How to improve product launches in a complex healthcare landscape

Building the capabilities your commercial teams need to be launch-ready.

Introduction

It's widely recognised that, for the pharma industry, the era of the blockbuster product launch has passed. We no longer expect to see new 'big discovery' medicines with a potential patient pool in the tens of millions.

The decline in pharma's investment/reward ratio over the last few years has been enormous. Profits per brand have never been lower and the cost of bringing a drug to market (factoring in failures) now averages $2.6 billion. That's an increase of 140% over a decade, with the top 20 pharma companies collectively spending approximately $60 billion on drug development every year[1].

We are all aware that a successful launch has a significant impact on a product's revenue trajectory in subsequent years. This is clearly demonstrated by a Deloitte study that analysed drug launches in the United States. Despite the importance of this crucial stage, 36% of drugs launched between 2012 and 2017 missed their launch forecasts. 50% of these failures were attributed to limited market access, 46% to inadequate understanding of customer needs, and 44% to poor product differentiation[2].

Ensuring the success of any launch is becoming even more critical with ongoing patent erosion, as well as the growing challenge from biologics, biosimilars, and the growing number of new market entrants. To remain profitable, pharma companies urgently need to accelerate the return on investment from every product they develop.

With therapy areas becoming increasingly crowded marketplaces, the days of standardised global targeting of broadly defined patient cohorts are gone. Now, each time a product is launched, pharma companies must identify the precise patient cohort being addressed within each local market, to create a stronger rationale for how their product can significantly improve on the current standard of care within a specific healthcare system. Unless the benefits, in terms of treatment costs, efficiency, or patient outcomes, are clearly targeted and offer a stand-out advance on what is already in use, no healthcare system is likely to be prepared to go through the pain and effort of adopting something new.

[1] The pursuit of excellence in new-drug development, McKinsey 2019
[2] Rethinking market access. Delivering on the promise of therapeutic innovation, Deloitte 2022

The pressure on pharma

With product launches happening faster and closer together, pharma companies need to conduct them more efficiently and cost-effectively if they are going to maximise the return on their investment.

At the same time, ongoing developments within healthcare and radical changes in the stakeholder ecosystem are presenting their own challenges. Decision-making networks are continuing to evolve, with increasing involvement from secondary care, regional formulary boards, financial stakeholders, and other new stakeholder groups. As a result, pharma companies are having to look differently at the ways in which they relate to, and engage with, healthcare systems.

Many of the functional teams involved regularly feel under pressure from the increased pace required when launching products, and the inevitable complications around getting them to market.

A successful product launch demands that these teams work at increased speed, and make their voices heard in an increasingly crowded and noisy marketplace, whilst navigating and engaging different, often less familiar, areas or stakeholders within the healthcare system landscape. And that requires new capabilities and ways of working.

The importance of being capability-ready pre-launch

In the current landscape, it's critical that customer-facing teams are prepared for a product launch before it happens. And that means possessing a new suite of capabilities.

On the roadmap to launch, it's obviously vital to initiate conversations with strategically important stakeholders. Some may believe that this is already happening but, as Rubica has identified, in many organisations it's not being done in a sufficiently targeted manner. The main problem we see teams encountering is an inadequate level of engagement with stakeholders in strategic decision-making roles. That problem is made worse by the fact that those stakeholders differ significantly from those teams are traditionally used to dealing with.

Rubica's data on the Top 20 pharma companies reinforces this point. It shows that **57% of customer-facing managers lack the confidence to talk through strategic priorities with senior level stakeholders, and 50% feel insecure in challenging senior external stakeholders on the necessity to do things differently**[3].

The strategic-level conversations they need to have are very different from those conducted at a nurse or general prescriber level around safety and efficacy and the practicalities involved in adopting a product in their respective departments.

At a strategic level, teams will be having conversations with people they do not commonly engage with. Within hospitals, these could be clinical budget holders, chief and deputy pharmacists, and lead clinicians. Elsewhere within healthcare systems, they may be payer-level stakeholders, senior non-clinicians, and regional meds optimisation or service leads.

Most customer-facing teams are in unfamiliar territory when it comes to gaining access to these key stakeholders. One thing that is certain, however, is that they are exceptionally busy people. So, before taking on the challenge of winning their attention, it's crucially important to spend time, in advance of launch, helping teams prepare and develop their capability and confidence. They will then be far better equipped to secure optimal engagement from those stakeholders on the product launch journey.

[3] Top 20 Pharma Data, Rubica Change & Analytics 2023

Improving stakeholder targeting and engagement. A six-point plan for launch readiness.

