

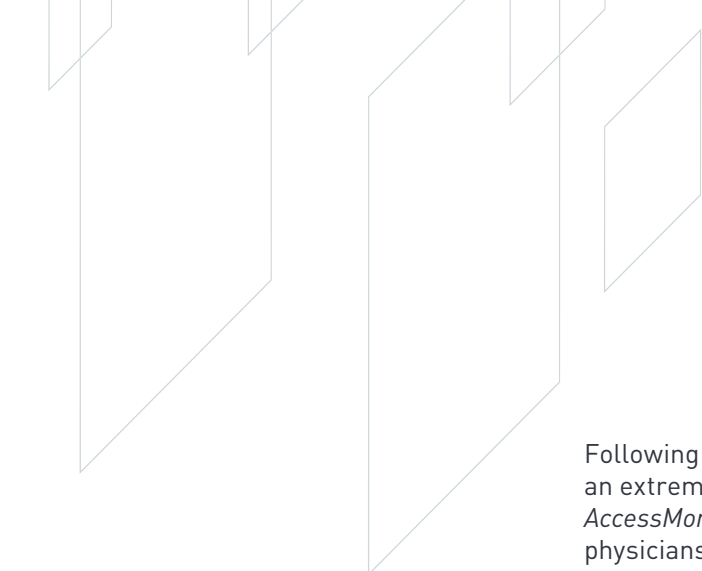


SALES + MARKETING

Conducting the Sales Symphony: How the “Orchestrator Rep” Addresses a Restricted-Access, Multichannel World

Jaideep Bajaj and Saby Mitra

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Following years of eroding access, pharmaceutical companies' sales reps face an extremely difficult sales environment. According to the 2014 edition of ZS's *AccessMonitor*[™] report,¹ access is in some way restricted for almost half of U.S. physicians, compared with 23% in the first six months of 2009.

Several factors are responsible for reduced access, including the proliferation of digital technologies; 92% of U.S. physicians access health information digitally from their offices, with 21% making online searches during patient consultations, often displacing the traditional need for pharma reps.²

But pharma reps' best days are not necessarily in the past. Digital promotional budgets constitute less than 10% of marketing expenditures for most pharmaceutical companies, and the sales force remains their most expensive—and their most important—promotional resource. However, it's clear sales reps must evolve to remain relevant. As a result, sales forces that orchestrate both personal and multichannel engagements will be far more successful in influencing brand choices than companies embracing the status quo.

The person at the center of these engagements? The “orchestrator rep.”

Introducing the orchestrator rep

The orchestrator rep is not necessarily a new role in the sales organization. Nor is it a key account manager (KAM), who has a distinct role managing large systems. Instead, orchestrator reps harmonize call activities with multichannel customer interactions. The rep will orchestrate the customer experience, not represent the sum of it. As we have observed accompanying reps on thousands of sales calls and during interviews, there are myriad opportunities to deliver orchestrated customer engagements.

For instance, at a fundamental level, a rep aware of a doctor's recent multichannel interactions (such as an invitation to a symposium or a key opinion leader [KOL] webcast) can help the rep include relevant information during product details, delivering a holistic and coordinated customer experience.

1. *AccessMonitor*[™] examined call reports for more than 200 unique sales teams comprising approximately 35,000 sales reps and examined interactions with approximately 325,000 physicians and prescribers.

2. See *Navigating the Minefield: Implementing Key Account Management in Pharmaceuticals, Multichannel Marketing Report 2013*, Eyeforpharma report; also, Zuzanna Fiminska, *Encourage a Culture of Experimentation to Perfect Your Multichannel Strategy*, Eyeforpharma.com, Oct. 22, 2013. <http://social.eyeforpharma.com/digital/encourage-culture-experimentation-perfect-your-multichannel-strategy>



Orchestration skills help optimize physicians “touches” by combining personal and technology-enabled tactics. Such reps can optimize their personal reach and frequency and their firm’s resources, based on customers’ value, access restrictions and channel preferences. Indeed, ZS caseworks reveal that when thoughtfully integrated, traditional rep detailing and multichannel interactions have significant impact in three key areas:

Reach: Rep interactions with physicians lead to nearly 20% of physician traffic to a pharmaceutical brand website (see Figure 1).³ As the orchestrator rep leverages non-personal channels (for example, a brand website) to introduce an offer or a service, the orchestrator rep also increases the reach of multichannel interactions.

