

# INNOVATIONLAB

Assessing the status of HCP engagement in  
the biopharmaceutical industry

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## OBJECTIVES

We undertook this program to gain a deeper understanding of the current landscape of HCP engagement within the life science industry. This focus group was convened to identify key pain points and opportunities for technology to bridge the gap between your needs and successful HCP interactions.

*Generative AI, word frequency analysis, and human analysis were used to generate this insight report.*

## METHODOLOGIES

- 01 Participant Survey**  
 Initial assessment gained perspectives on HCP engagement strategies and challenges
- 02 Deep-Dive Interviews**  
 In-depth conversations with key decision-makers within pharma and biotech explored specific challenges and desired functionalities for HCP engagement technologies
- 03 Roundtable Discussion**  
 A facilitated group discussion at Medical Affairs Professional Society annual meeting with industry participants fostered open dialogue and collaboration, generating valuable insights into shared challenges and emerging trends
- 04 Expert User Group Sessions**  
 Ongoing sessions with agency vendor teams with expertise in managing and executing the logistics of HCP engagements provide a complementary perspective on user needs and pain points related to HCP engagement tools

## PARTICIPANT PROFILE



8 VP, SVP, Executive Director | 8 Director, Senior Director | 2 Associate Director, Manager

Focus group participants were selected to represent a diverse range of Life Sciences organizations of various sizes, across an array of therapeutic categories including rare disease, oncology and cell & gene therapy.

*HCPs are consumers. They increasingly expect Amazon/Netflix-like experiences with relevant content served up where they are.*

**VICE PRESIDENT, MARKETING**

**TOP CHALLENGES**

# Access to HCPs/Institutional Restrictions

Ranked as One of the Top Challenges for Both Marketing (#2) and Medical Affairs (#1)

The etiology surrounding the difficulty in accessing HCPs is multifactorial. Demands on their time from an increase in both patient load and administrative work (eg, prior authorizations, electronic health records) have significantly eaten into time available for pharmaceutical industry engagement. An increasing number of academic and healthcare institutions are enacting policies limiting interaction with the pharmaceutical industry, ranging from a complete “no-see” edict to seeing only “credentialed” sales reps and MSLs. Layer on a significant number of pharmaceutical and/or medical device companies vying for limited time slots, and a significant share of voice is difficult to achieve.



**MOST CHALLENGING**

MARKETING

1. Identifying the right HCPs
2. **Access to HCPs/Institutional restrictions**
3. Having content and data to share
4. Budget constraints/Spending caps
5. Scheduling/HCPs' willingness to travel
6. White space/Geography



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MEDICAL AFFAIRS

**LEAST CHALLENGING**

## IDENTIFICATION AND PRIORITIZATION

# Identifying and Prioritizing KOLs and Decision-Makers

**70%** of participants reported challenges in identifying KOLs and decision-makers, particularly in therapeutic areas that are new to them

**40%** mentioned the need for a more data-driven approach to KOL identification and prioritization

**30%** expressed interest in using AI to map HCP influence networks

*We have tons of manual spreadsheets all over the place and everybody hates them because they are hard to keep up with.*

*Every time I send out another spreadsheet, it gets populated very quickly and then it gets completely forgotten about.*

**SENIOR DIRECTOR, MEDICAL AFFAIRS**

### CONTEXT

- Identifying the right KOLs and decision-makers is critical for effective HCP engagement and education; it is necessary to strategically **identify early adopters and strategic thinkers**
- Traditional approaches to KOL identification are manual, time-consuming, and often subjective; **existing technologies are overwhelming or lack targeting**
- There is a growing interest in using **data-driven approaches** to KOL identification, tracking, and qualification for specific engagements

### CHALLENGES

- **Difficulty in identifying emerging KOLs** (ie, rising stars) and decision-makers, particularly in therapeutic areas or institutional settings that are new to them
- Ensuring a balanced, diverse mix of KOLs that **reflects the target HCP audience**
- Vendor solutions that claim to easily generate relevant KOL lists just by checking some boxes; the **outputs often are not applicable for niche needs**, or the turnaround times are too long
- **Global and US teams do not always align on KOL scoring** methodologies and tier criteria, making it hard to coordinate and compare across regions