Step 1 Identify and prioritise your critical targets

Customer-facing teams may feel confident in identifying 'who' they are targeting with a product, but when it comes to a product launch, they need to take their thinking to the next level. Who are the people who are really going to make a difference to the product launch? The answer is unlikely to be those they have typically been speaking to.

As a starting point, it's a good idea for teams to look at the patient journey into which the new product will fit. By taking a detailed and nuanced view of this, it's possible to pinpoint what we call the 'keystone stakeholders' within each healthcare system, those who have decision-making authority or significant influence at critical stages in the successful adoption of any new product. This exercise singles out the most important individuals from the potentially overwhelming number of those with at least some influence. Once the field has been narrowed down and the key stakeholders identified, these can be aligned with the adoption timeline relevant to the product launch for their healthcare system. This following diagram offers an example:

Fig.1
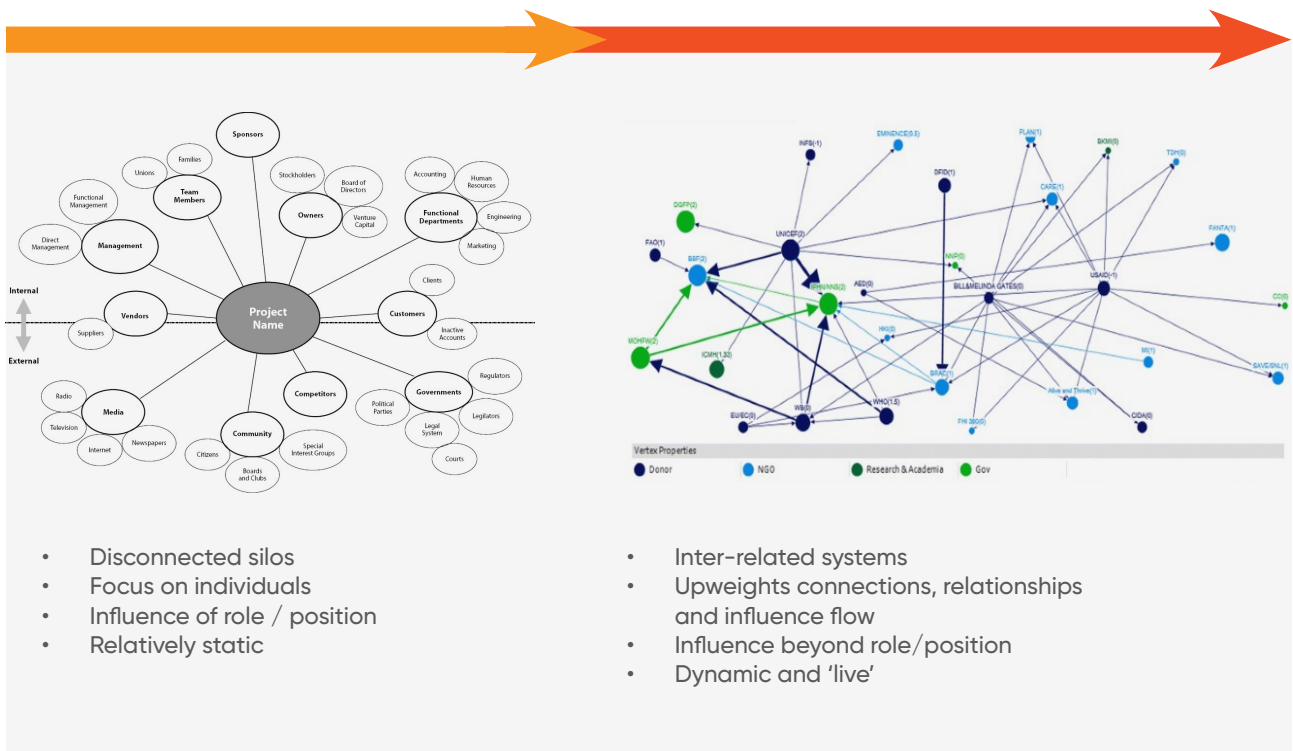**Example adoption process timeline for a biosimilar**
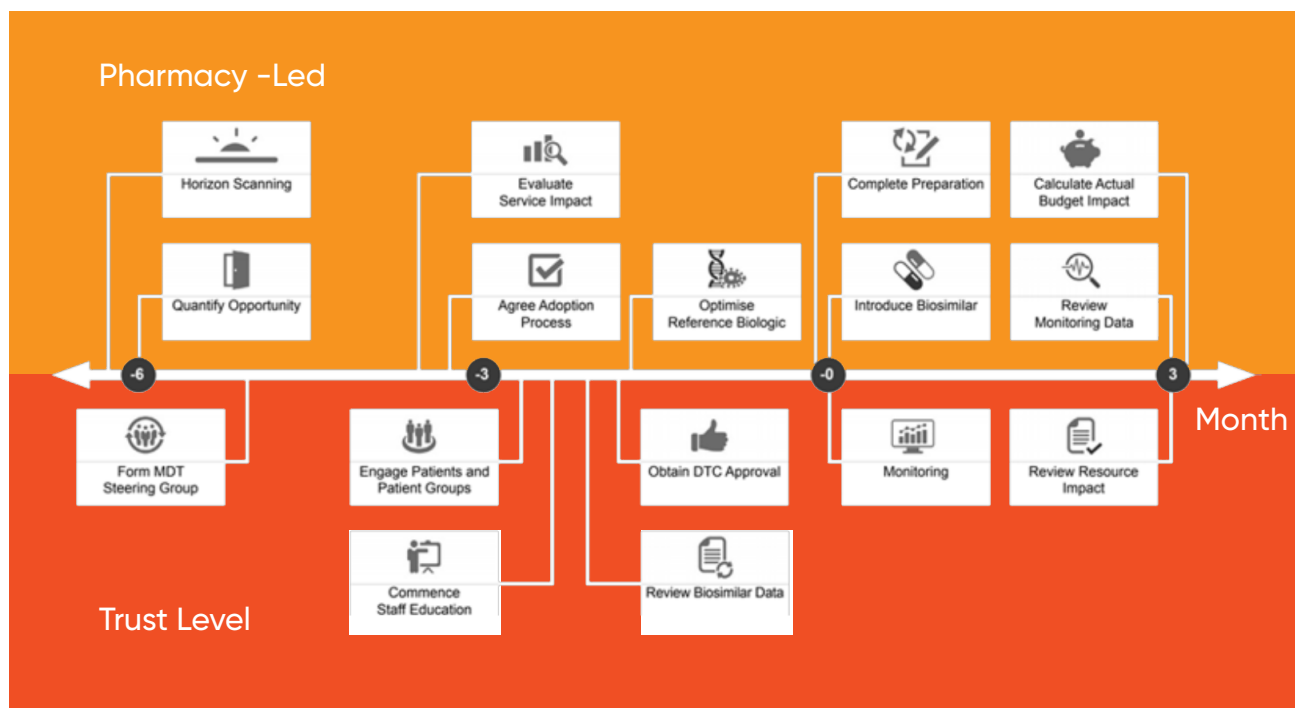
https://cancervanguard.nhs.uk/wp-content/uploads/2017/11/122149-Sandoz-Vanguard_IPDF_DR2.pdf

