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The Impact of iPads on Pharma: A Primer

A FirstWord Dossier Primer Report

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The Impact of iPads on Pharma: A Primer

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Executive Summary

When Apple launched the iPad in April 2010, it ignited tablet frenzy among consumers and businesses alike. Apple sold 15 million of the devices in its first nine months, surpassing all tablet PCs ever sold.¹ Analysts project that more than 50 million tablets will be sold in 2011, be they iPads or Android-based devices.²

Pharma companies, despite historical reluctance to adopt new digital solutions and existing investments in tablet PCs, have proven eager to embrace tablets. Today, the list of Big Pharma companies with tablets in the field includes Pfizer, AstraZeneca, Novartis, Abbott, Eli Lilly, and sanofi-aventis, while numerous specialty Pharma companies have deployed tablets or are testing them internally.

The demand for a leading edge, state-of-the-art examination of what the industry has learned about tablets is therefore high. This report meets that need. It also explores where experts have identified room for growth and how they envisage the industry's relationship with tablets developing in years to come.

The report distils these findings into six key parts that progress from tablet inception to introduction.

Making the business case for tablets

A number of business cases have drawn Pharma organizations toward tablets; the most common of these is that tablets improve rep-physician interaction. As physician access declines, reps need to present compelling material on the spot. Unlike tablet PCs, which are heavy and take time to boot up, tablets are instant-on, instant-off and highly portable, meaning a rep can just as easily make a presentation walking down a hospital corridor as seated beside a physician in an office. Furthermore, content can be customized for physicians, who can physically steer a conversation on a touch screen toward their interests. The device, meanwhile, generates a constant stream of data that can help tailor future marketing campaigns.

¹ 'The incredible "ecosystem" behind iPad's success', the brandgym blog http://wheresthesausage.typepad.com/my_weblog/2011/03/the-incredible-ecosystem-behind-ipads-success.html

² 'Tablet sales to nearly triple in 2011: Gartner', MarketWatch <http://www.marketwatch.com/story/tablet-sales-to-nearly-triple-in-2011-gartner-2010-10-15-1328470>

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Other business cases for tablets that the report explores include: how tablets can increase internal productivity, the inexpensive relative cost of tablets compared to tablet PCs, and the notion that those companies that lag behind tablet integration risk cultivating a negative, anachronistic perception among customers, which may impact prescribing behavior.

Though return-on-investment (ROI) is still lacking for any of these business cases, they together have proved persuasive enough to drive the devices' popularity.

Choosing a device

The market for tablets became increasingly competitive in the first six months of 2011. The iPad controlled 95 percent of US tablet market share in the third quarter of 2010.³ As of May 2011, that market share had declined to 82 percent, as competitors like Motorola, Blackberry, and Samsung emerged with viable alternatives.⁴

Experts interviewed for this report agree that the iPad is still the most attractive tablet for Pharma organizations. The iPad is the most advanced tablet on the market yet costs less than or the same as its competition. IT departments can use iTunes to create specific profiles and encrypted channels. Content designers have the most experience with iPads, and reps and physicians are familiar with it as consumer devices. In 2011, 30 percent of US physicians already own iPads, with an additional 28 percent planning to purchase one within the next six months.⁵

Android alternatives to the iPad will become more attractive to Pharma organizations in the coming several years. Devices like the Motorola Xoom, Blackberry Playbook, and Samsung Galaxy Tab have already overtaken some of the iPad's market share. As physicians and consumers adopt Android tablets, it weakens the argument that the iPad's near-exclusive popularity with physicians gives it primacy as a Pharma marketing platform.

³ 'Apple's iPad carves 95% tablet market, competition is dust', ComputerWorld
http://blogs.computerworld.com/17273/apples_ipad_carves_95_tablet_market_competition_is_dust

⁴ 'iPad controls 82% of US Tablet Market', Culture of Mac, May 5, 2011
<http://www.cultofmac.com/nielsen-ipad-controls-82-percent-of-u-s-tablet-market/93479>

⁵ Taking the Pulse US 2011, Manhattan Research

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Some experts believe the future for Pharma may be a device-agnostic one, where dynamic, cloud-based content can simultaneously function on a spectrum of devices.

In the short term, however, it is important to commit to a single tablet platform. Device agnosticism requires tablets and digital solutions to reach a point of ubiquity. In the meantime, single platforms allow designers to optimize content and for organizations to maintain cohesion while implementing a new strategy.

Cementing a strategy

Establishing a comprehensive digital strategy is one of the biggest challenges for Pharma companies integrating a new digital solution. Lack of a digital strategy is one of the primary reasons digital solutions continue to underperform in the Pharma industry.⁶ To lay a firm foundation for tablets, the report finds that companies should consider:

- identifying specific business needs and determining how tablets address them
- ensuring senior level buy-in
- assessing internal and external competencies and filling gaps where necessary
- determining speed of deployment

The final of these challenges is one of the most important, as the rate of deployment often varies from one company to the next. Where one company may choose a cautious, pilot-driven approach, the next may deploy tablets within a few months and adapt once the devices are in the field. Either way, conveying an understanding of the rate of deployment across the organization can obviate future departmental frustrations or misunderstandings.

Embracing content creation

Some Pharma companies to date have pursued a conservative course with content creation, electing to transfer existing print and digital materials to their tablets rather than designing materials anew. Experts interviewed for this report concur that this approach is flawed. Content designed natively for tablets is more interactive, has bolder graphics, and allows physicians to steer conversations toward their own interests and gaps in knowledge, thereby unleashing the value of the form factor.

⁶ Across Health digital survey EMEA 2011, Slide 38, "Regulatory issues, strategies and ROI questions are the three main bottlenecks for digital within organizations"

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The GPS function within tablets ensures that the devices always know where they are in relation to longitude and latitude. As a result, content can be localized down to the zip code, providing physicians with statistics about disease prevalence and social impact in their direct communities.

A study has found that physicians in general like tablet details but do not like being left without materials for future reference.⁷ Content designed natively for tablets can include swipe buttons that allow reps to forward slides and apps of interest instantly to physicians' emails.

The value of data

Due to the abundance of data that tablets generate, Pharma companies can obtain detailed statistical insights into where reps go, how long they stay, which content they use, and how customers respond to it. This wellspring of data can be used to record customer preferences, tailor marketing campaigns, and train reps to better leverage content.

For Big Pharma companies, updating their digital infrastructure to accommodate and capitalize on this data is a challenge. Creating solutions that sit on the back end to segment incoming data and then analyze it requires full commitment from IT departments. Despite these challenges, all interviewed experts agree that harnessing the digital component of the device can add value, improve closed loop marketing, and illuminate ROI.

Introducing tablets

Although the majority of employees will be familiar with tablets — recent research found that 90 percent of consumers in the US own a tablet or are considering buying one⁸ — training is still an essential step. Companies need to ensure their reps know how to operate tablets fluently and understand how the devices should be used within a corporate framework, rather than as a general consumer device.

Tablets may be cutting-edge devices, but training should start out simple. Employees need to learn how to launch the devices and navigate apps. Secondary print materials that reinforce training sessions may prove useful. Companies may also consider letting employees use the devices for primarily personal means - playing music through iTunes, sending emails, watching videos - for an extended period of time to build competence.

