



Driving Growth with HCP Activation

February 2023



The post-pandemic HCP promotional environment



Today's Speakers



Sue Johns

*Senior Business Marketing Director, CSMS,
IQVIA Consumer Health*



Kerri Petrakis

*National Sales Director,
L'Oreal Dermatological Beauty*



Todd Francis

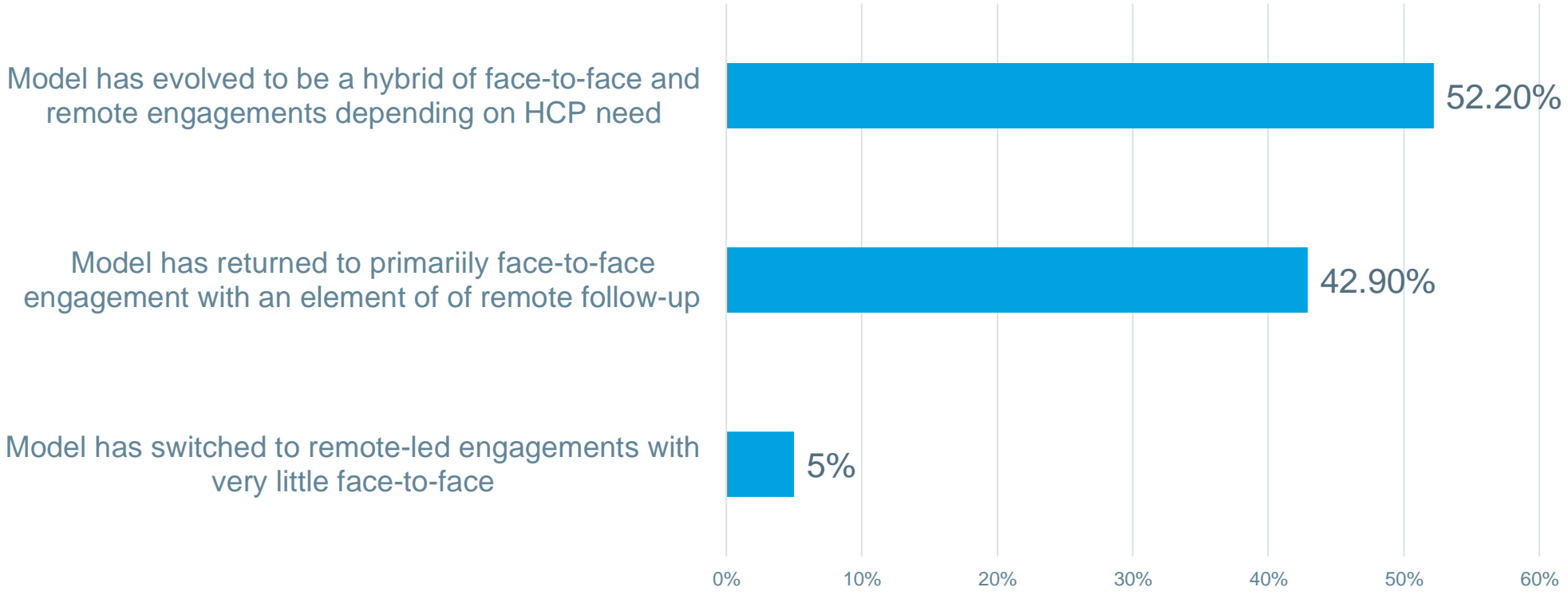
*GM, Sales Practice Lead
IQVIA CSMS*



Matt Stewart

*Marketing Manager, Global,
IQVIA Consumer Health*

LIVE POLL - How does your HCP engagement model look today?

