

Health Industry **Insights**TM An IDC Company



Pharma 2.0 - Social Media and Pharmaceutical Sales and Marketing

February 23, 2010

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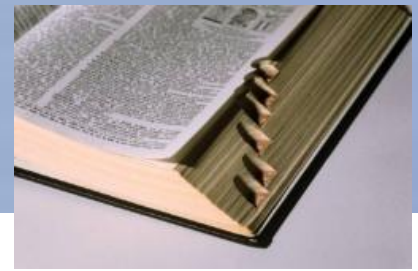
Program Director, IDC Health Insights



Agenda

- Defining the 2.0 World of the Web, Health and Pharma
- Pharma Sales and Marketing Plans are Evolving
- Social Media Case Studies
- Essential Guidance
- Panel Discussion
- Q & A

Web 2.0 Definitions



- Web 2.0
 - The new Internet, which is characterized by communities, and interactive media
 - Second wave of architecture and application development
 - Provides improved graphics and enhanced end user experiences
 - Customized content delivery and collaboration using standard browser platform
- Health 2.0
 - Communities form around areas of interest
 - Participants freely exchange information about their experiences — both good and bad
 - Web discovery via search is the natural first step for buyers
 - The Internet as the primary source of knowledge
 - Internal knowledge management and process improvement initiatives depend on collaboration and web 2.0 technologies
- Pharma 2.0
 - Convergence of social media and life science
 - Consumers form communities to discuss health conditions and drugs
 - Pharmaceutical companies join in that conversation (with trepidation)
 - Pharmaceutical companies use social media to augment DTC marketing efforts

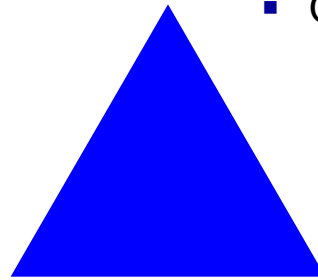
Three Distinct Facets of Health/Pharma 2.0

Customer

- Support / Search / Self-help
- Q&A discussion forum
- Guided support
- Advice and expert assistance
- Best practices and education
- Referrals and partners

Cloud

- Live in the cloud - participate
- Capitalize on existing communities
- Defend the brand
- Quickly resolve customer issues



Process Improvement and Transparency

- Knowledge Management
- Project Management Blogs
- Employee Policy Wikis
- Dashboards

- Training and Education
- Best Practices Wikis
- Best Practices Exchange
- Business Process Documentation

Technology Goals Will Change

From ...

Building infrastructure

Creating content

Enabling transactions

Capturing eyeballs

Integrating applications

To ...

Building community

Creating loyalty

Enabling self-service/help

Capturing experts

Integrating channels

Web 2.0 Is a Double-Edge Sword

Opportunities

- True multichannel sales and marketing
- Communities give us a new way to touch our customers
- Blogs and Wikis allow us to communicate to new customers
- Advanced search and knowledge management bring us new customers
- Wikis and blogs capture issues, thinking, and responses

Threats

- Customer processes must be consistent and transparent
- Communities may inform our customers of deficiencies
- Companies must monitor and participate in the discussion
- A winning search and knowledge management strategy is hard work

You have a “permanent” record

Health / Pharma 2.0 — A More Informed Patient

- **Increased focus on consumerism**
 - Increase consumer responsibility and involvement in healthcare choices
 - Tools to help minimize healthcare cost
 - Guiding customers to “best” providers
- **Acute and chronic disease communities**
 - Individuals sharing information and advice
 - Comparing notes on treatments, physicians, providers, and payers
 - Looking for best options in a bad situation
- **Wellness communities and information portals**
 - WebMD
 - Revolution Health
 - Destination Rx

Health / Pharma 2.0 Communities

- **Consumers**
 - Medpedia
 - Wikipedia
 - You Tube
- **Physicians**
 - Sermo
 - Web MD Professional
 - Medscape Physician Connect
 - Professional role based portals
 - MomMD
- **Physician Training**
 - SDN: Student Doctor Network
- **Disease communities**
 - American Diabetes Association
diabetes.org
 - epilepsy.com
 - Patientslikeme.com ALS
 - Medpedia communities
 - Healia communities
 - tудиabetes / es tудиabetes
- **Drug Review Communities**
 - iGuard
 - eHealthMe
 - eDrugSearch
 - PrescriptionDrug-Info

