Goin’ mobile:

Strategies for a more effective field force
Mobility: A craze, not a phase

The mobility craze is not a passing phase. Virtually all technology watchers predict a continuing sharp rise in the number of mobile devices in the hands of consumers and business people alike. In fact, Morgan Stanley Research predicts that in 2014, more people will connect to the Internet via mobile devices than via desktops.

Intoxication with mobile connectivity and functionality is as strong in the life sciences industry as elsewhere. Current estimates are that 75 percent of U.S. physicians have either an iPad or an iPhone. And customer relationship management (CRM) vendors report that three-quarters of pharma sales reps sport iPads today.

Here we’ll discuss how industry field forces are currently using the devices, what the future is likely to bring and how best to develop and implement a mobile strategy — so you can go unplugged without becoming unhinged.
The evolution of mobility

While the vision of “a mobile device in every hand” is nearly reality, it’s taken many years to arrive.

Over the past 40 years, computing hardware has steadily become smaller, cheaper, more personal and more convenient to use. There were, however, distinct developments within each decade that shifted the paradigm. One was the move from mainframes to minicomputers in the 70’s. Another was the advent of client/server computing in the 80’s. Another was the introduction of PC’s and laptops in the 90’s. And most recently, there was the shift to applications supported in the cloud.

Perhaps most significantly, each new generation of computing hardware has put computing power into the hands of ten times more people — dramatically increasing demand for devices and applications that touch seemingly every facet of daily life.
Drivers of innovation

The CRM and business intelligence (BI) markets are driving innovation in mobile technology and integrated solutions for the pharmaceutical industry. The broader forces enabling this transformation include:

- **Software as a Service (SaaS) and cloud computing.**
  By 2020, more than 70 percent of CRM solutions will be based on this model.

- **Predictive analytics.** The advanced analytics and predictive modelling used by other industries are becoming more integral to pharma given the need to realize commercial efficiencies.

- **Social media.** The trend is toward mining social sites for rich insights into patient attitudes as well as toward using them to engage physicians.

- **Outsourcing.** Momentum is building to rely on partners for CRM related services (such as sales force automation, master data management, analytics and call centers).

- **360 degree view of the customer.** Heavy investment in re-architecting data warehouses is enabling greater data integration such that unified, multi-channel communications to the customer will finally become a reality.
Beyond the digital detail

Field reps armed with iPads and other tablets are using the devices’ captivating displays to improve their engagement with healthcare professionals. It is not unusual for average face time with physicians to increase from a mere two minutes to six minutes.

A well designed tool for the field force can also incorporate an array of CRM applications, including basic sales force automation, reporting and analytics, data management, customer loyalty management (the field force can become an army of primary market researchers!) and KOL management.

Increasingly, mobile devices are proving their value in interactions other audiences, too — from payers and healthcare network managers to patients and suppliers.
A measure of maturity

IMS surveyed 50 U.S. pharmaceutical companies in early 2012 to ascertain their stage of mobile deployment. Most (65 percent) either already had installed iPads in the field or had decided to do so. Nearly a third were piloting a solution, and another 26 percent were still in the planning stages. Notably, about half of the companies that had elected to use only iPads had reconsidered that decision and were re-introducing PCs to complement the iPad.

Virtually all companies were — or were planning — to introduce mobility to the field force before other end users. And they were first and foremost focused on delivering CRM and BI applications.

**SIX STAGES OF MOBILE MATURITY**

- **Stage 1**: Have iPads (but devices are still on the shelf/warehouse)
- **Stage 2**: Have a mobile device with only email and browser access
- **Stage 3**: Have used only iPads and then gone back to laptops/tablets together with iPads
- **Stage 4**: Have built out mobile apps for both commercial and consumer users
- **Stage 5**: Have several apps installed and allow only connected use for commercial users
- **Stage 6**: Have several apps installed and allow disconnected use for commercial users

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**Is your company using or planning on deploying enterprise mobility solutions to support frontline and/or mobile workers?**

- Currently using deployed solution: 40.2%
- Planning to deploy a new solution: 14.1%
- Planning to evaluate a new solution: 12.0%
- No current plans to evaluate or deploy solution within 24 months: 6.5%
- Evaluated solution, but did not deploy: 6.5%
- Not sure/don’t know: 20.7%

*Source: IMS Health*
Mobile computing tomorrow

To invest in mobile technology is to brace for continuous change; within 24 months, today’s devices will almost certainly be obsolete.

In general, we foresee that mobile devices will become more PC-like in that they will be able to handle the standard business software currently reserved for PCs.

Meanwhile, pharmacos will be trusting their mobile devices to do more, for more user groups. According to our survey of 50 U.S. companies, their next areas of focus will be:

- **Introducing BI and analytics to the field force.** Reps can have access to rich insights in the form of dashboards, accompanied by guidance on next steps.
- **Deploying mobile devices to other commercial users,** starting with Managed Markets teams and eventually including marketers, clinical field staff, operations staff and executives.
- **Developing a holistic view of the customer,** finally realizing the full benefit of the CRM ideal.
- **Delivering incentive compensation updates,** tying together effort and rewards.
- **Developing applications for physicians and consumers/patients.** Already, iTunes includes some pharma applications for physicians and other healthcare providers.
Thinking strategically

An effective mobile strategy takes into account:

• **The capabilities and limitations of the mobile device itself** and considers the need for smartphones, PCs and tablets in unison.

