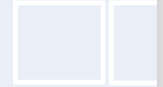


# Cutting Through the Noise:

## Gaining and Maintaining Share of Voice in Today's Oncology Marketplace



by Lou Iovino

It can be described through any number of overused, imprecise analogies: the shifting sands, a disturbance in the force, the winds of change, etc. But, however you slice it, today's marketplace is a challenge for pharmaceutical companies everywhere. The battle for share of voice in the market begins during clinical trials and reaches its apex at a brand's approval and in the years that follow. With so many oncology products in development and an ever increasing glut of print and electronic information reaching physicians, pharmaceutical companies must employ highly focused strategies to penetrate the noise and effectively reach their target audiences.

### Understanding the Targets

The first step in reaching physicians is to understand how they get their information. Oncologists clearly prefer information delivered through vehicles that are deemed to be unbiased in nature. Promotional materials and pharmaceutical sales professionals are increasingly viewed as the least desirable means of getting information about a product (see figures 1-6).

"Many oncologists have indicated that they do not want to see pharmaceutical sales representatives, or have begun to limit [representatives'] opportunities," said Dennis Wollschleger, RPh, Executive Vice President of National Oncology Consultants. "Most practices are seeing more patients than they have in the past, which is putting a premium on their time." For a full discussion of this topic,

see "Restricted Access" in the March 2008 issue of OBR.

With strict rules of engagement becoming more commonplace and open access policies disappearing in many institutions, sales professionals have to capitalize on the time they do manage to get with physicians and make themselves an asset to a physician's practice. "Physicians want access to reliable information about treatment options," said Charles Hugh-Jones, MD, Vice President of Medical Affairs for Enzon Pharmaceuticals. "High-quality sales calls can still have an important role. But these must be balanced with ongoing scientific exchange [with practices] through pharma's medical science liaisons and medical information departments."

However, getting in the door is only part of the battle. A pharmaceutical company, its brands and representatives have to gain credibility and trust in the minds of physicians—and avoid at all costs any missteps that shake the foundations of that trust. "Companies have to do the best job they can to present their data objectively, warts and all," said Brendan Ward, Creative Partner at Regan Campbell Ward • McCann. "If they accomplish that then I don't think it makes a difference to the doctor whether the information is branded or delivered by a sales representative."

### Share of Voice Prior to Approval

The earlier, the better has always been the mantra for beginning to establish a brand's identity in the minds of physicians. The hurdles that compounds have to clear are higher today than ever before due to fierce competition and intense stakeholder scrutiny.



**Charles Hugh-Jones, MD,**  
Enzon Pharmaceuticals



**Dennis Wollschleger, RPh,**  
National Oncology Consultants

“A strong preclinical data publication strategy, work with key opinion leaders and regular presentation of data at congresses are all very important components of a solid prelaunch brand strategy,” according to Michael Ross, General Manager of ICC Trio. “A strong trial recruitment plan also helps to create positive buzz around a product and the disease where it will be used once approved. The more positive noise a brand can generate during its prelaunch phase, the greater the chance of early adoption at launch, given that the data are compelling and physicians believe in the value of a product.”

the true measuring stick for physicians in the trenches.

“In the case where a molecule represents a truly new science, describing, in a general way, the mechanisms of the disease, of current therapies, and new potential mechanistic strategies, are all valuable ways of preparing an audience for a coming molecule, without growing the category for players already in the market,” said Ward. “In creating a prelaunch strategy, however, it is important to keep in mind that along with ‘buzz’ come raised expectations of performance. And modest data creates a negative impression when it fails to live up to what may later be perceived as preclinical hype.”



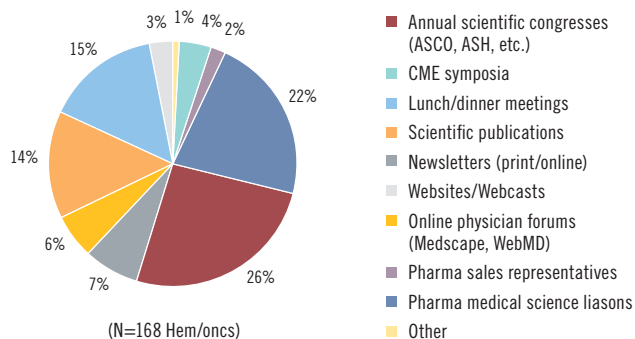
**Brendan Ward,**  
Regan Campbell Ward • McCann