Pharma Sales and Marketing Plans

- Reduced sales headcount
- Industry consolidation has fewer reps selling more products
- New regulations, technologies, and transparency initiatives create advantages for purchasers
- Very restrictive direct marketing rules (MA) will become more widespread

Planned IT Spending by IT Solution in 2010

IT Solution	% Planning To Increase Spend	Avg. Increase Expected	% Planning To Decrease Spend	Avg. Decrease Expected	% Expecting No Change in Spending
Social Network Marketing (Web 2.0)	27.9	10.5	3.7	5.1	68.4
Physician Profile Management	26.5	8.9	3.3	9.7	70.2
Sample Management	21.1	11.9	4.6	7.8	74.3
Customer Relationship Management (CRM)	20	4.6	11.6	8.8	68.4
Brand Management	19.5	6.7	10.8	6.7	69.7
Edetailing	16.9	7.5	9.6	7.5	73.5
Analytics / Business Intelligence	16.7	8.7	8	4.5	75.3
Sales Force Automation (SFA)	16.7	11.4	5.9	5.2	77.4
Data Management	15.9	4.2	12.9	6.5	71.2
Incentive Compensation Management	15.8	3.4	11.8	5	72.4
Mobility/PDA/Wi-Fi/SmartPhone	13.7	6.5	12.9	6.5	73.4
Call Center	12.4	3.5	5.3	4.5	82.3
Route Planning	10.5	7.8	7.2	7	82.3
Data Integration	10	7	10	6.5	80
Feedback Management	8.5	5.6	3.6	9.8	87.9
Database/Application Consolidation/Rationalization	5.7	4.4	19.3	2.6	75
Predictive Modeling	5.3	8.7	14.5	5	80.2
ELearning & Training Effectiveness	5.3	2.5	15.8	6.8	78.9
Affiliations Management	5.3	7.6	9.1	4.5	85.6
CDI/Master Data Management	5.3	5.4	18.5	8.5	76.2
Knowledge Management	2.7	7.1	12.8	7	84.5
Customer Lifetime Value Analysis	0	2.4	10	5.5	90
n = 149					
Notes: Responses of "don't know" are not included					
Source: Health Industry Insights' 3Q09 Leading Indicators in Life Science IT Spending Survey					

Pharma Case Studies: myalli Community Forums

The screenshot shows the homepage of the myalli community forums. At the top left is the 'alli' logo. To its right is a navigation menu with links: 'home', 'about alli', 'myalliplan', 'healthy eating', 'keeping fit', 'allicircles', and 'getting started'. Further right are links for 'join alli', 'buy alli', 'pressroom', 'alli updates', 'FAQs', 'myalli global', and 'sign in'. Below the navigation is a large banner featuring a photo of two women. To the right of the photo, the text reads 'alli community' followed by a quote: 'I decided to make a change once and for all. I chose to use alli because I need the support group.' attributed to '— Krystal, 23, Memphis'. Below the banner is a section titled 'keeping it real. connecting, learning and supporting one another'. This section contains a paragraph about the alliplan's role in helping users achieve lasting change and a link to 'See a sample of the community homepage below'. Below this is a 'recent discussions' section with two entries: 'New to Alli' and 'Encouragement for the New to Weight Loss and the Experienced'. To the right of the main content is a sidebar with a 'myalliplan' section, an image of a laptop displaying the website, a 'learn more' button, and a 'learn more about alli' section with links for 'How alli helps >', 'What is alliplan? >', 'A new approach to healthy eating >', and 'How to start >'. Below that is an 'experience the full allicircles community' section with a link to 'Participate in discussions, get advice and connect with other allicircle members.'