Drivers of Brand Website Traffic

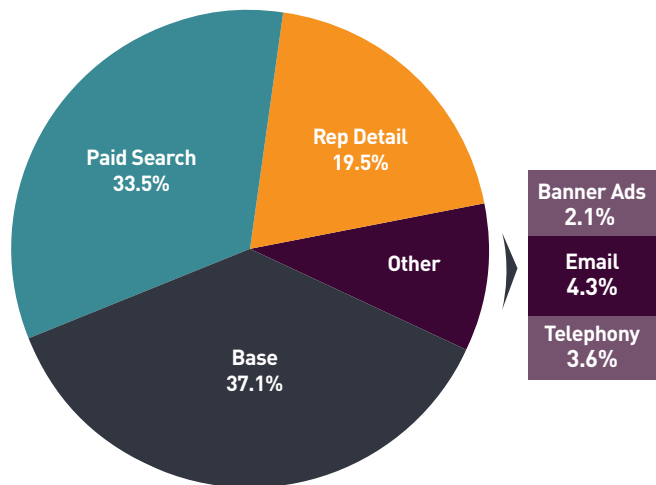


Figure 1. Rep details drive nearly one-fifth of traffic to pharma companies’ brand websites.

Source: ZS Associates

3. Data obtained through ZS clients’ sales forces and marketing operations.

Doctors are twice as likely to open rep-initiated emails than those sent by company headquarters.

Engagement: ZS's work with pharmaceutical firms reveals doctors are twice as likely to open rep-initiated emails than those sent by company headquarters (see Figure 2). Orchestration can thus improve physician engagement with multichannel tactics.

Physician Email Open Rates

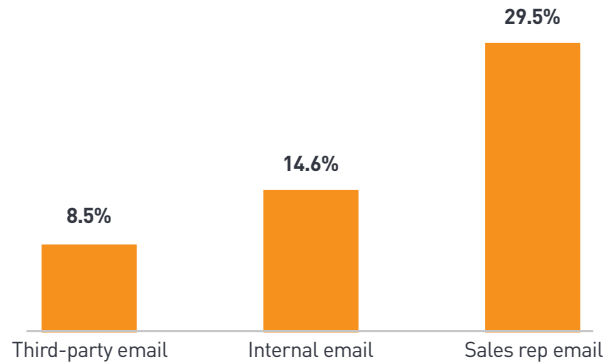


Figure 2. Doctors are twice as likely to open an email sent directly by a sales rep than one sent from the company.

Source: ZS Associates

Performance: Trial rates or non-writer conversion is significantly higher for doctors exposed to both personal and multichannel promotions versus just one of the promotional vehicles (see Figure 3).

Non-Writer Conversion Rate

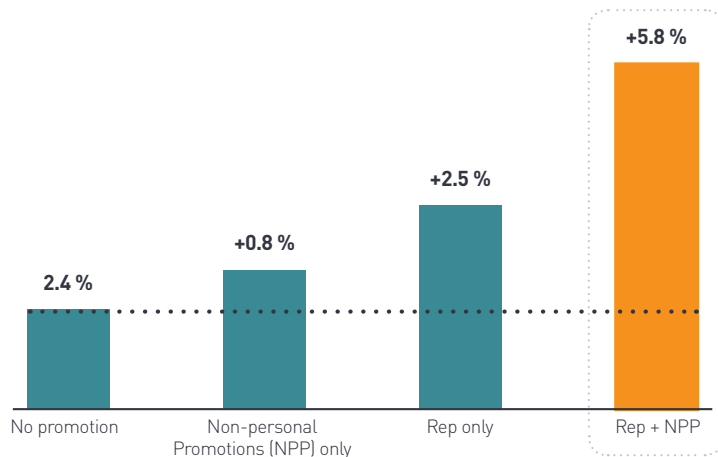


Figure 3. When doctors experience multiple promotional channels, non-writer conversion rates more than double.

Source: ZS Associates

The three stages of an orchestrator rep model

The degree to which a pharma company embraces the orchestrator rep model depends on corporate culture, the locus of control between sales and marketing organizations, and the company's willingness to invest in technology. We believe companies can enable orchestration capabilities in three key stages, incrementally adding value while managing the pace of change in the organization (see Figure 4).

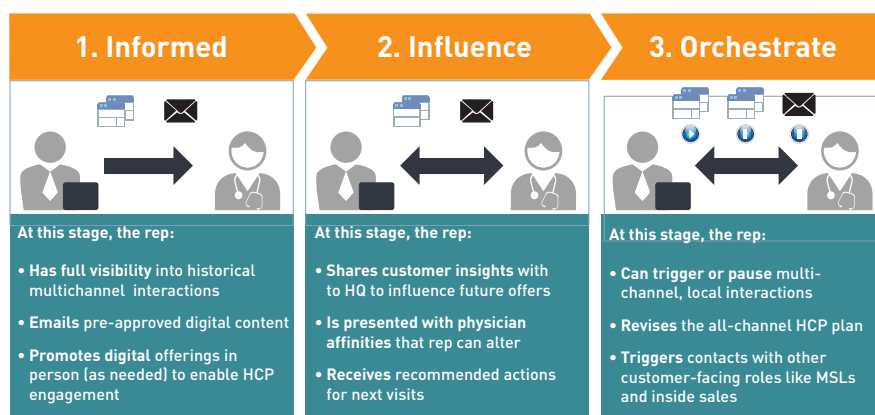


Figure 4. Three stages mark the journey toward becoming an orchestrator rep.