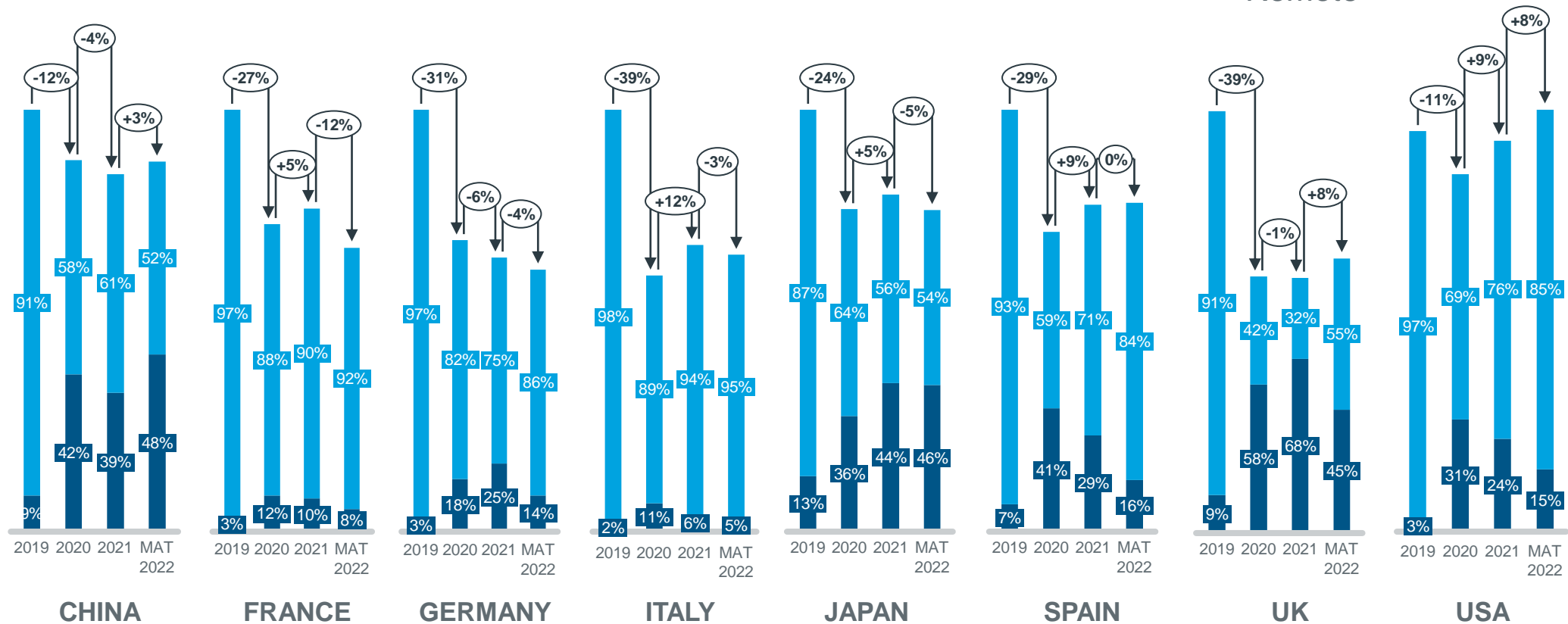


Acceleration in remote detailing has slowed post-pandemic

Major Markets: Full year 2019 vs 2020 vs 2021 and MAT December 2022

Share of F2F & Remote interaction in promotional volume

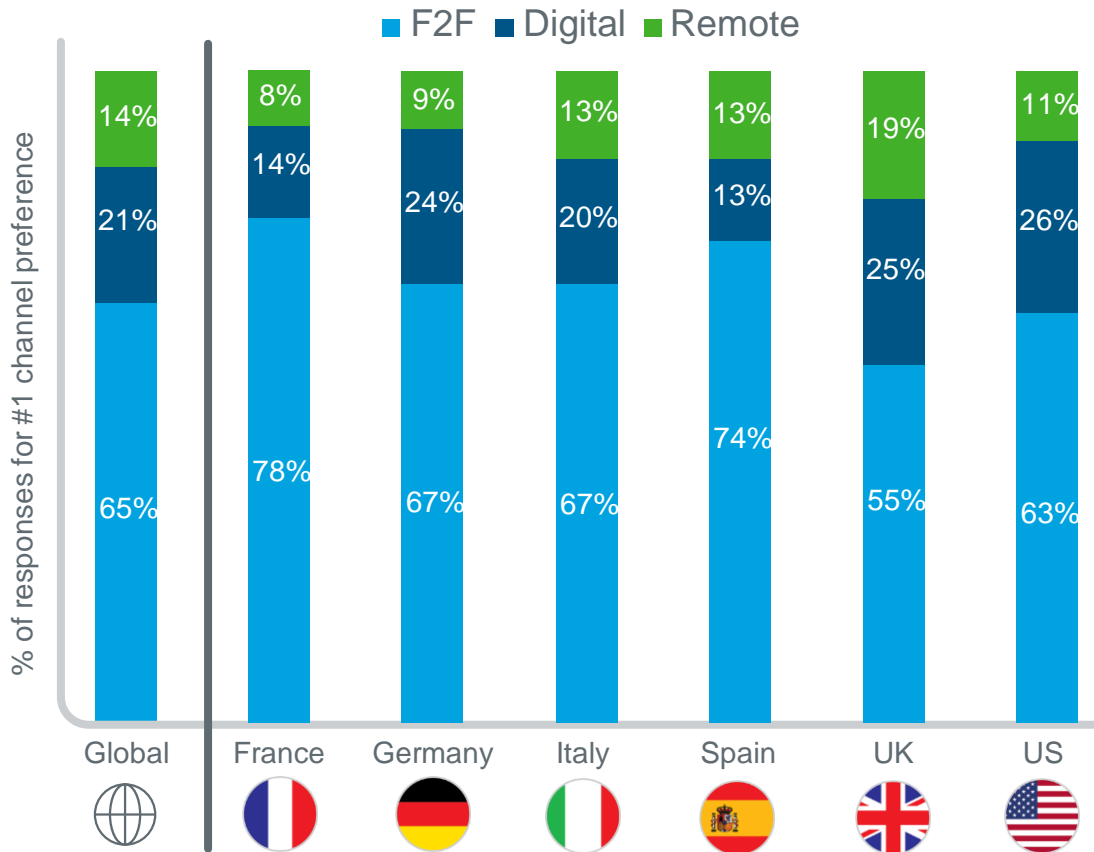
- Face to Face
- Remote



Source: IQVIA Channel Dynamics, F2F includes F2F detailing and F2F meetings, Remote includes phone detailing, e-detailing (live), e-meetings (live)

F2F remains the most preferred channel in 2023 but remote and digital interactions of growing importance