Pharma Case Studies: Gardasil Facebook Page

facebook Search Home Profile Account

Take a step against cervical cancer

Wall Info Boxes

TAKE A STEP AGAINST CERVICAL CANCER

Suggest to Friends

Fans
6 of 109,456 fans See All

Arjay Canoja
brittany pradhan
Alana Roberts
Judith Healey-Greene
Lace Rich
Katey Niles

Create a Page for My Business
Report Page
Share +

Detailed Info

Website: <http://www.Gardasil.com/PPI>
<http://www.Gardasil.com/PI>
<http://www.fda.gov/medwatch>

Company Overview: You may not know much about HPV (human papillomavirus), but you should. In fact, 80% of women will have had genital HPV* in their lifetime. So take a look at our Boxes tab. Getting the facts about HPV and its connection to cervical cancer and genital warts is the first step toward helping to protect against it.

* Number represents more than 30 genital HPV types, not just Types 6, 11, 16, and 18.

IMPORTANT INFORMATION

GARDASIL® [Human Papillomavirus Quadrivalent (Types 6, 11, 16, and 18) Vaccine, Recombinant] is the only cervical cancer vaccine that helps protect against 4 types of human papillomavirus (HPV); 2 types that cause 70% of cervical cancer cases, and 2 more types that cause 90% of genital warts cases. GARDASIL is for girls and young women ages 9 to 26.

GARDASIL may not fully protect everyone, and does not prevent all types of cervical cancer, so it's important to continue routine cervical cancer screenings. GARDASIL does not treat cervical cancer or genital warts. GARDASIL will not protect against diseases caused by other HPV types or against diseases not caused by HPV. GARDASIL is given as 3 injections over 6 months.

SELECT SAFETY INFORMATION

Anyone who is allergic to the ingredients of GARDASIL, including those severely allergic to yeast, should not receive the vaccine. GARDASIL is not for women who are pregnant.

The side effects include pain, swelling, itching, bruising, and redness at the injection site, headache, fever, nausea, dizziness, vomiting, and fainting. Sometimes fainting is accompanied by falling with injury, as well as shaking or stiffening and other seizure-like activity. Only a doctor or health care professional can decide if GARDASIL is right for you or your daughter.

You are encouraged to report negative side effects of prescription drugs to the FDA. Visit www.fda.gov/medwatch or call 1-800-FDA-1088.

Read the Patient Product Information or the Prescribing Information for GARDASIL.

Create an Ad

Connect With More Friends

Share the Facebook experience with more of your friends. Use our simple invite tools to start connecting.

More Ads

Merck & Co. includes fair balance information - here and elsewhere

Facebook © 2010 English (US) About Advertising Developers Careers Terms Find Friends Privacy Mobile Help Center

Pharma Case Studies: AstraZeneca on Twitter

twitter Login Join Twitter!

Hey there! **AZhelps** is using Twitter.

Twitter is a free service that lets you keep in touch with people through the exchange of quick, frequent answers to one simple question: What's happening? **Join today** to start receiving **AZhelps's** tweets.

Join today!

Already using Twitter from your phone? [Click here.](#)

 **AZhelps**

Name AstraZeneca Helps

0 following 144 followers 28 listed

Tweets 64

Favorites

Following


 [RSS feed of AZhelps's tweets](#)

@gookygox Saw your tweet about access to or the cost of ZOMIG® (zolmitriptan) AstraZeneca may be able to help. Call us @ 800-236-9933
5:08 AM Feb 15th from web


@PryncessDenise Saw your tweet about access to NEXIUM® (esomeprazole magnesium) AstraZeneca may be able to help. Call us @ 800-236-9933
8:56 AM Jan 4th from web in reply to PryncessDenise

@beattyj Please call AstraZeneca @800-236-9933 to report any side effects you had when taking NEXIUM® (esomeprazole magnesium)
6:32 AM Dec 14th, 2009 from web in reply to beattyj

Pharma Case Studies: J&J Acquires Children with Diabetes Site




FAMILY SUPPORT NETWORK
Find a Friend in the Family Support Network



children with DIABETES
The online community for kids, families and adults with diabetes

Diabetes Scholars FOUNDATION
Family Scholarships Available for




FRIENDS FOR LIFE

February 17, 2010
Volume 16, Number 7
First Published in June 1995

Chat
Forums
Conferences
Ask the Diabetes Team
Care Suggestions
School
News

Miss America 1999 Nicole Johnson, with daughter Ava



"Because I have type 1 diabetes, my daughter is at risk. That's why I had her screened through TrialNet."


