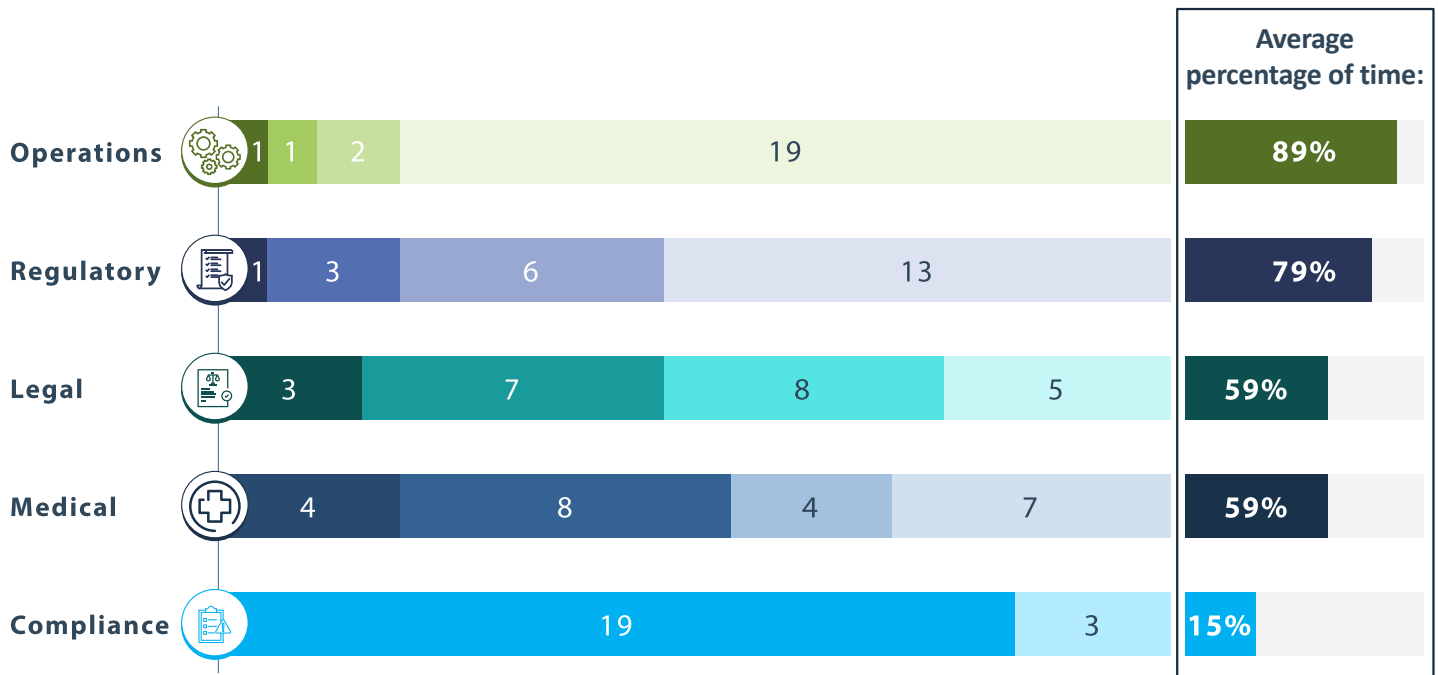
GRANDMASTER TIPS:

For all participants, lines can get blurred. Clear roles and responsibilities with semi-annual refresher training is one key to success. Another more nuanced approach is to play to each other’s subject matter expertise, and to move the conversation along if a decision cannot be made about a specific comment. And don’t sweat the small stuff – the non-material changes are more often than not, more efficient for offline review.



Allocation of MRL Review Process Functional Support

Companies were asked to indicate the approximate percentage of time (as a percentage of overall role/remit) that the following functions are able to support your MRL promotional review process:



*One company did not provide a Percentage for the Compliance Function

Source: Medical/Regulatory/Legal (MRL) Promotional Review Industry Landscape: Resources, Process, & Administration, December 2022, n=23*

Re-evaluate the Board

As a game progresses, and moves and countermoves shape the potential outcome, it’s very easy to be so linearly focused that you leave your king exposed. Or conversely, you are so focused on the short game that you miss an opportunity for checkmate. The longer the game continues, the more likely that the outcome you are anticipating is met with surprise moves and blunders.

*According to the TGaS Landscape of MRL Cycle Review Times, companies define cycle times differently, and ranges vary widely from a minimum of 3 days to a maximum of 78. The average cycle time for simple material like an internal communication can be 14 days; something more complex like a speaker slide deck is approximately 34 days. **A lot can happen in those 2 – 3 months from submission to approval. There can be so much focus on the minor points that the big picture can be lost. A best practice is to stop and take a breath. Re-evaluate the board.***

- » Has the competitive landscape changed?
- » If this piece isn’t approved by a specific date, how does that impact the rest of the campaign?
- » How do these decisions impact future materials?
- » Have the promotional rules for the platform changed (especially for social media)?

