



REFLECTING & REFRAMING

ASSESSING THE IMPACT OF COVID-19 ON STRATEGIC PLANS & PROGRAMS AND PAVING A PATH FORWARD

A toolkit of research approaches to help you reflect
and reframe strategic plans during and following the
COVID-19 crisis



Where are you on the road to readiness?

COVID-19 has created a new norm in the provision of healthcare. As physicians and other HCPs lead the fight against COVID-19, their practice dynamics and needs are rapidly evolving. Our data tells us that traditional rep engagement has been permanently altered. New platforms, enabling communication and engagement between reps/MSLs and HCPs are quickly being developed, but whether they will adequately replace face-to-face engagement is yet to be seen. Value and reputation have become the key relationship currency in this new world order. As such, HCP engagement practices must evolve to meet the new needs and expectations of these key customers.

Many are asking whether paradigm shifts, such as e-detailing and telehealth, will continue beyond the curve. Across many therapeutic categories, telehealth visits are not keeping pace with traditional office visits and as such, new and switch volumes are significantly down. Investment in HCP non-personal promotion is growing, but engagement remains negligible. Healthcare systems and providers are already pushing back against manufacturers' aggressively flooding the market with digital detailing and virtual communications.

The actions you take today will define the tenure and strength of your relationships with HCPs today and into the future.

What you say matters now more than ever. As the market adapts, an unprecedented opportunity has emerged to renew the role of your brand in the hearts and minds of your customers. What is of value to you as a manufacturer, is not necessarily what is of value to your providers, patients and payers. New relevancy expectations must reshape your communications to meet the evolving needs of your customers. Supporting continuity of care has never been more important. Reprioritize current assets and pivot brand and content strategies to meet new relevancy expectations and ensure alignment with the evolving and unfamiliar market dynamics.

Yes, businesses are facing unprecedented challenges, but this time of disruption presents opportunities to emerge stronger out of this crisis. Whether you are a brand leader, have just launched or are planning to launch, it is imperative to assess the impact of these unfamiliar market dynamics on your product and portfolio performance.

We stand ready to support you!

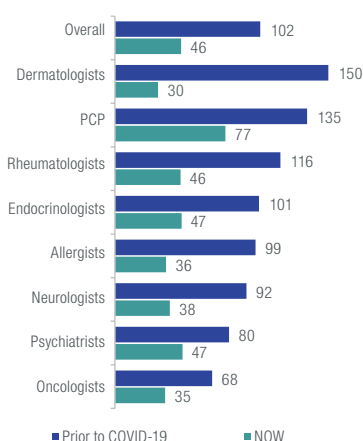
Understanding the impact of COVID-19 on HCP practices



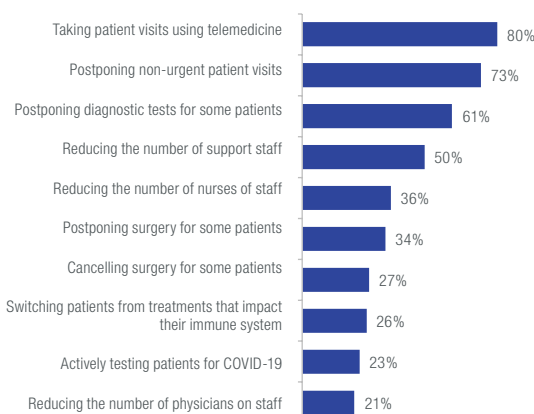
Methodology: 311 interviews with HCPs in the US from March 26 to April 2, 2020. Each HCP evaluated up to 3 recent e-details. This resulted in 642 e-details being evaluated.

HCP practices are undergoing major changes

HCPs are seeing roughly half as many patients per week as before COVID-19



Percent of practices that have made changes due to COVID-19



HCPs report that 16% of their patients have had difficulty filling scripts since COVID-19

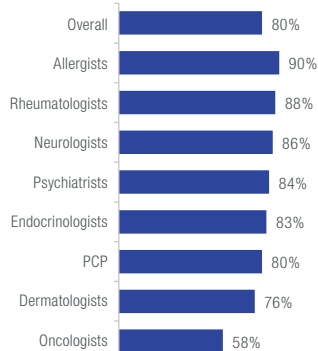


55% of HCPs report having difficulty sourcing general medical supplies

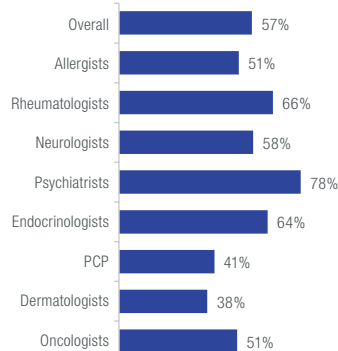


Telemedicine use is increasing sharply. And the shift has happened quickly

Percent of HCPs now using telemedicine



Percent of patient visits via telemedicine



There are questions that are still being resolved:

- Reimbursement?
- Digital samples and materials?
- Is the quality of care as good as in person visits? What types of patient visits are best suited to telemedicine?
- What are the best technology platforms? HIPAA, EMR, Telemetry
- What administrative logistics are required to effectively manage a set of telemedicine visits?