⁷ Satisfaction ratings of physicians toward various detailing formats, 'Physician Detailing Survey', April 12, 2011. Intouch Solutions & Harrison Group

⁸ 'Most People Want Tablets, Use Them For Books, Games', TechNewsDaily
<http://www.technewsdaily.com/most-people-want-tablets-use-them-for-books-games-2838/>

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Once reps have a baseline understanding, companies can train for more advanced functionality within the specific context of sales calls. Sharing control of the device with physicians, engaging them with content, and understanding how to use tablets on the go in hospital corridors are new behaviors that need to be explained and reinforced.

Finally, once tablets are in the field, companies can adopt an iterative approach wherein physicians constantly provide feedback, reps constantly learn about shortcomings and successes, and management constantly uses this feedback to customize future marketing campaigns and training.

Making the business case for tablets

Pharma companies responded to the launch of the iPad in April 2010 with immediate enthusiasm. A number of companies deployed the devices within a matter of months, foregoing cautious pilots. Others began to test them internally in spite of existing investments in tablet PCs. A year later, some companies continue to stockpile iPads while they wait for proper software products.⁹

Organizations initiating the tablet journey today can draw on the industry's learnings to pinpoint how tablets may best serve their needs. The primary business cases for tablets are:

- The devices can improve interaction between sales reps and physicians and create meaningful customer value.
- They can streamline internal communication and improve efficiency and mobility across an organization.
- They can cut operating costs
- They can provide a way to keep pace with competition.

Which of these business cases organizations find attractive may impact the devices they select and how they implement strategy.

Optimizing rep-physician interaction

In the past decade, physicians have become harder to access. Only seven percent of sales visits in the US now last longer than two minutes, while 43 percent of reps fail to make it past the receptionist.¹⁰ As a result, reps have narrower timeframes to present educational materials and attempt to impact prescribing behavior.

⁹ 'iPads Are Latest Weapon in Medical Sales, *The Wall Street Journal* <http://online.wsj.com/article/SB10001424052748703493504576007723119984758.html>, 'Big pharmaceutical companies stockpiling iPads for future sales apps', TUAW http://www.tuaw.com/2011/05/17/big-pharmaceutical-companies-stockpiling-ipads-for-future-sales/?a_dgi=aolshare_twitter

¹⁰ 'Changing the Face of Detailing. How to motivate physicians to see Pharmaceutical sales reps', ARCUS http://www.arcusgroup.ca/pharmaceutical_sales.htm

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If companies want to pursue a digital strategy during calls, it is useful (and imperative in the opinion of some) to have a device that turns on instantly and functions in a stationary setting as well as on the go. Tablets are a novel solution.

“The iPad offers instant gratification in that there is no boot-up time,” says Bill Drummy, founder and CEO of Heartbeat Ideas. “It means that the device is always ready. When you are walking down the hall with a doctor, any barrier provides an excuse for the doctor to end the conversation. The iPad strips all of those barriers away.”

This differentiates tablets from their predecessors, tablet PCs, which were often plagued by short battery life and were cumbersome to carry.

“Delivering a positive customer experience can differentiate companies,” says Sandra Muzinich, e-Capabilities Lead, Lilly UK. “A PC dying in the middle of a call because it is out of battery leads to bad calls and bad experiences with physicians.” Tablets like the iPad have a 10-hour battery life, which provides reps with more flexibility.

“You can use it in an office to access compelling content or can do the same thing walking down a busy corridor with a physician standing by your side,” says Muzinich.

Tablets can also help create value for the customer. Due to the devices’ interactive nature, physicians can steer conversations toward their own interests rather than idly listen to generic presentations. If certain points intrigue physicians, they can physically guide the touch screen toward further content. Reps can then send that content directly to physicians via follow-up emails.

“It would be impossible to do that without this format,” says Dave Mihalik, senior director of marketing, EKR Therapeutics. “Imagine taking one page of printed material and putting three or four or five icons on the bottom that let you delve deeper into any topic of interest with a touch of your finger. The iPad makes that possible.”

Increasing internal efficiency

One reason tablets have proven so popular among consumers is because they expand the utility of a connected mobile device.¹¹ Smartphones may enable continuous connectivity, but it is difficult to read articles and type emails on a smartphone-sized screen, not to mention impossible to access stored files the way one can on a laptop. Tablets bridge the divide, in that they are powerful enough to act as laptops yet light and thin enough to easily slip in a bag.

¹¹ ‘Why Your Next PC Will Be a Tablet’, PCWorld
http://www.pcworld.com/article/211193/why_your_next_pc_will_be_a_tablet.html

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Pharma companies can harness these features to improve efficiency across their organizations.

"The iPad is an ideal, middle range device that enables you to become more mobile," says Bob Harrell, director of integrated marketing at Shire Pharmaceuticals. Shire's head office has issued iPads to its commercial staff to improve employees' efficiency while traveling and to increase their mobility.

"Can I say it is really a must-have? No, but I do think it is convenient, and it makes it easier to do work in certain cases," says Harrell.

"The sheer ability to house and quickly refer to information is a great benefit," adds Dennis Urbaniak, vice president, US Diabetes, sanofi-aventis. "In general, we have way too much information at our fingertips. The iPad allows you to process that information a lot faster."

Sanofi-aventis has deployed iPads to some of its internal divisions, including the Diabetes Division. According to Urbaniak, the company will consider replacing laptops with iPads in the future because employees can maintain all their old laptop proficiencies while becoming more mobile.

"For those of us that spend the majority of our time traveling, it has greatly improved our productivity while on the road," says Urbaniak.

Some Pharma companies have also embraced tablets as a way to streamline internal training. Pfizer, for instance, has started delivering iPads pre-loaded with e-training materials to new sales reps. A recent pilot showed the iPad to be more effective than printed materials or Kindles at relaying information.¹²

Minimizing cost

Tablet PCs often cost more than \$2,000. The average iPad 2 with WiFi and 3G costs \$729.¹³ Although the return-on-investment (ROI) for iPads or other tablets has yet to be proven, the lower price point of the devices may make them a relative cost benefit.

"I have heard people say it is nearly disposable from a field-cost perspective," says Harrell. A few months before the iPad launched, Shire signed a purchase order for a three-year deal to replace laptops with tablet PCs. In spite of that investment, they realized the potential value of the iPad and, due to its low cost, proceeded with pilots. "Because tablet PCs are so expensive,

¹² 'iPad Replaces Paper for US Field Force Training', Cafepharma Message Boards

<http://www.cafepharma.com/boards/showthread.php?t=455839>

¹³ Apple website,

http://store.apple.com/us/browse/home/shop_ipad/family/ipad/select?mco=MJE00TIOMDI

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and because the laptop and technology infrastructure is so expensive, to add an iPad is like a rounding error," Harrell says.

"If two years from now something better comes out, well you know what?" says Drummy. "It is a \$700 capital investment. Big deal. A single sales call costs a pharma company, what, \$500? Essentially, the iPad can pay for itself in one call."

Tablets can also cut costs on printed materials. Pfizer anticipates that the move to the iPad for sales training purposes will save \$500,000 a year, as physical textbooks and manuals can cost up to \$1,000 per new rep.¹⁴

Everyone else is doing it

In 2010, those Pharma companies that deployed tablets into the field were a novelty. More than a year later, the list of companies with tablets in their sales forces includes, but is not limited to, Lilly, Pfizer, AstraZeneca, Novartis, Abbott, Sunovion, ProStrakan, Stryker, Eisai, EKR Therapeutics, and LEO Pharma.¹⁵ A recent survey conducted by Intouch Solutions and the Harrison Group found that 49 percent of US physicians have received tablet details from a Pharma sales rep.¹⁶

As tablets become industry standard, those companies that resist or wait for conclusive ROI may risk failing to meet raised physician expectations.

