



# **KOL Partnership Model**

***A New Approach to Improve Efficacy***

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## Introduction

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**This position paper proposes guidelines to help pharmaceutical companies partner with KOLs to better support the development and the marketing of their products**

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### Context & Objective

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- **Partnerships with KOLs (Key Opinion Leaders)<sup>1</sup>, also called TLs (Thought Leaders) are part of the armamentarium used by pharmaceutical companies to:**
    - Develop their products through pre-clinical and clinical trials
    - Raise the awareness and the preference of HCPs (Health Care Professionals) but also of health authorities, PAGs (Patient Advocacy Groups), individual patients, etc., for their marketed brands
  - **In this position paper, Smart Pharma Consulting proposes:**
    - A simple but rigorous process and...
    - A set of tools...
- ... to recruit and manage KOLs in a more efficient and effective way**

*This position paper has been written, assuming that it is not illegal nor reprehensible to collaborate with medical thought leaders to influence other stakeholders' opinion and behavior vis-à-vis a medical practice or a given medicine, provided it is in the best interest of patients*

## Introduction

KOLs have the potential to influence their peers, but also other stakeholders in a specific area, at international, national and local levels

### KOLs definition

#### KOL: Key Opinion Leader

- The acronym KOL is generally used to qualify physicians who have a **recognized expertise in a specific field** (e.g. oncology, endocrinology, epidemiology, biostatistics, etc.)...
- ... and who are able to **influence the opinion and the medical practice** (e.g. treatment scheme, prescribing habits, preference for a given product, etc.) of their peers (specialists or GPs)
- KOLs may also contribute to **modify medical guidelines** when they are members of learned societies or when they advise health authorities
- KOLs' influence can be at international, national or local levels
- Other stakeholders may also be considered as KOLs (e.g. members of governments, of health authorities, of learned societies, of patient advocacy groups, journalists, pharmacists, nurses, etc.)

#### Pyramid of influence & types of influencers



# Introduction

The relationships between pharmaceutical companies<sup>1</sup> and healthcare professionals are increasingly regulated and potential conflicts of interest must be disclosed

## Regulatory framework<sup>2</sup> regarding KOLs & pharmaceutical companies partnerships



### European regulations - Directive 2001/83/CE (Article 94)

- Prohibition of bonuses, benefits (in cash or in kind) from pharmaceutical companies to prescribers
- Hospitality at a reasonable level



### France

- **Prohibition of benefits** (in cash or in kind), in any form whatsoever, directly or indirectly, for medical professionals
- Obligation to **disclose potential conflicts of interest** between health professionals or health facilities with pharmaceutical companies
- Measures put in place in the DMOS law **extended to students in healthcare** and patient advocacy groups



### UK

- **Interdiction to supply, offer or promise gift, pecuniary advantage or benefit** to HCPs in connection with the promotion of medicines or as an inducement to prescribe, supply, administer, recommend, buy or sell any medicine
- During meetings organized by pharma companies, **provision of inexpensive items only** (pens, etc.) that **must not bear the name of any medicine** or any information about medicines



### Germany

- No influence of HCPs in a **dishonest** manner and therefore **no** advantages **granted** or **promised**
- **Open** and **transparent** cooperation
- Existence of a code for the collaboration (FSA) of the pharmaceutical industry with physicians, pharmacists and other healthcare professionals to **avoid conflicts of interest**



### Italy

- **Prohibition** in all circumstances, of **any kind of economic incentives** designed to compensate healthcare professionals for time taken from normal professional activities in order to participate in congressional events
- Participation in conferences related to the role performed by the industries in the field of research, development and scientific data and inspired by **ethical, scientific** and **cost-effective criteria**



### Spain

- **Prohibition** of **direct or indirect offering** or provision of any type of incentive, prize or gift (in cash or in kind) to HCPs
- **Previous communication to authorities of all events** of a scientific or promotional nature, organized or sponsored by pharma companies
- No **organization** or **sponsor** of events that take place **outside of Spain** (unless it makes more sense from a logistical standpoint)

Sources: <http://eur-lex.europa.eu/> – Leem – The ABPI Code of Practice for the Pharmaceutical Industry – Code of conduct farmindustria – Farmaindustria Code of practice – Compliance issues for pharmaceutical companies in Germany

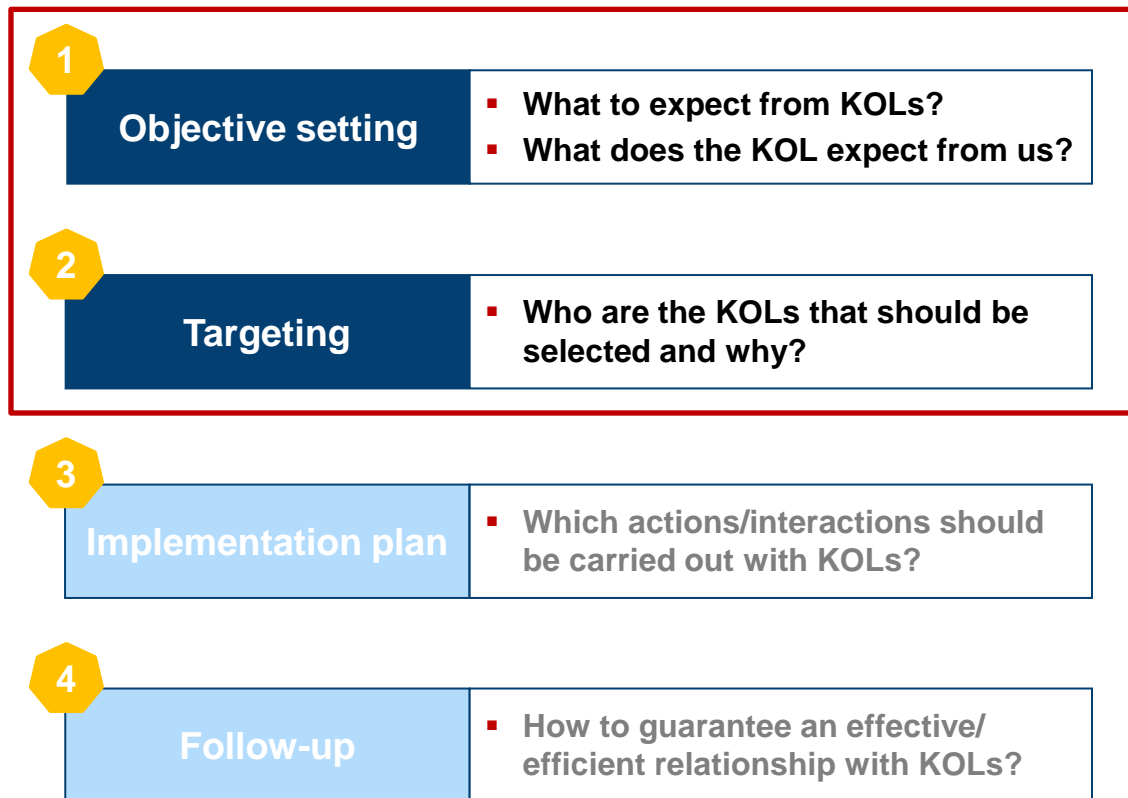
<sup>1</sup> Including biotechnology and medical devices companies – <sup>2</sup> Extracts

