Veeva Medical

2025 KOL SATISFACTION REPORT

Research shows that medical affairs teams, with their scientific background and deep knowledge of the evidence, are highly valued by key opinion leaders (KOLs).

94%
say scientific exchange between clinical experts and biopharma companies is becoming more important

86%
are satisfied or very satisfied with biopharma engagement

88%
say MSLs bring relevant information to meetings

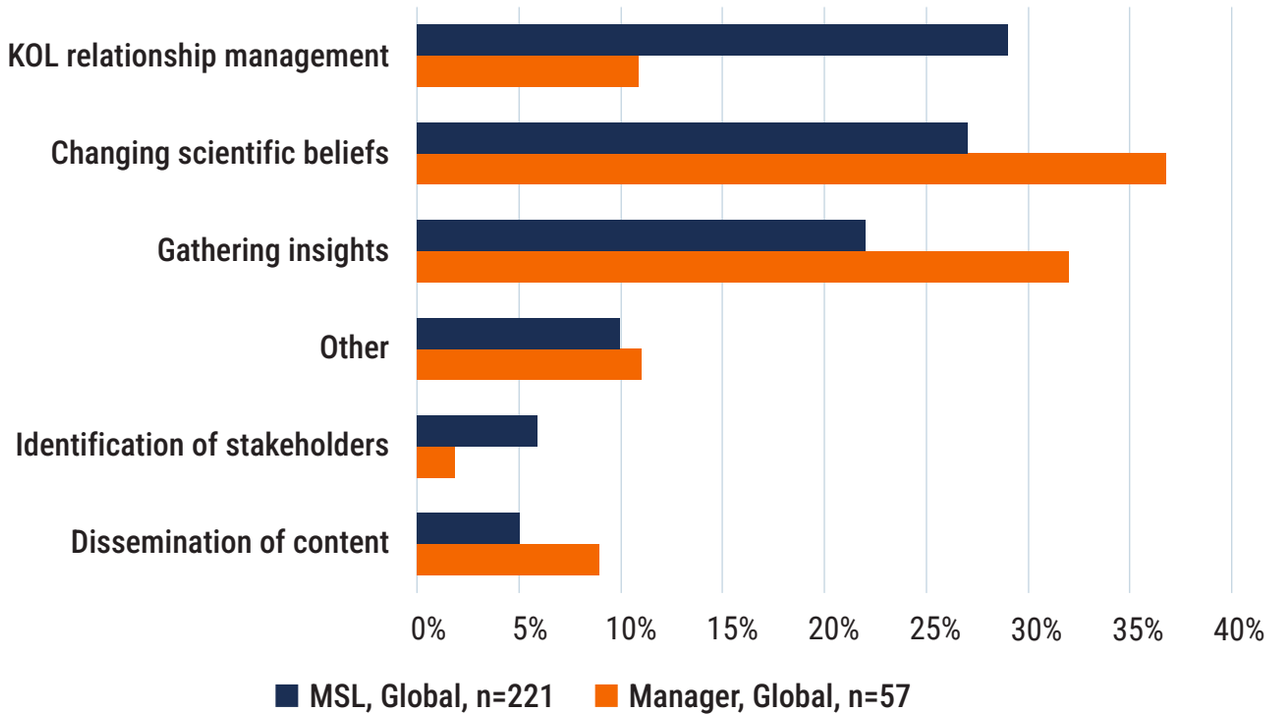
Faced with limited resources and conflicting priorities, where can medical affairs focus efforts to maximize engagement?

Veeva conducted surveys with both field medical teams and KOLs. Findings validate that KOLs want personalized interactions, including tailored content. However, many say this level of customization differs among companies. And, organizations don't always permit MSLs to tailor engagement and content.

KOLs also want field medical teams to share their scientific opinion — how they interpret the evidence they present and/or what that means for clinical practice. This is key for informed, transparent scientific exchange that helps them formulate their own position. Our survey data shows that the industry is split as to whether it is appropriate to share the corporate scientific position (in a compliant manner) or if it should be an unbiased source of information.

