

COVID-19 Impacts Current State of Biopharma Field Sales

With field forces grounded, will COVID-19 be the catalyst necessary for sustained changes in biopharma's promotional models?

Over the last couple of weeks, several biopharmas including Pfizer, Merck and Amgen have stopped field sales face-to-face (F2F) meetings with physicians and other healthcare professionals (HCPs): [Pharma salesforces brought to a halt](#); while [grounded by the pandemic, pharma reps turn to digital tools to reach docs](#). Unlike many other industries, biopharma has been slow to fully adopt virtual sales capabilities despite the body of evidence suggesting a great need. Field rep access to physicians has significantly declined for over the last decade, especially in Oncology. Many articles like Policy & Medicine (policymed.com) in recent years have pointed out [nearly half of all US physicians restrict access by manufacturer sales reps](#). This data points to a need for new promotion strategies, supported by available technologies, based on physician preferences to engage virtually. How do we expect the landscape to change as COVID-19 drives even more restrictive policies with an increasing number of healthcare systems telling industry salespeople to stay away? Will COVID-19 spark an even more decisive and rapid change?

- **Not all are equally prepared for the shift to virtual engagements**

Biopharmas who have developed their omni-channel sales & marketing plans to include remote or inside sales capabilities are at an advantage with an agile function poised to quickly address field force gaps in coverage. Some companies are leveraging those capabilities to train field forces on virtual engagement strategies and tactics. Well positioned to minimize the downside impact of its grounded field force, a top biotech with one of the industry's largest inside sales functions has deployed its inside sales channel leadership team to further equip and train >1500 field reps for impactful virtual engagements.

On the other hand, companies who have resisted the adoption and integration of alternative sales channels may struggle to maintain and optimize physician access. In addition to not having an established inside sales capability to rapidly scale during this time, it will take longer to find resources for optimally equipping, training and managing the transitions necessary for continued performance in this new environment.

- **Physician fluency and preference for virtual engagements will continue to rise**

A recent Kineticos study corroborated several other studies in recent years indicating increased physician preference for alternative channels when seeking information; it's not surprising that the increased use of other channels directly correlates with the decreased levels of F2F meetings. A [CMI Media survey](#) across multiple specialties showed that while 50% of physicians approve of in-person

visits, 79% actually prefer e-details and 43% would prefer web conferences. Other reports show a majority of providers prefer communicating by email. Coupled with shifting channel preferences, the recent spike in telemedicine resulting from COVID-19 will further increase physician preference and comfort levels for leveraging technology to communicate virtually.

- **Actionable insights from COVID-19 postmortems will vary given different biases**

Biopharmas with established capabilities like inside sales augmenting their field forces will likely expand those capabilities across more brands. With improved comfort leveraging virtual platforms such as Skype or Zoom for customer calls, field reps will coordinate more virtual HCP engagements into their own call activity. Expect the level of teamwork across inside and field sales reps to also increase as the model proves viable and field reps seek to partner more closely with their inside sales counterparts.

We should expect different points of view from those who have maintained traditional biases over time when building field teams. When debriefing this period for actionable insights, many will recognize the missed opportunities and make decisive changes by establishing virtual capabilities for increased overall sales force effectiveness. A few, however, will make excuses pointing out a relative lack of productivity during this period as evidence to further justify a status quo approach to F2F customer engagements.

So, what does this mean for Biopharma?

Are we going to replace field forces with digital technologies and/or virtual sales teams? **NO!** Those who predicted the death of our field sales forces with alternative tech-driven channels as viable replacements have been proven wrong. Biopharma's field forces remain a most valuable resource for driving impactable sales.

Nonetheless, biopharma has had many signals including physician access restrictions, provider preferences, as well as multiple analyses that indicate significant improvements in impactable sales and ROI when integrating various technologies, especially remote capabilities. Despite the evidence, biopharma has remained relatively slow to embrace virtual capabilities to augment and enhance its field sales customer interactions. Other industries integrated functions like inside sales into the fabric of their sales organizations decades ago; perhaps, much greater margin pressures in those industries forced a more expeditious need for greater efficiency and effectiveness.

COVID-19's impact on the current state of biopharma field sales and its customer universe could be the catalyst that finally drives sustainable change to our industry's personal promotions. An objective analysis of field sales forces grounded by COVID-19 will likely trigger a greater industry commitment to building sustainable integrated remote HCP engagement functions. With this period's exponential increase in virtual communications, more insights are to be gained. Today's landscape will help sales & marketing leadership set forth a vision for a new normal when evolving and integrating new capabilities. Top-of-mind will be how best to drive the optimal mix of provider F2F and virtual engagements when considering key priorities such as rationalized targeting strategies, activity metrics, and performance incentives. With today's pandemic driving even more evidence supporting the evolution of promotional models, watch and learn from transformations of biopharma's trailblazers and lack thereof with slow adopters.

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