## Guidelines for KOLs Recruitment

An effective collaboration with KOLs requires to follow a rigorous recruitment process that should be based on accurate information gathering

### Recruitment & Management process of KOLs

#### The 4 key steps



Recruitment

Management

- Relationships with KOLs should be defined according to the set objectives
- Then, the prospective KOLs should be profiled and targeted
- Once the KOLs have been selected, their interactions with the pharma company and the activities they are expected to implement should be defined and formalized in an implementation plan
- The implementation of the plan should be carefully monitored with the help of KPIs (Key Performance Indicators) and of KEIs (Key Execution Indicators)

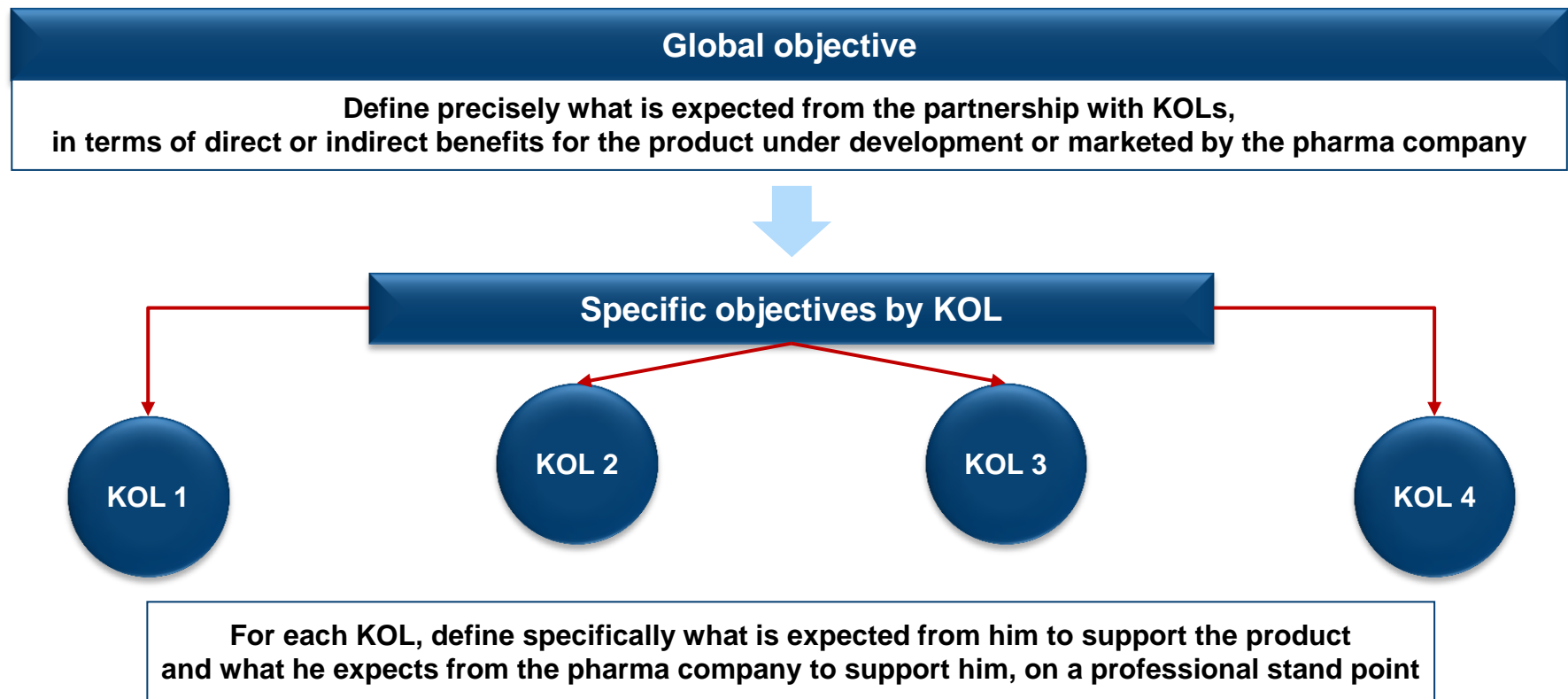
## Guidelines for KOLs Recruitment

Before defining the activities to be carried out by KOLs, specific objectives, consistent with a global objective, have to be set for each of them

1

### Objective setting

*Partnerships with KOLs should be part of a global strategy, including also market access, medico-marketing and sales initiatives*