A singular focus on differentiating the attributes of a product from those already on the market and those coming in the pipeline must be at the center of all prelaunch activities. The points of differentiation must ultimately be meaningful to physicians in everyday practice. While nuanced science and unexplored pathways can make for interesting discussion, clinical benefit for patients will always remain

### Off to the Races

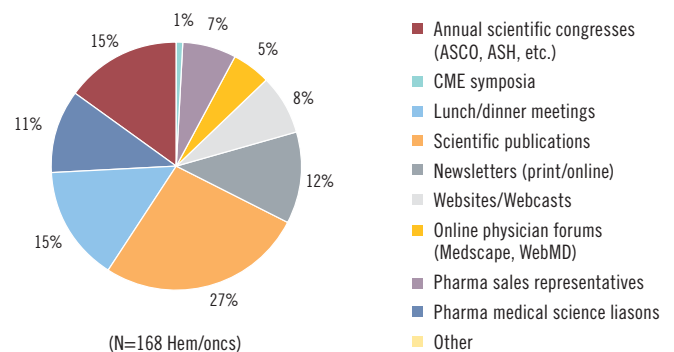
Upon approval, data collection and dissemination must still remain at the center of any brand commercialization strategy. “Data generation is certainly always a key component,” said Hugh-Jones. “Two issues [cont. on pg 24 >>](#)

**What is Your Preferred Way of Receiving Information About Investigational Drugs?**



**Figure 1.** Source: 2008 NMCR Analytics, Data on file.

**What is Your Preferred Way of Receiving Information About FDA Approved, Marketed Drugs?**



**Figure 2.** Source: 2008 NMCR Analytics, Data on file.

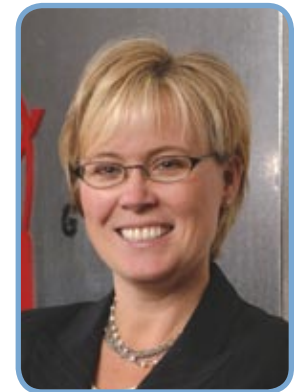
currently face physicians regarding data dissemination: quality and quantity. Or, in other words, data accuracy and data overload. The search for share of voice should not become part of the problem. Instead, companies can help physicians with accurate, concise data that can help in treatment decisions.”

If data are not compelling enough to cause physicians to take notice and reevaluate how they treat patients, share of voice will be the least of the brand’s problems. Solid data provides pharma the opportunity to implement a commercialization strategy that can best communicate the story of a brand and the value it brings in the treatment of patients with cancer. “The most important vehicles to maintain interest following launch, beyond solid data, are the tried and true elements of a promotional program,” said Ward. The oncology business in general has very little faith in the power of advertising and direct mail to persuade doctors to use a product. However, since this audience is extremely data-sensitive, awareness is an objective easily achievable via non-personal promotion. It’s as simple as this: in the post-launch environment, your cus-

tomers knows your data. Your job is to keep the product top of mind, and advertising and promotion are the best ways to do that.”

A solid clinical and commercialization program certainly drive a brand’s ability to stay at the forefront of the discussion after launch. In oncology, however, the ante is continually being raised and brands are now faced with additional expectations from stakeholders.

“The clinical data, while important, are really only one piece of the puzzle since today’s oncology products also compete based on services they provide,” said Peyton Howell, MHA, President of Pharma and Specialty Services at AmerisourceBergen Specialty Group. “Medical oncologists, specifically, expect comprehensive patient support programs including reimbursement support, patient assistance and, increasingly, patient adherence services. Also, field-based reimbursement and payer experts are part of the leading edge of support for new oncology products.”

