

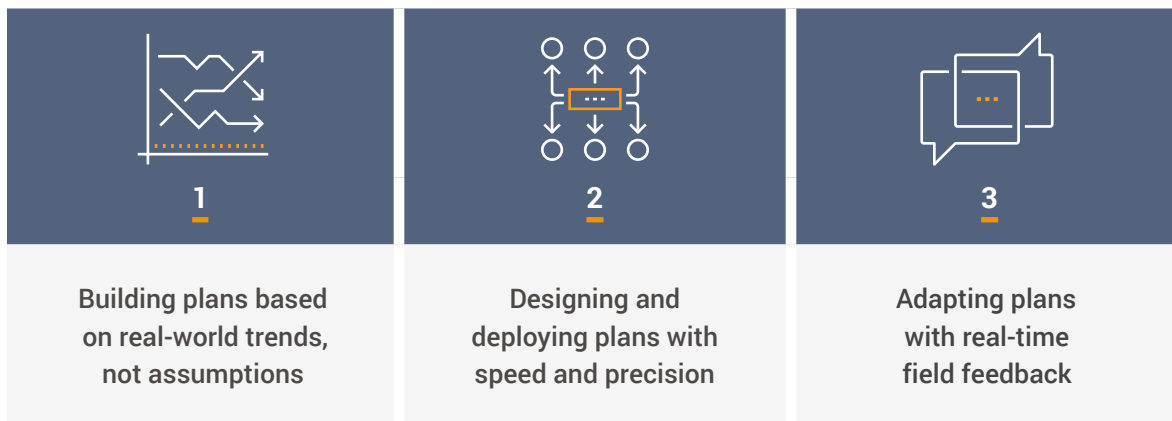
## AGILE FIELD FORCE PLANNING

# Three Steps to Create Better HCP Engagement

U.S. biopharma field force activity is **up 9% over last year**, largely driven by in-person meetings. At the same time, 84% of healthcare professionals (HCPs) prefer to **maintain or increase the share of virtual interactions** with biopharmas. For field reps, understanding HCPs' preferences can mean the difference between effective engagement and missed opportunities.

Your field team's success is determined long before reps initiate their outreach to HCPs. Designing a thorough field force plan and incorporating field force activity data is essential to optimize HCP targeting, build robust channel strategies, and personalize interactions with each individual customer. But rigid planning cycles, lagging and siloed data sets, and limited access to vendor data can make it difficult to see these trends – never mind react to them.

In this ebook, we'll cover how commercial operations teams can improve HCP engagement and optimize field force planning by:



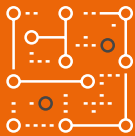
## Why traditional field force planning falls short

Traditional field force alignments are a complex, highly manual, and inflexible process. For a truly customer-centric approach, your field force planning can't rely on lagging industry data or one-size-fits-all strategies. Here are three reasons the traditional approach to field force planning isn't effective:



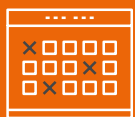
### Outsourcing costs

Constant budget scrutiny and the pursuit of streamlined operating models have caused some biopharmas to consider outsourcing their field force planning process. But, outsourcing has its own risks – it can have **hidden costs** for customization, there is **less control** over your data and strategy, and **cookie-cutter solutions** are often unable to meet your company's specific needs.



### Manual approaches

Homegrown alignment solutions give companies more control over the process, but teams often need to work across multiple teams and spreadsheets. This approach is **resource-intensive, inefficient, and error-prone**. It also **limits insights**, because it's much more difficult to spot strengths and weaknesses in your strategy with fragmented data.



### Inflexible strategies

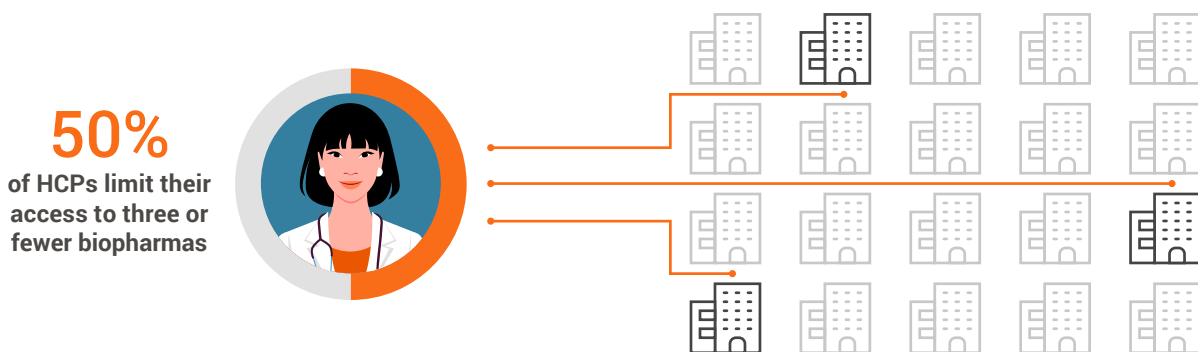
Traditional alignments might happen at scheduled times quarterly or every six weeks. This **slow-moving approach** can't effectively account for shifts in the market, new product launches, or evolving field force engagement trends. It also makes it **more difficult to capture and act on feedback** from reps when alignments are wrong.