Key Findings

Which of the following responsibilities do you, or the MSLs you manage, find the MOST challenging?**



Increasing demands on field medical's time and performance require them to optimize for effectiveness and efficiency. MSLs say KOL relationship management is one of the most challenging responsibilities, along with changing scientific beliefs, and gathering insights. However, a key finding shows that managers of field medical teams don't necessarily view these challenges in the same way.

Tailoring Content to Meet KOL Needs

81%

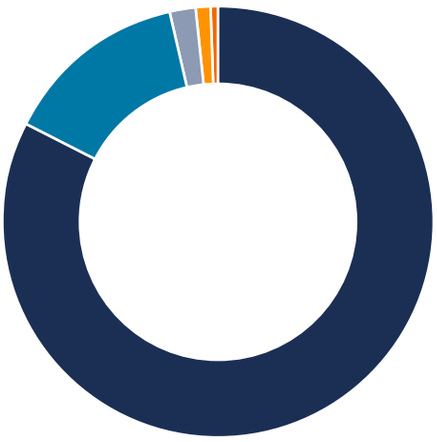
of KOLs say they want content customized to meet their needs and interests*

66%

say they experience different levels of customization among companies*

MSLs and their managers also feel it is important that they customize their interactions.

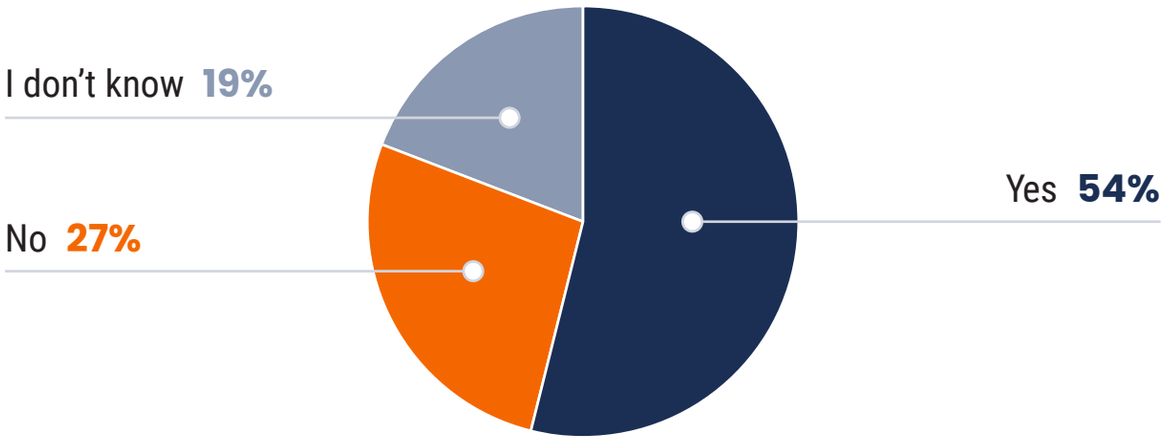
It is important that MSLs customize each engagement based on the KOL's interests, educational needs, and career objectives.**