### OPPORTUNITIES

- **Leverage AI and machine learning to analyze HCP data** from multiple sources and identify potential KOLs
- Develop a standardized, **data-driven framework for KOL prioritization** based on relevant criteria (eg, research output, digital presence, peer influence)
- **Allow flexibility in data delivery** (not all solutions allow information to be lifted as a working database for future use)

## CONTENT FORMAT AND DELIVERY CHANNELS

# Evolving HCP Engagement Strategies and Channels

**80%** of participants mentioned the need to adapt engagement strategies to changing HCP preferences and behaviors

**60%** highlighted the importance of leveraging digital channels for HCP engagement

**50%** expressed interest in exploring innovative, nontraditional content formats

*Our attention span as a country — as a world — has decreased quite significantly.*

SENIOR MARKETING DIRECTOR

### CONTEXT

- HCPs' **preferences** and behaviors related to information consumption and engagement **are rapidly changing**
- Traditional channels like in-person speaker programs are becoming insufficient as a single strategy, **particularly with younger HCPs**
- There is a growing need to leverage **digital channels and innovative content formats** to capture HCPs' attention
- **Share of voice is harder to obtain** as demands on HCPs increase

### CHALLENGES

- Developing **engaging, compliant content** that stands out in a crowded digital landscape
- Measuring the **impact and effectiveness** of new engagement channels and content formats
- **Overcoming internal resistance** to change and securing buy-in for new approaches
- **Lack of comfort with and guidance for AI usage**
- Reaching HCPs due to **restrictions and decreasing attention**

### OPPORTUNITIES

- **Bring value to where HCPs are**, instead of trying to bring them to you
- Collaborate with HCPs to **co-create content** to ensure relevance and value
- Experiment with **short-form, interactive content formats optimized for digital channels**; explore modular content and journey-based approaches to enable personalization at scale
- Leverage data analytics to **continuously refine engagement strategies** based on HCP behavior and feedback; use AI and machine learning to derive actionable insights and predict needs at the individual HCP level

## METRICS

# Measuring the Impact and Success of Medical Affairs Activities

**90%** of participants acknowledged difficulties in measuring the impact and success of Medical Affairs efforts

**60%** reported using primarily quantitative metrics focused on reach and frequency, rather than quality and impact

**50%** expressed a desire to capture more qualitative insights and understand the “why” behind HCP behavior

*I don't care about the number of interactions. I want to care about what they're doing and what we can do. What is the next step based on the quality of the information that we're getting?*

ROUNDTABLE PARTICIPANT

## CONTEXT

- **Demonstrating the value and impact** of HCP engagement activities is crucial for securing resources and support
- It is important to focus on **quality of interactions versus the quantity**; make every engagement count
- HCPs and MSLs **dislike overly formal tracking and measurement approaches** that make interactions feel transactional

## CHALLENGES

- **Difficulty in attributing specific HCP behaviors or outcomes** to specific interactions or activities
- **Lack of standardized metrics** and frameworks for measuring engagement impact
- Balancing the need for meaningful measurement with the desire to **maintain authentic, nontransactional HCP relationships**
- **Fragmented** insights and engagement **across organizations**
- Carrying through **insights to action**

## OPPORTUNITIES

- Developing a **balanced scorecard** of leading and lagging indicators, incorporating both **quantitative and qualitative metrics**
- **Leverage technology** to capture and analyze unstructured data, such as MSL field notes and HCP feedback
- Collaborate with crossfunctional teams to **align on key performance indicators** and share insights
- Incorporate **Medical Affairs impact stories** into executive and board-level reporting

## COMPLIANCE

# Navigating Compliance and Regulatory Considerations

**100%** of participants emphasized the importance of compliance and regulatory considerations in all HCP engagement activities