# Creating an agile approach to field planning

The **growth of data and digital channels, frequent market disruptions, and increased competition** have made field force planning more challenging in recent years.

For commercial teams to be successful, territory alignments must evolve far beyond inflexible and highly manual “plan-execute-measure” constructs. Field force engagement data can help you understand what’s working – and what’s not – when engaging target HCPs.



*Veeva Pulse Data, January 2023–March 2024*

Combining your field team’s activity data and customer data into a precise, dynamic, and omnichannel-enabled plan creates an agile approach to market as new information can be used to consistently inform and modify strategy. Historical interactions, channel preferences, and feedback from your field teams are key to deepening relationships with HCPs, targeting more effectively, and optimizing engagement.

This agile approach to territory alignments also allows you to balance the needs of the business, HCP preferences, and feedback from your field force. It also ensures your field is engaging as effectively as possible on the channels your customers prefer by:

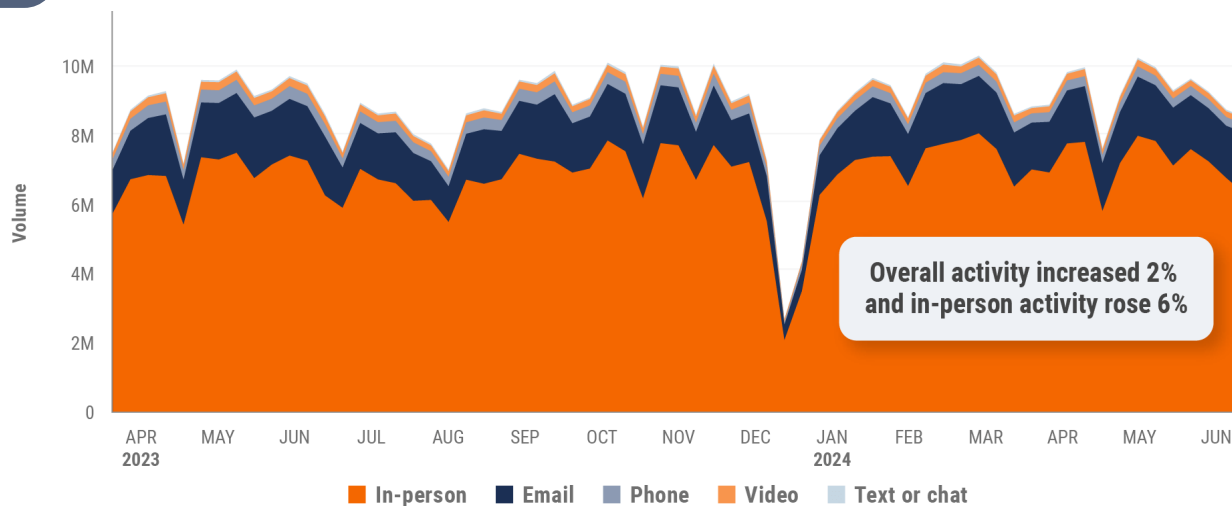
- ➔ Using channel data and insights to inform channel strategy
- ➔ Accounting for HCP’s preferences to improve the customer experience
- ➔ Enhancing field team execution by incorporating field feedback

## Build your plan on benchmarking and channel insights

Field force activity data can help you understand what channels are the most effective. This data sets the baseline, and from there you can benchmark your company-specific data against the rest of the industry.



Global Channel Mix



*Field force activity data can help you understand what channels are the most effective.*

This data will help you answer key questions like:

- ➔ What differences are there between regions?
- ➔ What channels deliver the most value?
- ➔ Where are the gaps in channel strategy?

Through this assessment, you'll learn how your customers prefer to interact with your field teams, depending on where they are in the customer journey. This allows you to set the foundation for agile field force planning by consistently updating your strategy based on timely, relevant data that will set your reps above the rest of their competitors.



