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Welcome to the fourth edition of *What Physicians Want!*, a report of the key findings from a biennial survey conducted by Publicis Touchpoint Solutions and Sermo. Since the survey’s first report in 2008, its objectives have been to measure how well the biopharmaceutical industry is fulfilling physicians’ needs and to offer guidance to life sciences executives as they seek to provide better service to these crucial stakeholders.

Each edition of the *What Physicians Want!* survey report provides a snapshot of the degree to which the life sciences industry is fulfilling its value proposition to physicians. Moreover, each successive report adds incremental value by comparing the new data to those from previous editions.

The 2014 *What Physicians Want!* survey questioned 245 Sermo physicians. About three quarters of the respondents were primary care providers (GP, FP, IM, DO), while the remaining quarter were physicians from 11 surgical and nonsurgical specialties.
Executive Summary

The bottom line of this year’s data is simple but profound: (1) increasingly, more and more physicians want and expect to be called on by healthcare representatives and (2) those representatives better bring their “A” game. Here’s a quick overview of these two main points.

Tipping Point—Over 50% of Respondents Now Want to See More Traditional Representatives

From the top of this year’s results to the bottom, one thing is clear—increasingly, more and more doctors want to see healthcare representatives. And there’s especially good news for the beleaguered primary care sales representative: for the first time in the history of the survey, a majority of respondents want more or significantly more traditional primary care sales representatives calling on them. Of all the findings from this year’s survey, we believe this is the most significant. (See the trend graph on page 5 and the details on page 6.)

Specialty representatives are in high demand, too. In fact, the vast majority of specialty physicians want more specialty sales representatives calling on them. And this year’s respondents show strong interest in seeing a variety of nontraditional representatives, including clinical health educators, customer service representatives, medical science liaisons, virtual representatives, and hybrid representatives.

So that’s the easy part of the message. Here comes the hard part.

Representatives Better Bring Their “A” Game

Today’s doctors simply will NOT waste time meeting with mediocre representatives. On the contrary, these doctors continue to call for more “higher-quality” representatives. That means more use of clinical studies and evidence-based medicine, better trained/educated representatives, and even more use of iPads/tablets by field representatives.

And that’s not all. These docs want more physician-focused disease-state websites and more physician-focused product websites. They also want more virtual, on-demand information, sampling, and support.

[F]or the first time in the history of the survey, a majority of survey respondents want more or significantly more traditional primary care sales representatives calling on them. Of all the findings from this year’s survey, we believe this is the most significant.
In other words, they want it all, and they want it when and how it’s convenient for their schedules.

But why do they want it? Because helping patients is their top priority. And for today’s doctors, “helping patients” means more than giving them a week’s worth of samples. It means they want life sciences companies to help them educate and support their patients more effectively and efficiently. It means helping their patients access the medicines they need. And finally, it means communicating with them and their patients in channels that are properly focused, easy to access, and simple to navigate.

Like you, the Publicis Touchpoint Solutions team is committed to serving healthcare professionals (HCPs) by delivering the right messages, at the right times, and through the right channels. Thank you for your interest in this edition of What Physicians Want! and for joining us as we seek to gain a better understanding of the needs and wants of these crucial stakeholders.
Physicians Highly Value Their Sales Representatives

The reports of my death have been greatly exaggerated.
— Mark Twain

The mid-to-late 2000s were, without question, a time of significant pharmaceutical sales force turbulence. And with the emergence of new technology-based marketing tactics, many in the media were predicting the imminent demise of the pharmaceutical sales profession. On the contrary, this year’s What Physicians Want! results indicate that the life sciences sales profession is alive and well. Let’s begin with a close look at respondents’ attitudes toward the sales force.

Primary Care Representatives Are Increasingly in Demand

Of all the findings to be gleaned from this year’s survey, we believe the most important is this:

For the first time in the history of the survey, a majority of survey respondents want more or significantly more traditional primary care sales representatives calling on them.

Why is this so noteworthy? Several reasons:

1. The growth curve is steady and substantial—an increase of 14% since 2012 and 40% since 2010.

2. The 2014 data mark a tipping point; now clearly more than half of all respondents are calling for more primary care representatives.

3. Primary care representatives are the largest single group within biopharma sales and are the standard-bearers of the profession; in many ways, their strength reflects the strength of the entire industry.

4. If this demand trend continues, we may soon experience a shortage of primary care representatives.

On the contrary, this year’s What Physicians Want! results indicate that the life sciences sales profession is alive and well.
Interestingly, it turns out that primary care physicians (PCPs), including GPs, FPs, IMs, and DOs—who, of course, are the most likely physician subset that primary care representatives will call on—express an even higher interest in seeing more of these representatives than does the entire universe of respondents. The 2014 survey shows that 62% of primary care physicians want more or significantly more traditional primary care sales representatives calling on them.

