

DOCEREE

360

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EDITION



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Executive Summary

Healthcare delivery has come a long way since it was considered that a clinician could only tend to a patient in a physical setting. What's distinct about it is that it has not been long enough. The journey traversed by the healthcare industry has been undeniably quick.

The pandemic became the driver of change for the sector globally, providing a long-awaited digital shift to various aspects of healthcare delivery, of which a healthcare professional (HCP) is an important component. It bolstered point-of-care (POC) channels that are now not just changing the dynamics of the HCP-patient relationship, but also the way life sciences brands interact with prescribers.

The widespread popularity of POC channels illustrates their capability in improving the way care is delivered and costs managed by investing in high-impact strategies. Marketers can aid prescribers with relevant information at the right moments, greatly enhancing patient outcomes. Also, timely communication to HCPs on patient affordability programs can reduce medication abandonment substantially and improve medication adherence significantly.

As the whole industry evaluates and re-evaluates different strategies to ascertain what's the most effective way to engage HCPs on the POC, we took a step back to understand the behavior of HCPs and how they respond to messaging campaigns. In doing so, we see there is a unique opportunity to advance the category through

personalization, actionable insights, and deep understanding of communication and channel preferences.

To compile an analysis in the form of a report, we went through campaigns run on our platform over the last one year. Our teams touched base with our esteemed partners – the life sciences brands we work with, the POC platforms we have collaborated with, and HCPs, the real users – to understand and capture the impact of placing messaging campaigns at the point-of-care and the dynamic changes happening across the landscape.

With an analytical approach, the information was examined to draw intriguing learnings which could form a strong base for marketers and platforms for developing their future strategies that would help the industry grow.



“I have noticed some brands supplementing their sales representatives with the insights they have gathered from data derived through digital marketing. This process has allowed those companies to better place their messaging and target consumers accordingly.”

Harshit Jain MD
Founder & Global CEO

Our research methodology

In our annual report, we evaluate the potential of point-of-care (POC) channels to engage HCPs optimally, and how advancements in the space have led the industry to expand.

The pragmatic assessment of campaigns run on our global network of HCP-only POC platforms in the past 12 months provides key learnings that can enable marketers and publishers to make better sense of digital interactions. In-depth understanding of the landscape is essential to run successful campaigns and deliver meaningful health outcomes.

To capture the behavior and journey of HCPs and understand the criticality of key factors that could improve the efficacy of POC campaigns, we conducted detailed analytical review of 250+ campaigns. Systematically, over 21 million impressions served to 600K+ HCPs on our 70+ partner POC channels were analyzed.

Campaigns of around 100+ advertisers - comprising consumer healthcare and medical devices companies, life sciences brands, hospitals, and diagnostics - run on a mix of POC channels, consisting of EHR, eRx, telemedicine, EHR apps, were taken into account.

Assessment of brand campaigns for 190+ specialties, including Primary Care, Cardiology, Oncology, Hematology, Nephrology, Gynaecology and Pulmonology, was done as part of the data-mining move to arrive at significant conclusions. We also went through secondary researches and conducted internal surveys to arrive at logical conclusions.



250+
Campaigns



70+
POC Platforms



100+
Advertisers



600K+
HCPs



21M
Impressions



190+
Specialties

Key Learnings



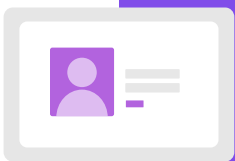
HCPs spend an average of 6 hours out of an average 11-hour workday on EHR