## Three trends impacting field force planning

Industry benchmark data like **Veeva Pulse data** can give companies visibility into overall field activity and HCP engagement trends to use as a measure for the industry, and inform your own field force strategy decisions. Here are three trends impacting the industry right now:

- 1** **HCP access declined from 60% in 2022 to 45% in 2024.** While some HCPs only engage in person, that data also showed the importance of a hybrid approach, as 50% of accessible HCPs engage via a mix of in-person and video.
- 2** Although many field teams are likely celebrating the return of in-person meetings, commercial teams shouldn't abandon their hard-won digital access with HCPs. Video meetings combined with in-person resulted in **three times greater promotional response** over in-person alone.
- 3** Content sharing frequency in **Engage**, a digital engagement platform, is twice that of in-person and other video meeting channels. **Digital content sharing can increase promotional impact** by 2.5 times vs. meetings where content isn't shared. In an analysis of Veeva Pulse data, the top three biopharmas used content in 70% of meetings vs. 18% for the bottom three, creating a wide competitive advantage.

Combining activity data with existing customer data can lead to more sophisticated insights and improve segmentation, targeting, and multi-channel planning. Activity data allows you to personalize the engagement approach by answering the following key questions:

- ➔ How digitally engaged is this customer?
- ➔ How successful have video meetings been?
- ➔ How well does this HCP engage with content?

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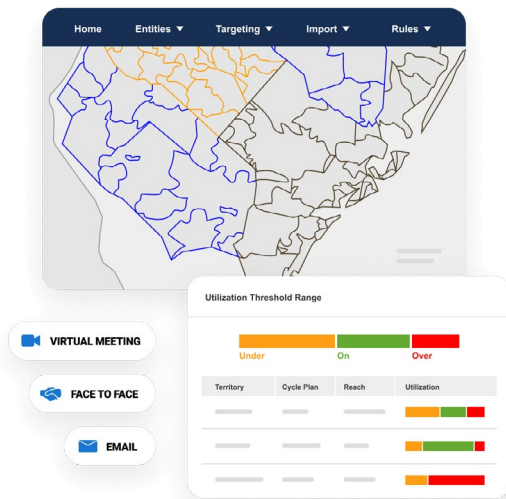
STEP 2

## Design and deploy your field force plans

Optimizing the channel mix for maximum commercial impact and customer experience requires aligning field activity trends with evolving customer preferences. But, traditional field planning methods, often reliant on spreadsheets, disconnected data sources, and siloed technology prove inefficient and cumbersome – hindering agility and speed. Territory alignment software that is seamlessly integrated with your CRM platform offers a best-in-class approach to field planning.

Field interactions recorded in your CRM platform – including the type of interaction, how the engagement went, and content usage – allow you to monitor interactions with HCPs over time. Using this data, you can assign priority level and weight to each channel in your territory alignment solution to ensure reps optimize for multichannel interactions instead of reverting to whatever channels are most comfortable for them.

This approach empowers field teams to execute their engagement strategy in a sophisticated way, at scale, as even field reps with small territories will often have too many HCPs to independently determine the most effective approach for each customer.



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Align is the only solution that is fully integrated with CRM. We can select our target group, build our multichannel cycle plans directly in Align, and then we can push through to the end user, supporting their goals and approval process.

**Global Head of Commercial Operations**  
A leading global biopharma

## STEP 3

# Use field feedback to improve your approach

No matter how precise your data and strategy are, there is no substitute for real-world feedback, as sometimes data may not capture the realities on the ground. For example, a target physician may not be accessible or prefers virtual meetings over in-person interactions. When this happens, you need to be able to easily capture feedback from your field team and act on it.

Field feedback can also help quickly reconcile broader discrepancies in the planning process. For instance, when GSK's commercial operations team switched to an outside data solution, the new dataset created a skewed alignment based on mailing addresses, rather than the practice addresses that the field team uses for calling on HCPs. By **enabling field feedback**, the reps identified nearly 70,000 records in the customer reference data that needed to be removed.

Additionally, integrating field feedback in a single-app experience with **Veeva Vault CRM** allows home office teams to get early field feedback without the hassle or risk of error-prone spreadsheets. When field feedback is captured in a smooth, convenient, and consistent process, it:

- Speeds up alignment adjustments
- Reduces errors from manual data capture
- Prioritizes the field team's time with the right targets

Integrating field feedback quickly and accurately ensures that plans are kept current without waiting for a fixed date in the planning cycle. Most importantly, it gives your field team agency in the process and confidence that the data will support their customer engagement goals.

## Conclusion

Biopharmas that use field force activity data as the foundation for agile territory alignments can empower field teams with dynamic and precise omnichannel plans that create a competitive advantage. As field teams supplement quantitative measures of success with more qualitative measures, the ability to rapidly adapt plans based on their feedback is a key differentiator.

Learn how **agile, data-driven field force planning** can move your team beyond measuring reach and frequency to deliver a better customer experience.