Understanding the impact of COVID-19 on HCP practices

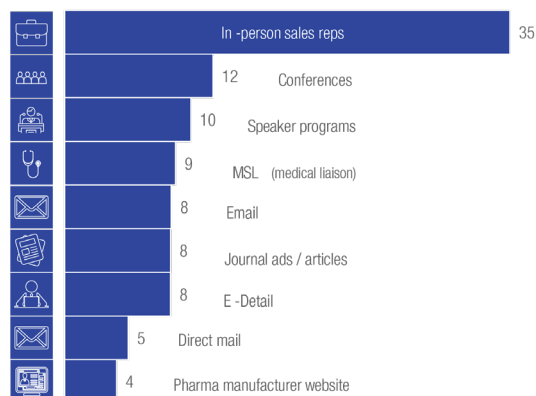


A massive shift in the detailing landscape



Top preferred channels are still in-person

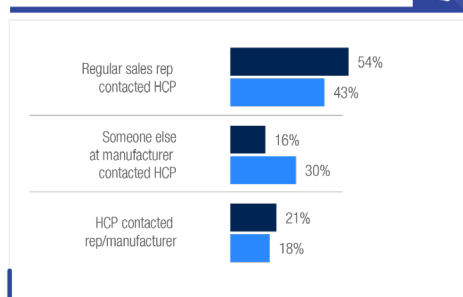
HCPs' preferences for communication channels with manufacturers



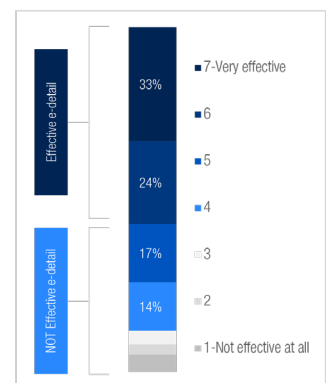
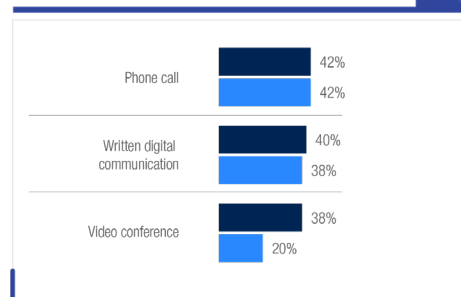
42% of HCPs cannot think of a manufacturer that has effective e-detailing interactions.