**60%** reported challenges in balancing effective HCP engagement with compliance requirements

**40%** expressed interest in leveraging technology to streamline compliance processes, such as speaker program management and reporting



## CONTEXT

- **Compliance and regulatory considerations are critical** in all HCP engagement activities, from content creation to speaker program management
- There is often **Compliance pushback** to have no connection between Commercial and Medical Affairs, and between the data of the respective departments
- There is growing interest in leveraging technology to **streamline compliance processes and reduce risk**

## CHALLENGES

- **Keeping up with evolving regulations** and guidance related to HCP engagement, particularly in digital channels
- Ensuring **consistent compliance** training and awareness across all teams involved in HCP engagement
- **Managing the complexity and resource intensity** of compliance processes, such as speaker program logistics and reporting

## OPPORTUNITIES

- **Collaborate with Legal and Compliance teams** to develop clear, practical guidelines for HCP engagement across channels
- **Invest in technology solutions** to automate compliance processes, such as speaker program management and fair market value tracking
- **Regularly review and update compliance policies** and training based on new regulations, industry best practices, and internal feedback

## TECHNOLOGY AND AI

## Leveraging Technology and Data to Enhance HCP Engagement

**80%** of participants reported using CRM systems to track HCP engagement, but they noted limitations in terms of data quality and usability

**70%** expressed interest in exploring AI applications for activities such as content generation and KOL identification

**50%** mentioned the need for better data integration across systems to enable a holistic view of HCP engagement

*There are things that we are doing with brute force now that I'm sure technology can help us with.*

SENIOR DIRECTOR, MARKETING

## CONTEXT

- **Technology and data analytics** offer significant opportunities to enhance HCP engagement and **drive better outcomes**
- Many of the available HCP/KOL identification solutions and databases are very **expensive and inaccessible to smaller companies** with limited budgets; typical costs put them out of reach
- **Many repetitive processes** in content development and review **could benefit from AI automation**

## CHALLENGES

- **Siloed data** across multiple systems, making it difficult to gain a holistic view of HCP engagement
- Smaller companies' **lack of fit-for-purpose solutions**
- **Concerns about data privacy, security, and compliance** when leveraging HCP data for engagement purposes
- **Lack of internal expertise and resources** to implement and manage advanced technology solutions

## OPPORTUNITIES

- Invest in data integration and governance to **enable a single view of HCP engagement** across channels and teams
- **Pilot AI applications in low-risk areas**, such as internal content summarization or KOL research, to build organizational comfort and expertise
- **Partner with technology vendors or consultants** to accelerate implementation and drive best practices

## SURVEY RESULTS AND INTERVIEW INSIGHTS

# Challenges With Current HCP Engagement Technologies

### CURRENT CHALLENGES OR LIMITATIONS OF EXISTING TECHNOLOGIES

- Understanding what is (or will be) necessary in this quickly evolving space, and what fits in with my **company's expectations**
- Being able to access, target, and engage with providers in the virtual space (**what makes a technology more appealing**, more accessible, or more targeted than what is already out there)
- Existing CRM systems are cumbersome, have poor user interface, and contain so much noncurated information that this can create "**data paralysis**"
  - End users (eg, MSLs for Medical Affairs) get frustrated with the system and often will not enter data
- There is no system that **tracks and reports meaningful metrics** to demonstrate the value of our interactions

### HCP/KOL IDENTIFICATION

- The databases and systems used are often **very static** and do not evolve with changing KOL interests and activities over time
- There is **distrust of vendor solutions** that claim to easily generate relevant KOL lists just by checking some boxes. The outputs often are not applicable for niche needs
- **Tracking KOL engagement longitudinally** across multiple platforms (eg, CRM, insights management) **is very manual**; the systems do not integrate with each other to provide a holistic view