While the good news about the demand for primary care sales representatives may be the headline, there’s more in this year’s survey that bodes well for the biopharma sales profession.

**Nine out of 10 Specialty Physicians Want More Specialty Representatives**

We continue to hear ongoing cries that specialty physicians are increasingly closed to biopharmaceutical representatives. And in some cases that’s true. Yet the data from this year’s survey paint a decidedly different picture of the attitudes of real-life practicing physicians in 11 specialty categories: allergy/immunology, cardiology, dermatology, endocrinology, gastroenterology, rheumatology, oncology, nephrology, ob-gyn, general surgery, and urology.

Of the specialty physicians, more than 9 out of 10 (91%) want to see more or significantly more specialty sales representatives. Survey verbatims indicate that specialists want to see sales representatives with a high level of specialty-specific knowledge of diseases, their own product(s), and competitors’ products.
Doctors Indicate Continuing Strong Demand for Nontraditional Representatives

This year’s respondents also expressed strong demand for a wide range of nontraditional representatives.

**Clinical Health Educators:**
Clinical health educators are credentialed HCPs who work with physicians and/or patients to improve health outcomes, and nearly three quarters of physicians surveyed want to see more of them. While clinical health educators are often nurses, many companies deploy other allied health professionals (eg, nutritionists, diabetes educators, etc) in this role, depending on the disease states they are supporting.
Medical Science Liaisons:
Medical science liaisons (MSLs) generally work with academic physicians and HCPs involved in clinical trials. While the survey did not ask which respondents’ practices would be or should be covered by MSLs, nearly 8 out of 10 stated that they would like to have more or significantly more MSLs calling on them.

Customer Service Representatives:
Customer service representatives were preferred by a strong majority, with three quarters of respondents saying they want to see more of these nontraditional representatives. Customer service representatives are defined as representatives who do not “sell,” but instead work with physicians' practices to provide services such as patient literature, samples, formulary information, etc. There is no doubt that the support provided by customer service representatives is becoming more and more important to practicing HCPs.

There is no doubt that the support provided by customer service representatives is becoming more and more important to practicing HCPs.
“Hybrid” Sales Representatives:

One of the emerging sales models is the "hybrid" sales representative. Hybrid representatives have defined geographic territories and specific sets of target HCPs, just like typical field representatives. But they reach their physicians through a variety of channels (eg, face-to-face, phone, and video) and at times (eg, work day, after hours, weekends) that are preferred and most convenient for each physician. This model is proving to be very popular with physicians; two thirds of 2014 survey respondents want more or significantly more hybrid representatives calling on them.

Virtual Representatives:

A majority of respondents (55%) also expressed a specific desire to be called on by more or significantly more “virtual representatives.”

Virtual representatives can include live video detailing teams (in which a sales representative interacts in real time with an HCP through the Internet with a webcam), telephone, chat, and web-enabled interactions (eg, click-to-call and click-to-chat).

Taken together, these data suggest that the downsizing of the recent past was not so much an out-and-out rejection of face-to-face interaction as it was a necessary pruning. Looking back, we realize it made sense to better align the total number of sales representatives calling on each physician or to reassign marginally beneficial redundancies in some sales forces.
Quality Interaction Is Key

As shown in the results presented so far, the life sciences sales profession is alive and well. But the data also show that HCPs have high standards for the representatives that call on them. Indeed, they demand representatives who are highly trained, experienced, and adept at engaging in clinical discussions that add value to their practices.

Although the trend has improved slightly since 2008, more than three fourths of respondents still want more calls from “higher-quality” representatives.

But how do MDs define “representative quality?” The survey responses provide valuable insight.

Focus on the Science

Physicians are hungry for clinical conversations with life sciences representatives that are based on clinical studies and evidence-based medicine (EBM). More than 9 out of 10 physicians surveyed (91%) want representatives to make more use of clinical studies and EBM in their conversations.

Training and empowering representatives to use clinical studies actively in their conversations with physicians is paramount. Representatives with expertise in using clinical studies have a strong understanding of the science—including the disease state, therapeutic options, research methodology, statistics, etc. Likewise, representatives who

Quality is never an accident.
— William A Foster
successfully employ clinical studies are also adept at using a high-science sales approach that seamlessly incorporates clinical study results into a dialog to address specific issues concerning each physician’s practice.

Bring on the Specialized Teams

Throughout this year’s responses, physicians have indicated a desire for greater numbers of more value-focused, highly trained, nontraditional teams. As noted previously, this desire is reflected in high demand for more specialty representatives, medical science liaisons, and clinical health educators.