Harrell likens it to a table stakes argument in poker. Even if companies are not sure they have the best hand, there are enough chips in the pot that it may make sense to play.

"The bar is starting to be raised about the basic expectation that customers have," says Harrell. "If we are still using tablet PCs or only using print, it positions us as being a dinosaur, you know - not progressive, not innovative - and we start to look pale in comparison. So even if the iPad does not deliver more time with the physician *per se*, it hurts our company's reputation if we fall behind."

¹⁴ 'iPad Replaces Paper for US Field Force Training', Cafepharma Message Boards
<http://www.cafepharma.com/boards/showthread.php?t=455839>

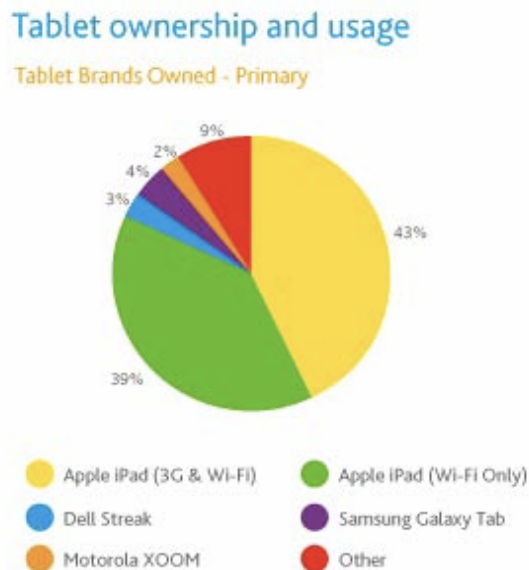
¹⁵ 'Drug Reps Fear iPad's Spying; They Should Be Worried About Their Jobs', BNET
<http://www.bnet.com/blog/drug-business/drug-reps-fear-ipad-8217s-spying-they-should-be-worried-about-their-jobs/8417>

¹⁶ 'Physician Detailing Survey', April 12, 2011. Intouch Solutions & Harrison Group

Choosing a device

If organizations are convinced by one of the four business cases for tablets, the second step in the tablet journey is to select a specific device. This step became more complicated in the first six months of 2011, as a number of companies have introduced tablet competitors to the iPad. These include Research in Motion's BlackBerry PlayBook, Motorola's Xoom, Window's 7 Tablet, and Samsung's Galaxy Tab.

Although the Apple iPad, newly updated as the iPad 2,¹⁷ continues to be the most established device in the tablet marketplace, Android-based competitors control roughly 18 percent of market share in the US, as of May 2011.¹⁸ By comparison, the iPad controlled 95 percent of US tablet market share in the third quarter (Q3) of 2010.¹⁹



Source: iPad controls 82% of US Tablet Market, Culture of Mac, May 5, 2011

Pharma companies that decide to integrate tablets in 2011 therefore have a choice about which tablet is best suited for their organizations.

"I think organizations absolutely should look at Android-based tablets," says Wendy Blackburn, executive vice president of Intouch Solutions. "The iPad was lucky to be the first on the

¹⁷ 'Apple Launches iPad 2', Apple.com <http://www.apple.com/pr/library/2011/03/02ipad.html>

¹⁸ 'iPad controls 82% of U.S. Tablet Market', Culture of Mac, May 5, 2011

<http://www.cultofmac.com/nielsen-ipad-controls-82-percent-of-u-s-tablet-market/93479>

¹⁹ 'Apple's iPad carves 95% tablet market, competition is dust', ComputerWorld

http://blogs.computerworld.com/17273/apples_ipad_carves_95_tablet_market_competition_is_dust

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market, but there are going to be other, equally good, if not better for some applications, devices out there.”

The iPad appeal

Compared to its newly minted competitors, the iPad has a number of factors in its favor.

The first is recognizability. Physicians have proven one of the fastest areas of iPad uptake. Seventy-five percent of US physicians own Apple devices, be they iPhones, iPads, or iPods, according to Manhattan Research’s most recent *Taking the Pulse US Survey*. Thirty percent of US physicians specifically own iPads, with an additional 28 percent planning to purchase one in the second half of 2011.²⁰

Pharma reps that use iPads for detailing are likely to find their audiences familiar with the device and eager to use it, which may not be the case with the Xoom, the Playbook, or other Android models.

“We have not run into a lot of physicians who think the iPad is just another gadget,” says Blackburn. “They too recognize its value and are looking at adopting it internally in their offices. So they appreciate the rep who has one in their bag.”

Second, the iPad benefits from a more developed app marketplace. The Android Market offers fewer than 100 apps for Honeycomb, the version of Android optimized for tablets.²¹ The Apple App Store, by comparison, boasts more than 65,000 apps for the iPad.²² These range from media apps to branded apps to apps designed to help physicians with referencing, dosing, diagnosis, and patient care.²³

Pharma companies thus have more native apps to choose from, and content creators have more experience designing iPad apps for custom solutions.

Third, the iPad offers a secure operating system. Pharma IT departments have generally resisted Apple in favor of Windows and Adobe Flash. However, when it comes to field-based tablets, an open-source operating system like Android presents challenges for securing information. Through Apple iTunes, IT specialists can create specific profiles and encrypted channels for securely sharing information between iPads and the office. They can also use the

²⁰ Taking the Pulse U.S. 2011, Manhattan Research

²¹ Android Market Still Features Less Than 100 Apps For Honeycomb’, GottaBeMobile

²² <http://www.apple.com/ipad/built-in-apps/app-store.html>

²³ ‘25 iPad Apps Revolutionizing Healthcare’, The Health Hawk <http://masterofpublichealth.org/2010/25-ipad-apps-revolutionizing-healthcare/>

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'find my iPad' app to locate an iPad remotely in the event that it is lost or stolen. If the tablet is stolen, IT specialists can wipe it clean, thereby protecting sensitive information.

"The iTunes environment that some people curse for the way that Apple has implemented it is actually quite useful if you want to lock down an iPad," says Johnathan Reid, senior project manager, commercial IT, Abbott.

The combination of these three factors has made the iPad the overwhelming tablet of choice in the Pharma industry.