Getting Around

- What's New
- About CWD
- CWD Pressroom
- Privacy Policy
- Search CWD

People

- Family Support Network
- Adults with Diabetes
- Care Photos
- Chat Rooms
- CWD Conferences
- ▶ Kids with Diabetes
- Parents
- Parent Humor
- Scholarships and Financial Aid
- Grandparents
- Humorous Tidbits
- Mailing Lists
- CWD Forums
- Poetry and Art
- Videos
- Polls
- Quilt for Life
- Surveys
- Rufus
- Blogs

Living With Diabetes



Hello! My name is Colton and I am 12 years old. I would like to tell you my story. In the summer of 2000, I had not been feeling very good for quite some time. My mommy didn't know what was wrong with me. I didn't know what was wrong, and didn't know how to tell her or my daddy how I was feeling. I was asking for something to drink constantly as well as wetting my diaper so much that it was constantly leaking. My mommy was changing me every 10 or 15 minutes sometimes. My mommy took me to the doctor on June 2 because of they way I was acting and drinking so much. My pediatrician told her that I was drinking so much because I had a sore throat, and that whatever I was drinking felt good to my throat. But, that is all that she did. No tests or anything. She put me on an antibiotic and that was it. My mommy has a friend who is a nurse. She told my mommy that she didn't want to scare her, but that she should take me back to the doctor and have them test my pee pee because all of the symptoms that I had pointed towards diabetes.

▶ Visit Colton's page
▶ More children with diabetes


Upcoming CWD Conferences and Events

Friends for Life: Orlando 2010
June 29 – July 4, 2010
Orlando World Center Marriott
Orlando, Florida
Family Scholarships from
Diabetes Scholars Foundation

Friends for Life Canada: Vancouver 2010
August 27-29, 2010
Renaissance Vancouver Hotel Harbourside
Vancouver, BC, Canada

CWD Focus on Technology
September 3-5, 2010
Renaissance Charlotte Suites Hotel
Charlotte, North Carolina
Family Scholarships from
Diabetes Scholars Foundation

QUILT FOR LIFE



View Lauren's Quilt
View the Online Quilt Gallery

Current Poll

For insulin pump users, how often do you usually change your infusion set?

- Every day
- Every two days
- Every three days
- Every four days
- Every five days or more

Vote

Poll Results

For insulin pump users, how often do you usually change your infusion set?

Every day

1% | 3

Consumers and Physicians Speak Out



Image: Stephen Dummit for The Wall Street Journal

- Abilify Bristol Myers Squibb
 - Andy Behrman, a former spokesman for Abilify says that “Abilify Kills”

- Doctor Admits Vaccine Is More Deadly Than Swine Flu Itself
 - Fox news segment. Physician says he will not give it to his kids



Consumers and Physicians Speak Out

The screenshot shows the Facebook page for 'Truth About Gardasil'. The page features a pink and green ribbon logo with the text 'Women of Courage' and 'Truth About Gardasil'. The page is divided into several sections: 'Suggest to Friends', a memorial message for those who have passed away from side effects of Gardasil, a list of fans including Jen Mossett, Sherri Tenpenny, Amy Poteet Fisher, B.a. Brooks, Jacqui Brewer, and Elisabeth Jones Twigg, and a 'Favorite Pages' section featuring 'Vaccination Information Network (VINE)'. The main content area shows recent activity with multiple posts from the 'Truth About Gardasil' page. One post from February 13 at 6:03pm discusses the need for a bill making Gardasil mandatory in New York. Another post from January 29 at 6:35pm shares a link to a news article about Merck's doctor hit list. A comment from Mike Sansom is also visible.

facebook

Search

Truth About Gardasil

Become a Fan

Wall Info Photos Discussions

Truth About Gardasil + Fans Truth About Gardasil Just Fans

RECENT ACTIVITY

- Truth About Gardasil discussed I meet with legislators on the Truth About Gardasil discussion board.
- Truth About Gardasil discussed I meet with legislators on the Truth About Gardasil discussion board.
- 2 more similar stories

Truth About Gardasil needs help from those of you in New York. They are trying to pass a bill making gardasil mandatory for all those born after 1/1/96 - this CAN NOT happen! We must continue to post / email / phone about this and let them know it is not acceptable! If you are in NY and have been injured by gardasil or know someone that has, please contact me!