2022 HCP #1 channel preference



Study characteristics

23,000+ HCPs surveyed, with 10,500+ HCP surveyed in the EU4+UK & US

Respondents include **GPs, pharmacists and 15+ specialty types**

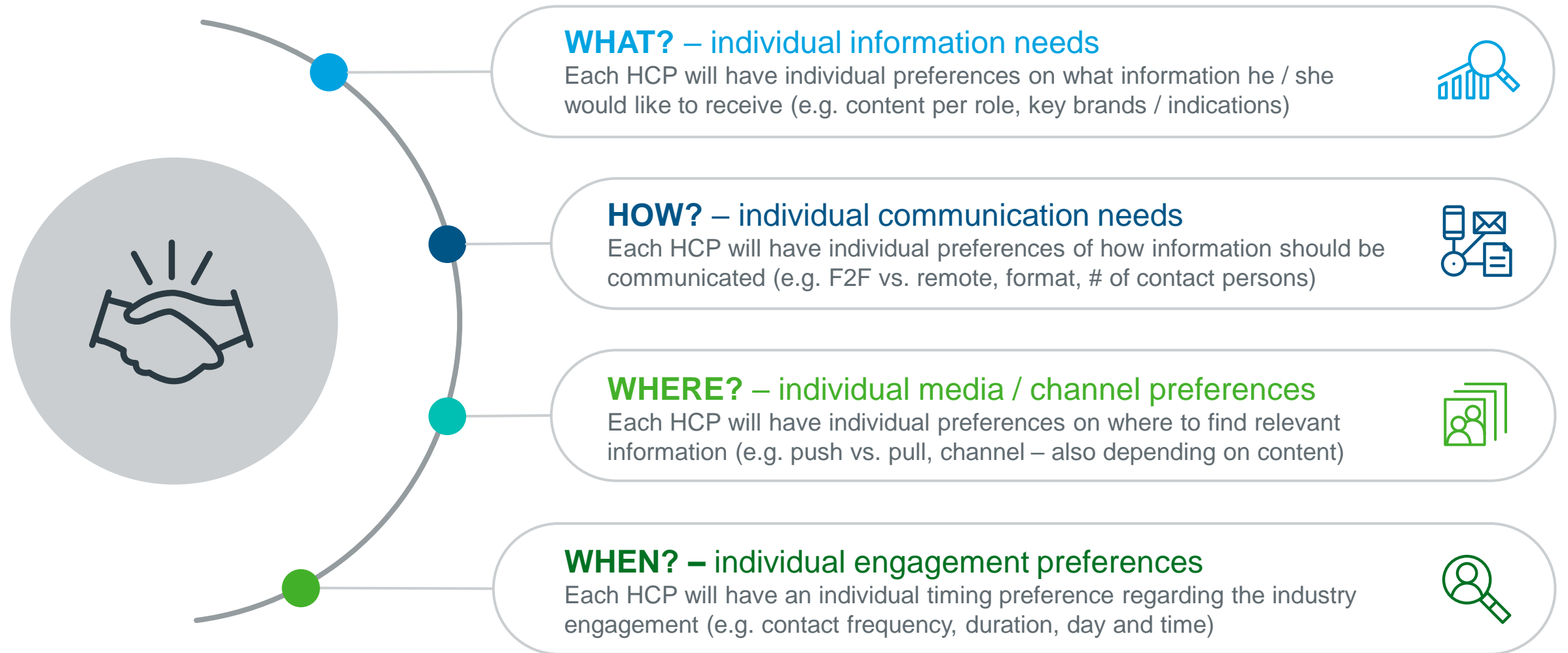
The study highlights country-specific **omnichannel readiness**

Channel	Hybrid group
Text or instant message	Remote
1:1 telephone call	Remote
1:1 video call	Remote
Remote virtual conferences	Remote
Emails	Digital
Online info (e.g. website)	Digital
Self-guided online content	Digital
Conferences (in-person)	F2F
1:1 F2F visits	F2F

Source: IQVIA Channel Dynamics Channel Preference Study

Covid-19 has accelerated omni-channel and will have a lasting impact on customer interaction in the long run