01



Script generation is 3x on POC than on other online mediums

02



Script lift is 32% higher in trigger-based messaging

03

THE BIG OUTCOME



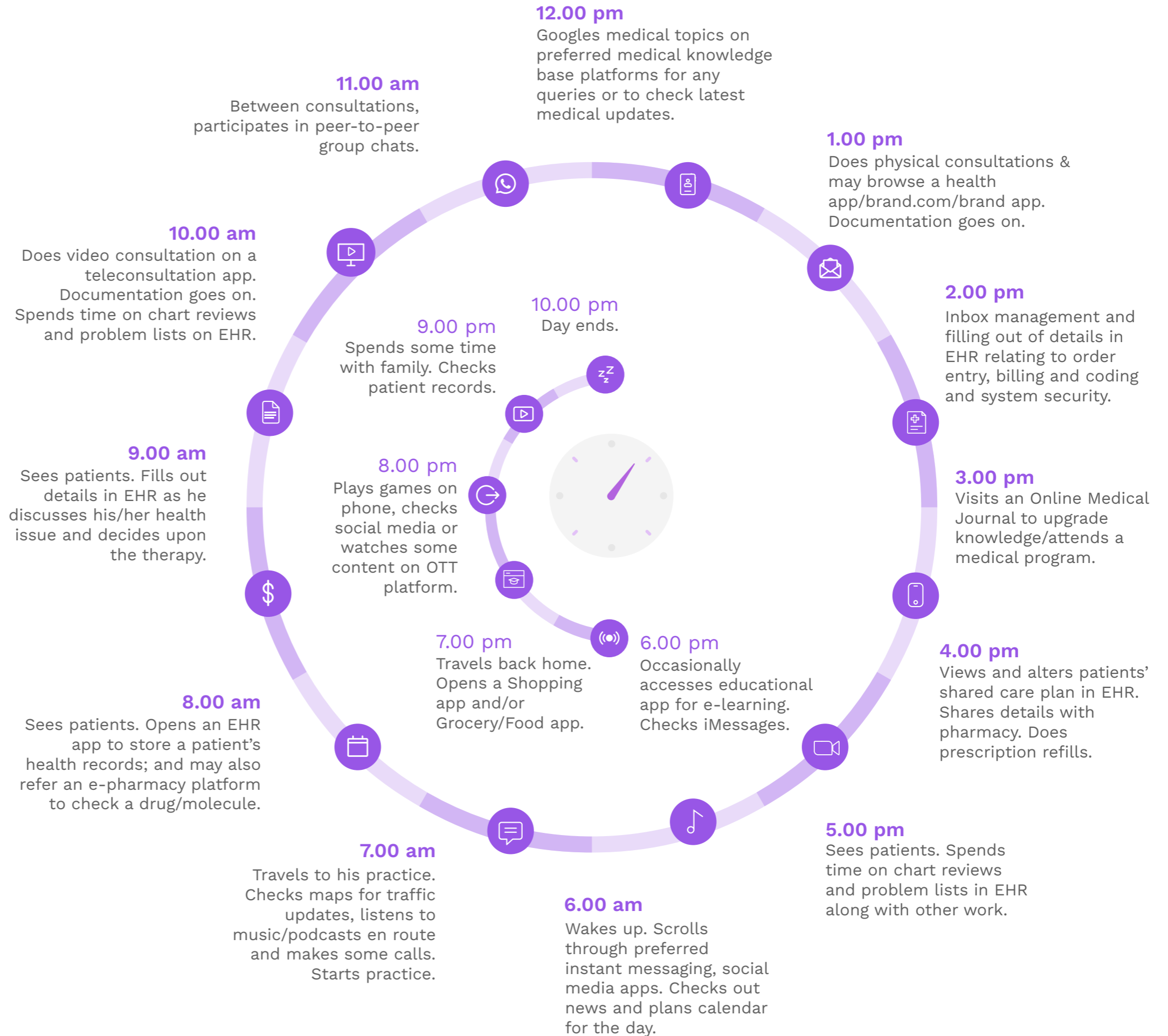
HCPs
SPEND AN
AVERAGE
OF **6 HOURS**
ON POC
OUT OF AN
AVERAGE
11-HOUR
WORKDAY

A Day In The Life Of An HCP

The new hybrid workflow of HCPs requires a rethink of marketing strategies, opposed to 'one-model-fits-all' approach.

As the industry adapts to the evolving era of POC, we aggregated data points to come up with a blueprint of an HCP's routine. With this, our purpose is to provide a bird's-eye view of an HCP's life during the day, and how best marketers can utilize it to develop effective engagement strategies.

Over the past few years, a lot of factors, especially flexibility and time efficiency, have contributed tremendously to the growth of hybrid roles of HCPs. The heightened use of POC platforms among HCPs to engage with patients during the pandemic made the space even more dynamic.



The world of POC

The POC ecosystem consists of platforms that HCPs use to provide care to their patients in the most safe, secure and transparent way.

Telehealth platforms

They deliver remote care to patients via telecommunication and digital communication technologies.

EHR platforms/EHR Apps

HCPs are busy on EHRs taking care of administrative tasks such as order entry, billing, documentation, and coding and system security; medical care tasks such as chart reviews and problem lists; and inbox management.

eRx platforms

They share a drug prescription directly to a pharmacy electronically using an eRx platform.

In the digital realm, HCPs tend to a patient through a standalone EHR, telehealth or an eRx (e-prescribing) platform or via an integrated system.

Our research suggests that on average,

the workday of an HCP is 11 hours long, of which they spend 6 hours each day working on POC.

Physical Practice
46%



54%
POC Engagement

When is the best time to engage with them?

The analysis of different HCP archetypes suggests the peak POC hours are:



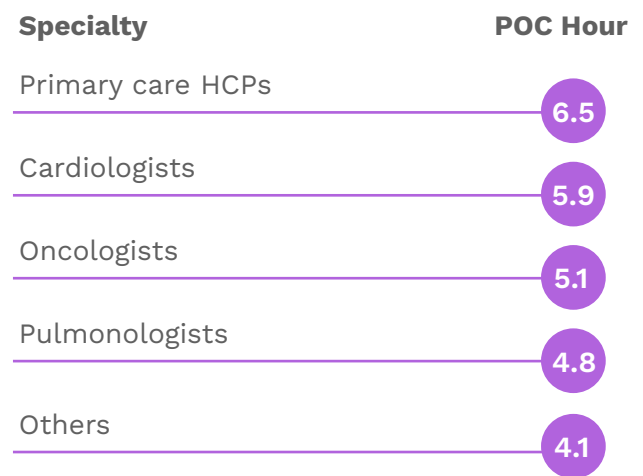
The other major highlight is that HCPs are not only spending time accessing POC platforms during their office hours, but also during their 'leisure time' around 8/9 pm.

HCPs spend their 'leisure time' around 8/9 pm checking and refining patient reports from during the day.

Using it actively!

It is noticeable that primary care physicians interact with POC platforms more compared to other specialists.

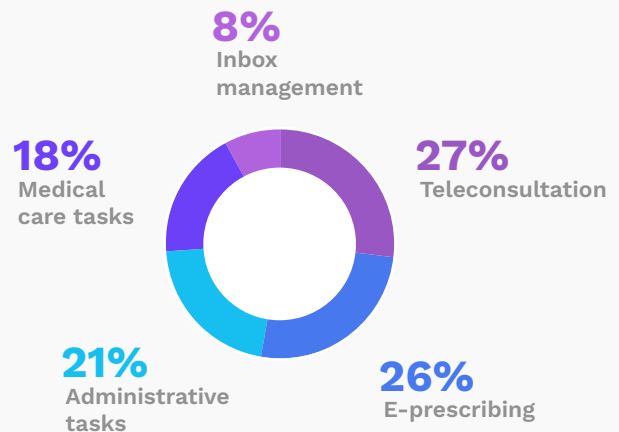
Primary care consists of four major areas of specialty: Family Practice, Pediatrics, Obstetrics and Gynecology and Internal Medicine. As they consult patients from all age groups and offer routine check-ups, diagnosis and preventive care, they are more active on POC in comparison to others.



Time spent on POC specialty-wise

Tele-consultations become the new norm on POC

Many health systems have either integrated or looking to integrate telehealth within EHRs. During the pandemic, technology was a great enabler of providing patient care. The convenience and continuity teleconsultation provides by way of remote monitoring, video and text consultations and patient education has expanded its usage beyond the period of crisis. HCPs are now spending considerable time on tele-consultations as virtual care has become mainstream.