These stakeholders are connected in a network across which information and influence is constantly flowing. It's vital to have a grasp of how that network works, as well as an understanding of each individual stakeholder's personal and professional motivations, and their priorities within their healthcare system.

Mapping these connections can be extremely helpful but should be done in the form of a network map that accurately reflects the complex system in which pharma and its healthcare customers are working (Fig.2). Traditional stakeholder maps tend to downplay the interconnections and their significant influence on decisions being made at different stages of the adoption process.

Fig. 2
Traditional stakeholder map vs stakeholder network map

- Disconnected silos
- Focus on individuals
- Influence of role / position
- Relatively static

- Inter-related systems
- Upweights connections, relationships and influence flow
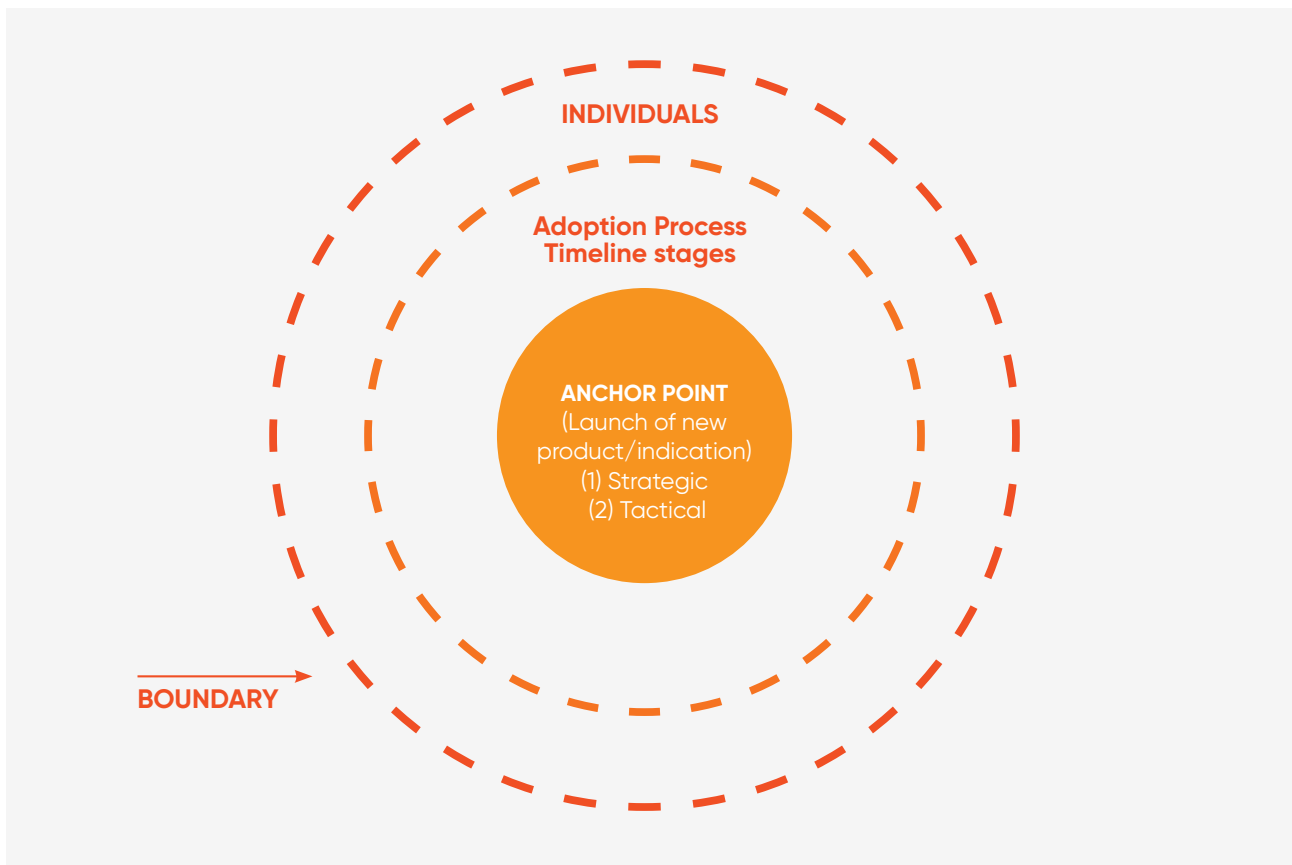- Influence beyond role/position
- Dynamic and 'live'

Staying focused

Network maps make it far easier for teams to spot where the gaps are in existing customer relationships and decide how to close them, but they do need to be kept within bounds or they can become huge and unwieldy. Limiting them to the keystone stakeholders, plus those that influence, will help you to see what's most relevant and develop different routes' across the network which are needed to connect with individuals who are strategically important.

Keeping the network map within limits can also be done by setting 'boundaries' and mapping within a specific area such as a geography, and using the key stages of the 'Adoption Process Timeline'.

Another way is anchoring the map in a pain point or objective that is known to be relevant to a particular healthcare system and where the new product can be useful. It's then possible to map outwards from that.

In most cases, a tension between setting boundaries (Fig.3) and anchoring will define an area to start mapping.

Fig. 3
Setting boundaries and an anchor point

INDIVIDUALS

Adoption Process
Timeline stages

ANCHOR POINT
(Launch of new
product/indication)
(1) Strategic
(2) Tactical

BOUNDARY

Using the map

Using the network map, customer teams can draw connections within organisations and between individuals. Arrows can be used to show the direction of influence and the weighting of the lines can be adjusted to reflect the strength of that influence in the context of the product launch. The 'reach' of influence is another key element to identify in mapping for a successful launch. You can use other visual devices to give added priority to individuals with the most connections to keystone stakeholders or the strongest influence on them. Finally, the maps can be used to clearly visualise the comparative strengths of existing relationships that have been captured during mapping.

Reviewing the map will now indicate the priorities for engagement. It will show who are the influential stakeholders with whom strong relationships already exist, or those closely connected to existing strong relationships. And it will reveal where the teams have weak or non-existent relationships with influential stakeholders, and now need to develop new connections.

By looking at the strong relationships closest to the places where a relationship is lacking, it's possible to identify the points from which teams should start to work on forming new connections.

Preparing for a meaningful conversation

Step 4 **Offering reasons to engage**

At this point your customer-facing teams will have a clear idea of their key targets. The question now is why those stakeholders should even be interested in a conversation.

There are two potential drivers here – *Relevance* and *Resonance.*

Relevance is about speaking to the head, or what you might call the rational brain. That means connecting to whatever happens to be their current focus, by addressing 'matters in hand'. And it's not just about coming up with theoretical talking points; it's vital that any potential topic of conversation has a practical dimension with real-world relevance. Nowadays, that's unlikely to be your new product!