What makes for an effective e-detail

How e-detail was initiated



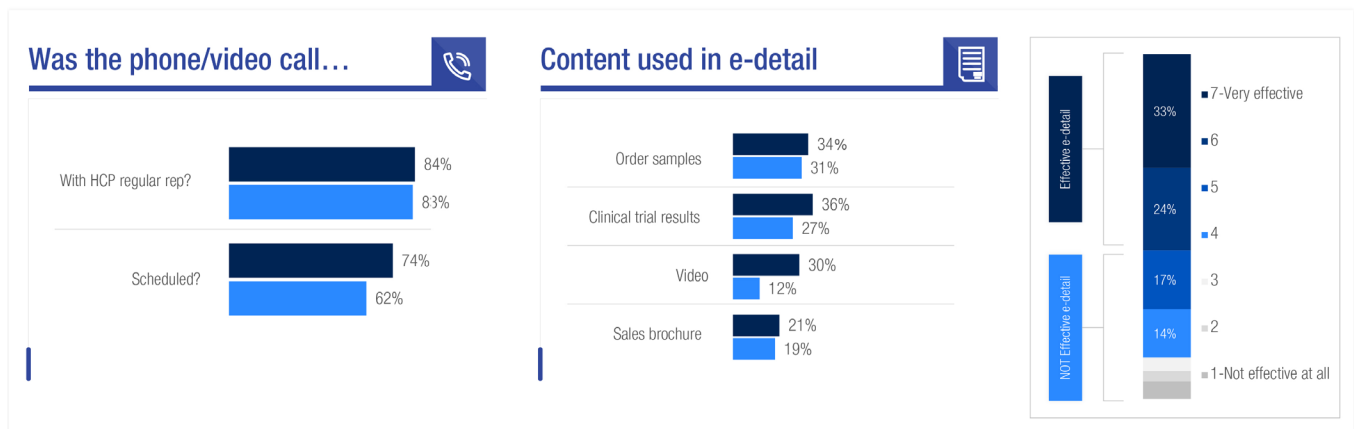
Method of interaction



Understanding the impact of COVID-19 on HCP practices

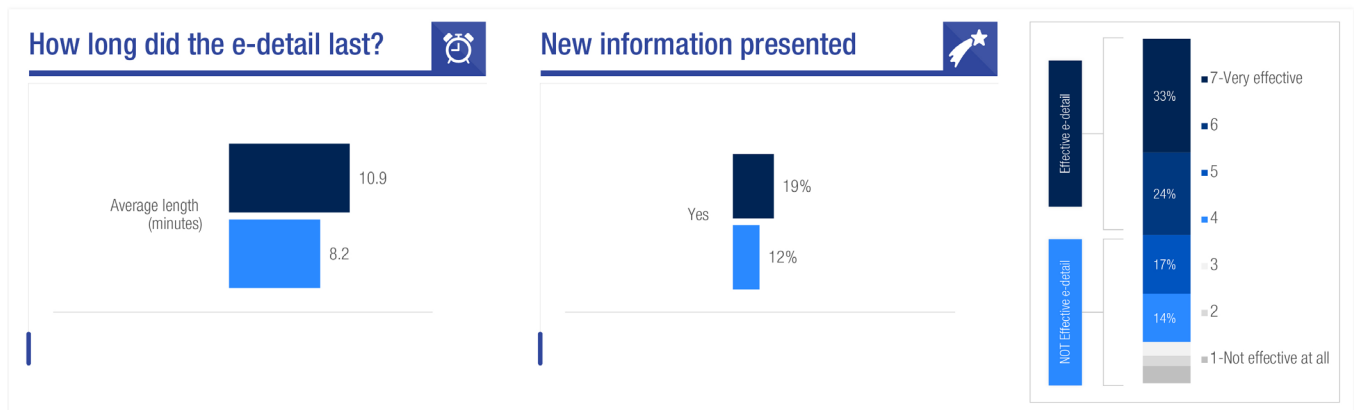


Effective e-details provide an opportunity for a dialogue



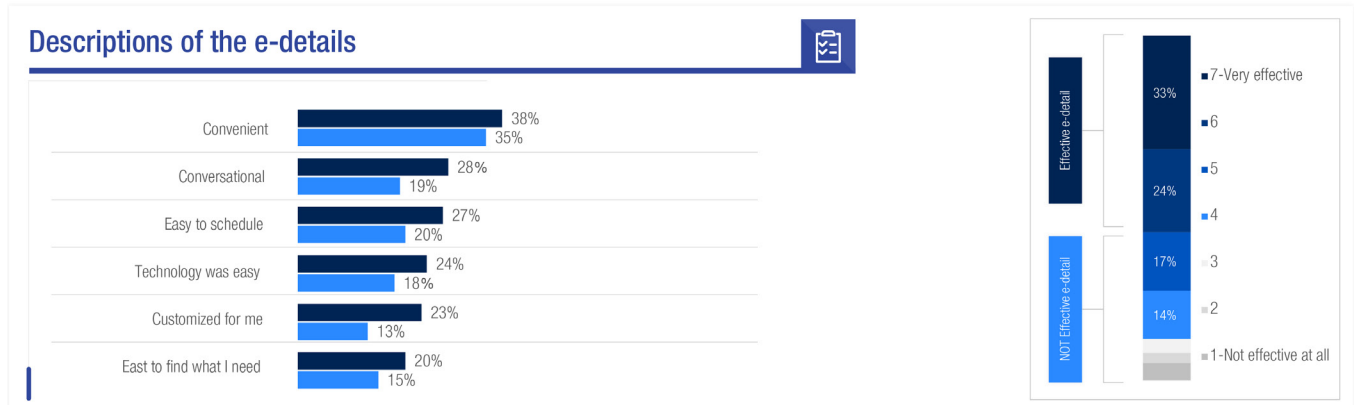
Effective e-details provide new information that's relevant to customer needs

New information leads to a more motivating e-detail



Effective e-details take advantage of the technology and make it easy for the HCP

But most e-details do not do any of these things. There is enormous room to improve.