Source: ZS Associates

At stage 1, sales reps are informed, with full visibility into recent interactions. Reps use knowledge of physician interaction with marketing tactics to drive a more harmonized customer experience. Knowing a doctor is interested in learning about side effects (based on an inside sales or website interaction) can guide the next call. Reps can also leverage digital technologies to send physicians personalized emails and links to videos.

At stage 2, both the brand and the rep influence each other on current and future offers. Based on insights collected across channels, reps may be presented with channel and offer preferences or message recommendations for individual customers. Reps can implement the recommendations and share feedback with the marketing organization to help shape future promotional strategies.

At stage 3, companies have recognized the possibilities and are primed to tap them, and reps will orchestrate touch points across all multichannel engagements. Reps can intervene in eligible future campaigns if appropriate, and trigger actions at the customer level. For instance, reps can align the delivery of a patient kit with call schedules, allowing them to deliver kits personally. A rep can also revise an all-channel touch point plan developed for the customer and alter content and promotion mix accordingly.



Ensuring success

We believe that **five key considerations** will distinguish successful implementations from lackluster outcomes:

- 1. Cross-functional buy-in from senior management:** Sponsorship should come from executives with both sales and marketing responsibilities.
- 2. Enable the ultimate vision incrementally:** A road map can help manage both the degree and pace of change in the organization.
- 3. Shape proof points in early testing:** Start small—working with a cross-brand early experience team and first-line management can help refine and gather proof the orchestrator rep model is working as planned.
- 4. Make it easy for the reps:** Enable a simple mobile solution, ideally integrated into their sales force automation (SFA) platform; train reps on orchestration capabilities and not just tools.
- 5. Don't let other sales force excellence (SFE) levers stand in the way:** Review current sales rep competencies, hiring profiles and incentive plans to include orchestration dimensions.

The view from the box seats

The orchestrator rep was not created in a vacuum. Market events, the emergence of multichannel marketing and many other factors over several years have accelerated its development. Likewise, the ability of pharmaceutical and biotech companies to implement an orchestrator rep model is not something that can be expected to simply happen, or to happen overnight. It will take time, investments in technology and change management, and will not always be smooth.

Taken as a whole, the orchestrator rep model may seem daunting. But it need not be—ideally, it happens through a planned and methodical implementation as outlined above, which can make it far less burdensome.

It's time for the pharmaceutical industry to embrace changes that come with rapidly evolving customers. Physicians will have an experience whether you design one or not, and sales reps will face declining access no matter how hard you try to stem the tide. Customers will gravitate toward channels that allow them to get information when they want, in their preferred format.

However, commercial models that thoughtfully integrate sales and multichannel marketing strategies—turning traditional reps into orchestrators—will continue to deliver superior customer-centric engagements and business performance.

About the Authors



Based in Princeton, N.J., Jaideep Bajaj is Chairman of ZS. For more than two decades, Jaideep has addressed sales and marketing issues for clients in the pharmaceutical and health care industries. His areas of expertise include sales and marketing strategy and effectiveness; customer segmentation; promotion response and ROI assessment; sales force size and structure territory alignment; call planning; incentive compensation; and product performance enhancement decision support tools and dashboards. Jaideep's extensive experience encompasses dozens of companies worldwide.



Saby Mitra is an Associate Principal at ZS in Evanston, Ill. Saby is a leader in ZS's Customer Centric Marketing Practice. He has more than 14 years of experience in advising and helping clients shape their commercial organizations through CRM and adjacent commercial technology solutions in United States and Europe. Saby's expertise includes designing and implementing global transformation programs in several customer-centric initiatives, including sales force automation, multichannel customer engagement, and closed-loop marketing solutions in the life sciences industry.

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About ZS Associates

ZS Associates is a global leader in sales and marketing consulting, outsourcing, technology and software. For more than 30 years, ZS has helped companies across a range of industries get the most out of their sales and marketing organizations. From 21 offices around the world, ZS experts use analytics and deep expertise to help companies make smart decisions quickly and cost effectively. ZS comprises multiple affiliated legal entities.



**For more information,
please contact:**

ZS Associates
+1 855.972.4769
inquiry@zsassociates.com

www.zsassociates.com