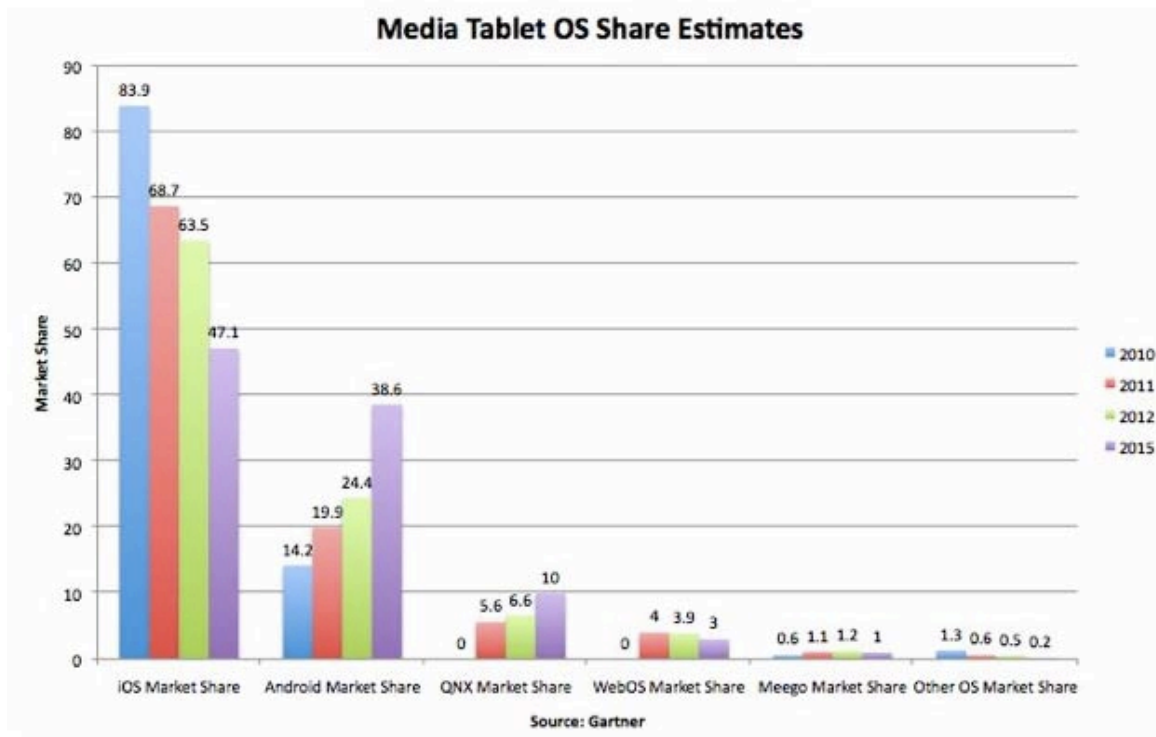
Android or agnostic?

The iPhone launched the smartphone revolution, but it currently controls just 28 percent of the smartphone market.²⁴ As more tablets offer user interfaces and price points comparable to the iPad, Apple's hegemony over the tablet marketplace is forecasted to similarly slacken. Gartner forecasts that Apple's tablet share will shrink to 69 percent by the end of 2011 and 47 percent by 2015. Meanwhile, Android is expected to climb to 39 percent market share in that same time period.²⁵

²⁴ 'Android grabs 53% of global smartphone marketshare; iOS 50% of application revenues', BGR <http://www.bgr.com/2011/05/19/android-grabs-53-of-global-smartphone-market-share-ios-50-of-application-revenues/>

²⁵ 'Apple's Tablet OS Share Will Shrink To 47 Percent By 2015', TechCrunch, <http://techcrunch.com/2011/04/11/chart-apples-tablet-os-share-will-shrink-to-47-percent-by-2015/>

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Source: 'Apple's Tablet OS Share Will Shrink To 47 Percent By 2015', TechCrunch

As the general population adopts various iPad competitors, physicians may trend in the same direction, thereby weakening the argument that the iPad's near-exclusive popularity with physicians gives it primacy as a Pharma marketing platform. Therefore, companies that wish to deploy Android-based tablets in the coming years can hedge their bets that, by the time they introduce their devices to the field, the non-iPad stigma may well have vanished.

Furthermore, some analysts believe that Pharma is headed toward a heterogeneous future where sales forces, physicians, and patients use an array of tablets essentially interchangeably.

"The direction in which we are heading for our field force as well as overall corporate is an attempt to get as device-agnostic as we possibly can," says Dennis Urbaniak, vice president, US Diabetes, sanofi-aventis.

Sanofi has already moved to the Good Mobile Messaging platform, which is a secure e-mail application that can be dropped onto any device.²⁶

²⁶ For more on Good Mobile Messaging, read here: <http://www.good.com/products/good-mobile-messaging.php>

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"We see a shift within the company to get away from picking a particular platform toward finding apps that you can use across these different devices and letting people pick and choose what best works for them," Urbaniak continues. "We are not 100 percent there yet, but that is definitely the direction that we are moving."

"I think that ultimately we should be device-agnostic and have a digital strategy that is based on the cloud," seconds Bob Harrell, director of integrated marketing at Shire Pharmaceuticals. "It is like building your own municipal water system. Why would you do that when you do not have the capabilities? You do not have the funding. You do not have the staff or the process to upgrade it on a regular basis. Instead, you should get on the grid. And that is my feeling about tablets as well. I am extraordinarily skeptical about hitching your wagon to a single device."

As organizations make their initial forays into the tablet marketplace, they can select specific devices with the confidence that in the future, the content and programs they design will likely matter more than the specific brand of tablet with which they proceed today.

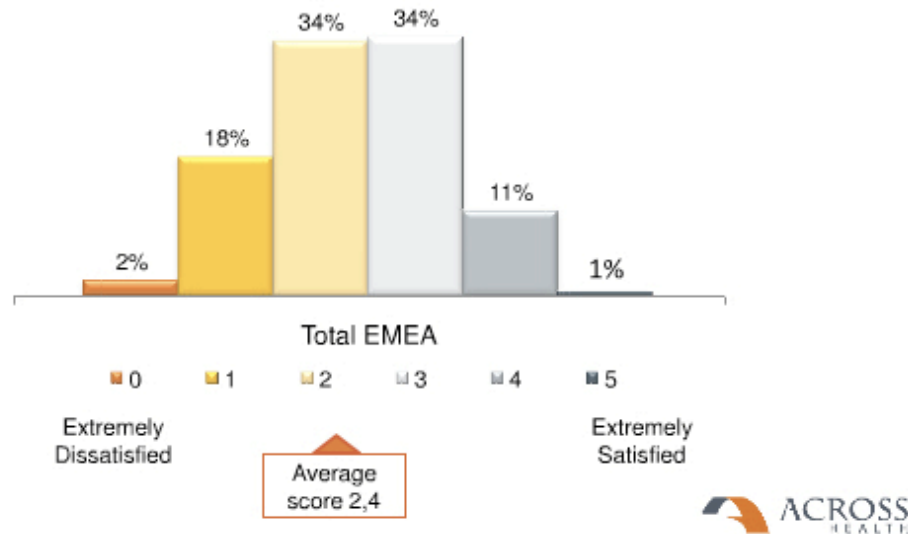
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Cementing a strategy

Pharma companies have struggled to capitalize on digital solutions and opportunities, whether they be websites, social media channels, or digital detailing devices like tablet PCs.²⁷ A recent Across Health study found that just 12 percent of participants, mostly comprising managers, directors, and VPs within an international spread of Pharma companies,²⁸ expressed satisfaction with their current digital activities.²⁹

Only 12% are satisfied with their current digital activities ...

On a scale from 0 to 5, how satisfied are you with your current digital activities?