• **A day in the life of the user.** The device must be matched to the tasks that users perform and the way that they like to work.

• **Disconnected vs. connected applications.** Reps and account managers can function in a disconnected mode for the majority of their tasks. District managers, area managers and vice presidents cannot.

• **A short investment horizon.** At the pace of technological change, any device adopted today will have a “shelf life” of less than two years.

• **Other potential users** beyond the sales force.

• **The benefits of working with established SaaS providers.** The do-it-yourself approach to developing and maintaining applications is becoming less and less practical.

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**MOBILITY CHECKLIST**

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<thead>
<tr>
<th>Activity</th>
<th>Owner</th>
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<tr>
<td>Determine what devices, e.g., phones, iPads, laptops and tablets will be used by different users, including reps, account managers, sales leadership, etc.</td>
<td>Identify key owner(s)</td>
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<td>Secure expertise in-house and from trusted third parties</td>
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<tr>
<td>Develop a business case that lays out objectives for reducing costs and/or increasing revenue, driving efficiencies and effectiveness</td>
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<td>Assess available budget for training and change management</td>
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<td>Identify a champion and secure executive sponsorship</td>
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<tr>
<td>Identify which applications will be required for mobile users, i.e., transaction, reporting and analytics</td>
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<tr>
<td>Select a pilot project: Walk before you run</td>
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<tr>
<td>Map out a “day in the life” of a rep. You will still need email software as well as Excel and Word.</td>
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<tr>
<td>Establish goals for user adoption; set expectations</td>
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<td>Ensure compliance with regulatory agencies/government, especially social media health applications</td>
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Rollout success: Adopt a mobile mindset

The same way that children aren’t adults in miniature, tablets aren’t (yet) miniature PCs. To ensure a successful rollout, you must:

- **Focus on user adoption**, which is best achieved with simple and fun-to-use apps. The killer apps for the field force are e-detailing, CRM, reporting, and BI.
- Pay attention to the look and feel of what the end user experiences. *Keep it simple!*
- **Don’t try to force-fit existing apps into a mobile world**
- **Apply the principles of change management.** Nearly half of the companies that already have deployed to the field feel the need to reinvigorate their change management.
- **Pilot with a limited number of users** so that you “walk before you run”
- **Start with a small footprint;** introduce a few applications over time rather than expect mass conversion with a “big bang” approach
- **Enable offline capability,** such as for KPIs, performance tracking and some customer profile information
- **Allow flexibility in what users can do with their devices;** if you lock down the environment, the device will stay at home or in the trunk of a car
Implementation framework

When companies have thoughtfully applied all the elements of this framework, they have been able to raise adoption of CRM in the field from less than 20 percent to more than 80 percent!
Going, going, gone mobile

In progressing from “Going Mobile” to “Gone Mobile” pharma companies have the opportunity to dramatically change the relationship that end users have to their work. Well-designed mobile apps, supported by a comprehensive mobile strategy, will win the hearts and minds of end users in ways that previous technologies have not. In the case of field reps, they will then be more effective, efficient, responsive and compliant.

While most pharmacos are still finding their way with mobile computing, there are lessons to be learned from early adopters and from trusted third parties.

A key to success is finding the right balance between proceeding on the basis of a sound strategy and attempting to plan too far into the future. Those who hesitate will discover that the future of mobile computing is already here.

Lessons Learned

- When developing a business case, focus on cost reduction
- Avoid the temptation to do it yourself; take advantage of the expertise, scope and attentiveness of SaaS providers
- Look at all potential users, even if you first deploy just to the field
- Cater to individual roles and what they need
- Keep it simple; deliver just the core ingredients
- Consider the medium — don’t try to jam existing, on-premise functionality into the mobile environment
- Think through connected vs. disconnected apps
- Don’t scrimp on “look & feel;” apps should be easy and appealing to use
- Accept that for now, a single device may not be the best course of action; there is a place for the trinity of smartphone, iPad and PC
- Expect hardware changes every 15-20 months, and keep your options open if you’ve not already invested in a device
IMS improves the efficiency and value of clients' commercial analytics and information processes through a broad range of services:

- Sales and marketing analytics and reporting
- KPI design and implementation
- CRM implementation
- Managed markets contract management
- Data warehousing, integration and management

Drawing from our extensive industry experience with methodologies honed over hundreds of client engagements, we recommend approaches, guide analytics, design processes and deploy systems — even manage these activities on an ongoing basis to lower operating costs, provide staffing flexibility and improve overall performance.

In turning to IMS specialists located both onsite and offshore, clients tap into our extensive global industry experience, deep domain expertise and knowledge of precisely how their commercial organizations operate. The result? Faster speed to insight and better business performance.