▶ Watch the full on-demand webinar for more detail and commentary on this topic at <https://bit.ly/2xXTlvk>

REFLECTING & REFRAMING

Supporting research to assess the impact of COVID-19 on strategic plans & programs



A toolkit of approaches to help you reflect and reframe strategic plans during and following the COVID-19 crisis



TOP PRODUCTS: DEMONSTRATING LEADERSHIP



ASSESSING THE IMPACT ON RECENTLY LAUNCHED PRODUCTS



ASSESSING THE IMPACT ON PLANNED PRODUCT LAUNCHES



RE-ENTRY READINESS: LOOKING BEYOND THE CURVE



LEVERAGING THE POWER OF PATIENT ACCESS & SUPPORT PROGRAMS



DETAIL DISTANCING



FORECASTING THE IMPACT OF A BLACK SWAN EVENT



TOP RX PRODUCTS: DEMONSTRATING LEADERSHIP



CHALLENGE:

As a market leader, you have an unprecedented opportunity to define new market dynamics and demonstrate population health leadership, as the healthcare system adapts to COVID-19. How will you take steps to further differentiate your brand – both now and into the future?

CRITERIA TO CONSIDER

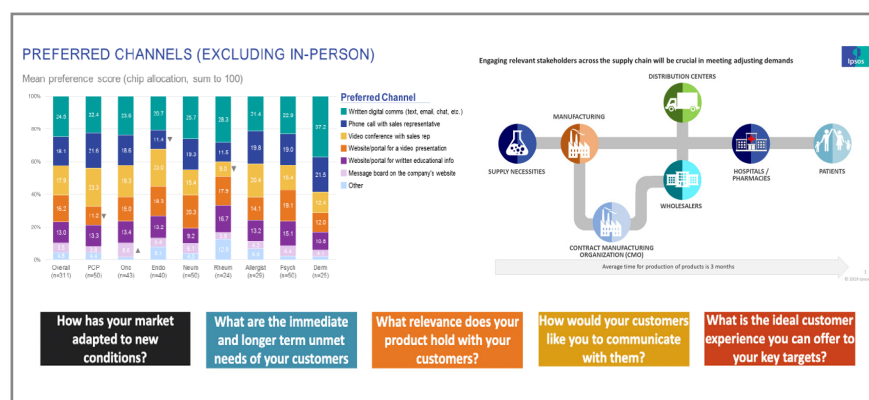
- How can you adapt your strategy to demonstrate your leadership among the evolving market dynamics?
- Have you evaluated your supply chain to ensure your customers will not be concerned about demand shortages?
- Have you realigned your messaging to be more socially responsible and address the current needs and stressors of healthcare systems, providers and patients?
- What can you do to emphasize and improve your patient and provider support systems to best limit access barriers?
- Have you considered spending into the curve to capitalize on potential market opportunities?
- How can your organization be positioned to capitalize on changing dynamics in connected health or other care delivery platforms, in terms of creating and maintaining connections with and among providers and patients?

CRITICAL CONSIDERATIONS

- What are the opportunities to develop good will and embrace social responsibility?
- How have communication channels changed for stakeholders across the treatment value chain?
- What should be your messaging and actionable priorities?
- How will you prioritize the needs of providers and patients?
- Are consumers aware of and appropriately utilizing your existing support systems?

IMPLICATIONS/ RESULTS

Results will include a situational analysis, identifying challenges, opportunities and critical questions, reevaluating messaging focus points and channels, reassessing available leverage points, and reimagining your brand's strategic imperatives and behavioral objectives.



Our Rapid Review Approach



In this evolving treatment atmosphere, leading brands should not rest upon their laurels. How you leverage your trusted relationships with HCPs and patients will strengthen your position as a market leader.



ASSESSING THE IMPACT ON RECENTLY LAUNCHED PRODUCTS



CHALLENGE:

As a result of COVID-19, access to physicians is currently a scarce resource, resulting in limited contact for sales reps, changes in physician prescribing behavior and patient interactions, as well as a less predictable competitor response. Together this presents recently launched products with a unique challenge.