Source: Across Health digital survey EMEA 2011

Lack of a comprehensive digital strategy was one of the primary reasons for this widespread disapproval.³⁰

²⁷ 'Pharma Web Sites Struggle To Build Trust', *Pharmalot*, <http://www.pharmalot.com/2011/01/pharma-web-sites-struggle-to-build-trust/>; 'Enterprise 2.0: where to begin (part 1 – does your boss know social media?)', *pharmaphorum* <http://www.pharmaphorum.com/2011/04/12/enterprise-2-0-where-to-begin-part-1-%E2%80%93-does-your-boss-know-social-media/>; 'What happened to tablet-pc detailing?' *74pharma*, http://www.74pharma.com/index.php?option=com_content&view=article&id=71%3Awhat-happened-to-tablet-pc-detailing&catid=1%3Alatest-news&Itemid=55

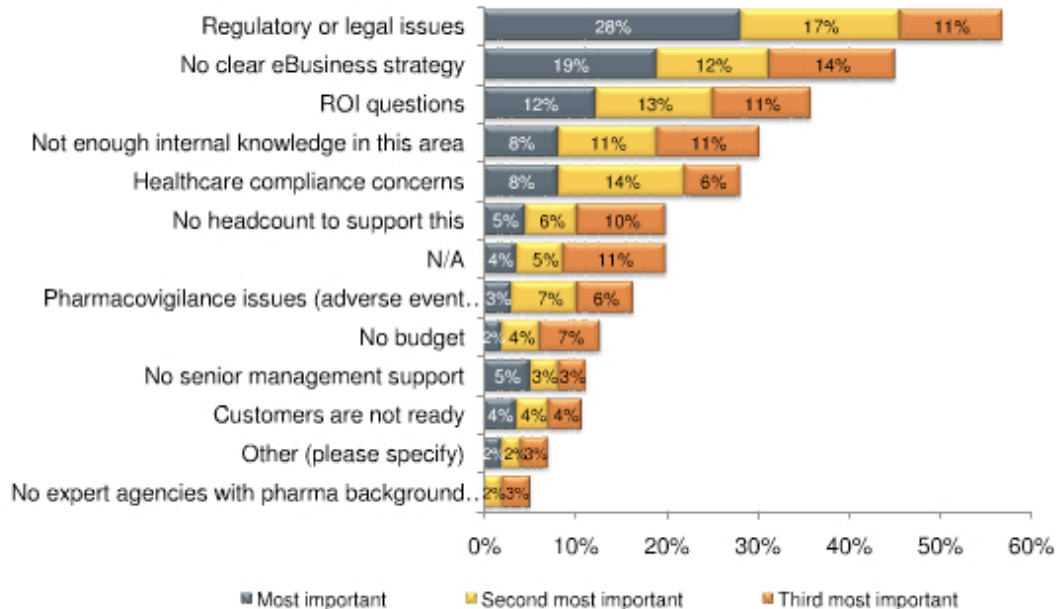
²⁸ Across Health digital survey EMEA 2011, Slide 10, "Participant Profile"

²⁹ Across Health digital survey EMEA 2011, Slide 15, "Only 12% are satisfied with their current digital activities ..."

³⁰ Across Health digital survey EMEA 2011, Slide 38, "Regulatory issues, strategies and ROI questions are the three main bottlenecks for digital within organizations"

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Regulatory issues, strategies and ROI questions are the three main bottlenecks for digital within organizations



Source: Across Health digital survey EMEA 2011

Once organizations choose a specific tablet, be it an iPad or an Android-based solution, it is critical to cement a digital strategy that will govern later steps in the tablet journey.

Identifying the problem

Whether organizations plan to use tablets internally or externally, identifying specific business objectives they hope to accomplish is a key step in designating a digital strategy. Is the goal to add value for customers? To close the loop on closed loop marketing? To enable better data aggregation? To improve employee efficiency during travel?

“The iPad is a device that has a lot of potential and it can do a lot of cool things, but it is a platform, not a solution on its own,” says Bill Drummy, founder and CEO of Heartbeat Ideas.

“The first thing you need to do is identify what the problem is, and then apply the unique capabilities of the tablet to help solve the problem.”

The solutions that tablets provide can then be turned into concrete objectives to achieve through tablet integration. Dave Mihalik, senior director of marketing, EKR Therapeutics, says it was critical to link iPad use within the organization to specific business objectives. EKR Therapeutics, which pursued the iPad as an external tool for sales and marketing, identified

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three primary objectives: stronger customer relationship management, improved detailing presentation, and better data collection.

"From a capability standpoint, the tool is built to deliver," says Mihalik. "If you use it the right way - build the right types of tools for it, apply the right kind of applications, and put the right content into it - the tool should be successful. Really the onus is on the company to identify how they want to use it and make it the true business tool they need it to be."

"Get in line"

A second important step in forming a successful digital strategy is to ensure top-down support. IT may be in favor of tablets from the bottom up, or sales managers may want the devices to keep pace with rival brands, but if upper management is not behind the move, it may result in mixed signals or faltering support.

"If you get senior-management buy-in, people throughout the organization will be a lot more committed, and the right activity will result," says Sandra Muzinich, e-Capabilities Lead, Lilly UK.

Bob Harrell, director of integrated marketing at Shire Pharmaceuticals, argues that support should extend all the way to CEOs, as they can secure buy-in for cloud-based solutions and tablets across the company.

"In our case," says Harrell, "the cultural and departmental inertia or resistance has fallen away because everybody has gotten the message from the top down that, 'Hey, there is a new sheriff in town and it is called the cloud. You had better get in line.'"

IT departments, engrained in a Windows mentality, may resist switching over to Apple or Android operating systems, just as sales reps may push back against the devices, fearing that the rise of a new digital solution will inexorably lead to the decline of physical reps.³¹ On cafepharma, the internet hub for sales rep chatter, reps have bemoaned the iPad's ability to track locations and record activity when the device is in use. One thread called "Beating the iPad" discusses numerous ways to ditch the device, including dropping it in a microwave or passing it off on a day laborer at the Home Depot.³²

Another thread explores how to turn the device's tracking mechanism off.


³¹ 'Drug Reps Fear iPad's Spying; They Should Be Worried About Their Jobs', BNET <http://www.bnet.com/blog/drug-business/drug-reps-fear-ipad-8217s-spying-they-should-be-worried-about-their-jobs/8417>

³² 'Beating the iPad', cafepharma <http://www.cafepharma.com/boards/showthread.php?p=3930713>

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03-09-2011, 10:01 AM #1


Anonymous Posts: n/a

 **Tracking your every move - IPAD**

Your Ipad was put in place for a specific reason. That is to track everything you do on a minute to minute basis. Every minute of every day is tracked and all of your activity. What can you do? Go into your general settings. Find the button that says Locations services. You will see all the items Ferring is tracking in a minute to minute basis. Turn this button off and leave it off always. If they are not tracking you this will not be a problem for Ferring.

And you thought they were just taking care of us.....shame on you!

Hey heard OD is getting ready for sweeping plans on the Urology side. Anyone else hear this?



Source: 'Tracking your every move – IPAD', *cafepharma*

Ensuring sales managers have the support of upper management to enforce use and optimize integration is therefore important.

Internal competence and coordination

Tablets represent a new type of technology that can update more quickly, unleash greater mobility, and increase detailing activities. With these attributes come new responsibilities that may challenge a company's existing internal competence. The third element of a good digital strategy, therefore, is to ensure that the proper players are in place to harness the device to its full potential.

Organizations may consider hiring new managers, programmers, or digital specialists to bring in outside expertise that exceeds that of anyone within the organization. One of the first moves EKR Therapeutics made after selecting the iPad was to hire a new Chief Information Officer (CIO).

"If you have good programming and good internal capabilities, you start with a blank slate that leads to better brainstorming and more ideas flowing," says Mihalik. "Not only did we bring on a new CIO with strong expertise in the development of iPad-based tools, but that CIO brought with him a team of experienced programmers."