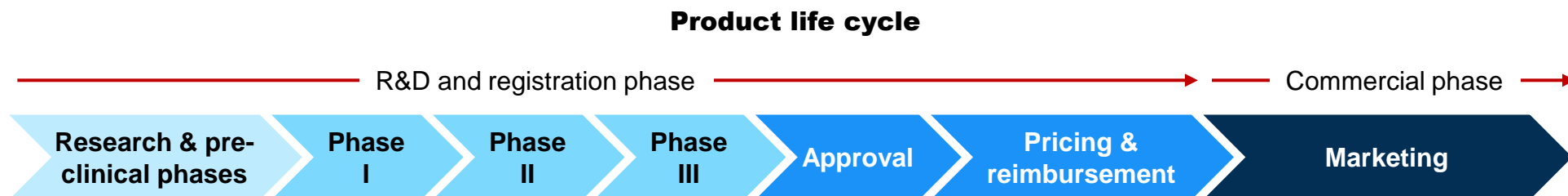


## Guidelines for KOLs Recruitment

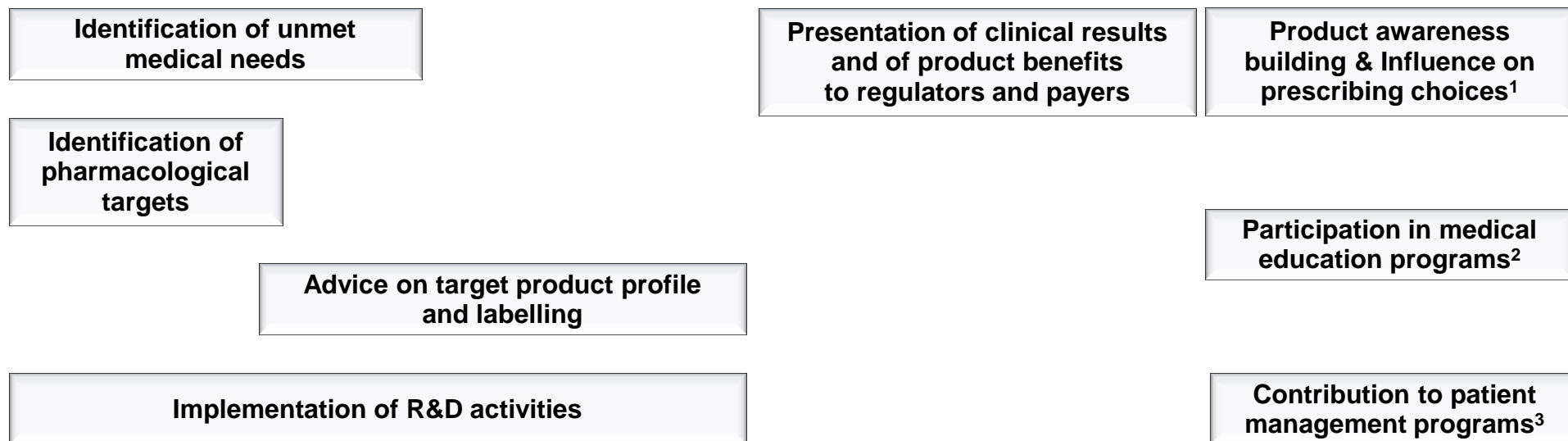
The objective of the KOL partnership and the corresponding activities will depend on where the product is positioned on its life cycle

1

### Examples of KOL roles according to the product life cycle



### Examples of KOL roles



Sources: Adapted from GBI Research, Market Rx, by Smart Pharma Consulting

<sup>1</sup> Through articles, lectures, etc. – <sup>2</sup> Through Continuous Medical Education (CME) programs –  
<sup>3</sup> Through projects carried out with patient advocacy groups (PAGs)

## Guidelines for KOLs Recruitment

The targeting phase should enable to identify the KOLs with whom a partnership should be beneficial and to understand their networks of influence

2

### KOLs targeting – Methodology (1/2)

#### Key questions

#### What to do

##### Selection criteria

- What are the relevant selection criteria to be used considering the final objective?

- Review of possible relevant criteria (e.g. level of influence, scope of influence, scientific/media awareness, membership of a network, etc.)
- Selection of a limited number of relevant criteria

##### KOLs profiling

- What information should be collected?
- How to collect and analyze this information?

- Internal and external databases reviews to qualify KOLs
- Assessment of the number of: publications, quotes, lectures during conferences and congresses, etc.

##### KOLs segmentation

- What is the degree of interest and the likely support of the KOL for the product?

- Mapping of preselected KOLs on a matrix according to the most relevant criteria
- Identification of KOLs' networks

##### KOLs selection

- Who are the KOLs that should be selected to partner with?
- For which kind of partnership?

- Selection of the KOLs
- Preliminary definition of the type of partnerships to be carried out with the targeted KOLs



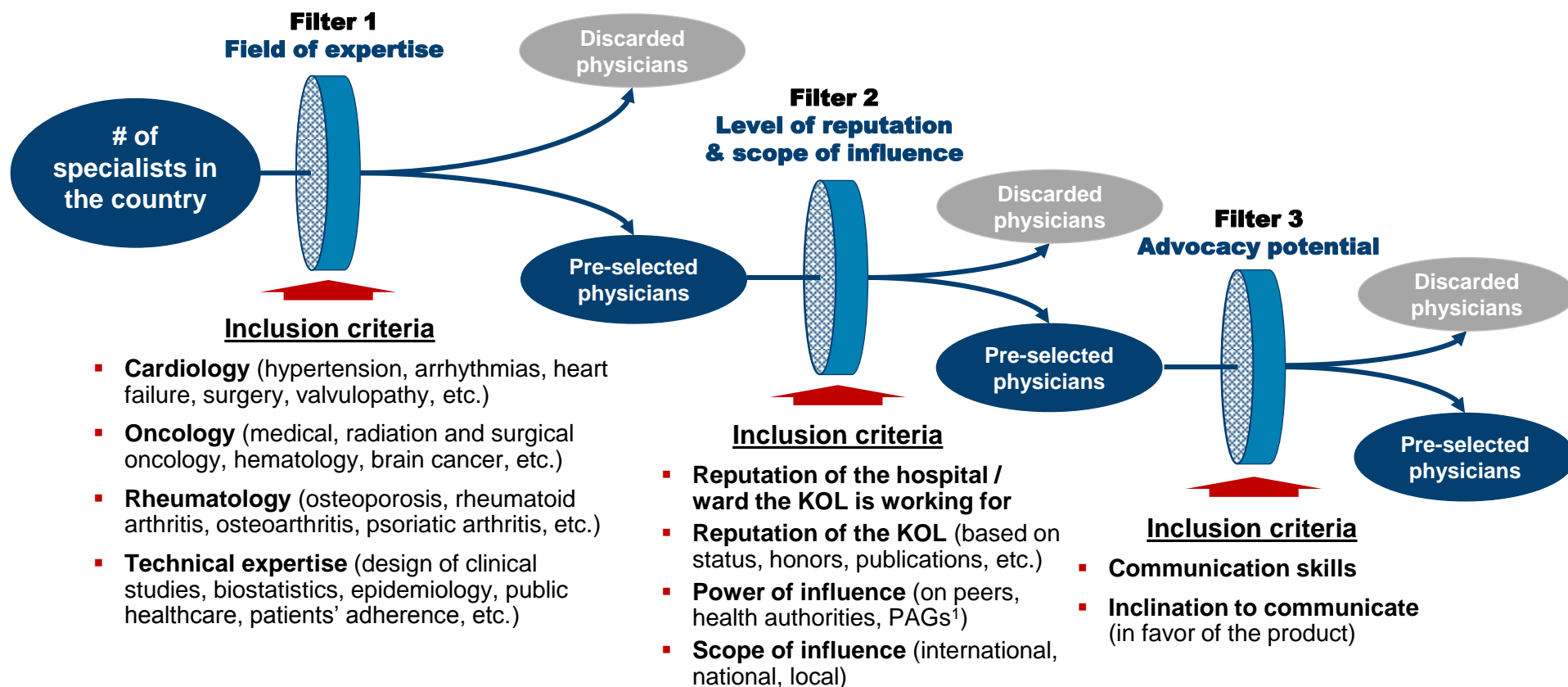
## Guidelines for KOLs Recruitment

Relevant selection criteria and gathering of accurate and reliable information about the KOL profile are of utmost importance to optimize the value of the partnership

2

### KOLs targeting – Methodology (2/2)

Screening process (illustrative)