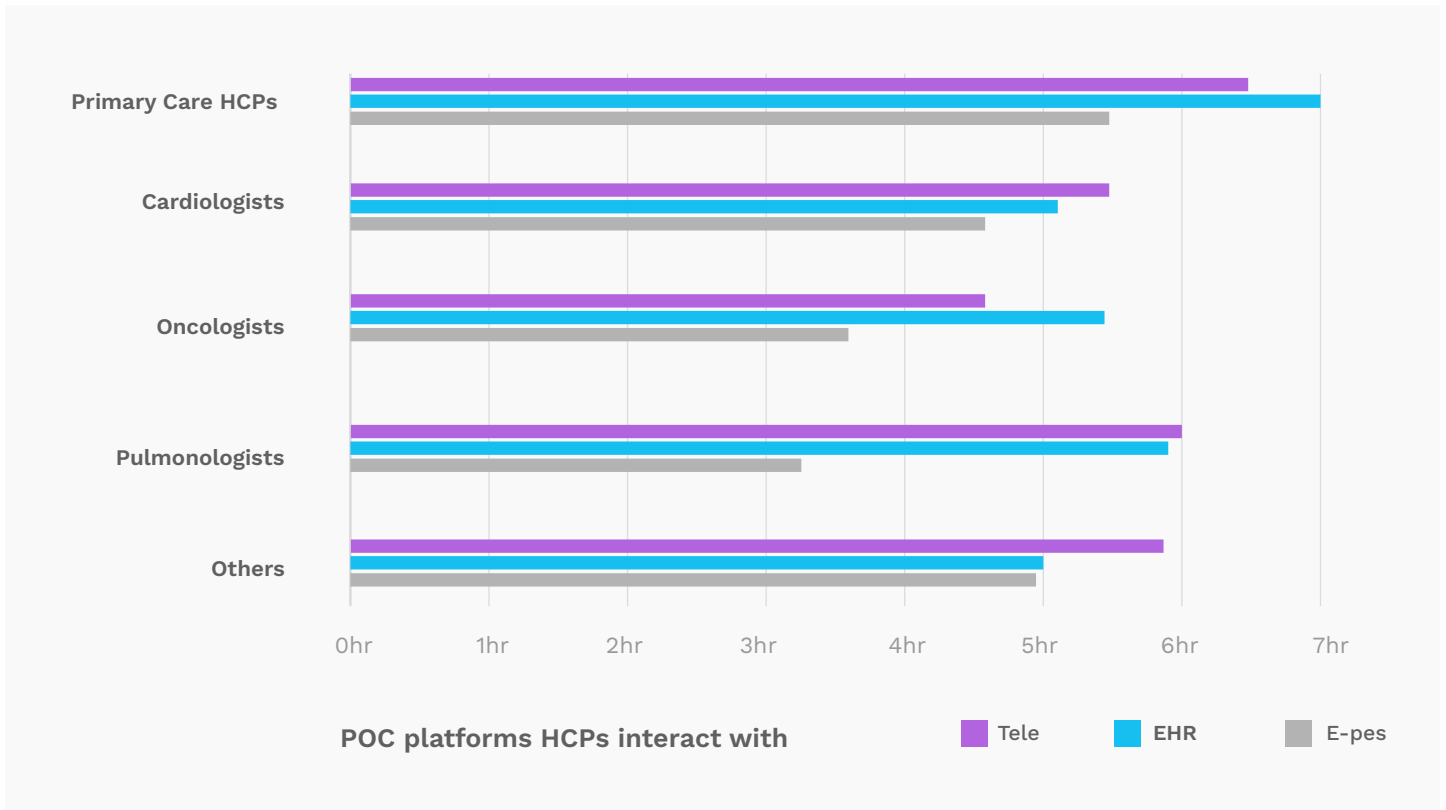
Where are they spending most time on POC

HCPs are spending their time, where?

Which platform...

Nearly, HCPs from all specialties spend maximum time on EHR platforms, given the the exhaustive nature of documenting and recording patient information. Specialists

also interact with eRx platforms as they research information about drugs and medications prior to prescribing them to their patients.

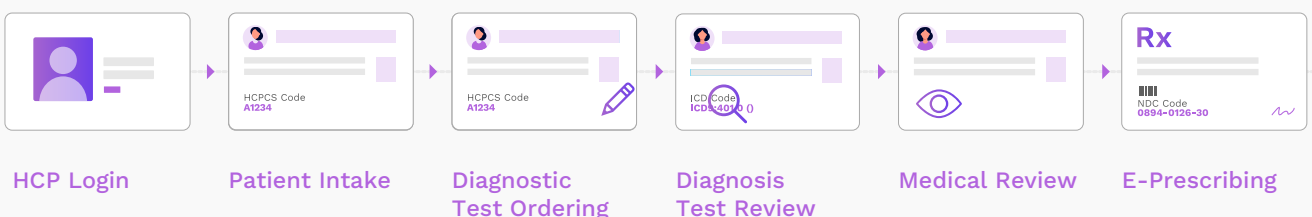


Where in the workflow...

Understanding the workflow of HCPs at the POC affords marketers the ability to communicate with them at precise moments. At each touchpoint of the HCP workflow -- from patient intake to a consultation and a

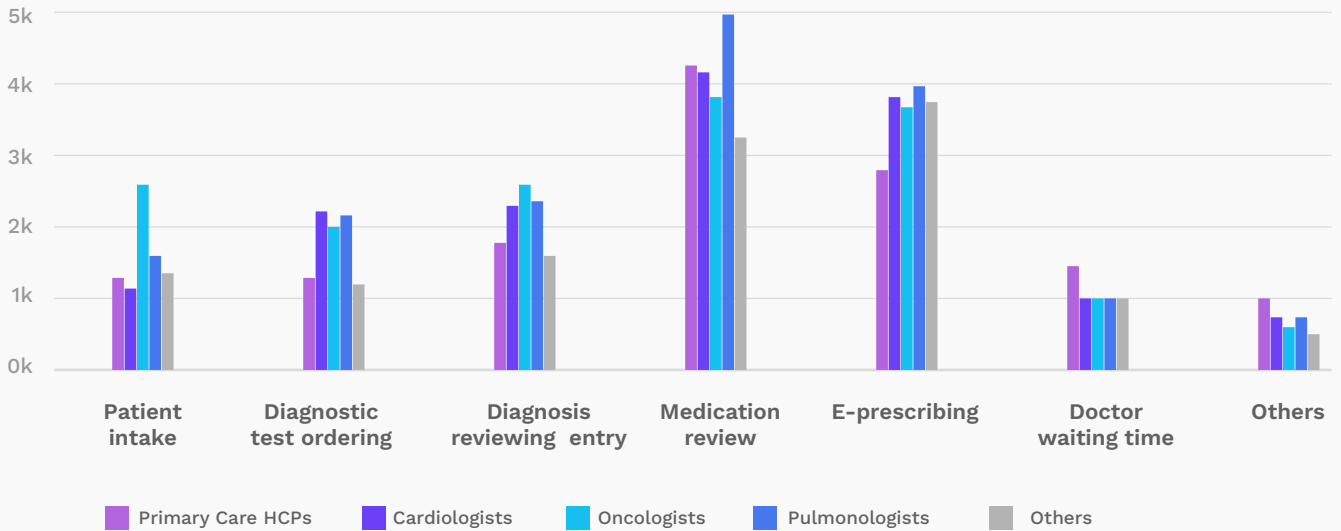
prescription being written, a relevant message as per the stage they are at can be shared with them that they can relate to and act upon.

The HCP workflow within an EHR



Diving into the EHR workflow of HCPs, we saw that across specialties HCPs are spending time for the longest period at the stages of medication review and e-prescribing. At other junctures when they are not tending to

patients, the engagement is much lesser such as during doctor waiting time between appointments and application settings.