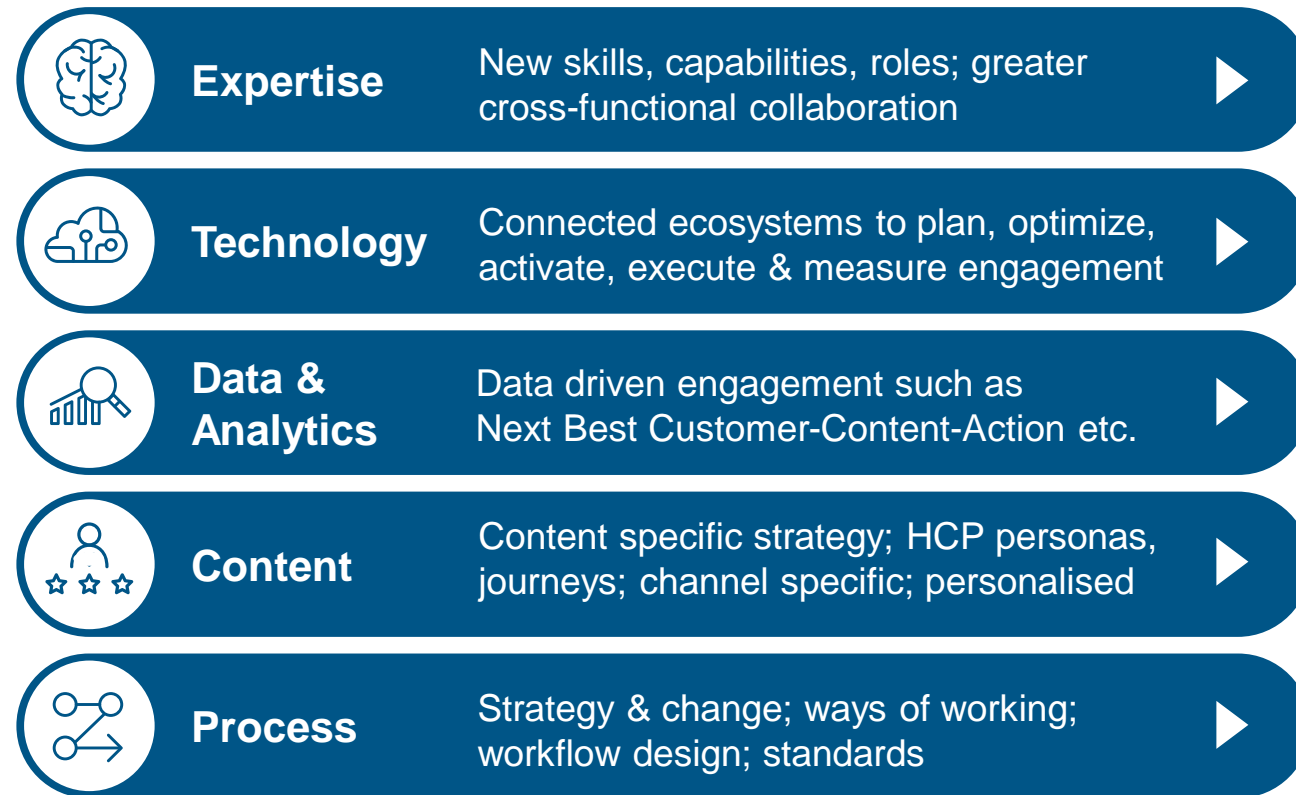
Key (future) customer needs



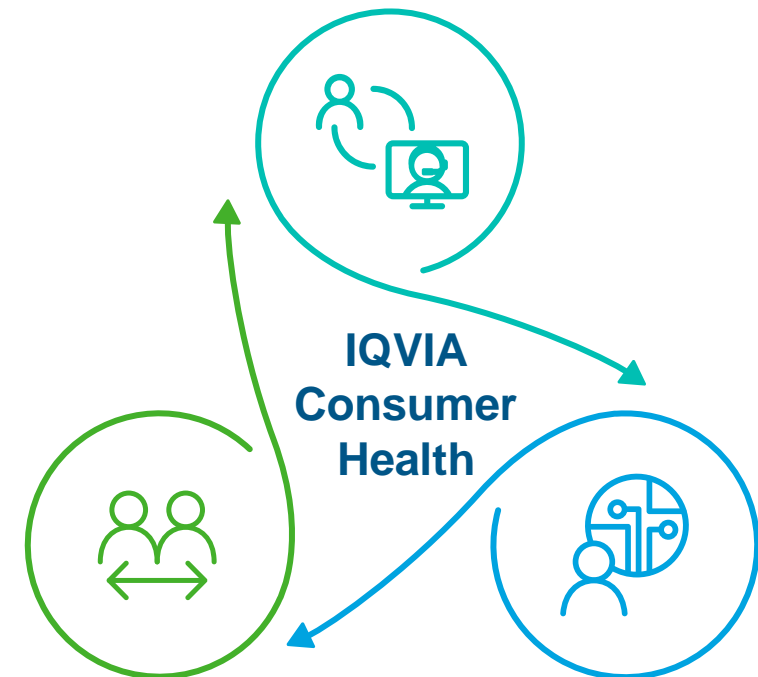
Industry needs to 'get smart' in the age of omnichannel engagement

COVID-19 pandemic forced greater use of multiple channels – using these channels to offer seamless, value-adding engagement experiences for HCPs is crucial

KEY REQUIREMENTS & EXAMPLES



IQVIA CAN HELP AS REQUIRED...





*IQVIA, ProVoice Survey, 12 months ending November 2021

PERSONALIZED



SCIENCE

PRESENCE



REACH

MORE

SALES

OMNICHANNEL APPROACH: Defined



An integrated approach for bringing the right message, using the right communication channels & experiences, at the right time, to each health care professional, in a personalized way.