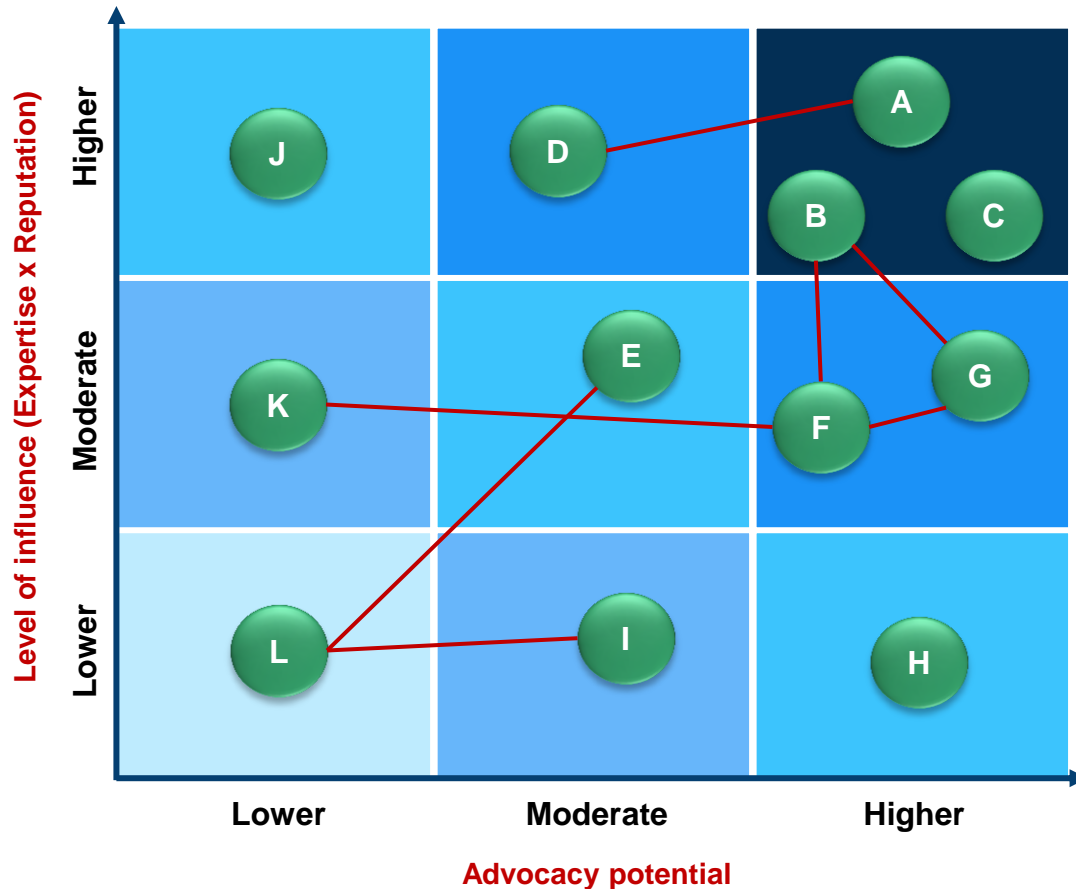


## Guidelines for KOLs Recruitment

The proposed matrix is a useful tool to prioritize the candidate KOLs to partner with and to pre-define the type of partnerships that could be considered with them

2

### KOL targeting – Segmentation & selection



- The proposed matrix facilitates the final selection (targeting) of pre-selected KOLs based on their level of influence and their inclination to support the development and/or the use of the pharma company product
- The matrix helps to define the kind of partnerships to be set with the KOLs
- The prioritization of the targeted KOLs, should also take into account:
  - The life cycle of the product
  - The networks of influence of the KOLs

## Guidelines for KOLs Recruitment

**Qualification of KOLs should be documented with reliable data collected through desk research and field research (e.g. interviews of peers and of prospective KOLs)**

2

### How to qualify KOLs?

What data to collect?	How to collect data?	How to analyze data?
<ul style="list-style-type: none"> <li>▪ <b>Status</b> (e.g. head of medical department, professor, age, public vs. private practice, place(s) of practice)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Internet, direct search</li> </ul>	<ul style="list-style-type: none"> <li>▪ Being head of hospital and professor is a plus</li> </ul>
<ul style="list-style-type: none"> <li>▪ <b>Field of expertise/interest</b> in a therapeutic area, in a technique, etc.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Probing by MSL<sup>1</sup>, medical reps and other collaborators of the pharma company</li> </ul>	<ul style="list-style-type: none"> <li>▪ KOLs should express their field of interest over the long term and their expectations from a partnership with the pharma company</li> </ul>
<ul style="list-style-type: none"> <li>▪ <b>Level of reputation &amp; scope of influence</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Field research (e.g. peers, pharmacists interviews, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Internal or national level is preferable in general to local level (but it depends on the objective)</li> </ul>
<ul style="list-style-type: none"> <li>▪ <b>Communication skills</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Analysis of past performances</li> <li>▪ Interviews of peers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Verbal communication (e.g. lectures, courses)</li> <li>▪ Written communication (e.g. articles, websites)</li> </ul>
<ul style="list-style-type: none"> <li>▪ <b>Type &amp; level of communication</b> <ul style="list-style-type: none"> <li>– # articles published (impact factor<sup>2</sup>, peer-/ non peer reviewed journals, position as an author...)</li> <li>– # of trainings p.a. (CME<sup>3</sup>)</li> <li>– Teaching activity at university</li> <li>– Presence on the Internet</li> <li>– # of lectures (congresses, round tables)</li> <li>– # of quotes by journalists in current year</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Review of scientific articles published (PubMed/Medline, Google scholar, Expertscape)</li> <li>▪ Probing by collaborators of the pharma company and peers interviews to evaluate trainings, teaching activities and lectures</li> <li>▪ Google searching for presence and quotes on the Internet</li> </ul>	<ul style="list-style-type: none"> <li>▪ The higher the impact factor is, the better</li> <li>▪ KOLs should be ideally positioned as 1<sup>st</sup> or last authors in articles</li> <li>▪ The higher the number of training, teaching and lectures, the better</li> <li>▪ Perceived quality of articles, training, teaching and lectures should be assessed</li> </ul>
<ul style="list-style-type: none"> <li>▪ <b>Membership in learned societies</b> <ul style="list-style-type: none"> <li>– Title / position / activities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ On the website of the learned societies or by calling them</li> </ul>	<ul style="list-style-type: none"> <li>▪ Being a member of the management board is a plus</li> </ul>
<ul style="list-style-type: none"> <li>▪ <b>Inclination to partner with a pharma company and to support its products</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Probing by collaborators of the pharma company</li> </ul>	<ul style="list-style-type: none"> <li>▪ They should clearly express their interest in the product and the company...</li> <li>▪ ... and in the types of partnerships they are looking for</li> </ul>

## Guidelines for KOLs Recruitment

To convince KOLs to partner, it is important to take into account their expectations and to highlight the benefits they will draw from it, in terms of professional development

2

### How to convince KOLs to partner?

#### What do they want?

- Qualify a KOL to **design a partnership that will fulfill his professional expectations** (*simultaneously with that of the pharmaceutical company*):
  - Is the KOL yet a partner of the pharmaceutical company?
  - What has been qualitatively and quantitatively his level of involvement?
  - What has been his feed-back from previous collaborations?
  - What is his mid- to long-term professional ambition?
  - What does he expect from pharmaceutical companies in general, and specifically?
  - Is he looking for a long-term partnership?
  - Is he more inclined to enter into a “win-win” partnership or a “fee-for-service” transaction?