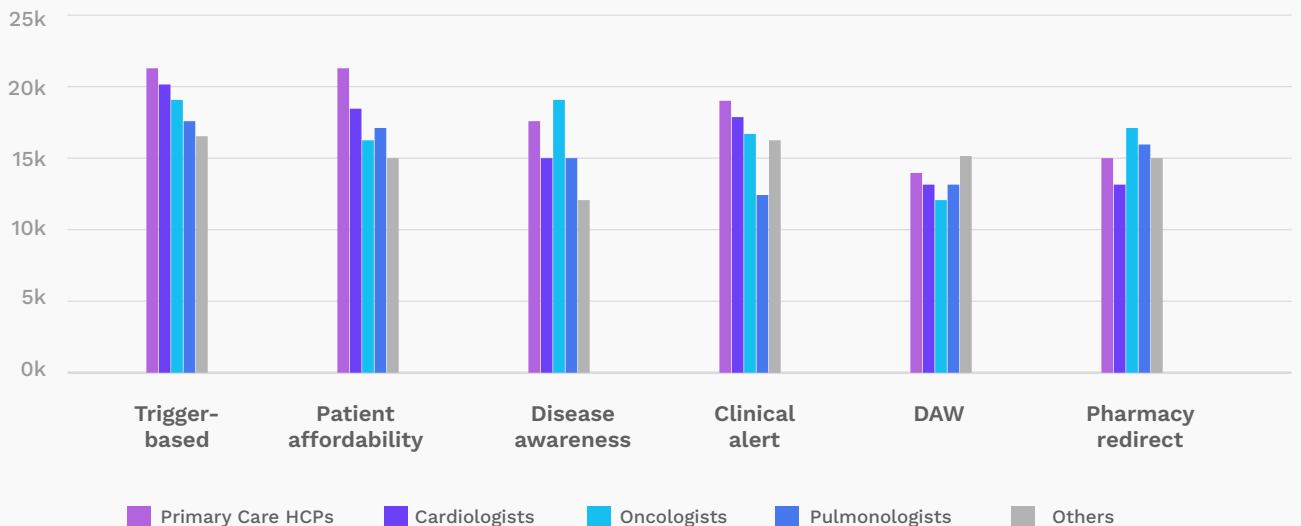


HCP's time consumption within EHR workflow

Which messaging type...

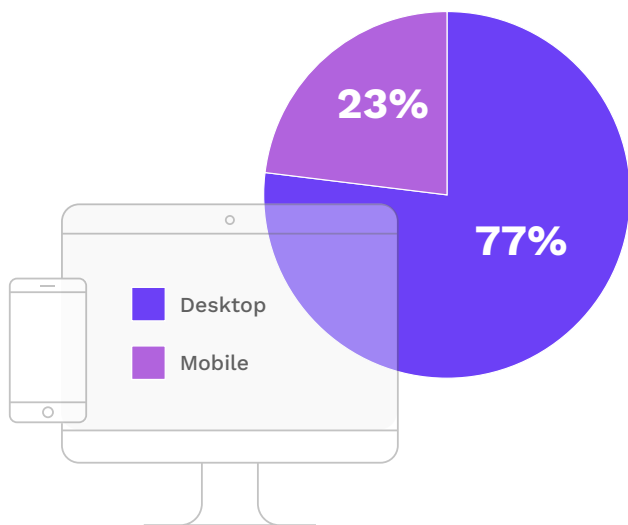
We observed that the average viewable time of a brand message on POC is 18 seconds.

Depending upon which workflow stage they are at, it varies from specialty to specialty.



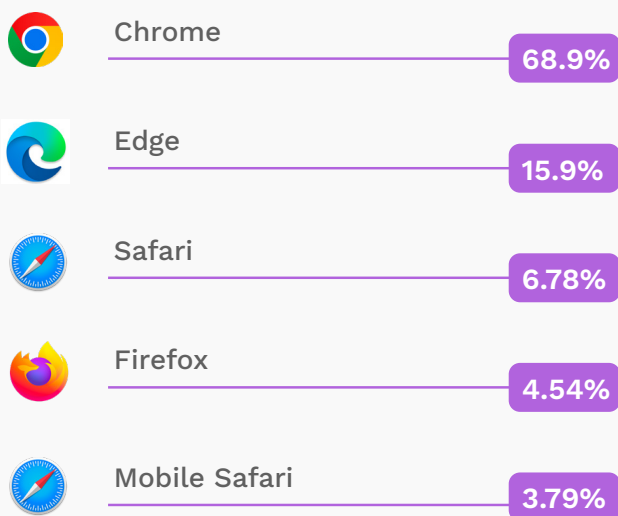
Viewable time vis-a-vis HCP workflow stage

Accessing POC: What's still popular?

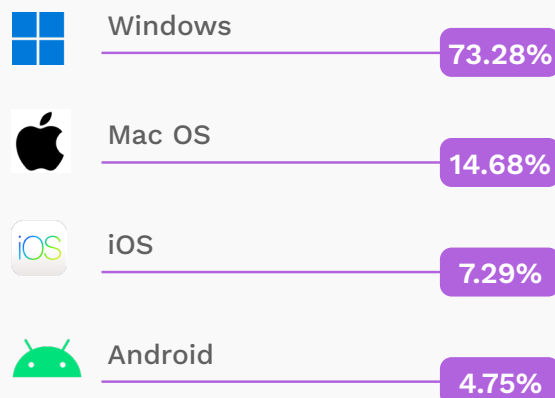


Contrary to the popular belief that mobile technology has gained ample foothold among HCPs, it is seen they are more comfortable using desktops to access EHRs. The ease of reporting patient details, communicating with patients and other specialists, and sharing information with pharmacists make desktops a preferable choice for HCPs.

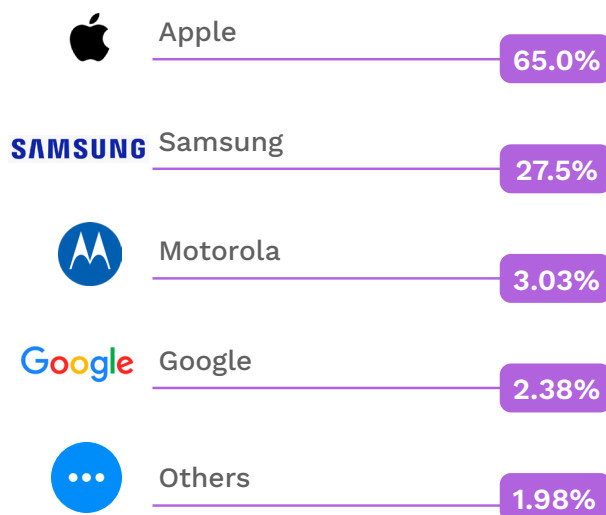
Top 5 Browsers



Top 4 Operating Systems



Top 5 Device Types



02



SCRIPT
GENERATION
IS **3X ON**
POC THAN
ON OTHER
ONLINE
MEDIUMS

Healthcare delivery has undergone a major shift in the last two years with HCPs being forced into workflows they were not prepared for. Penetration of POC platforms due to a renewed emphasis on interoperability has resulted in network expansion to specialty practices also such as neurology, oncology, and cardiology.