OMNICHANNEL APPROACH: Energize, Execute & Elevate



Build Plan of Action

Energize Salesforce
Motivation + Engagement

WHO – WHAT- WHY

Team Engagement
Skill Development
Recruitment Evolution
Segmentation/Classification
Targeting / OTC

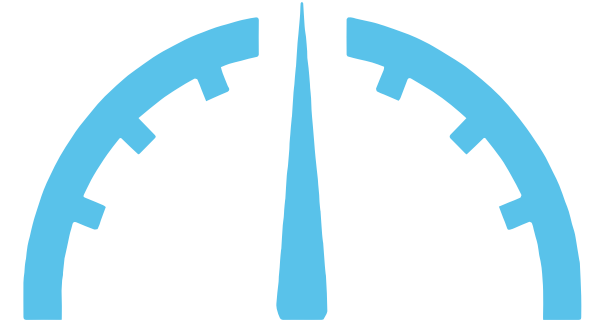


Activate HCP Engagement

Execute Plan
Messaging + Channels

WHERE-WHEN-HOW

In-Office Engagement
Email Communication
Peer-to-Peer Engagement
Regional/National Congress
Inside Sales Overlay
Digital Overlay



Measure & Adjust

Evolve 360 Approach
via Metrics & Reporting

MEASURE-ANALYZE

CRM
Extraction Reporting Tools
Sales Reporting
ProVoice Share of Recommendations

OMNICHANNEL APPROACH: Activation & Key Learning



Build Plan of Action

Energize Salesforce
Motivation + Engagement

WHO – WHAT- WHY

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Recruitment Evolution
Segmentation/Classification
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OMNICHANNEL APPROACH: Activation & Key Learning

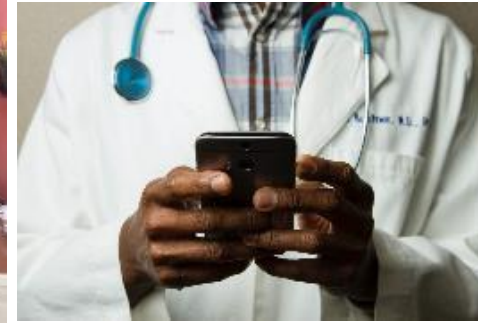


Activate HCP Engagement

Execute Plan
Messaging + Channels

WHERE-WHEN-HOW

- In-Office Engagement
- Email Communication
- Peer-to-Peer Engagement
- Regional/National Congress
- Inside Sales Overlay
- Digital Overlay



OMNICHANNEL APPROACH: Activation & Key Learning



Measure & Adjust

Evolve 360 Approach
via Metrics & Reporting

MEASURE-ANALYZE

CRM

Extraction Reporting Tools

Sales Reporting

IQVIA ProVoice Share of
Recommendations



VS



Driving HCP Recommendation in an omnichannel age



Dermocosmetics: a market strongly influenced by the recommendations of healthcare professionals

A doctor's recommendation or prescription

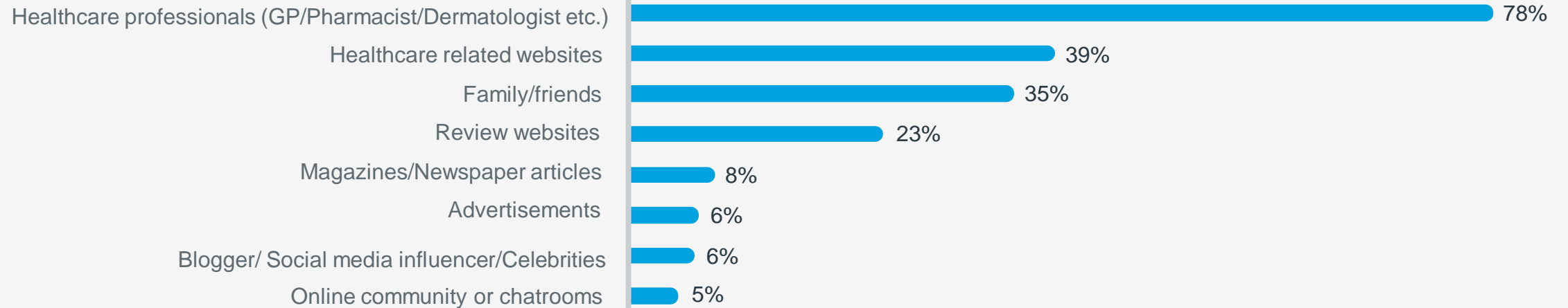
19% of consumers of dermocosmetic products say they buy these products in pharmacies on prescription from a doctor

