Summer Training Report

By

Aastha Dwivedi

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Aastha Dwivedi

Student

MBA Pharmaceutical

IIHMR UNIVERSITY JAIPUR

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A STUDY TO EVALUATE E-DETAILING AS AN ACCEPTABLE AND EFFECTIVE PHARMACEUTICAL MARKETING COMMUNICATION TOOL (esp. during Covid period)

ABSTRACT

Electronic detailing or E-detailing is defined as use of electronic and interactive media to facilitate sales presentation, increase customer engagement and enable better service to healthcare professional and other stakeholders Pharmaceutical Professionals are facing dozens of challenges on the field, like how to deliver effective and productive information to their customer in given limited and little time. To overcome these challenges pharmaceutical companies are trying to upgrade their marketing platform by devising new online customer engagement strategies. Moving graphics and video are used to capture the attention of Healthcare Professionals (HCPs).As the current ongoing COVID crisis has forced the pharmaceutical companies to adopt online mediums for their pharmaceutical drug promotion and hence this study tries to explore the opportunities, *challenges* and most importantly the *perceptions* of the Healthcare and Pharmaceutical professionals towards these online mediums. The study also investigates further the *"time"* given by HCPs to the pharmaceutical professionals for their *Online product promotion* mediums as during *Offline promotion* the time allotted by HCPs to pharmaceutical professionals was less than a minute. This is the qualitative study of HCPs (n= 100) and Pharmaceutical Professionals (n=122).The variables in the questionnaire were suggested by senior pharmaceutical industry leaders during their telephonic interview for the evaluation of e-detailing The overall findings of the study evaluates and understand the acceptability, effectiveness and perceptions towards E-detailing and online pharmaceutical drug promotion mediums of HCPs, and Pharmaceutical field sales professionals of pharmaceutical industry.

KEYWORDS

E-detailing, digital marketing, social media marketing, healthcare professional, pharmaceutical industry,

pharmaceutical marketing, webinar, online detailing,

INTRODUCTION

Electronic detailing or E-detailing is defined as use of electronic and interactive media to facilitate sales presentation, increase customer engagement, and enable better service to healthcare

professional and other stakeholders. (Kwak, 2006). According to research E-detailing has potential to reduce marketing cost and increase the acceptability of physicians (Montoya, 2008).“E-detailing keyways for successful implementation to digital technologies in pharmaceutical marketing” state that E-detailing is an IT tool for promotional activities and delivering pharmaceutical product information to healthcare professionals. (Getov, 2019,). Numerous studies showed that physician attitude towards detailing and pharmaceutical sale representative are mostly negative. It was found that 28% of HCPs (Healthcare Physician) were only satisfied with current trend of detailing and 48% were dissatisfied (Manchanda, 2005). Healthcare marketing is to learn and understand needs and desire of patients in order to meet higher standards of necessities (Radu, 2017). Physicians are key players in pharmaceuticals sales (Arora, 2006).They play prominent role for purchaser a particular therapy segment and prescribing the particular brands and theses stage where pharmaceutical companies get advance in relationship with physicians (SAXENA, 2018) Day by day doctors are giving less time to medical representative for pharmaceutical product promotion as a result of that products are not getting desired
exposure (Jones, 2008). Due to overloaded work of doctors, their dependency on internet for any product information was increasing and so looking at this alternative, pharmaceutical companies introduced e-detailing to deliver their information (Ventura, 2013).

Indian Pharmaceutical sector is highly competitive and one of the highly organized sector among all segments (Rajan, 2015). The Indian pharmaceutical industry ranked 3rd in world in terms of volume and 14th in terms of value (M, 2020). Although, the global prescription drug market grew by CAGR of 6.4% in 2007 (Berkrot, 2008) but it declined to CAGR 2% in the period 2017-2022 (Rickwood, 2017). Sales representative are the live hood of the industry (Ranjan, 2015). Despite increasing reps numbers, physician now typically spend seven minutes per day with reps compared to 12 minutes in 1995. (Amirkhanova, 2006)

Over a decade healthcare sector has seen change in marketing trend like mass marketing approach to specific approach, image marketing to specific marketing, one measure for all to personalization (Purcarea, 2019). The Internet has brought a big revolution in the world in every sector. Pharmaceutical digital marketing gives ample opportunities to companies to promote their products to the right and targeted audience (P.saytya, 2017). There are multiple strategies to boost the brand via different platforms like SEO, social media, etc. Social media marketing includes social media platforms to engage their audience by uploading text, images, or videos. E-mail, Facebook, Instagram, YouTube, Twitter is commonly used in this market (Parekh, 2016,). Effective social media marketing can build trust pharmaceutical-physician relationship and also help to communicate all necessary information about product (Akhtar N., 2015).There are *four benefits* of E-detailing over traditional sale rep detailing. *First,*it is more cost effective and efficient in maintaining interaction in physicians. *Second*, undoubting e-detailing improves accuracy of product marketing message. *Third,* it provides pharmaceutical companies a much more accurate data of

physician behavior. *Lastly* it provides double coverage. MR details plus e-details can give multiplier effect towards prescription (McKinsey, 2012).