The competitive landscape of life sciences industry calls for marketers not only to cautiously plan their budgets but also to target the right HCPs at the right time, especially on the POC. When campaigns are implemented and executed strategically at the point-of-care, it results in significant script lifts as compared to other mediums.

3x

The opportunity for an impression to convert to a prescription on POC, better called script generation media, is 3 times compared to when served on other online media.

Prioritizing HCP workflow for script generation

Our research suggests that the nature of the medium is the biggest factor behind majority of scripts being written on POC.

To drive prescriptions, HCPs must be engaged while they are tending to their patients, the possibility of which is on point-of-care channels. Navigating the online journey of prescribers to disseminate their communication pertaining to their medical specialty, therefore, is critical.

The greatest advantage of POC channels is that HCPs are very close to deciding a drug or a therapy on these mediums. A brand message served to them at relevant touchpoints increases the chances of conversion as HCPs are better positioned to take a call.

POC - Script Generation Media



Close interactions with patients



Apt for HCPs to gather information they can act upon to improve patient outcomes

With POC platforms getting popular owing to the ease of engaging care providers across multiple specialties, tracking conversion metrics helps better identify prescribing patterns and script lifts that have significant impact on the return on investment (ROI) of businesses.

We have gathered that every metric is a valuable measure of how a brand campaign is performing, which is crucial from the point of sales.

What each conversion metric conveys¹



NRx: New prescription

A new prescription is defined as dispensed prescriptions given a new number by the pharmacy, not necessarily new therapy for the patient.

It does not include refills but does include renewals.



NBRx+: New Patient Count

Count of patients starting a prescription drug who have not previously used the product or administration. It differs from New-to-Brand Prescriptions (NBRx) in that the NRx metric does not consider whether or not the patient has previously used the product.



TRx: Total prescriptions

TRx = NRx + Refills

After the first time a prescription is filled, when it is refilled, the pharmacy refers back to the previous drug ID number and notes this as a refill.

So, this is total prescriptions written by HCPs for a particular drug over a specific period of time. This includes prescriptions for refills and renewals, which are scripts patients get when they run out of refills.



TBRx: Total New Patient Count

The total count of new product fills or administrations.

Apart from these, there is another important metric to consider.



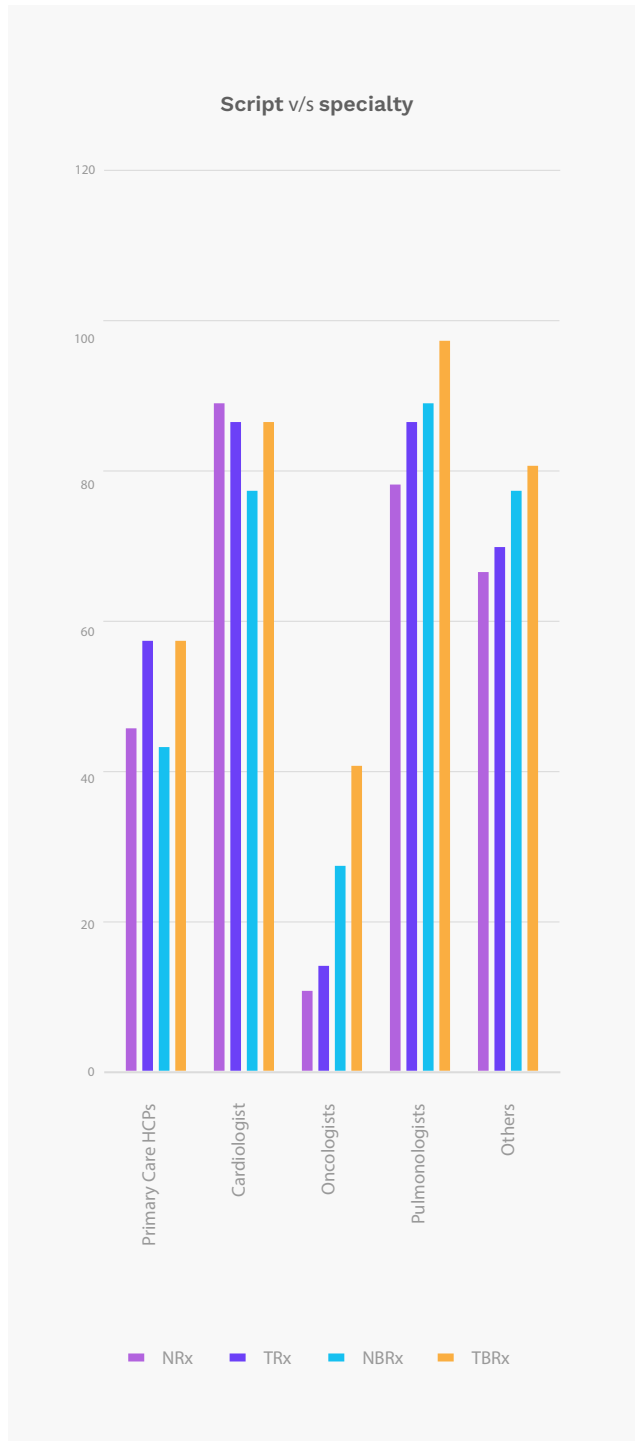
New-to-brand-Prescribers:

This is about a new HCP prescribing a brand.

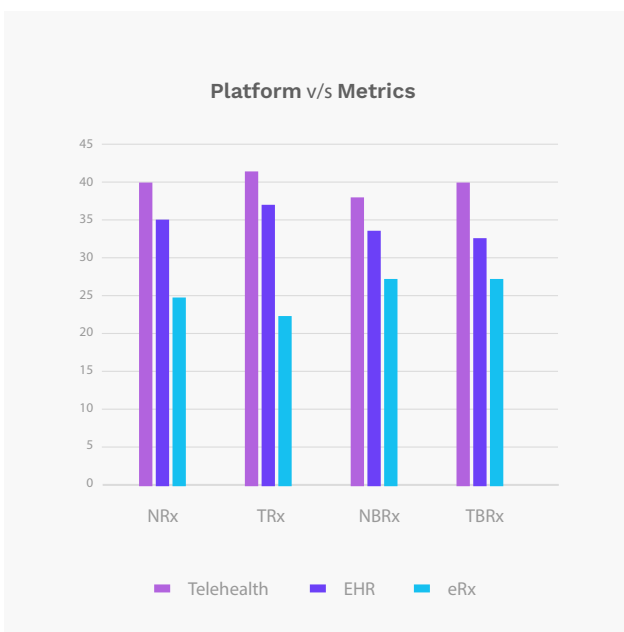
How does a metric perform vis-a-vis other parameters

Conversion metrics perform better on POC compared to other mediums

Metrics perform better with specialties requiring less procedure



Conversion metrics perform comparatively better on telehealth platforms



What we also deduced is that key performance indicator (KPI) has significant impact on cost per HCP per script for campaigns run on POC channels.