CRITERIA TO CONSIDER

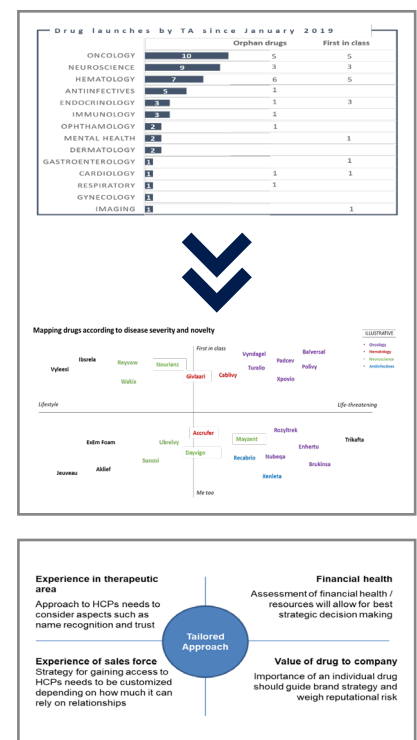
- How deeply affected are your recently launched drugs by the new market realities, such as reduced physician access, limited interest in switching patients to new medications, etc.?
- Are you aware of shifting competitive dynamics and what plans do you have to address them?
- Have you looked at the current and future risk profile of each of your recently launched products and developed a mitigation strategy?
- What aspects of your marketing and communications strategy have you already re-assessed to align with new expectations in social responsibility?
- Have you considered how the severity of the treated condition may affect the responsiveness of physicians towards your drug?
- Are you able to meet any post-marketing clinical study and data requirements?

KEY SUPPORTING QUESTIONS

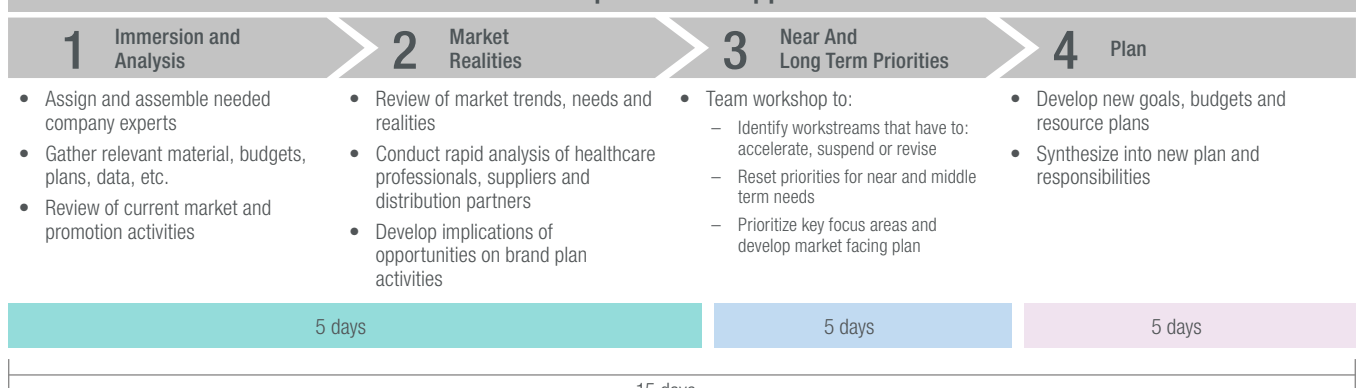
- How have the interactions that are most critical to your messaging and promotional strategy changed?
- Which activities will you continue, slow, or stop and what are your contingency plans?
- What impact does a transition to virtual interactions on your messaging and promotional strategy have?
- Have you revised your original forecast considering the impact of a lack of personal physician contact, shifting prescribing priorities and economic hardship?
- What is the availability of resources and what poses the greatest risk?
- Are there any supply chain concerns that can impact your stock?
- What impact do you anticipate on your overall portfolio strategy?

IMPLICATIONS/ RESULTS

Results will include a risk assessment and prioritization, risk mitigation activities, as well as forecasting and scenario assessment.



Our Rapid Review Approach





ASSESSING THE IMPACT ON PLANNED PRODUCT LAUNCHES



CHALLENGE:

COVID-19 has rendered physicians inaccessible, diverted regulatory attention and disrupted clinical trials – all of which will directly impact your plans for the approval and optimal launch of new products.

CRITERIA TO CONSIDER

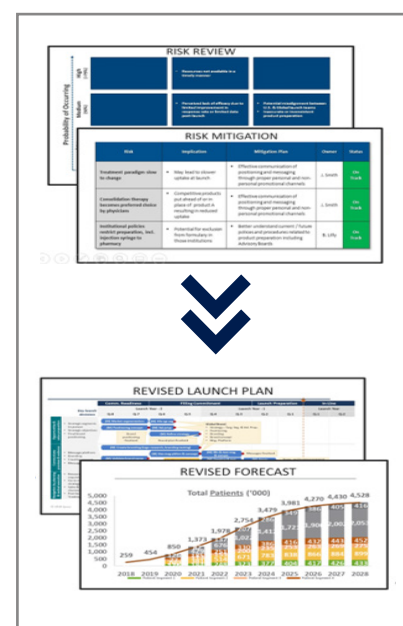
- Is your launch at risk? What exercises in milestone reframing have you engaged in as a result of the changing market?
- What aspects of your launch plan are out of your control, now in doubt, and in need of contingencies?
- How have you revised your marketing strategy as a result of the shifting competitive landscape?
- How quickly can you develop or adapt existing physician detailing plans to match your revised strategy and evolving market realities?
- Are you able to deliver any post-marketing real world evidence requirements as part of regulatory approval?