Those companies that feel confident in their existing leadership can still take steps to ensure internal departments are cross-functionally aligned for tablet initiatives.

"It is key to have a link between the IT and sales and marketing teams and other relevant departments," contends Johnathan Reid, senior project manager, commercial IT, Abbott. "They need to work together as a team. You cannot sit in a silo. That just does not work when you are trying to deploy these devices in an integrated manner."

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Ensuring proper external partners

Just as the novelty of tablets may challenge internal competencies, so too may they highlight shortcomings of external agencies. Step four of a solid tablet strategy is to evaluate the skill sets of agencies of record from a tablet-marketing standpoint. If their capabilities are lackluster compared to leading-edge firms, it may be best to make an agency switch.

“If they do not have as much history of expertise in designing for digital or building a digital platform for tablets, you may be disappointed in terms of how interactive your resulting content will be,” says Wendy Blackburn, executive vice president, Intouch Solutions.

In addition to reshuffling its internal deck, EKR Therapeutics sought the services of a progressive digital agency. Shire did the same to better capitalize on tablets and their novel form factor.³³

“In the software world, you have business management solutions like Siebel and SAP that were built on the premise of large enterprise systems,” says Harrell. “They are big and clunky, take long to upgrade, are very expensive, and require a big staff to manage them. We decided that in embracing the iPad, we needed a solution that was built for the cloud. When the big on-premise applications try to go to the cloud, it’s like Microsoft trying to be a startup.³⁴ They are trying to adapt an architecture, a culture, a system that was built to be a battleship, and it just does not work.”

Speed of deployment

A final element of the digital strategy to resolve is the speed of deployment. Some organizations have taken an aggressive approach to tablets, choosing to get them into the field and then react with updates on the fly. These companies have often foregone careful pilots with the belief that this is a new type of technology that will always be evolving. It therefore makes more sense to jump in than for an organization to cautiously tap its toes.

“We went for it,” says Mihalik. “We had to believe that we would be able to internally establish the competencies to develop our content and manage the platform. That is part of the reason we brought a new chief information officer on board who was very familiar with this idea of development.”

³³ ‘Veeva Systems Launches First Integrated Pharma CRM and CLM Solution Designed for the Apple iPad’, Veeva Press release <http://www.businesswire.com/news/home/20110110006199/en/Veeva-Systems-Launches-Integrated-Pharma-CRM-CLM>

³⁴ For more on on-premise software: http://en.wikipedia.org/wiki/On-premises_software; for more on the opposite solution, cloud computing: http://en.wikipedia.org/wiki/Cloud_computing

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On the other hand, for a big Pharma company, the reality of transferring a Windows-based organization to a new corporate platform may require a more calculated approach.

“Pharma in these areas is not known for being groundbreaking,” says Dennis Urbaniak, vice president, US Diabetes, sanofi-aventis. “It will not hurt to try to be more progressive in this case, but at the same time you do not want to go too far to the other side of the spectrum where you rush out with something that is not going to have a benefit. I think whatever we do on these platforms needs to have more of a long-term view, and needs to be developed in that fashion. Otherwise, you find yourself jumping from one thing to the next and you never achieve good momentum over time.”

Whichever approach an organization takes, it is important to determine a rate of deployment before the first tablets hit the field.

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Embracing content creation

The digital revolution has redefined the concept of content. What used to be bound by the margins of a page can now scroll onto infinity, seamlessly jump from one page to the next, or spontaneously break into animation. Tablets push this online transformation a step further. Content is no longer something people look at on a screen; it is something they can hold in their hands, something they can twist, amplify, control.

Those Pharma companies that pursue tablets for external use in their sales forces can consider how to leverage this new style of content for the betterment of sales calls. To date, some companies have elected to simply transfer over existing print and digital content rather than design new content to capitalize on tablets' unique features. Experts like Sandra Muzinich of Lilly UK believe this is a mistake.

"You have to be clever with the technology," says Muzinich. "It is not enough to just take paper-based details and convert them over. You need to take advantage of the interactivity that the iPad provides."

"A lot of our clients basically want to take websites and throw them on the iPad," says Bill Drummy, founder and CEO of Heartbeat Ideas. Part of this is practical, he says. Companies have vast repositories of content and would like to transfer it to their new digital solutions as easily, inexpensively, and expeditiously as possible. "This is a real mistake and a missed opportunity," Drummy contends. "If you use the device creatively and think about what is unique about it, you can make a much greater impression on your target audience. That is where the real value comes from."

Although there is no evidence yet that quantifies the difference good content can make, a study by the Harrison Group suggests that physicians do notice the difference. Sixty-eight percent of physicians who received a tablet detail were extremely or very satisfied. Those that did not like tablet details complained that presentations appeared to be "optimized for another format."³⁵ They also responded negatively to the fact that presentations were "too slow" or that reps did not offer print "leave-behinds for reference".³⁶

Good content can address these complaints and, in so doing, potentially distinguish a brand from an increasingly crowded tablet playing field.

³⁵ Satisfaction ratings of physicians toward various detailing formats, 'Physician Detailing Survey', April 12, 2011. Intouch Solutions & Harrison Group

³⁶ Verbatim comments from physicians responding to iPad details, 'Physician Detailing Survey', April 12, 2011. Intouch Solutions & Harrison Group

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Taking advantage of touch

Touch screens are a focal point of tablet content creation. Navigating by way of touch makes the user experience more dynamic. Physicians can be drawn into a presentation as their fingers guide the screen.



Source: Intouch Solutions, Mockup for a hypothetical disease; letting physicians guide by touch

As Drummy explains, “It is very significant that you can interact with the screen. If you are talking to somebody, he or she can interact with the screen too. As a result, it gives you a lot more intimacy with the device than if you were only accessing it through a keyboard and a mouse. You need to design with that intimacy in mind.”

Graphics benefit if they are bold and set against clean backgrounds, and text is more effective if it is minimal on tablet screens. When physicians express interest in specific graphics, reps can open up in-depth statistics and textual rigor on separate pages.³⁷ For this reason, content designed natively for tablets often diverges from the linear, PowerPoint style of traditional Pharma presentations. Instead, it presents an ecosystem of content with each physician’s preferences acting as that content’s organizing force.

“The delivery of information through the iPad is completely new,” says Dave Mihalik, senior director of marketing, EKR Therapeutics. “You of course can simply repurpose your pieces and put them in a format that looks nice on an iPad, but you get into the same kind of linear delivery of information.” As Mihalik’s CEO continues to challenge, “A 12-page brochure transferred onto 12 slides of an iPad is not a game changer.”

³⁷ ‘Web design for touch screen/iPad and tablet computers’, inLIFEDesign
<http://www.inlifedesign.co.uk/web-design-for-touch-screen-ipad-and-tablet-computers/>

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On tablets, companies can bundle content together into various choices that physicians are free to pursue, rather than watching a presentation whose chronology has been predetermined generically. The following three slides demonstrate how a physician can choose from a number of buckets - multimedia, articles, and quick reads – and open them up for in depth information. A rep can then send the physician that information instantaneously via email.



Source: Heartbeat Ideas, Demonstration of 'OncoReader', an Oncology news aggregator

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Creating physician value

Digital content is inherently no more valuable than printed content. Each is a platform to exchange information. Tablets, however, may allow Pharma companies to add value that traditional materials simply cannot.