Cost per HCP per script is 17% lesser on POC than on other mediums

The KPI for campaigns being executed on POC channels is conversions. As HCPs are already tending to their patients, they are in the professional mindset of writing a

prescription. The chances of one being written then are higher as care providers are closer to the conversion funnel.

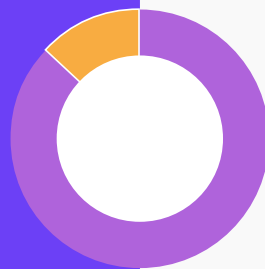
To put precisely, despite CPM (Cost Per Mille) being higher on POC, it costs less for an impression to convert to a script. Reason: The HCP is closer to the conversion funnel – exactly at the point where a prescription is about to be written. Any prescription that gets written ultimately brings down the overall campaign cost.

The Knowledge Gap

From our interactions with life sciences marketers prior to running a campaign, we take a stock of the knowledge gap existing around appropriateness of channel to be picked up for script generation.

87% of marketers have no clue about which medium to pick up when the objective is script generation.

No Responses



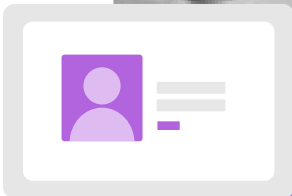
87%
Can't pick on account of non-awareness

13%
Had rough idea but not sure

Can you pick up an appropriate channel between endemic and POC for script generation?



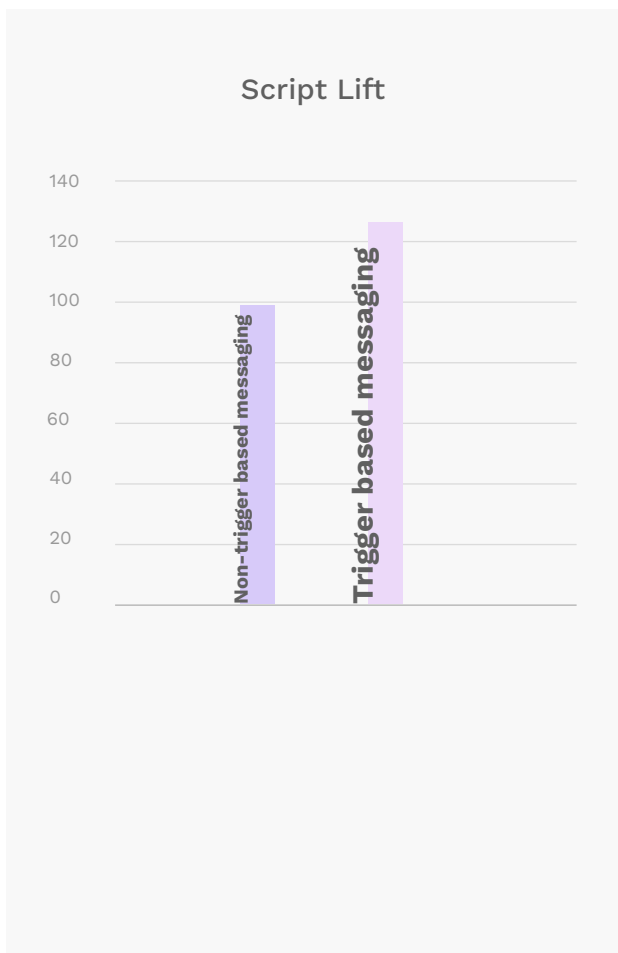
SCRIPT LIFT
IS **32%**
HIGHER IN
TRIGGER-
BASED
MESSAGING



In-person interactions are no longer the ‘only’ way to engage with HCPs for life sciences brands. The strengthening of point-of-care messaging tactics has changed the nature of how communication happens between brands and prescribers, causing the entire ecosystem to grow.

Of the many messaging strategies at the point-of-care, trigger-based messaging tactic seems to cause significant impact on script lift. Delving into all the POC campaigns, our data science team analyzed the performance of the campaigns to conclude that trigger-based messages perform relatively better over others.

Script lift is **32% higher** in trigger-based messages



What makes prescribers connect with trigger-based campaigns?

In the clinical workflow on the POC, HCPs engage differently with their patients at different junctures. How crucial is it for marketers to learn about HCP’s journey on the POC?

It is important so that at every step of the way they can share personalized messages with their target audience pertaining to their stage on the POC. Marketers benefit from the learnings gathered from the data sets around their target audience to gauge the behavior of their prescribers to effectively share information that enhances their interactions with patients.

Targeting HCPs based on their patient’s demographic and coverage profile; their clinical workflow; their patient’s clinical indicators or their prescribing behaviour make them more receptive to the brand message, expands their learning and help them attend to their patients a lot more efficiently, eventually improving therapy outcomes.

Other effective strategies

Besides trigger-based messaging tactic, other strategies work well too when it is about reaching out to HCPs with relevant information, such as Patient Affordability Messaging, DAW (Dispense as Written) Messaging and Pharmacy Redirect Messaging.

PATIENT AFFORDABILITY MESSAGING



Why this messaging strategy is so crucial for brands and could mean a great deal for HCPs for building a meaningful and long-term rapport and association with the patients?

Almost 30% of the new prescriptions are never filled at the pharmacy with therapy abandonment rate reaching over 69%².

With prescription medication remaining out of bounds for many Americans owing to high pricing, life sciences brands try to ease the burden on patients by offering co-pay cards and discount coupons. However, most of the times patients are unable to take advantage.

It is the HCPs through whom patient affordability programs are usually sourced. As care providers are mostly unaware about such patient benefits themselves, they are not able to pass them on. Sharing

information with them about patient aid programs, co-pay cards or discount coupons just when they are writing a prescription can play a big role in reducing medication abandonment and improving medication adherence.