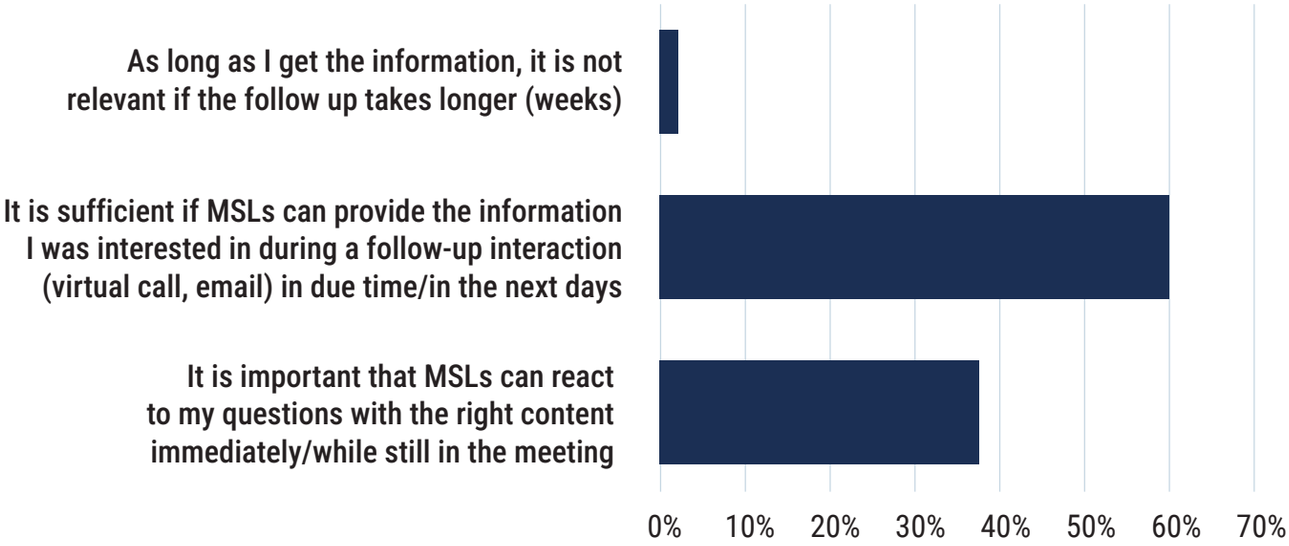
- Strongly agree **83%**
- Somewhat agree **14%**
- Neither agree or disagree **2%**
- Somewhat disagree **1%**
- Strongly disagree **<1%**

However, not all field medical teams are allowed to tailor the content they present. Many don't even know it is an option.

My company allows MSLs to personalize the content (in a compliant manner) that they use in KOL interactions.***



98% of KOLs want their information in a timely manner, but for 60% this means within days, not immediately*



The scientific content presented to KOLs often turns into action.

The scientific content presented/discussed in my interactions with MSLs leads to the following actions (please select all that apply):*

- I change the way I treat my patients — 79%
- I change the way I interpret the evidence — 74%
- I share information with the colleagues in my hospital/clinic/department/practice — 72%
- I incorporate information into my scientific presentations — 67%
- I incorporate information into clinical treatment recommendations/treatment guidelines — 60%
- I don't use the content — 5%

Sharing Scientific Opinion

When asked if it is appropriate for MSLs to express their scientific opinion on data when presenting to a KOL, field medical teams are split.

It is acceptable for an MSL to express their opinion on data when presenting scientific evidence to a KOL.**

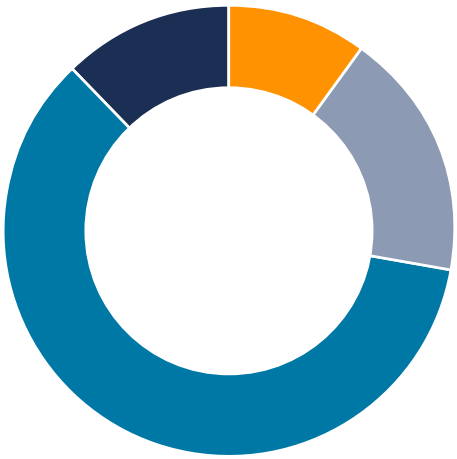
- Neither agree or disagree **19%**
- Somewhat agree **25%**
- Strongly agree **12%**
- Somewhat disagree **17%**
- Strongly disagree **28%**

However, most KOLs want biopharma companies, and field medical teams specifically, to share their scientific opinion.