### WHERE IT WILL BE MOST EFFECTIVE AT SUPPORTING HCP ENGAGEMENT EFFORTS

- **Leveraging generative AI** in identifying target HCPs, helping to prioritize them, and simplifying the process for summarizing key findings
- Tracking and housing insights, engagements, teams interacting with HCPs for profiling, and **understanding HCPs before meeting them**
- Understanding individual **restrictions** on HCP access (institutional or otherwise)
- Documenting **pan-pharmaceutical** involvement of KOLs
- Creating effective, targeted, tailored **nonpersonal promotion**
- Tracking and reporting on quality of HCP interactions (with minimal input time); evolving this into a **measurement of success**

### ADDRESSING THESE ISSUES

Companies need integrated platforms, consistent global processes, and a culture of proactive crossfunctional communication. However, change management and local adoption are challenges when rolling out new systems and ways of working globally.

## PHARMACEUTICAL INDUSTRY STATISTICS

# Pharma Is “All In” on AI<sup>1</sup>

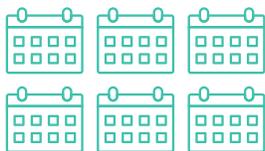
**95%** of pharmaceutical companies reported that they are investing in AI capabilities

**80%** of pharmaceutical and life sciences professionals are currently using AI for drug discovery

**65%** of survey respondents believe that AI will have the highest impact on manufacturing/supply chain management in pharmaceuticals

## Estimated Timeline Compression Is Significant<sup>1</sup>

AI could shorten the drug discovery process



**FROM 5-6 YEARS**



**TO JUST 1 YEAR**

Using AI in clinical trials could lead to

**70%**  
**COST SAVINGS PER TRIAL**

**80%**  
**TIMELINE REDUCTION**

The landscape of HCP engagement is undergoing a dramatic transformation, driven by AI. From creating personalized content to targeting high-value HCPs and offering 24/7 support through chatbots and virtual assistants, AI unlocks a wealth of opportunities.

However, ethical considerations around data privacy, transparency, and algorithmic bias remain paramount. By prioritizing responsible implementation, pharma companies can harness the power of AI to build stronger relationships with HCPs, empower them with the knowledge they need, and ultimately contribute to a future of improved patient care.

As AI technology evolves, we can expect even more sophisticated applications that further personalize the HCP experience and optimize engagement strategies. The future of HCP engagement is undoubtedly AI-powered, and pharma companies that embrace this transformation will be best positioned to thrive in the future.<sup>2</sup>

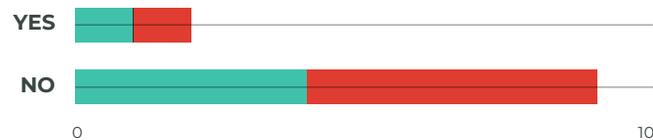
1. Varol D. AI in the pharmaceutical industry: innovations and challenges. Scilife. Updated January 30, 2024. Accessed June 17, 2024. <https://www.scilife.io/blog/ai-pharma-innovation-challenges>  
2. Corbu T. HCP engagement – how can AI revolutionize pharma's approach. Digitalya. Accessed June 17, 2024. <https://digitalya.co/blog/hcp-engagement-ai-pharma/>

## MORE ON AI

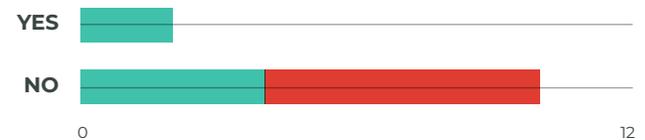
# Uptake by Biopharmaceutical Marketing/Medical Affairs

Although AI technologies are advancing and evolving rapidly, company-wide distribution by our participants' companies is cautious and uneven.

Is your organization's leadership asking you to explore the use of AI in HCP engagement?



Has your organization shared any rules or compliance guidelines around the use of AI?



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Most of our survey respondents felt “somewhat” knowledgeable about use of AI in HCP engagement

On a scale of 1 (*Not at all knowledgeable*) to 5 (*Extremely knowledgeable*), rank your personal level of understanding of AI and its practical applications in HCP engagement.



MARKETING MEDICAL AFFAIRS

IN A RECENT PHARMAVOICE SURVEY,