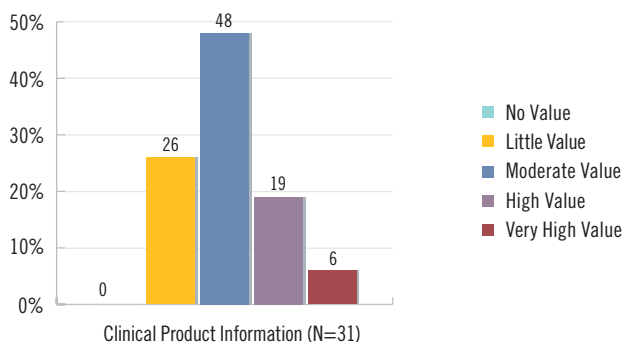


**Peyton Howell, MHA,**  
AmerisourceBergen  
Specialty Group

**Soothsaying on Share of Voice**

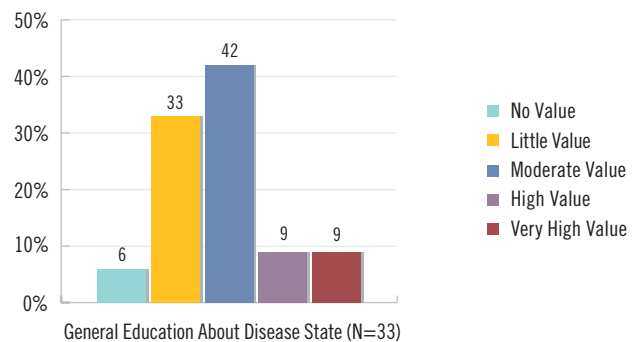
The Web is frequently being turned to as a cutting edge way to reach physicians and

**How Medical and Pharmacy Directors Rank the Services Provided by Pharma**



**Figure 3.** Source: 2008 Managed Care Network, Data on file.

**How Medical and Pharmacy Directors Rank the Services Provided by Pharma**



**Figure 4.** Source: 2008 Managed Care Network, Data on file.



Michael Ross, ICC Trio

potentially gain traction in the community. Online physician forums, social networking sites and blogs are all new approaches being tested by pharma, but the value of these approaches has yet to be fully understood. “There has been an increasing interest in how to best harness the power of the Internet in order to reach physicians,” said Ross. “We are beginning to get a sense of how these tools can be best utilized, but the tenets of sound communication with the community will not change even if the vehicle does.”

“Ultimately, the quality of the content is paramount regardless of the vehicle,” added Hugh-Jones. “It is important to stay focused on supporting good science and reliable data. It is often said that with good science, the business will follow. This, above all, remains true.”

As the conversation around oncology drugs and new treatment regimens continues to focus on cost to patients and impact on the health-care system, pharma will need to continue to devote time and resources to broadening the scope of their outreach efforts. One area that will require particular attention is payers.

“There is no doubt that the next frontier for share of voice in oncology will be with payers – both public and private payers,” according to Howell. “Oncology products will need credible value messaging focused on payer audiences. This is new territory for oncology products and it is important that manufacturers start now to assess their health outcomes related assets and build strategies to support this new paradigm.”

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How Medical and Pharmacy Directors Rank the Services Provided by Pharma

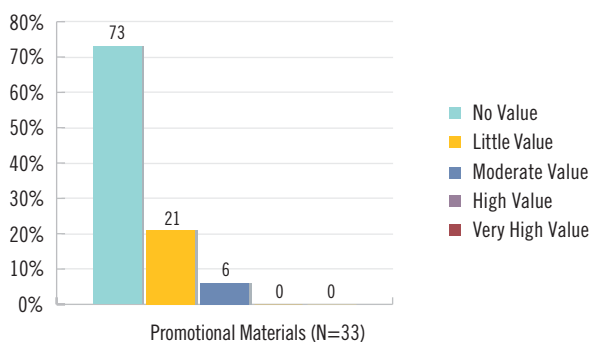


Figure 5. Source: 2008 Managed Care Network, Data on file.

How Medical and Pharmacy Directors Rank the Services Provided by Pharma

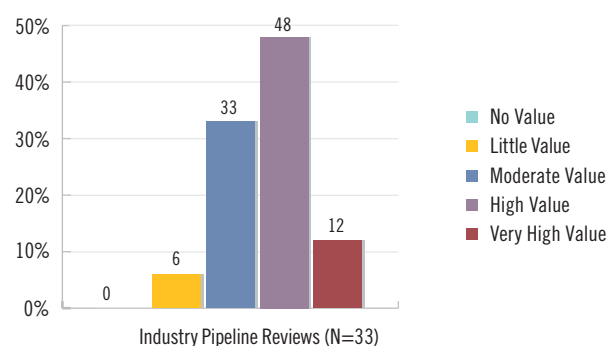


Figure 6. Source: 2008 Managed Care Network, Data on file.