It is appropriate for biopharma companies to **share an explicit opinion** on how their products should be **used in clinical practice** (in a compliant way).*

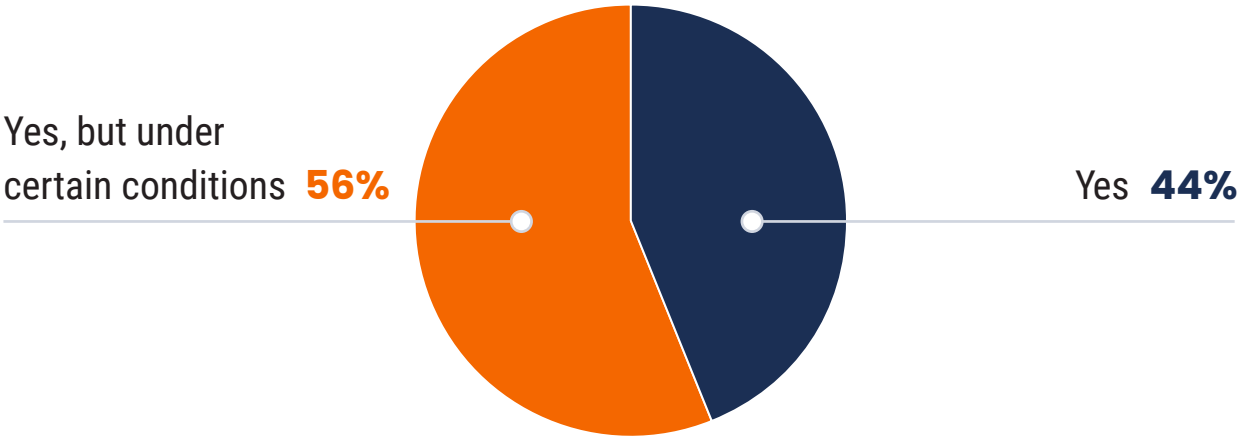
- Disagree **8%**
- Neither agree or disagree **8%**
- Agree **70%**
- Strongly agree **14%**

When presenting evidence, it is appropriate for biopharma companies to **share an explicit opinion on the interpretation of this evidence** (in a compliant way).*



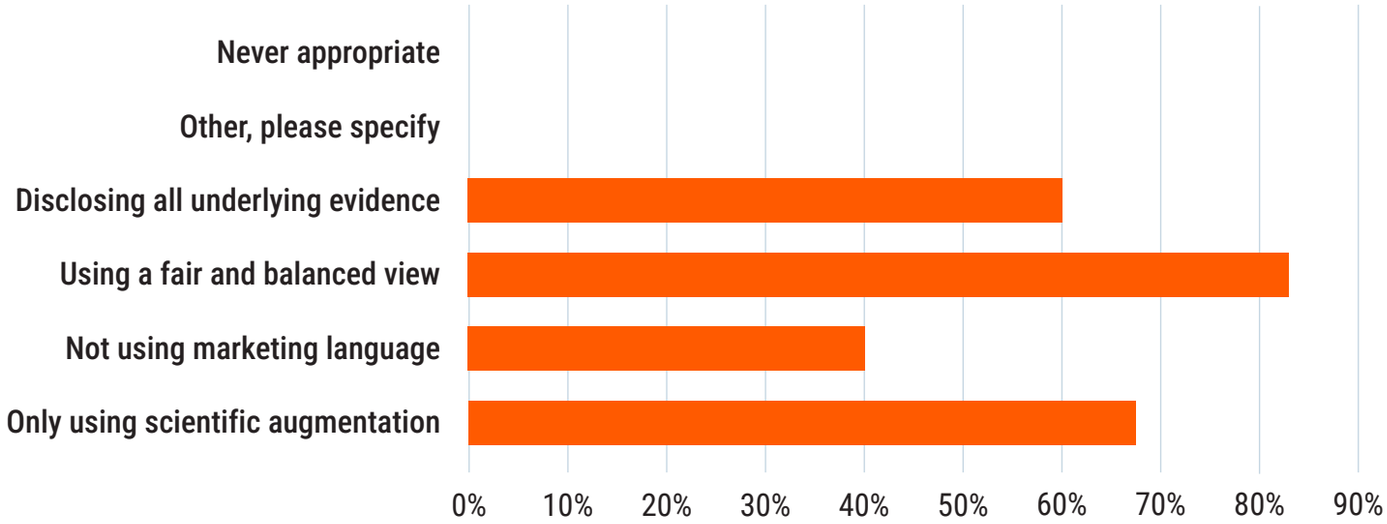
- Disagree **10%**
- Neither agree or disagree **18%**
- Agree **60%**
- Strongly agree **12%**