#### What should be proposed?

- Based on the knowledge and understanding of the KOL's professional expectations...
- ... propose ideas – to be discussed – of activities to be carried out through the partnership
- **Emphasize the benefits the KOL will draw** in terms of **personal awareness** and **competence development** through the partnership:
  - Increasing awareness and fame through publication of articles, interviews in media, presentations during congresses, lectures during medical meetings, etc.
  - Increasing reputation and extending influence by participating to scientific works (e.g. clinical trials)
  - Professional development through access to recent information, to high education programs<sup>1</sup>, by working in new research/medical areas, etc.
  - Funding of Investigator Initiated Studies (IIS)

## Guidelines for KOLs Recruitment

The KOL ID card is a practical tool which contains in one single page the most important information required to qualify and then recruit pre-selected KOLs

### Tool to facilitate the recruitment process: KOL ID card

<b>KOL name</b>	(First name – surname)	<b>Medical status</b>	MD – head of medical department – professor of medicine, etc.	<b>Location</b>	Address & City
<b>Specialty</b>	(Oncology – cardiology, etc.)	<b>Medical setting</b>	Private hospital – public hospital – teaching hospital – private office	<b>Country</b>	

Specific objectives for the pharma company		•			
Specific benefits for the KOL		•			

Items		Assessment <sup>1</sup>		Facts / Rationale	Source
<b>KOL Profile</b>	Field of expertise/interest in the therapeutic area	International - National - Local	•		
	Level of reputation	Low -Medium-High	•		
	Scope of influence	Low -Medium-High	•		
	Advocacy potential	Low -Medium-High	•		

Recommendations	Priority <sup>1</sup>	Rationale
Medical department	Low -Medium-High	•

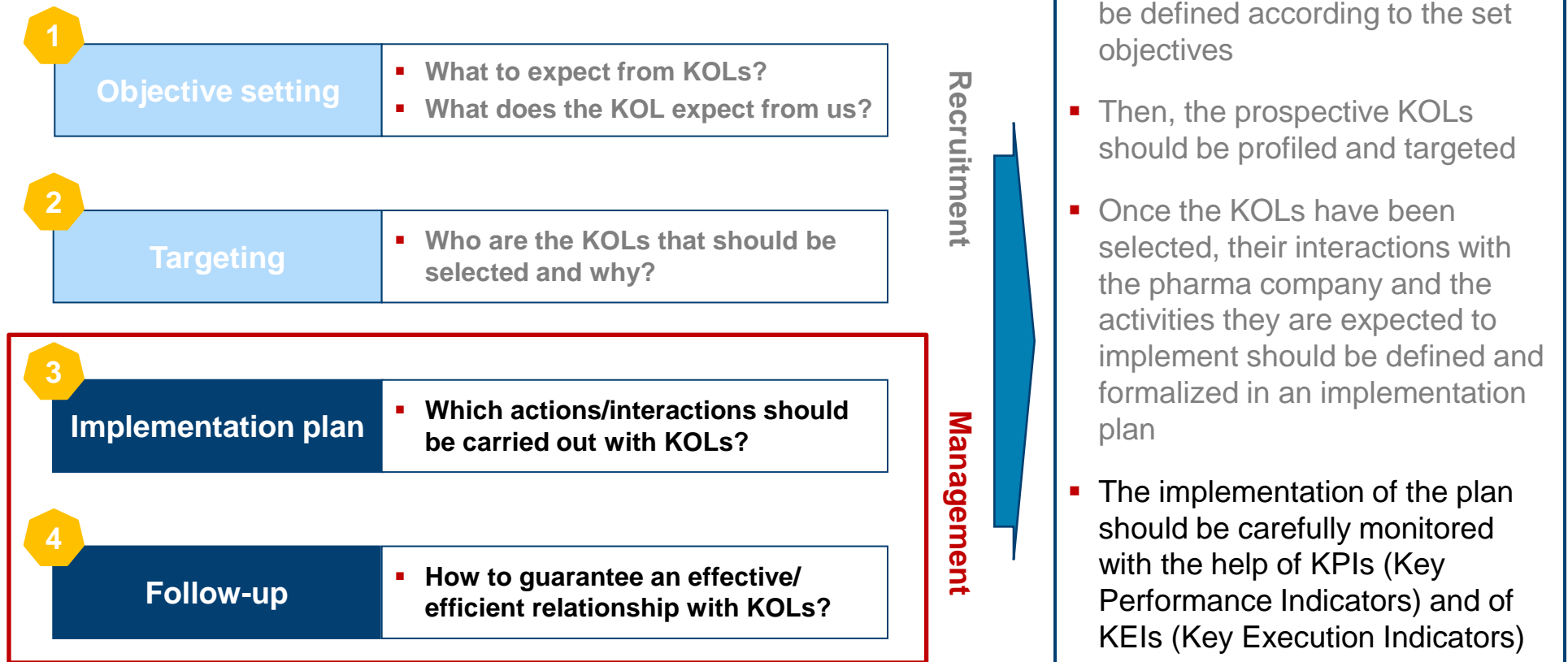
Final decision	
Selection: <b>YES - NO</b>	Rationale:

# Guidelines for KOLs Management

An effective collaboration with KOLs requires to follow a rigorous recruitment process and to develop a precise action plan along with monitoring tools