KEY SUPPORTING QUESTIONS

- How have you adjusted your forecast to account for changes in market dynamics?
- What marketing events that you were counting on have been cancelled, changed or postponed?
- What budgets and resources are available, evolving or at risk?
- Are you prepared for changes in regulatory approval timelines or requirements?
- How can you best engage with KOLs, physicians and other stakeholders, while practicing social distancing?
- Where do your activities need to be reduced, increased or redirected?
- How does your new product integrate into the existing treatment paradigm? What role does it have in your own portfolio?

IMPLICATIONS/ RESULTS

A comprehensive review of your intended launch strategy in light of the changing market landscape will enable your team to identify and employ risk mitigation activities, adjust critical milestones, and develop a revised launch plan and forecasts.



Our Rapid Review Approach

1

Immersion and
Analysis

- Assign and assemble needed company experts
- Gather relevant material, budgets, plans, data, etc.
- Review of current market and promotion activities

2

Market
Realities

- Review of market trends, needs and realities
- Conduct rapid analysis of healthcare professionals, suppliers and distribution partners
- Develop implications of opportunities on brand plan activities

3

Near And
Long Term Priorities

- Team workshop to:
 - Identify workstreams that have to: accelerate, suspend or revise
 - Reset priorities for near and middle term needs
 - Prioritize key focus areas and develop market facing plan

4

Plan

- Develop new goals, budgets and resource plans
- Synthesize into new plan and responsibilities

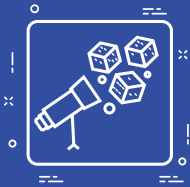
5 days

5 days

5 days

15 days

Milestones need to be re-evaluated, forecasts models adapted, marketing strategies evolved and contingency plans developed to stay on track.



RE-ENTRY READINESS: LOOKING BEYOND THE CURVE



CHALLENGE:

COVID-19 has created a new norm in healthcare provision. In this time of uncertainty and disruption, how can you look beyond the curve to ensure your brand is ready to reenter the market?

DIAGNOSTIC CRITERIA

COVID-19 is impacting many aspects of healthcare delivery and our ability to navigate our messages and products into this new environment. It is vital to understand which specific market dynamics are impacting your product(s). We believe there are four stages of managing the COVID-19 crisis in the pharmaceutical marketplace:

- **Recognize:** What are the trends we are seeing emerge?
- **Respond:** How do we respond to customer inquiries? How do we respond to change?
- **Reassure:** What steps are we taking to reassure our customers and our customer's customers about our products?
- **Recover:** Re-entry readiness, how do we re-enter and reenergize the market?

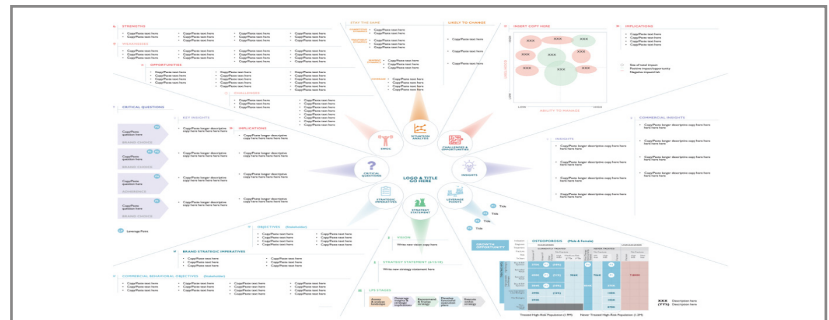
KEY SUPPORTING QUESTIONS

- How has the environment changed among your HCPs?
 - Have they reprioritized their time? Focus? Efforts?
 - Are they accessible? How has where you play changed?
- Housekeeping:
 - How has the patient journey been affected/re-prioritized?
 - Are you leveraging your patient access and support programs effectively?
 - Does your market map reflect current market dynamics?
 - Is your forecast current?

- Should you reassess your segmentation and customer portraits?
- How should the sales force be compensated?

IMPLICATIONS/ RESULTS

Situational analysis, redefining challenges and opportunities, reimagining sales and go-to-market strategy/engagement, and reconsidering leverage points to reassess your brand's strategic imperatives and behavioral objectives.