Furthermore, when asked to name “other types of representatives that you feel would provide more value in your practice,” respondents’ single consistent response was related to the desire to be called on by credentialed HCP sales representatives (eg, MD/DO/PA/NP/PharmD). This idea is consistent with respondents’ desire to be called on by sales representatives who are highly trained, experienced, and adept at engaging in clinical discussions.

Deliver Meaningful, Unbiased Information

Survey verbatims indicate that HCPs want representatives to deliver up-to-date information that will help them make better decisions for their patients:

- “Education regarding various options for treatment of the same disease”
- “Help me stay up to date on latest developments in medicine”
- “[Help] keep me up to date on newest products”
- “Deciphering the best meds to use for individual patient needs”
Digital Is Now Ubiquitous

As described, live human-to-human interaction is a crucial part of creating the high-quality educational interaction that prescribers seek. But personal discourse doesn’t stand alone. As part of the push for quality, life sciences marketers must also craft a strong digital presence.

Physicians are increasingly embracing digital offerings. As this year’s survey shows, more and more physicians are relying on digital communications in both their personal and professional lives.*

Smartphone and Tablet Use Is Omnipresent

Almost all surveyed physicians (94%) use smartphones for personal and/or professional use. Additionally, more than three fourths of respondents (77%) use iPads or other tablets (and of those that don’t currently use one, 68% plan to do so in the near future).

High Demand for HCP-Specific Healthcare Websites

Surveyed physicians continue to express significant interest in more disease-state websites and more product websites designed specifically for HCPs. An overwhelming 83% want more disease-state websites designed specifically for HCPs. And 69% want more product websites geared toward HCPs.

* While interpreting the results that follow, it is important to note that this survey was conducted with active Sermo participants; accordingly, the survey responses may reflect higher-than-average levels of digital interaction.
Employ More iPads/Tablets in Physician Conversations

Field representatives are increasingly using iPads and other tablets as their visual platform in conversations with physicians. Tablets/iPads are a clear hit with doctors; even with today’s considerable use of iPads by representatives, 76% of survey respondents still want to see more or significantly more use of iPads/tablets by representatives calling on their practices. In line with this preference for digital media, 64% of physicians want representatives to decrease use of traditional print visual aids.

Email

A slight majority of physicians want more use of eMail when it addresses issues of interest to them (eg, disease-state information, practice issues, etc). Fifty-eight percent of physicians wanted more or significantly more use of eMail to cover topics of interest.

eSampling and teleSampling

Physicians continue to be enthusiastic about eSampling. Eighty-one percent of respondents want more or significantly more availability of eSampling, defined as requesting samples via the Internet and receiving them by mail. Although not as popular as eSampling, a majority of respondents (58%) want more teleSampling (inside service representatives calling physicians to offer mail-delivered samples).

Even with today’s considerable use of iPads by representatives, 76% of survey respondents still want to see more or significantly more use of iPads/tablets by representatives calling on their practices.
Social Networking Sites

In view of the fact that this survey was completed only by Sermo physicians, it’s obvious that 100% of respondents use Sermo. However, these physicians are also active in other social networks. Facebook is the leading nonmedical social networking site for these physicians, with 63% active. LinkedIn places second, with 40% reporting use in this year’s survey. Google+ and Twitter are distant followers, with 20% and 19% (respectively) using them.

Communicating With Patients

This year’s survey asked about the communication channels physicians use (or plan to use in the near future) to communicate with their patients. The most commonly used methods continue to be phone (59%) and eMail (51%), with just 30% now using direct mail. Interestingly, 19% of respondents now communicate with patients through their own HCP websites, while 14% text and 12% use Facebook. Other methods (each used by less than 10% of HCPs) include LinkedIn, WebEx (or other video services), Google+, and Twitter.
Helping Patients Is the Top Priority

Healing is a matter of time, but it is sometimes also a matter of opportunity.

— Hippocrates

As detailed, the respondents to the 2014 What Physicians Want! survey look forward to seeing more high-quality traditional and nontraditional representatives. And they are excited to engage with biopharmaceutical companies through a wide range of digital resources. But regardless of the channel, these physicians interact with industry in order to achieve one overriding objective: helping patients.

The final key message in this year’s survey is a reprise from the 2012 survey: physicians are practically begging for efficient tools and communications that will help them help their patients. When asked to name “the day-to-day challenges life sciences companies could help you solve,” the vast majority of survey participants (204 of 245 or 83%) took the time to respond to this vital query, and the results are poignant.