“In the past with a paper-based detail aid, often it was a one-size-fits-all approach,” says Muzinich. “What we have been able to do with the iPad is to create content that can be segmented to meet individual customers’ needs.”

Reps at Lilly now often start their calls with questions. How physicians respond to those questions determines the content they will see moving forward through a call.

Content can also be tailored by location. Since tablets have GPS that can pinpoint the device’s location, content can be designed to automatically change based on latitude and longitude. For instance, physicians in one borough of London could see different prevalence rates or social consequences for a disease than physicians in the next borough over, with the app automatically making those adjustments based on the GPS.

“We can create content that highlights these statistical variations down to the zip code,” says Drummy. “Imagine flipping through an iPad and being able to say, ‘Do you know that 49 percent of people in your zip code have hypertension?’”

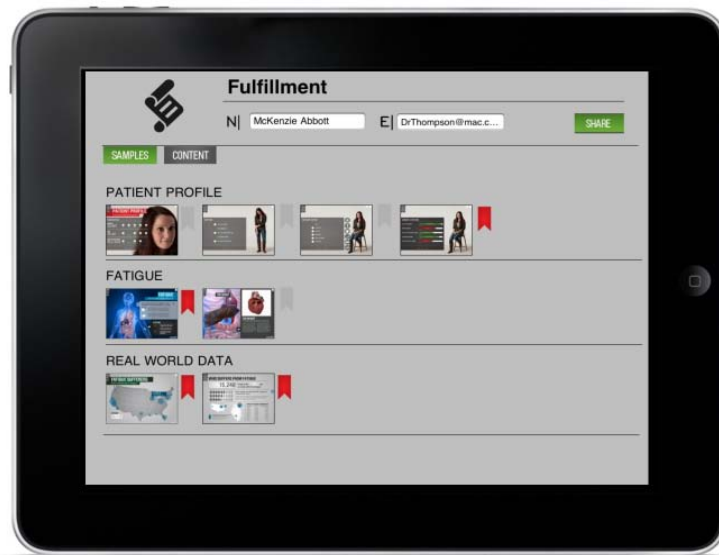


Source: Intouch Solutions, Mockup for a hypothetical disease; making presentations zip code specific

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Tablets also make it easy to extend materials to the physician for use after a sales call. With one swipe of a finger on a well-designed app, reps can flag material in which physicians express interest and email all that flagged material onto physicians. Physicians can then use those apps, videos, or downloadable PDFs to learn more about a product or to extend onto patients who have smartphones or tablets of their own.

“It can extend the meeting and also get the rep in the door in the first place,” says Wendy Blackburn, executive vice president, Intouch Solutions. “Physicians are so hard to access today, so if they know that you are coming with something that is valuable to them, which they can share and use in their practice because they do not have time to gather the best educational materials for their patients, then it is a win-win for everybody. You are bringing something of value to the physician. The physician can use that to better their patients’ care.”



Source: Intouch Solutions, Mockup for a hypothetical disease; forwarding content onto physicians

Content is king

Those pharma companies that pursue tablets as digital detailing aids can choose to integrate advanced content to varying degrees. Overlooking the importance of content altogether, however, may strip a tablet of its value.

“No matter what you do, the device itself is never going to drive the productivity,” says Dennis Urbaniak, vice president, US Diabetes, sanofi-aventis. “It is how you use it and the type of content that you are leveraging with it that needs to be thought through. This has become the

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number-one priority from a prospective-planning aspect. You have to be able to put the right kind of content onto whatever platform it is that you have.”

Johnathan Reid, senior project manager, commercial IT, Abbott, agrees.

“Remember: These devices are just to deliver content and information. You have to make sure that the content you are creating is of a high quality, which requires working with a strong creative agency side-by-side with IT developers. Organizations have to ensure that no matter which form the content is displayed on, whether it is a netbook, a tablet, a PC, or a smartphone, it is going to look nice and work well. The interface has to be smooth. And that is a huge challenge, much more than managing the devices.”

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The value of data

Tablets produce an abundance of data. With the proper software, one can collect a constant stream of information about where tablets have been, how long they were used, which of their content was accessed, and how users responded to it.³⁸ As a result, Pharma organizations can track their employees and map their efficiencies or inefficiencies. They can also study content effectiveness and customer preferences and use it to tailor future marketing campaigns.

Step five in the tablet journey is to ensure that, before tablets are deployed, the proper mechanisms are in place to harness this data.

“There is a common misconception in Pharma that if we deploy tablets with pretty pictures on them, we have accomplished our goal,” says Johnathan Reid, senior project manager, commercial IT, Abbott. “That is not the case. You can have all the animations you like, but if you do not know what the doctor is doing with it, what he thinks about it, how the rep is detailing, and what they are concentrating on in the surgery, you have lost that insight and the value that comes with it.”

Dennis Urbaniak, vice president, US Diabetes, sanofi-aventis, agrees.

“This data-driven approach is the difference between going in with a customer and having an initial first visit and then a successful second, third, fourth and fifth visit, versus a disaster after the first one because you failed to show them anything different,” he says.

Closing the loop on closed loop marketing

Closed loop marketing is arguably easier with tablets than it has been in the past. Rather than reps entering feedback from sales calls by hand, which introduces delays, inaccuracies, and gaps in data, tablets can make this process automatic.

“With the iPad, this whole idea of closed loop marketing becomes immediate,” says Dave Mihalik, senior director of marketing, EKR Therapeutics. “You can pull reports week by week about how often something was used in this setting for that physician.”

Organizations can adopt dashboard reporting tools that allow reps to analyze personal statistics culled from their tablets on a day-to-day basis. Organizations can also connect the presentation and CRM tools on their tablets to back-end software that signifies which presentation materials are being used with which audiences.

³⁸ ‘iPhone and iPad can track a user’s location history’, *Los Angeles Times*, <http://articles.latimes.com/2011/apr/21/business/la-fi-apple-tracking-20110421>

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"Our chief information officer realized that rather than building all our content and then thinking, 'Oh wait, it would be great to measure everything', it made more sense to build all that stuff in from the start," says Mihalik. "As a result, everything we introduce is tied to the effectiveness of that interaction."

EKR is currently testing software that would enable material to be measured for effectiveness in real time: as reps show physicians slides on their tablets, they will be able to "swipe left" to indicate a positive response and "swipe right" for a negative response.

Overcoming software challenges

Creating a system robust enough to handle streams of tablet data and turn them into actionable insights is a challenge organizations must confront. Urbaniak says it is critical for organizations to have this work on the back-end finished before tablets are introduced to employees. "This really needs to be mapped out before you put a device in anyone's hands," he says.

Sanofi-aventis has invested in a closed loop marketing system to capture feedback from customers. The intent is to improve future content and marketing campaigns. One of the reasons the company has been cautious with its tablet roll-out, however, is because it wants to ensure that this system is finalized before tablets are in the field.

The work that IT departments must undertake is extensive, according to Reid.

"Closing the loop involves more than just capturing the data," he says. "We also need to link that data to the customer. We need to segment it. We need to analyze it, and that involves several different types of solutions that sit in the back end."

Various departments must collaborate on this process if an organization is to create a system that results in "decision-making power", Reid continues. "If you treat it purely as an IT project or purely as a sales project, it is not going to work for you. You really need to work as a group."