Is it appropriate for medical field teams (MSLs) of biopharma companies to **share their scientific opinion during interactions with healthcare professionals** (in a compliant way)?*



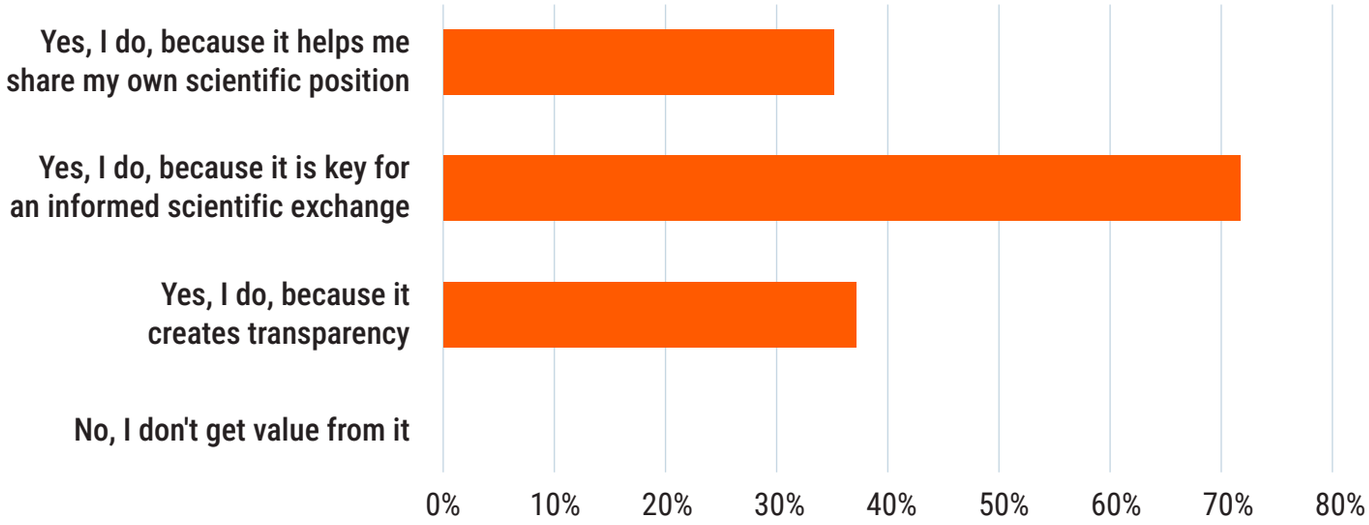
Some KOLs believe sharing an opinion is only appropriate under certain conditions.

Which conditions need to be fulfilled to make sharing the "corporate" scientific opinion appropriate?*



However, all KOLs say they benefit from the sharing of corporate scientific opinion.

Do you get value from representatives of biopharma companies being explicit about the company's scientific opinion?*



Summary

With this growing mandate, medical affairs needs to think differently about resourcing to engage KOLs effectively.

In a recent discussion at Veeva Commercial Summit with Jamie DeMaria, global head, medical affairs excellence at Boehringer Ingelheim, he agrees that deploying the same strategies and people across different assets and products is not sustainable. Nor, will it lead to strategic success. “We have to be smarter about our objectives and how we deploy people,” he says. “We have to continue to be a nimble organization when it comes to engaging with our customers. We need to learn how to grow and evolve.”