## Recruitment & Management process of KOLs

### The 4 key steps



Sources: Smart Pharma Consulting

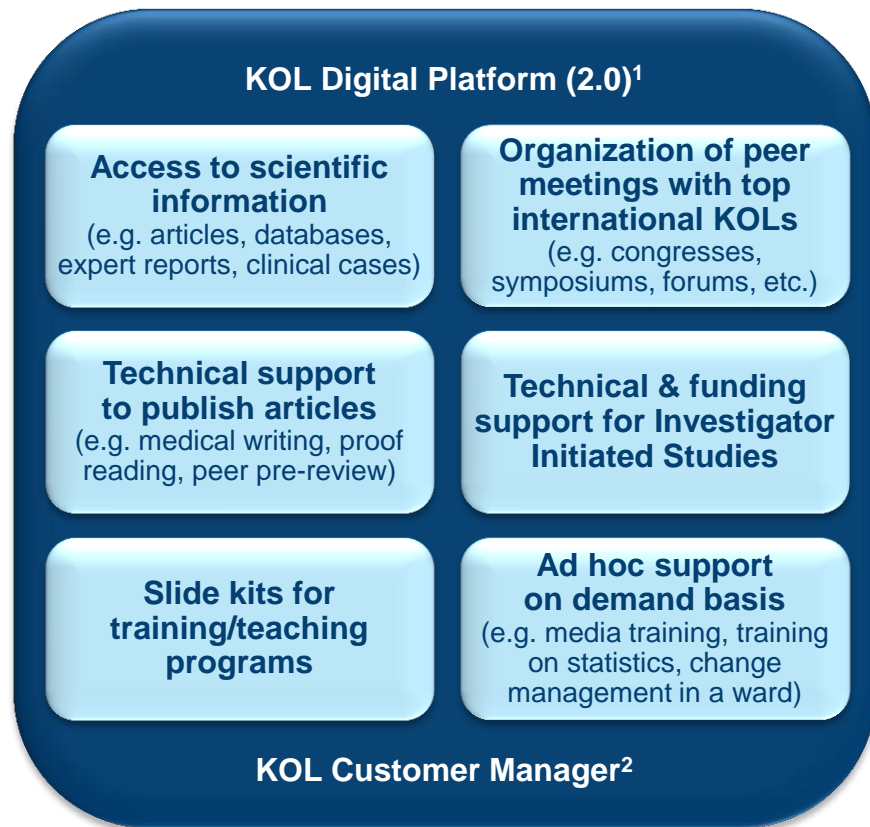
## Guidelines for KOLs Management

Pharma companies should balance what they expect from KOLs in terms of activities and what they give them in terms of services to ensure a win-win partnership

3

### Services proposed to & activities carried out by KOLs

#### Services proposed to KOLs (Illustrative)



#### Activities carried out by KOLs (Illustrative)



Sources: Smart Pharma Consulting

<sup>1</sup> Access limited to KOLs – <sup>2</sup> Each KOL should have a dedicated Customer Manager (e.g. a MSL) –

<sup>3</sup> Such as Visual aids, leaflets for patients – <sup>4</sup> Continuous Medical Education – <sup>5</sup> Such as lectures to sales forces, face-to-face meetings with the marketing team, etc.



## Guidelines for KOLs Management

If KOLs share the objective of the pharma company and accept to communicate, the following means can influence medical practices and help better position products

3

### Potential value of KOL activities (1/2)

#### Article writing

- KOLs may support the pharmaceutical company priorities by communicating in scientific journals, professional magazines or lay press regarding:
  - New medical approaches, new guidelines, patient management, etc. in a given therapeutic area, etc.)
  - The position of its products in the therapeutic strategy
- Perceived reliability by readers: **H**
- Number of exposed readers: **L** to **H**

#### Lectures during symposia

- While giving lectures, KOLs may accept to cover topics of interest for the company
- ... and/or position their products vs. direct competitors or indirect therapeutic alternatives
- KOLs may also share their own experience as a prescriber of the company products
- Perceived reliability by participants: **M**
- Number of exposed attendants: **L**

#### Press conference

- Press conferences enable to have indirectly access to a larger number of readers
- The messages conveyed by KOLs may sometimes be modified by journalists
- It is rare for KOLs to make strong statements in favor of a product during a press conference
- Perceived reliability by readers: **M**
- Number of exposed readers: **H**

#### Training of peers / CME<sup>1</sup>

- KOLs may communicate to their peers, to pharmacists, to nurses, etc., during training sessions regarding:
  - Medical topics of interest for the pharma
  - The position of its products in the therapeutic strategy
- In such circumstances, KOLs may convey strong messages, if they decide to do so
- Perceived reliability by participants: **M-H**
- Number of exposed attendants: **M**

**H:** Higher – **M:** Medium – **L:** Lower



## Guidelines for KOLs Management

KOLs can be of great value through direct collaboration (by training, informing, giving advice, etc.) with medical, marketing and sales teams of the pharma company

3

### Potential value of KOL activities (2/2)

#### Participation to internal meetings

- KOLs may play an effective role during internal meetings by:
  - Informing / training medico-marketing-sales teams about scientific trends and position of competitors
  - Role playing with sales reps (e.g. selling forums)
  - Being invited as a “guest star” to show collaborators the ability of the pharma company to partner with top medical leaders

#### Promo material review

- KOLs may collaborate with the marketing team by contributing to the creation of promotional materials
- Thus, they can create value by:
  - Suggesting messages
  - Developing a scientific rationale to support messages/claims of the products
  - Assessing and editing the content of promotional materials (visual aid, booklet...)

#### Advisory board member

- Advisory board meetings with KOLs should be preferred to individual meetings with KOLs when the objective is to:
  - Generate innovative ideas or concepts (brainstorming sessions)
  - Estimate key market trends (including stakeholders opinions and behaviors)
  - Obtain a consensual opinion regarding market environment, products development, marketing strategy, etc.

#### Participation to scientific studies

- KOLs, especially if they are supposed to sign or co-sign the corresponding publication, may be very helpful to:
  - Participate to the design of the study
  - Carry out the study (either about a given pathology only or a pathology & its treatments involving the pharmaceutical company product)
- Involvement of KOLs in medical/clinical studies will depend on their field of interest

## Guidelines for KOLs Management

The development of a “KOL Partnership Plan” or K2P is a centerpiece to maximize the probability of success while partnering with KOLs

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### KOL Partnership Plan (K2P) – Why?

WHY?

- The development of a clear – precise – concise and shared implementation plan, called “KOL Partnership Plan” or K2P – between KOLs and pharmaceutical companies – will ensure that:
  - The objectives of the collaboration is well understood and agreed upon
  - The reciprocal expectations are well defined and accepted
  - The respective commitments are fulfilled and in due time
- The preparation of an implementation plan increases the probability of success of the partnership over time...
- ... and minimizes the risks of mutual disappointments
- The KOL Partnership Plan (K2P) will facilitate the coordination and the communication across the pharmaceutical company; and thus optimize synergies across market access, medical, marketing and sales departments

## Guidelines for KOLs Management

To build a useful and effective “KOL Partnership Plan”, it is recommended to follow the 5-step process proposed here-below

3

### KOL Partnership Plan (K2P) – How?

HOW?