DAW MESSAGING



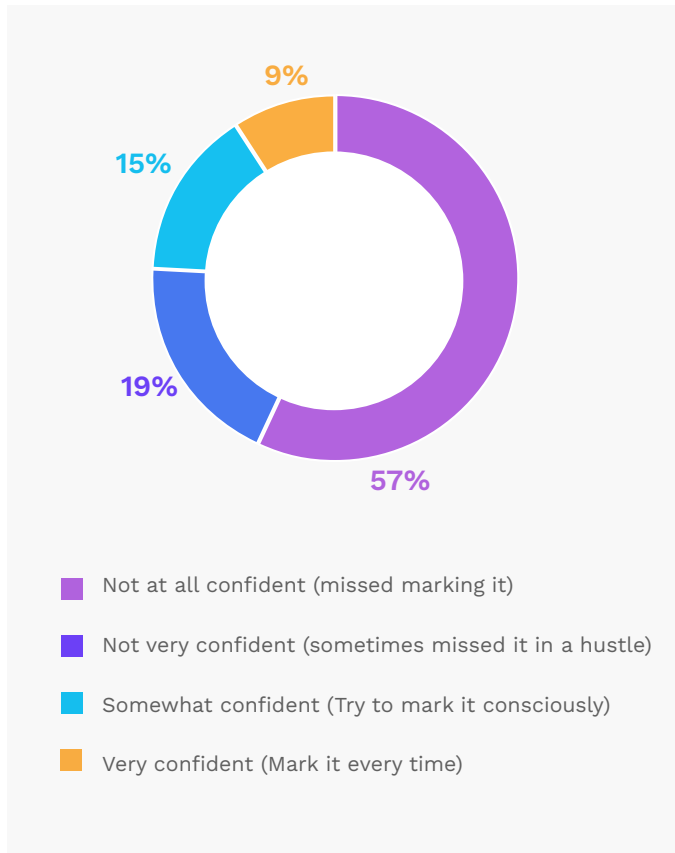
HCPs indicate at the time of writing a prescription that the beneficiary should only get the brand-name version of the drug. It leads to their patients getting a high-quality, well-researched drug as against the generic or substitute versions. Sometimes, prescribers forget to instruct a drug as DAW that may result in their patients not getting the exact branded drug.

DAW messaging campaigns ensure that once an HCP has prescribed a medication with an NDC code, their patients get the exact same drug as specified.

What does it mean for a brand? That there are less chances of a brand drop out or a no fill.

Without the messaging feature, HCPs in a small survey revealed:

How confident were you in dispensing branded drugs or as DAW on POC without a recall?



With DAW messaging, **94%** of the HCPs were able to dispense branded drug to their patients.

PHARMACY REDIRECT CAMPAIGN



It ensures that the drug prescribed is being directed to the right pharmacy.

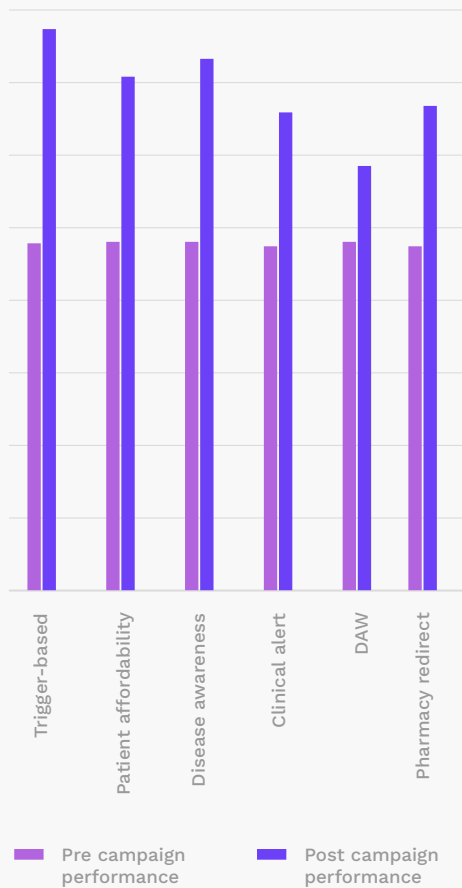
Medications which are meant for non-specialty medication often get directed to specialty pharmacy or at times specialty medication gets directed to retail pharmacy, causing patients immense difficulty. With pharmacy redirect messaging, brands ensure that HCPs are not facing inconvenience of marking the pharmacy incorrectly.

A recent case study of a pharma manufacturer that employed EHR pharmacy alert messages resulted in 94% lift of script volume within the EHR network partners submitting to the brand's preferred pharmacy network³.

Impact of messaging tactics on campaigns

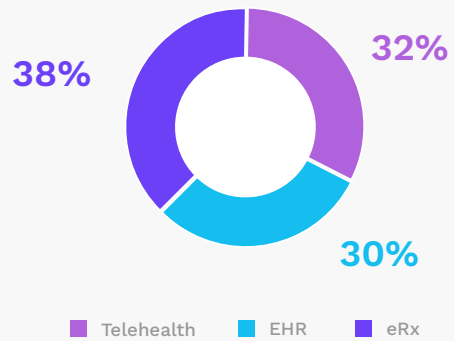
Adopting a messaging tactic as per the business objective clearly has a positive impact on the overall campaign and the outcome. Aligning relevant messages enhances communication with HCPs, resulting in substantial script lifts.

Pre/post performance v/s Type of messaging

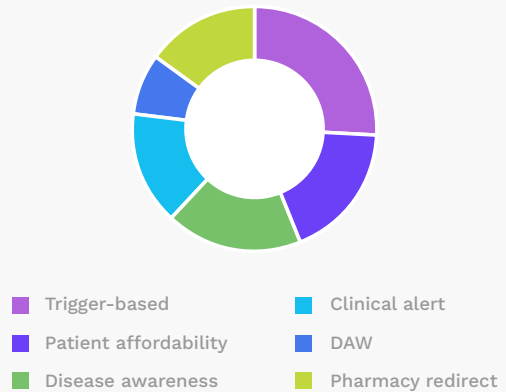


Apart from script lift, performance of POC campaigns is also measured on another parameter – impressions.