Purchasing a product for medical reasons

29% of consumers of dermocosmetic products say they buy these products for medical reasons

Valuing the advice of the pharmacist

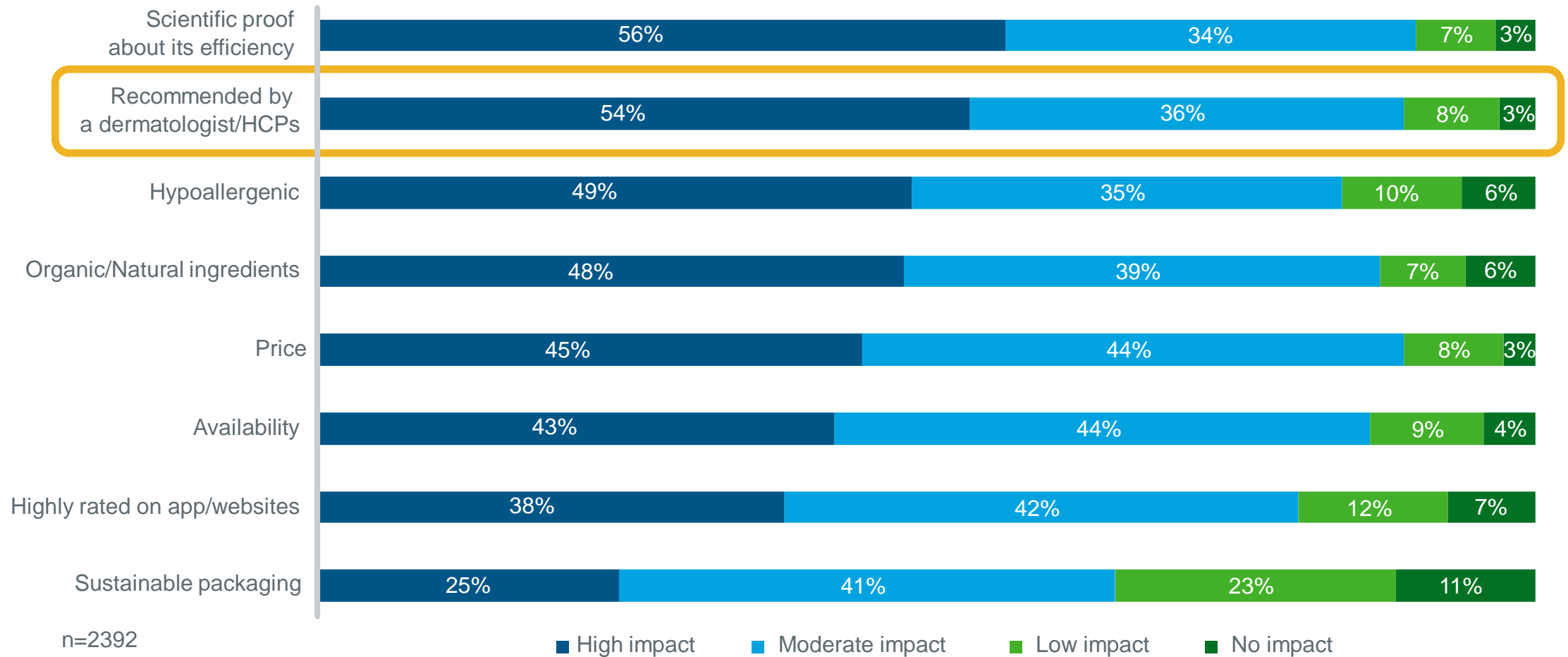
44% of consumers of dermocosmetic products declare that they value pharmacist advice when purchasing a dermocosmetic product