February 13 at 6:03pm

7 people like this.

RECENT ACTIVITY

- Truth About Gardasil discussed THATS ENOUGH on the Truth About Gardasil discussion board.
- Truth About Gardasil discussed Vaccine Ingredients on the Truth About Gardasil discussion board.
- Truth About Gardasil discussed THATS ENOUGH on the Truth About Gardasil discussion board.

Truth About Gardasil <http://www.theaustralian.com.au/news/drug-company-drew-up-doctor-hit-list/story-0-1225693586492> Merck uses intimidation in Vioxx incident? Hmm, think they sound honest and trustworthy?

Vioxx maker Merck and Co drew up doctor hit list | The Australian
www.theaustralian.com.au
AN international drug company made a hit list of doctors who had to be "neutralised" or discredited because they criticised the anti-arthritis drug the pharmaceutical giant produced.

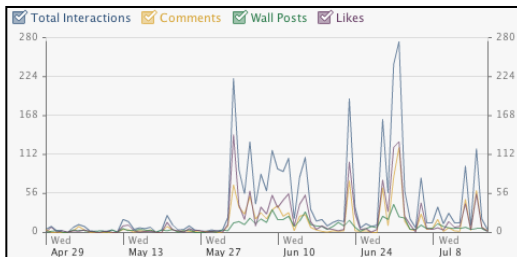
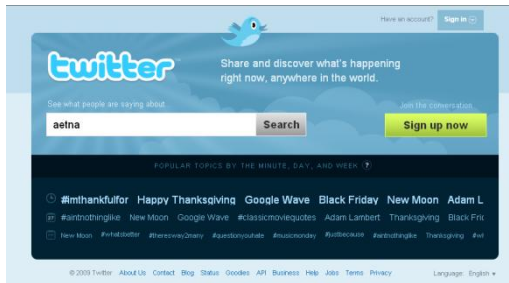
January 29 at 6:35pm · Share

Lynda Franc likes this.

View all 6 comments

Mike Sansom Ms. Rigby, I applaud you updating us with the latest unpopular news/item of immediate attention, please contact me further about your post. Thanks.
February 13 at 3:44pm · Report

Social Listening: Examples



■ Tools

- Spiral16
- Radian6
- Networked Insights
- IDG Social Scout (service that uses Networked Insights)

■ Twitter Search

- search.twitter.com
- Advanced search
- Search API

■ Facebook Insights

- Measures user exposure, actions, and behavior relating to the Social Ads and Facebook Page
- Fan demographic and geographic data
- Fan integration graphs
- Post quality

■ Google Sidewiki

Risk, Rules, and the FDA

- Risk in Health 2.0 for Pharma
 - Discussions of Adverse Events
 - Discussions of off-label use
 - DDMAC has not issued guidelines
- Regulation by warning letter
- DTC and Physician marketing will be addressed as part of healthcare reform
- FDA has not thought this through
 - New guidelines for social media are just being developed now
 - Federal hearings were in held in DC on Nov.12 – 13, the FDA is still accepting comments until February 28, 2010

Transparency — the Next Big Thing

- Excellence is obvious when your customers begin to compare notes
 - Consistent high-quality products and services
 - Predictable across multiple channels and products
 - Equitable pricing and terms
 - Quality support, service, returns, exchanges
- Most companies will need to invest in improved internal systems and process to thrive in this environment
 - Order management
 - Quality and fulfillment
 - Service and support mgmt.
 - Customer self-help
 - Customer community
 - Search optimization
 - Business process
 - Damage control

Essential Guidance

- Look for process improvement opportunities inside your own company — create transparency in customer-facing processes
- Identify and participate in relevant Internet communities
- Establish/sponsor a community for your customers and prospects
- Evaluate/improve search placement for relevant terms
- Establish “damage control” policies and procedures

Questions?

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Program Director

Please feel free to email me at:

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Or join me and your peers and the conversations in our [Health Industry Insights Community](http://idc-insights-community.com/health) (<http://idc-insights-community.com/health>)



Panel Discussion

- **Fraser Edward**

Research in Motion
Manager, Market Development

- **Joe LeBas**

Vivisimo, Inc
Vice President and General Manager, Americas