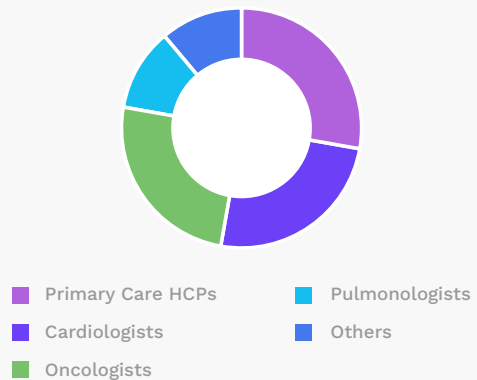
Impression v/s Platforms



Impression v/s Messaging type



Specialty v/s Impression



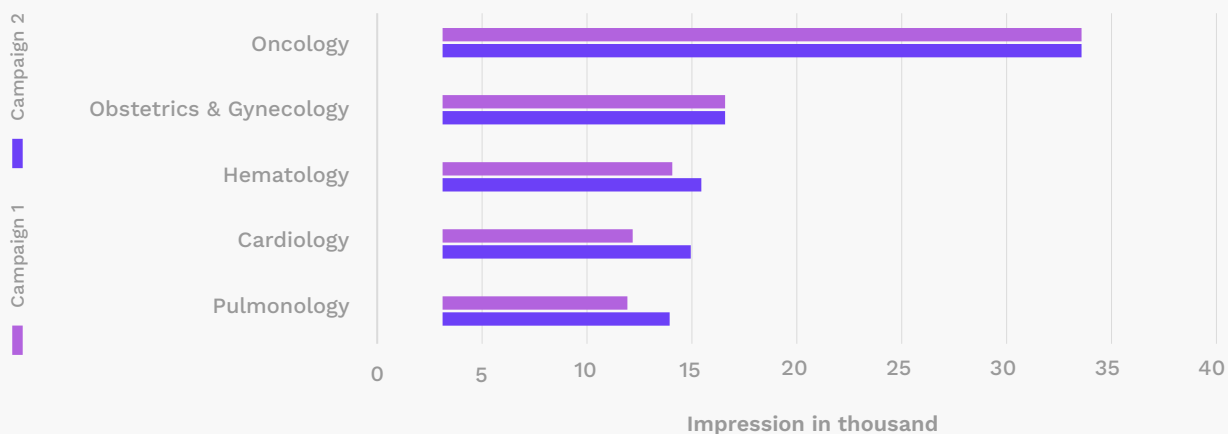
The rich availability of NPI-level data accumulated from POC campaigns goes a long way for brands marketers in predicting the best actions they could take with an HCP.

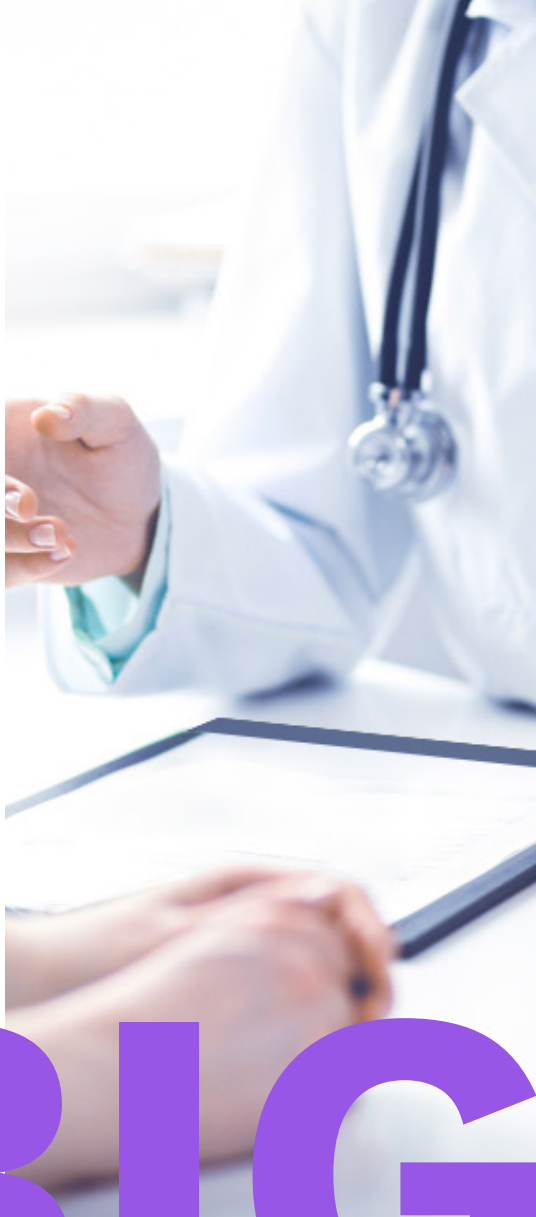
On POC channels, at every touchpoint behavior of a prescriber can be gauged, elevating the way certain data sets could be predicted for future campaigns.

Campaigns of brands perform 37% better based on previous insights

Life sciences brands can utilize insights from previous campaigns to do effective moment marketing or prepare sales representatives for their next interactions with HCPs.

We analyzed brand campaigns of a life science brand over 5 different specialties and how they were able to improve the performance of under-performing campaigns using insights from previously run campaign.





THE

BIG

OUTCOME

What is the outcome of a POC campaign?

Script Generation

Brand marketers can positively impact script generation by showcasing a message at an opportune moment to the right HCP on the right channel. By doing so, there is a greater possibility of a prescription being written; affordability benefits being shared with patients; or that of a patient refill.

How It Helps?

It helps connect the future journey of patients which doesn't happen when campaigns are run on other mediums.

POC
IT CONNECTS
THE FUTURE JOURNEY
OF PATIENTS



The utility of the channels is different. Depending upon what the objective is, marketers can choose suitable platforms to devise channel strategies for desired output.

Conclusion



POC to become an integral part of marketing initiatives

What it means for life sciences brands?

One size doesn't fit all – this has become even more relevant for life sciences brands as they brace themselves for messaging aggressively to HCPs on digital platforms, something that many marketers are yet to have a deeper understanding of. Data-driven strategies will gain momentum as the ecosystem grows further and script generation mediums become popular, for the kind of precision and personalization they would offer in targeting HCPs.

What it means for Healthcare Professionals?

The opportunity to gather relevant information while attending to patients on POC channels prompts HCPs to make accurate diagnoses and provide precise therapies. Meaningful communications cultivate a digital environment that supports HCPs to achieve improved health outcomes for their patients.

What it means for Platforms?

Informed HCPs mean higher engagement for platforms. Platforms gain a lot by sharing information with providers that empower them to serve their patients optimally, either by providing right medication or therapy, or by passing to them patient affordability benefits. Engaged HCPs mean improved site engagement and that's what platforms look forward to.

Annexure

1. https://docs.oracle.com/cd/E12102_01/books/AnyInstAdm784/AnyInstAdmLifeSciences4.html
2. https://www.bemedwise.org/wp-content/uploads/2019/11/a3_report.pdf
3. <https://www.pharmaceuticalcommerce.com/view/engaging-hcps-to-improve-brand-access-and-retention-with-digital-point-of-care-and-sales-technology>



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