Source: IQVIA Consumer Health, Dermocosmetics 2022 - Under the Skin

HCP recommendation is the second largest key factor when purchasing dermocosmetics

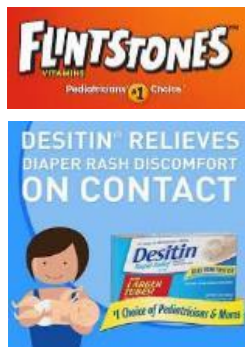






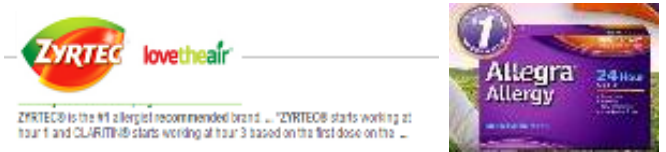
Which means a robust HCP strategy is needed for success



Source: IQVIA Consumer Health, Dermocosmetics 2022 - Under the Skin


How companies claim the #1 HCP Recommendation

IQVIA ProVoice® is used to substantiate the claim for over 75 OTC brands

<h3>#1 Pediatrician Recommended</h3>  <p>FLINTSTONES VITAMIN Pediatricians' Choice</p> <p>DESITIN RELIEVES DIAPER RASH DISCOMFORT ON CONTACT</p> <p>Choice of Pediatricians & Moms</p>	<h3>#1 Dentist Recommended</h3>  <p>DEEPER CLEAN THAN BRUSHING ALONE</p> <p>LISTERINE COOL MINT ANTISEPTIC</p> <p>#1</p>	<h3>#1 Physician & Gastro Recommended</h3>  <p>Why Choose Metamucil®?</p> <p>Doctor Recommended Brand #1</p> <p>It's the #1 doctor¹, pharmacist², and gastroenterologist¹ recommended fiber brand.</p> <p>Find Out More ▶</p> <p>Meta-mucil</p>	<h3>#1 Dermatologist Recommended</h3>  <p>CeraVe</p> <p>#1 DERMATOLOGIST RECOMMENDED SKINCARE BRAND¹</p> <p>Developed with dermatologists. Formulated with 3 essential ceramides.</p> <p>Learn more</p> <p><small>Source: IQVIA ProVoice Survey, Q1-Q4 2019</small></p>
<h3>#1 Eye Doctor Recommended</h3>  <p>Systane</p> <p>DOCTOR RECOMMENDED BRAND OF ARTIFICIAL TEARS</p>	<h3>#1 Neuro Recommended</h3>  <p>NEUROLOGIST'S RECOMMENDED OTC</p> <p>EXCEDRIN MIGRAINE</p> <p>Use as directed.</p>	 <p>Prilosec OTC contains medicine once only available by prescription, and is the #1 Gastroenterologist¹ recommended #5 Doctor & Pharmacist² recommended #5 Selling³ frequent heartburn medicine for 8 straight years.</p> <p>HEARTBURN TIPS & ADVICE</p> <p>Prilosec OTC - How it works</p>	<h3>#1 Allergist Recommended</h3>  <p>ZYRTEC love the air</p> <p>Allegra Allergy 24 Hour</p> <p>ZYRTEC® is the #1 allergist recommended brand... ZYRTEC® starts working at hour 1 and CLARITIN® starts working at hour 3 based on the first dose on the...</p>

7 key success factors for successful HCP Engagement to achieve #1 recommendation





Today's representatives require broader skillsets to work with a range of channels to optimize HCP activation and share of recommendation



**In-Person and Remote
Selling Skills**



**Knowledge of
Multichannel**



Analytics



**Technology and HCP
engagement skills**

Transform your HCP engagement models with IQVIA Consumer Health

[Enquire](#)



 **IQVIA**
CONSUMER HEALTH

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Thank You

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