When organizations develop guidelines and processes for a new paradigm like tablets, collaboration and communication between all relevant parties takes on heightened importance.

"Why reinvent the wheel within an organization?" Reid says. "It is bad enough that you do it within the industry. But within an organization, it does not afford you with the most flexibility and economies of scale."

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Ensuring ROI

In pursuing a data-driven approach, organizations can create feedback loops that may make marketing campaigns more effective in the future. They can also create loops that help evaluate return-on-investment (ROI) in real time. Statistics can track whether a digital strategy has worked by evaluating if sales have increased or decreased post implementation.

"We finally have visibility into that side of the equation," says Mihalik.

Organizations can create software that tracks how a strategy is implemented, whether the message was delivered, and how the audience responded to it. It also can track whether or not sales ultimately increased because of it.

"It is important to benchmark where things are now and where they go once tablets are launched," says Wendy Blackburn, executive vice president, Intouch Solutions. "We need to analyze if there is a lift in terms of the feedback physicians are giving. Are they providing more access and providing support for the initiative? The proper data and analysis can prove that value."

Introducing tablets

When Pharma companies introduce tablets to their employees, odds are it will not be those employees' first exposure to the devices. A recent survey conducted by Kelton Research found that 90 percent of consumers in the US own a tablet or are considering buying one.³⁹

At the same time, only one out of 20 consumers in the US actually owns a tablet.⁴⁰ Therefore, no matter how familiar or intuitive the platform may be, a basic introduction is in order.

"Training is crucial," says Sandra Muzinich, e-Capabilities Lead, Lilly UK. "It is imperative in any call with a physician that the rep is intimately familiar with the content and able to navigate through it seamlessly." Furthermore, employees need to understand how to operate the device as paid employees with set objectives behind their usage. For a device that can easily blur the lines between corporate and consumer spheres, the proper introduction can establish the ground rules by which tablets will be used within an organization.

"The iPad has made significant inroads into the consumer space, and employees naturally are consumers outside of the workplace," says Johnathan Reid, senior project manager, commercial IT, Abbott. "Of course the benefits they see there they want to bring into the office, which has resulted in a big discussion amongst IT professionals about how much consumerization of corporate IT should you allow. Where is the line? It is important for organizations to define it."

The proper training can help.

'Get to the basics'

When EKR Therapeutics introduced the iPad to its sales force in 2010, the company used a combination of video vignettes and interactive webinars to illuminate the device's many functions.

"We thought we were being so creative in the way that we were delivering the training materials," says Dave Mihalik, senior director of marketing, EKR Therapeutics. "But the very first follow-up I got was, 'Hey, can you send me a Word document with five clear steps so that I can open my iPad?'"

³⁹ 'Most People Want Tablets, Use Them For Books, Games', TechNewsDaily
<http://www.technewsdaily.com/most-people-want-tablets-use-them-for-books-games-2838/>

⁴⁰ 'Nielsen: Only 5% Own a Tablet, But That's a Lot', GottaBeMobile
<http://www.gottabemobile.com/2011/05/18/nielsen-only-5-own-a-tablet-but-thats-a-lot/>

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Training sessions may need to be reinforced with straightforward print materials that explain the basics of launching and navigating tablets. Some companies have also let employees use their tablets for email and basic communication to build competence before unveiling physician-facing content.

Bob Harrell, director of integrated marketing at Shire Pharmaceuticals, advises organizations to, "Do your due diligence, have demos, maybe give a few people in IT and management the loaners to carry around for a few weeks. But then it is a matter of giving the devices to the field without the field applications loaded for a few weeks to get them familiarized."

EKR Therapeutics decided to allow for more open access to the iPad.

"We felt that it would help their comfort level and their ability to navigate the iPad," says Mihalik. "One of the things people were nervous about is opening the iPad up with the greatest presentation scenario the marketing team could imagine but the rep does not know how hard to swipe, where to touch the iPad, and what they should expect once they do. Thanks to a more open approach, our reps got more comfortable, which now enables us to add more advanced content like video sequences or journal articles with fewer challenges."

Teaching advanced functionality

After reps get a feel for the basics of the device, organizations can train specific behaviors and practices to optimize usage.

"What is important is not the technology but how you use the technology," says Muzinich.

"With training you are able to practice the tailoring of calls and become familiar with how to use the content to bring value to each call and each physician."

"We have to stop treating our sales reps like they have the capacity of a toddler," says Bill Drummy, founder and CEO of Heartbeat Ideas. "They can absorb a lot and maximize this device's potential."

Wendy Blackburn, executive vice president, Intouch Solutions, recommends letting app developers perform half-day training sessions with reps to explicate how to optimize an app and integrate it with different databases.

"Tablets are extremely interactive, and we need to train sales reps to think about them that way," she says. "This is not a PowerPoint deck. There are ways that you can engage and invite physicians to be a part of the presentation. You can let them make selections. You can

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customize the data to their regions. There is a lot you can do, but in order for reps to execute it, you need to train for it.”

Drummy adds that it is crucial to train reps within the specific context of a sales situation.

“You want to teach them things like, ‘Do not put the tablet on the desk in front of doctors and sit across the desk from them. Come around to their perspective and sit side-by-side.’ Those kinds of subtle, psychological programming insights are absolutely important to train.”

Dennis Urbaniak, vice president, US Diabetes, sanofi-aventis, agrees, noting that a tablet can be used for myriad, potentially distracting, purposes. The more an organization can home in on a central utility and train for it, the more effective deployment will be.

“There are countless different directions you could take on this device,” he says. “We need to focus on a single one: how to improve the experience that you have with your customer both on a face-to-face basis as well as wherever possible in between those visits. That is the priority.”

An iterative approach

No matter how well designed tablet apps may be, experience in the field will likely highlight shortcomings or areas in need of improvement. Reps on the front line are often in the best position to offer this feedback, so it is important to impart an understanding that their feedback is critical to regular improvement of the devices.

“Every time you hear a presentation or you read something on iPad adoption, everyone says the same thing: You have to keep changing your content and keep it interesting,” says Mihalik. “The attractiveness of the new technology tool wears off if you are just displaying the same thing that physicians have seen two or three times. So we have gotten our sales team accustomed to pretty continual upgrades and updates about feedback they are receiving on the tool.”

EKR Therapeutics established advisory councils in each of its sales regions to monitor local feedback from reps and relay it to company headquarters.

“These advisory councils are a good representative sample of the team,” says Mihalik. “We have tried to get them involved from the very beginning to help build these platforms with us. We have found time and time again that if you do not do that step upfront, even in a pilot phase, let alone in a full rollout, it makes it very difficult for that uptake. We need to incorporate them into every step of the process, from inception to feedback.”

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As organizations begin to collect data from tablets, they can use the strengths and weaknesses it highlights for ongoing training with reps.

“Data can call attention to gaps that may need addressing,” says Muzinich. “If we find reps are not using particular areas of content, for instance, further investigation could reveal valuable insight, such as lack of relevance or even further training needs.”

Organizations can therefore establish an environment of continual improvement.

“My best advice for the iPad is to rapidly start using it and continuously learn from it,” says Drummy. “The older model of testing and piloting is outdated. By the time organizations finish going through all the pilots, there will be a new version of the technology on the market. I do not think that speed of change allows for that kind of deliberative, slow process. You need to dive in and start using it and learn from your reps on the ground.”