“Help My Patients Access the Medicines They Need”

The most common responses focused on helping patients access the medicines they need. But as in 2012, these were not pointed calls for industry to “cut prices.” On the contrary, the vast majority of HCPs are suggesting positive steps the industry can take to help patients gain access:

• “[P]atient assistance programs to increase long-term compliance by overcoming rising out-of-pocket expenses”
• “[It] helps to know patient’s COST of the drugs. Samples are nice, but patients want to know their cost.”
• “Providing samples to patients who cannot afford meds and work with them to get monthly supplies”
  [Note: 58% of respondents want more availability of teleSampling]
• “[G]etting patients enrolled in low cost programs”
• “[P]rior authorizations—do ’em for me”
“Help My Patients Understand Their Diseases and Therapies”

Another common theme has to do with helping educate patients more effectively and efficiently:

- “Additional patient education and reinforcement, non-biased”
- “Providing material to educate patients on their products specific to the patient”
- “I would like more educational materials to give to patients—they should be much simpler than what is currently available”
- “Providing patient educational resources including models, charts, or pamphlets for patients”
- “Clinically pertinent drug interactions educational materials for patients”

“Help Me Stay Informed so I Can Better Serve My Patients”

Physicians continue to request more—and more efficient—education for themselves and their staffs:

- “Point of care information regarding drug indications, effectiveness, and coverage. Modules built in EMR to deliver[the] info”
- “Office management tools; registries; meaningful use”
- “Clinical evaluations between various medications within the same class”
- “[H]ow to use evidence-based medicine appropriately for a specific patient”

[Note: Eighty-one percent of respondents want more industry-sponsored accredited CME and 65% want more industry-sponsored non-accredited CME (ie, promotional or on-label medical education).]
“Help Me by Communicating in Focused, Easy-to-access, and Simple-to-navigate Channels”

Finally, these HCPs are looking for simplified communications and assistance/support to help manage patient needs and improve health outcomes.

- “Cleaner communication—eMail and web, rather than faxes, minimize paperwork”
- “Easy contact helpline for patients if they need any assistance/have questions”
- “Having person available to answer product questions instantaneously”
- “Be sensitive to the [office’s] needs by talking to everyone in the office and try to assist in unmet needs”
- “Patient advocates (eg, RNs) that help patients with their disease state directly is a great asset”

In the end, physicians want help to educate patients, support patients who need assistance, and help patients stay on therapy. They will open their doors to life sciences companies and representatives that support them in accomplishing these goals.

“Help Me to Help My Patients”

- “Help my patients access the medicines they need”
- “Help my patients understand their diseases and therapies”
- “Help me stay informed so I can better serve my patients”
- “Help me by communicating in focused, easy-to-access, and simple-to-navigate channels”
Conclusion

Excellence is doing ordinary things extraordinarily well.
— John W Gardner

The 2014 edition of the What Physicians Want! report offers straightforward and valuable insight into the minds of today’s practicing physicians:

1. **Increasingly, more and more respondents actually want to see more representatives**
   For the first time in the history of this survey, more than 50% of physicians now want to see more primary care sales representatives calling on their practices. This new finding confirms a multiyear trend and marks an important tipping point.

2. **But physicians don’t want their time wasted**
   While they want to see more representatives, they expect quality representatives that add real value to their practices—this includes representatives who use clinical studies and EBM in their discussions, more patient education/support including clinical health educators, more highly educated and/or credentialed sales and clinical teams (PhDs, PharmDs, RNs, etc), even more use of iPads by representatives, more field customer service representatives, and more virtual, on-demand information, sampling, and support.

We believe these report findings are more than just separate and independent data clusters. On the contrary, when taken together, the ideas behind these findings may help biopharma executives visualize their interactions with HCPs in new and important ways. As shown in the infographic on the following page, this year’s respondents are seeking interaction with industry through both human-to-human and digital interaction. Furthermore, they want all interactions to be of high quality, seamlessly integrated, easy to access, and based on clinical studies and EBM. Finally, all interactions must be directed ultimately toward helping patients.

Thank you for joining with us as we seek to gain a clearer understanding of the needs and wants of these crucial stakeholders. Working together, we will be better able to deliver the right messages, at the right times, and through the right channels.
What Do Physicians Want? Infographic

What Do Physicians Want?

Physicians actually want to see **MORE** representatives...

**PCPs**

62% **Want More Primary Care Reps**
Calling on Their Practice

**Specialists**

91% **Want More Specialty Reps**
Calling on Their Practice

...but they don’t want their time wasted. They want:

- More use of clinical studies and evidence-based medicine (EBM)
- More clinical health educators and patient education/support
- More highly educated and/or credentialed (eg, PhD, PharmD, RN) sales and clinical teams

- Even more use of iPads by field representatives
- More field customer service representatives
- More virtual, on-demand information, sampling, and support

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