Market Dynamic Examples		Pre-Launch Scenario	In-Line Scenario	Biologic	Rare Disease
Product	Immuno-Compromising	Moderate		High	
	Requires In-person Diagnostics			Moderate	High
	Requires Infusion			Moderate	
	Requires In-person Monitoring/Follow-Up			Moderate	Moderate
Supply Chain	Reduced product availability		High		
	Lack of Samples		Moderate		
Communications	Hard to talk to reps to get information about the product	High			
	Don't have enough experience with the product	Moderate			
Access	Patients do not have necessary insurance coverage				
	Not enough staff to complete necessary insurance paperwork			Moderate	
	Patient Support Program difficult to work with		Moderate		Moderate

for illustrative purposes only

There is a quickly shifting paradigm, requiring a reassessment of brand strategy to ensure alignment with the evolving and unfamiliar market dynamics. It is imperative to look beyond the curve now, in order to prepare to reenter the market in a socially responsible way.



LEVERAGING THE POWER OF PATIENT ACCESS & SUPPORT PROGRAMS



CHALLENGE:

With rapid development of the COVID-19 pandemic, the healthcare industry and traditional care norms are quickly evolving. Access to physicians and medications are being fundamentally interrupted, creating uncertainty for both providers and patients.

CRITERIA TO CONSIDER

Preliminary results from an Ipsos pulse study on care management practices and HCP concerns revealed the following:

- 75% of HCPs report patients are having difficulty accessing medication
- 33% of HCPs are agreeing to e-Details so that they can acquire additional product samples
- 26% of HCPs report switching patients off treatments that are immuno-suppressing. This rises to 42% of oncologists and 52% of rheumatologists
- Further adding to this complexity are the overwhelming number of people who have lost their health insurance due to recent lay-offs and the burden this places on physician practices to help their patients to manage their health, especially those with chronic conditions.
- More than 16 million people have lost their healthcare insurance in the US, due to loss of employment. Patient access and support (PAS) programs can help ensure continuation of treatment during this difficult time.
- Only 19% of patients are actually aware of the patient support and access services that pharmaceutical companies provide

OBJECTIVES

In this time of health uncertainty and market disruptions, there are opportunities to explore ways in which your organization can leverage and optimize patient access and support programs to support your customers, while continuing to demonstrate your socially responsible corporate leadership.

This rapid assessment will allow us to quickly evaluate the current challenges being faced by HCP practices in meeting the unprecedented challenges they and their patients are facing during this pandemic and provide direction for how to best leverage your PAS program to meet these needs.

CRITICAL CONSIDERATIONS

How has the environment changed in your physician practices?

- What needs do they have that are not currently being met?
- How can you as a manufacturer help to alleviate this burden?

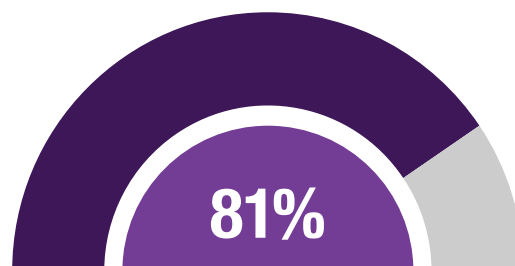
Are you leveraging your patient access and support programs effectively?

Do patients know your PAS program exists and how it can help them access needed medications?

Have you considered messaging to help support a switch from in-office to at-home injections?

IMPLICATIONS/ RESULTS

Results will include a situational analysis, identifying challenges, opportunities and critical questions faced by physicians and patients and reevaluating your PAS strategy.



81% of patients are unaware of the patient support and access services that pharmaceutical companies provide

This evolving situation presents an opportunity for pharmaceutical patient support programs to quickly respond to the evolving needs of providers and patients alike



DETAIL DISTANCING



CHALLENGE:

In this time of health uncertainty and market disruptions, where the new normal is “keeping your distance,” what channels can you use stay in-touch, stay relevant and get your message out, if you can’t be there in person?

CRITERIA TO CONSIDER

- What is your current channel-specific go-to-market strategy, where does it need to evolve and what resources are available?
- What are the options for “detail distancing” and how might they fit both your strategy and the needs of your customers?
- What do your customers want, in what form and at what frequency?
- How can you optimize your outreach (inside, outside, online, multichannel) in this new reality?
- What is your new socially responsible commercialization strategy, for both the near and long term?