Based on the key learnings from the surveys, here are recommended actions that medical affairs organizations might prioritize.

01

Establish strong partnerships

Medical affairs can be a strategic partner for both clinical and commercial, especially when it comes to the launch process. This includes preparing the market for what’s to come from a clinical perspective by engaging early on, bringing new evidence to market or asset indications, and supporting the sister functions internally with strategic input, key insights, or education.

To optimize for this, medical teams must prioritize efficiency and clearly define and establish straightforward scientific objectives. This narrative can then be pulled through the entire commercialization process.

For collaboration with the commercial team, it’s about building a full 360-degree view of how to approach key leaders. “Getting into the market years before and preparing the way so when commercial has its launch, we've made their lives easier," says DeMaria. This requires a lot of planning including how to go to market and market development. “To be a true partner to commercial colleagues means going beyond being a scientist. We need to bring the mindset of being a problem solver,” he says.

02

Shift to integrated omnichannel engagement

KOLs appreciate customized engagement based on their interests and needs. This, affirms DeMaria, is where an omnichannel strategy will be critical for medical affairs. “It’s more than just opening up a massive slide deck and picking the most relevant slides,” he says. Delivering true omnichannel for medical is building systems and structures to support tailored customer journeys. This starts with segmenting key stakeholders, understanding their needs, and then developing personalized content in the appropriate format for those individual personas.

Omnichannel will also alleviate the resource issue by targeting HCPs' learning asynchronously and keeping their knowledge evolving. DeMaria emphasizes, "If we do it the right way, then we can scale it with our current teams and make them more efficient."

Doing omnichannel well is not just about sharing information in different channels, but also getting information back. This ensures KOLs receive the next thing they require so the education channel evolves with their needs. "We have to be thoughtful about what we are trying to do and what data we are providing, and make sure the format is appropriate. With true omnichannel, these interactions are all part of customer journey," DeMaria says.

03

Demonstrate impact

MSLs provide credible scientific information, serving as thought partners to KOLs. "If you are a true thought partner for your HCPs, then they are looking for an opportunity to bounce ideas off of you and have those honest conversations," says DeMaria.

This value directly influences clinical practice changes and underscores the need for medical affairs to proactively demonstrate impact and become integral enterprise-wide problem solvers. "We've got to figure out a better way to harness that energy and demonstrate that value," shares DeMaria. "This data shows that people are actually making a practice change based on the information we are sharing."

To better understand impact, DeMaria suggests reviewing what KOLs consumed and when, and if their beliefs or how they treat their patients changed. "You have to look at different ways to assess activities and measure success of medical affairs, not by scripts, but by clinical adoption," he says. "You have to be prepared to share your metrics and do it the right way."

"We continue to have access because we are that thought partner who brings information to KOLs and has those scientific exchanges," emphasizes DeMaria. "This is a moment to demonstrate the value we bring to the organization and to the clinical community at large."

Learn more about Veeva's solutions for medical affairs

See Veeva's holistic, data-driven approach to measuring medical impact.

Demographic Summary

* **Survey 1:** Online survey of 50 KOLs (25 US, 25 EU), March 2025.

KOL status qualified by participating in at least three activities: publishing in scientific journals, involvement in clinical trials, speaking at conferences, and contributing to guidelines.

** **Survey 2:** Challenges, Opportunities, and Impact on MSL-KOL Engagement, online survey sponsored by Medical Science Liaison Society (MSLS) and Veeva, Nov-Dec 2024. Total of 317 responses from 39 countries. Responses cited in this report include Executive Management, Vice President of Medical Affairs, Manager/Director of MSLs (or equivalent title), MSL, Senior MSL, Medical Advisor (or equivalent title), and MSL Operations/Excellence/Training, Global Data.

*** **Survey 3:** Live poll during MSL Society webinar with Veeva, December 6, 2024, "Improving Efficiency and Impact: Insights from the MSL Community."

Numbers have been rounded for easy viewing.

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