GRANDMASTER TIPS:

Keep the production team (especially for digital production) informed of delays and realign expectations. Document agreed upon changes and communicate them promptly to your external or internal agency partners to make sure future materials – even those that have already been submitted – reflect the agreed upon changes in the review process. Better yet, develop a **brand book and claims library** that documents language and visual updates. Equally as important, take a step back at least once a month and ask – are these materials still relevant given the changes in the landscape, in language and in timing? Put a monthly reminder on your calendar and be diligent about it.



Castling Can Be a Sneaky Move

In chess, castling is when both the king and rook nearly swap places, but only if neither one has been moved yet and there are no pieces in between. It can significantly change the makeup of the board, and when you are in a vulnerable position, can be jarring to the opponent. It can also be used offensively giving you an immediate advantage.

In the promotional review process, castling can come in a few forms. For example, when anyone on the team surprises the rest of the collaborators by bringing in senior leadership to a live review unannounced, this surprise move can cause some discomfort amongst the team.

Another example of castling is when the team would like senior leadership to weigh in on material through an escalation process, which is usually more formal and flagged as such in the promotional review system. **Escalation can be a necessary and productive part of the review process**, but only when used appropriately to align upon the best way to advance content – not as a power move. Reasons for escalation vary: it could be an impasse, it could be a new channel or message for which the review team would like to seek more senior guidance, or it could be that a piece needs to have more of an expedited review due to an in-market event.

Lastly, castling can also consist of the old switcheroo. A last-minute agenda swap, depending upon the team, can be a welcomed relief or an unwelcomed event.

GRANDMASTER TIPS:

Escalation and senior leadership participation should be used sparingly and wisely during promotional review. Team members appreciate it when they know who will be attending the meeting ahead of time, so that the agenda can be managed efficiently, and participants are properly prepared. Most of us run from one meeting to another, with only a few moments to mentally prepare – make sure your collaborators are up to speed on what to expect. A formal escalation should be used very sparingly, usually related to an in-market event. Escalation should never become the “norm” and create unceremonious churn.



If Content Is King, Then Process Is Queen

The queen is by far the most important piece in chess. It is strong, can move swiftly in almost any direction and sits side-by-side with the king – governing the whole chess board. If you lose your queen early, it’s going to be a tough match. If you bring the queen out too quickly, you risk exposing your king. But know this--the queen is the most flexible piece in chess, and the process surrounding promotional review is often flexing and is in a persistent state of motion.

The pharmaceutical industry is required to be compliant and submit select materials to OPDP. Period. That is non-negotiable. To comply with those standards, your commercial and review team must have the time and tools

to be thorough, and thoughtful, about their work. The process is meant to bring these teams together in a manner to **maximize efficiency, promote collaboration** and provide appropriate documentation.

On average, most companies use the 5-by-3 rule: 5 business days before the live meeting, the initial materials should be submitted. If the piece has been reviewed once already and is submitted for re-review with changes, that is about 3 business days. Although this approach is the unofficial standard in the industry, the landscape is changing. Agile review teams are being stood up to take that review cycle down to 2 – 3-week sprints. Separate review pathways are deployed, some requiring all reviewers to weigh in, and on derivative pieces – Regulatory only. **Currently, over 20 organizations are deploying modular content to meet the demand of omnichannel, to meet the demand of the field force and to meet the demand of their customers.**

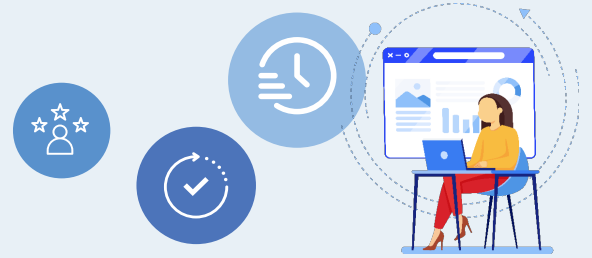


GRANDMASTER TIPS:

If you are a Marketing Operations or promotional review leader, just because the process is working today doesn’t mean that there isn’t room for improvement. Successful Marketing Operations leaders are focused on continuous improvement – stakeholder satisfaction studies, volume and quality metrics, updating training and guidance, career path development and keeping your eyes on the horizon for what is next.



Promotional review, like chess, is tried and true and has passed the test of time. It is a unique experience to collaborate, to strategize, to put the customer at the center, to innovate, and dare I say, even have some fun! If you would like to connect to understand how TGaS Advisors membership, benchmarking and transformational support services can help you on your journey from beginner to grandmaster, please contact Sue Lipinski at slipinski@trinitylifesciences.com to learn more.



Authors



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Sue has a wealth of expertise in omnichannel marketing in the life sciences industry. As a strategic advisor, she works closely with clients to optimize their marketing and digital center of excellence organizational structure, plan and align staff for future needs, and develop best in class frameworks for cross team collaboration. She also works with her Trinity clients to help them understand what good looks like for overall omnichannel performance and investment.

Sue’s pharmaceutical experience includes oncology, rare disease, and primary care digital marketing for healthcare and consumer audiences. In addition to pharmaceutical experience, Sue has prior experience in the non-profit, technology, financial services and health insurance industries. Prior to joining Trinity, Sue led a portfolio of worldwide business at the health and wellness arm of Razorfish, a top global digital agency.

Sue received her Bachelor of Science degree in Management Science at the State University of New York at Geneseo. Her minor is in Organizational and Occupational Behavior.



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