SUPPORTING IPSOS RESEARCH

- What types of e-detail invitations do HCPs open and accept?
- What technology platforms lead to better e-detail experiences?
- What sorts of information do HCPs want from e-details?
- Who should run the e-detail: the regular sales rep or someone else?
- How long should an e-detail be? What time of day is best?
- Do these issues vary by different types of HCPs?

IMPLICATIONS/ RESULTS

Results will include analysis of ROI (old and new), improved methods of customer interactions, redesign of promotional channels and durable new communication approaches.



Our Rapid Review Approach



Delivering impact comes from communicating to the right person at the right place in the right time with the right message. Develop socially responsible, personalized and contextually relevant messages to improve performance and remain connected to your customers.



FORECASTING THE IMPACT OF A BLACK SWAN EVENT



CHALLENGE:

While there are challenges, the current market environment provides a unique opportunity for your product to gain share and emerge stronger out of this crisis.

COVID-19 IMPLICATIONS

The uncertainty and market disruptions caused by the current health epidemic has impacted your business and the performance of your products in the market. Our recent experience suggests that the impact on each product will vary based on:

- Access to HCPs (patients and companies)
- Access to diagnostic/treatment centers
- Therapy area dynamics
- Demand-side shifts (e.g., new starts, switches)
- Supply disruptions
- Economic impacts on HCP practice and patient wallets
- Market access & reimbursement changes
- Competitive intensity/tactics

HOW WE CAN SUPPORT YOU

Recalibrate your 2020-21 forecast

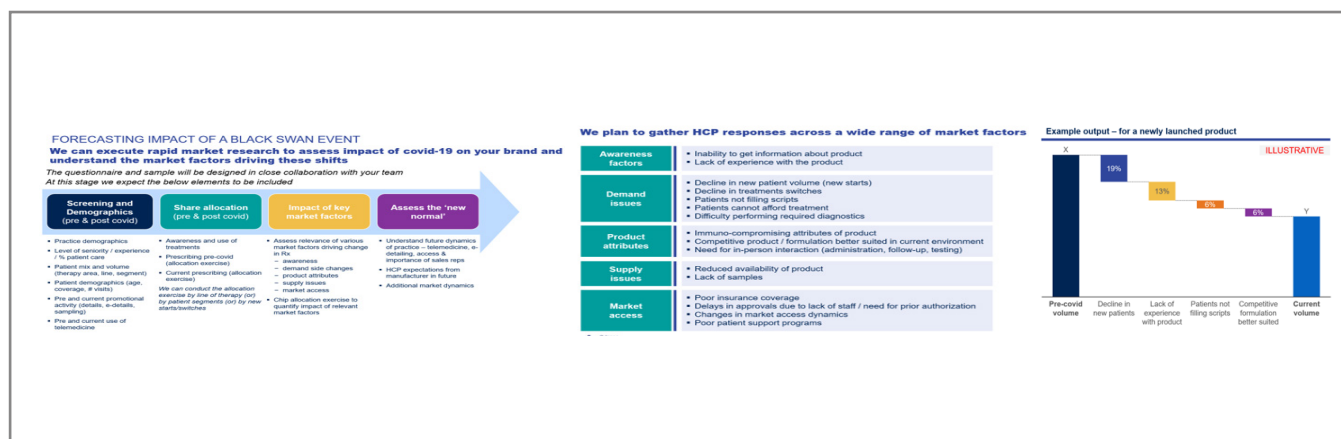
We can conduct rapid market research to assess how HCP prescribing is evolving for your product/tumor type:

- Streamlined questionnaire among your target physicians
- Detailed calibration of pre-COVID & post-COVID share for your products and key competitors
- Ability to build scenarios and sensitivities on top of your existing forecast models

Assess impact of market factors on your product

Our proprietary decomposition analysis enables us to attribute the changes in your forecast to key factors:

- Measures the impact of different market factors on your product performance
- Identifies actionable insights on areas you can focus investments to drive uptake
- Provides the most important market factors you should monitor to understand the impact on sales



Delivering impact comes from communicating to the right person, in the right place, at the right time and with the right message. Develop socially responsible, personalized and contextually relevant messages to improve performance and remain connected to your customers.



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 **ipsoshec**

About the Ipsos Healthcare Service Line

Ipsos' Healthcare Service Line partners with pharmaceutical, biotech and medical device manufacturers to inspire better healthcare. Operating in 50+ markets, our 1,000+ experts support key business decisions for our clients throughout the commercial lifecycle, from early-stage strategy, to launch, to performance optimization. We do this through a uniquely integrated combination of therapeutic and market expertise, gold standard real-world evidence and market-leading custom research approaches—all underpinned by a global footprint and unprecedented access to today's healthcare stakeholders.