Resonance, on the other hand, is about speaking to the heart, or the emotional brain. To do this effectively, it's necessary to pause and consider how to connect on a human level. Perhaps certain stakeholders are under particular stress at the moment or find themselves in a difficult and confusing situation. Maybe they are looking for a way in which they can make an impact at work. Understanding what's worrying or exciting them, the pressures on them and their motivations, can provide a compelling route into a meaningful conversation.

The key to initiating engagement with a particular target is establishing what they care about, at a practical, rational level, or from a more personal perspective. It's then possible to use the map that's anchored in known pain points or objectives to identify possible points of interest.

Preparing for a meaningful conversation

Step 5 | **What's in it for them?**

Once the team has identified some possible topics of interest, it's time to consider where the product might be able to meet a need or help with a problem.

It's useful to identify some questions that will help them to see the value of a particular conversation. These could be based on their initiatives or programmes that are at the planning stage but expected to run into difficulties, or those under consideration but yet to be worked out in any detail.

Time to talk

It's helpful for customer-facing teams to approach a conversation with a very clear structure in mind. It ensures that the time is spent fruitfully for both parties and all the bases are covered. A typical conversation plan could look like this:

Begin with a strategic starter.

The 'anchor' and strategic research previously mentioned should provide insights on which to base questions like these:

"I have noticed … x or y. What does that look like in your healthcare system?"

"If you could change one thing that's currently frustrating your attempts to improve patient outcomes, what would it be?"

"So, what's stopping you from improving/doing that now?"

"What are your short-, medium- & long-term goals in relation to…?"

Demonstrate that you have heard their problem or recognise their need

Listening to their concerns and playing them back helps to build credibility and trust. It's useful to frame this in three parts.

1. "What is happening right now?"

2. "What impact is that currently having?"

3. "So, your need/problem is …….. "

Consider how using the new product might help

Teams should never introduce the product unless they are certain that it's appropriate and resonates with the direction of the conversation. With that proviso:

Could it help directly? Is there a feature of the new product that could shift a bottleneck, answer a need, solve a problem, or improve patient outcomes?

Are the benefits indirect? Could the product save them money that would be better spent addressing a particular need or problem?

If an opening has been identified, agree what needs to happen next

"Whose buy-in or agreement is required at this stage of the adoption process for the new product. Can you provide an introduction?"

"Who are the likely champions seeking the change we have discussed?"

"What obstacles do you anticipate we need to explore and who with?"

Summary

For pharma companies, improving the success rate of product launches has never been so critical. With fast-moving changes in the marketplace, increased development costs, and the decline in the investment/reward ratio, the pressures to accelerate the return on investment from every product brought to market are enormous.

For healthcare systems to adopt a new product, they need to be convinced of its significant benefits in terms of reduced treatment costs, enhanced efficiency, or improved patient outcomes. They don't want a standardised global approach; they want a sales message clearly tailored to their patients and their specific needs.

Many of the functional teams involved in product launches feel under pressure from the increased pace demanded and the complexities involved. Not only do they need to work at speed but, given the changes in the healthcare landscape and its expanded decision-making network, they need to engage with a new set of stakeholders.

To stand a chance of success, these teams need to be prepared for a product launch before it happens. That means engaging with the people who are going to make the key decisions. The problem, as Rubica's research shows(3), is that many of these teams are insecure when it comes to holding strategic conversations with senior external stakeholders.

It's therefore crucial to spend time developing the capabilities and confidence that customer-facing teams need to target key stakeholders and secure their engagement with a forthcoming product launch.

It can be done. The first step is to identify and prioritise the critical targets for a launch. A detailed look at the potential patient journey can pinpoint the 'keystone stakeholders' in any healthcare system, the individuals with decision-making authority or significant influence on the adoption process. Network mapping then makes it possible to understand their vital interconnections and where work is needed to strengthen key customer relationships. At the same time, mapping a system's known pain points and goals can provide insights into their current issues and challenges.

These insights can help teams to prepare for meaningful conversations based on what is most likely to engage individual stakeholders at a practical, rational level, or from a more personal perspective. They also provide a potential context for talking about the forthcoming product and the benefits it could offer.

All this prepares them for the actual conversations, enabling them to ask relevant strategic questions, to listen constructively to, and demonstrate empathy with, stakeholders' concerns, to introduce the new product when appropriate and, by identifying opportunities and obstacles to adoption, to move the conversation on to the next stage of the product launch journey.

About Rubica Change & Analytics

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