- **Step 1:** Design of templates that can be shared with the KOLs and the pharmaceutical company collaborators (i.e. from market access, medical, marketing departments)
- **Step 2:** Filling up of the templates by the KOL Customer Manager assigned by the pharmaceutical company to the KOL (e.g. MSL) in coordination with the Medical Director and possibly with the Marketing Director<sup>1</sup>
- **Step 3:** Review and adjustment of the content of the K2P by the MSL with the KOL:
  - Objectives
  - Services proposed by the pharmaceutical company
  - Activities to be carried out by the KOL
  - Fees to be paid at a fair market value (if any)
  - Monitoring process of each service/activity
- **Step 4:** Follow up of the K2P:
  - Prepare the planned services/activities
  - Analyze the quality of execution of these services/activities
  - Reconsider – if not relevant anymore – planned services/activities
- **Step 5:** Assessment of the partnership:
  - Twice a year by the KOL Customer Manager and the KOL to measure the level of mutual satisfaction and decide about potential adjustments to be carried out
  - Once a year by a committee including: the Medical Director, the Marketing Director, the KOL Customer Manager, and possibly the General Manager, to evaluate the KOL partnership and decide about potential adjustments

## Guidelines for KOLs Management

The “KOL Partnership Plan” should include key information extracted from the KOL ID card<sup>1</sup>, specify the objectives of the partnership, its scope and duration

3

### KOL Partnership Plan (K2P) – Model: Introduction

<b>KOL name</b>	(First name – surname)	<b>Medical status</b>	MD – head of medical department – professor of medicine, etc.	<b>Medical setting</b>	Private clinic – private hospital – public hospital – teaching hospital
<b>Interest/ Expertise</b>	(e.g. Pulmonology, cardiology, etc.)	<b>Reputation/ Influence</b>	Private hospital – public hospital – teaching hospital – private office	<b>Advocacy potential</b>	Address & City & Country
<b>KOL Customer Manager</b>	(First name – surname – position in the company)	<b>Role</b>	(Describe briefly his role vis-à-vis the KOL)	<b>Coordination with...</b>	(Indicates the other collaborators whom to coordinate)

<b>Objectives of the partnership</b>					
<b>Specific scope of the partnership<sup>2</sup></b>					
<b>Duration of the partnership</b>	<b>Starting date</b>		<b>Ending date</b>		

Sources: Smart Pharma Consulting

<sup>1</sup> See the proposed format p.14 – <sup>2</sup> Examples: Development of a digital tool to improve patients adherence, Coordination of a multi-centric study, Expert support to estimate the medico-economic value of a new product, Lectures during medical meetings organized with peers, etc.

## Guidelines for KOLs Management

The “KOL Partnership Plan” should also describe the services proposed to the KOL and the activities the latter will carry out, as well as monitoring indicators

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4

### KOL Partnership Plan (K2P) – Model: Service/Activity Card<sup>1</sup>

Service or Activity #1	Pharma company objective	KOL objective	Key step description	Timing
.	.	.	.	.

Quality of execution Indicators		Expected impact Indicators		Comments
Expected	Achieved	Expected	Achieved	
.	.	.	.	
.	.	.	.	

## Guidelines for KOLs Management

Key execution and performance indicators are essential to optimize the chance of a proper execution of services/activities and of a win-win partnership

4

### Examples of tool to monitor partnerships with KOLs

Pharma company services	Key execution indicators (KEIs)	Key performance indicators (KPIs)
<ul style="list-style-type: none"> <li>Access to scientific information</li> <li>Organization of peer meetings with top international KOLs</li> <li>Technical support to publish articles</li> <li>Technical &amp; funding support to IIS<sup>1</sup></li> <li>Slide kits for training/teaching programs</li> <li>Ad hoc support on demand basis</li> </ul>	<ul style="list-style-type: none"> <li>Interest (10-point scale)</li> <li>Utility (10-point scale)</li> <li>Practicality (10-point scale)</li> <li>Implementation<sup>2</sup> (10-point scale)</li> </ul>	<ul style="list-style-type: none"> <li>Global level of satisfaction of KOLs (10-point scale)</li> <li>Inclination of KOLs to support the pharma company products: <ul style="list-style-type: none"> <li>Number of lectures / trainings / publications</li> <li>Quality/objectivity of messages conveyed to peers, pharmacists, patients, etc.</li> </ul> </li> <li>Increased level of KOLs awareness and reputation</li> <li>Increased level of products awareness and reputation</li> </ul>
KOLs activities	Key execution indicators (KEIs)	Key performance indicators (KPIs)
<ul style="list-style-type: none"> <li>Lecture during symposia</li> <li>Training of peers</li> </ul>	<ul style="list-style-type: none"> <li>Interest (10-point scale)</li> <li>Utility (10-point scale)</li> <li>Practicality (10-point scale)</li> <li>Implementation<sup>2</sup> (10-point scale)</li> </ul>	<ul style="list-style-type: none"> <li>Global level of satisfaction of attendees (10-point scale)</li> <li>Inclination of attendees to support &amp; prescribe the product: <ul style="list-style-type: none"> <li>Number of lectures / trainings / publications</li> <li>Quality/objectivity of messages conveyed to peers, pharmacists, patients, etc.</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>Article writing</li> <li>Press conference</li> </ul>	<ul style="list-style-type: none"> <li>Acceptance by recognized journals (scientific, medical, or in lay press, etc.)</li> <li>Post on well-know websites</li> <li>Number of journalists and quality of articles</li> </ul>	<ul style="list-style-type: none"> <li>Impact factor (for scientific/medical journals)</li> <li>Number of broadcasted issues for lay press</li> <li>Number of views / likes on Internet</li> <li>Contribution of content to support the product</li> </ul>
<ul style="list-style-type: none"> <li>Participation in scientific studies</li> </ul>	<ul style="list-style-type: none"> <li>Implementation (number of patients recruited, timing, cost vs. plan)</li> </ul>	<ul style="list-style-type: none"> <li>Publication of an article in a good scientific journal</li> <li>Impact of the publication on product reputation</li> </ul>

Sources: Smart Pharma Consulting

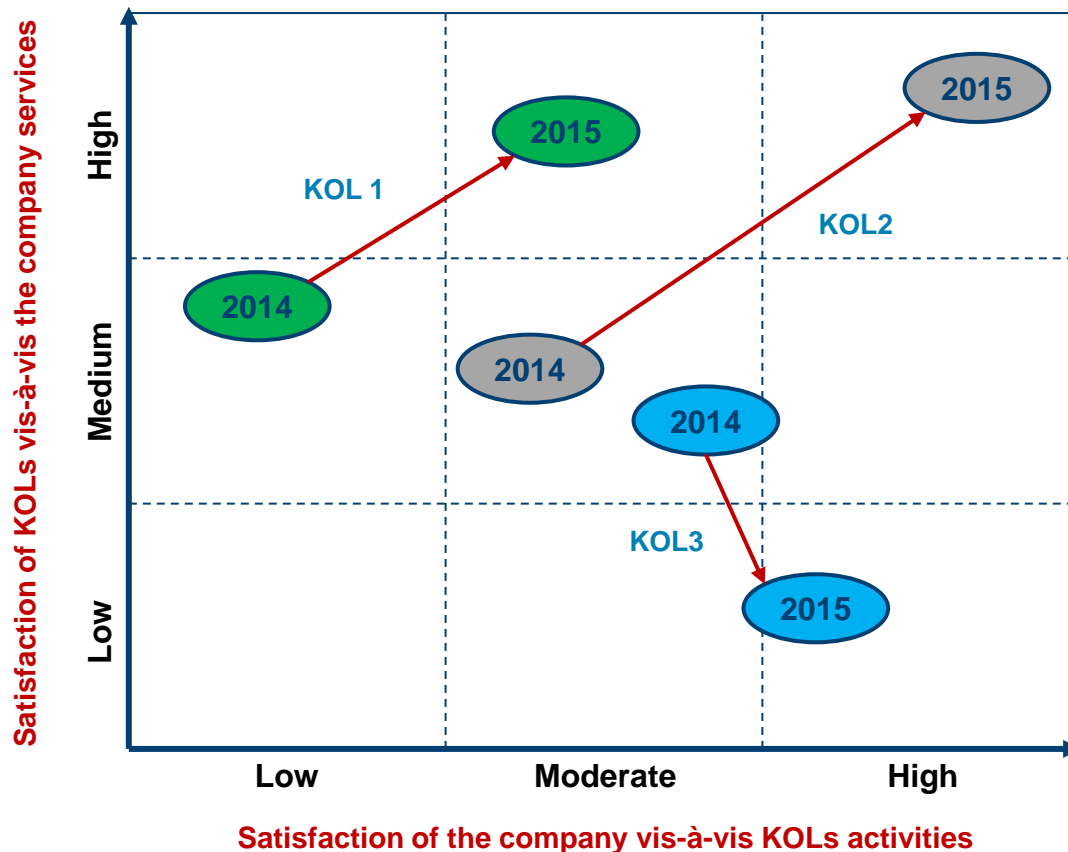
<sup>1</sup> Investigator Initiated Studies – <sup>2</sup> Logistics, timing, cost vs. plan

## Guidelines for KOLs Management

This mapping can help visualize the reciprocal assessment of the partnership over time, as perceived by the pharmaceutical company and the KOL

4

### Mapping of KOL involved in partnership – Follow-up tool



- The matrix helps visualize the opinion of KOLs regarding the services offered by the pharmaceutical company through the partnership...
- ...and the opinion of the pharmaceutical company regarding the activities carried out by the KOL
- It is proposed to evaluate the mutual level of satisfaction on an annual basis, but other periods of time can be used, if more appropriate, such as: quarter or semester
- It is suggested to use a three level assessment scale:
  - High (meaning above expectation)
  - Medium (meaning as per expectation)
  - Low (meaning below expectation)

## Conclusions

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The recruitment phase requires a painstaking gathering and analysis of information to qualify and evaluate the KOLs with whom the pharma company should partner

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### Key points to recruit KOLs

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- The recruitment of KOLs should comply with six key principles:
  1. Define a **specific objective** regarding the recruitment of KOLs, which should be integrated in a global strategy
  2. **Qualify and evaluate** the profile of the **prospective KOLs** by collecting reliable data related to their:
    - Field of expertise (medical and/or technical)
    - Level of reputation & scope of influence
    - Advocacy potential (communication skills and inclination to communicate)
  3. **Segment & pre-select** the KOLs based on their profile
  4. **Inform** the **prospective KOLs** of the pharmaceutical company intention to partner with them:
    - What is expected from them? (specific objectives of the pharma company)
    - What can be “offered” to them by the pharmaceutical company? (specific benefits for the KOLs)
  5. **Select the KOLs** whose profiles are **in line with** the **specific objectives** of the partnership...
  6. ...and **who value the services** that the pharmaceutical companies is willing to propose



## Conclusions

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The optimal management of KOLs requires to agree on a shared objective and on the related services and activities that should be planned and carefully monitored

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### Key points to manage KOLs

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- Once the KOLs have accepted, on principle, to partner with the pharma company, the **KOL Customer Manager** who has been assigned should organize an “**alignment meeting**” to:
  - Agree on the **mutual objectives** of the partnership
  - Define the **services to be proposed** by the company
  - Define the **activities to be implemented** by the KOL
  - Specify the **expected outcomes** for each service and activity
  - Set the corresponding **work plan** with timelines
  - Agree on the **approach** to **monitor** and the **indicators** to **measure** the corresponding **outcomes**
- The results of this meeting should be **formalized** in a “**KOL Partnership Plan**” (K2P)
- It is recommended to **maintain** a minimum level of 6 to 7 **services and activities** to ensure **regular contacts** between the KOL and the pharma company
- **After** the **completion** of each **service or activity**, an **assessment of the execution** and of the **impact** should be carried out by the KOL and the KOL Customer Manager of the pharma company

### 8 recommendations to optimize partnerships with KOLs

1. Define **clear** and **precise objectives**
2. **Communicate**, upfront, on the **mutual benefits** of the partnership, for the KOL and the pharma company
3. Ensure an **open** and **transparent relationship**
4. **Assign a KOL Customer Manager** who will be the KOL preferred contact point and who will ensure alignment and information sharing between all collaborators of the pharma company in contact with him
5. Make sure that the **services** provided by the KOL **contribute to fulfill** his **needs** and **expectations**
6. **Avoid** to ask **KOLs to promote “aggressively”** the **products**, which would affect his reputation and the pharma company one, and which may contravene national and international regulations
7. Build the **relationship** on an **exchange of services** rather than a fee-for-service deal
8. Make the **best use** of the **KOL limited time** by organizing useful exchanges

## Core capabilities

### 1 Strategy

- Assessing the attractiveness of markets (Hospital / retail innovative products - Vaccines - OTC - Generics)
- Growth strategy
  - Optimization of marketing / sales investments
  - Development of a company in the hospital market Business
  - Valuation for acquisition
  - Portfolio / franchise assessment
- Extension of product life cycle performance
  - Improvement mature products performance
  - Adaptation of price strategy
- Defense strategies vs. new entrants
- Competitive strategies in the hospital market
- Strategic partnerships companies / pharmacies

### 2 Management

- Facilitation and structuring of strategic thinking for multidisciplinary product teams
  - Key challenges identification
  - Strategic options formalization
  - Resource allocation optimization program
- Training of marketing and market research teams to sales forecast techniques (modeling and scenarios development)
- Development and implementation of a "coaching program" for area managers
  - Sales reps coaching
  - Regional action plans roll-out
- Development and implementation of a "sales techniques program" for sales forces (**STAR**<sup>1</sup>)

<sup>1</sup> Sales Techniques Application for Results (training courser)



### 3 Organization

- Rethink of operational units organization
- Improvement of sales force effectiveness
- Improvement of the distribution channels covering the hospital and retail markets
- Development of a strategic planning process