COVID-19 pandemic has caused unexpected challenges for healthcare and pharmaceutical sector worldwide (Nicolaa, 2020).The deadly virus disease has highly impacted on economy and people livelihoods and brought the digital transformation into focus (Savić, 2020).During abrupt period pharmaceutical companies are responding to rapid challenges start from interruption of supply chain and need to change business process (Vala, May 2020).Pharmaceutical companies are experiencing the shift towards working from home. This impact on the industry. This shift from in-person to digital is seen in advertising , medical conference, and sale reps meeting with physicians (Globaldata, 2020)

From these studies we will able to understand barriers in digital transformation in pharmaceutical companies and various social, demographic, and behavioral variables behind acceptance of e-detailing in India.

LITERATURE REVIEW

E-marketing is an important area for marketers. It is proved that web, internet and information technologies has made transformation in all sectors of business operations (Krishnamurthy, 2005). Pharmaceutical product detailing is described as a process of communicating the pharmaceutical product message to healthcare professionals (Banerjee, 2011).Company personal, managerial readiness, operational capabilities, audience appetence, are the important factors responsible for proper acceptability of E-detailing program (Banerjee S. D., 2011).Planning and executing can help brand team to provide more relevant information to the physicians (Bates, 2006).Meeting with physicians means exposure to brand message with communication tools like laptop, tablets, visual aid, literature etc. (Bhatt, 2018).

E-detailing helps physicians to look up medicines as per their requirements (Tiwari, 2016-2026) Medical representative are bridge between physician and companies (Lad P, 2017) The numbers of sales representative has increased by 77%in last eight years whereas Doctors were increased by 15% (Mark, 2003).US pharmaceutical companies spent more than 10 billion dollar on field force. Discomfort with detailing among Healthcare Physicians is on high time rise (Bernewitz, 2001).Prime reason cited by Doctors is that they aren't getting information they want. The bottom line in pharmaceutical companies have seen a diminishing ,marginal return on additional reps (Martin E. Elling, 2002).Overall, 28% to 35% of MRs experienced using laptop, computers, and tablets in pharmaceutical marketing. However the percent will get different in different group of Med.Reps according to geographical aera, age, education level and positions (Kwak, 2006). Prescription product manufactures appear to benefits from increasing from both –

E-detailing as well as traditional detailing (Carter, 2009).According to McKinsey consultant showed of 100 representative visits doctor, and only 8 representatives actually speak with physicians and HyGro consulting group found that only 7% representative calls last more than 2 minutes (Bates, 2006). According to one research it has been seen that utilization of internet among physicians is higher (Quijada, 2008). 97% of physicians felt that e-detailing is better than traditional way for explaining complex issues and 95% rated that presentation are better. 85% find that it is superior option to deliver information and 80% recommended that company should continue e-detailing (Anderson, 2006). Among Social Media, whatsapp is the highest, followed by webinar, are most preferred social media platforms used by specialist to stay connected (Jawaid, 2018).Physicians are always fond of new and advanced technologies such as tablets based e-detailing. Some of the major key players in e-detailing market are AstraZeneca, Abbott Health care, Novartis, AG., Hoffmann La Roche ,Merck & Co, Johnson and Johnson, Pfizer, Sanofi Aventis, Boston Scientific., GlaxoSmithKline (Tiwari, 2016-2026). Convenience, quality of information and incentives are some of the common reasons, physicians opt for adaption of E-detailing (Alkhateeb, 2008).E-detailing gives more flexibility to physicians to gather the information from pharmaceutical companies in their suitable time. (Myshko, 2004) The impact of social media is huge, moving from conventional marketing to and adapting social media is very powerful tool, which can rephase whole pharmaceutical industry. (Ahmed R. R., 2014) According to one qualitative. study, twitter and blogs were the two main social media tools that are mostly use by physician (Sirouspanahi, 2014).There are many benefits of E-detailing like lower detail cost, greater reach and interaction frequency, higher customer acceptance, provider situation and market structure ,greater depth and speed of information (Heutschi, 2003).49% of physician are e-pharma. E-pharma means a physicians that do continuous prescribing and have used the internet for e-detailing and CME purpose (Mack, 2005).There are three type of e-detailing -- *virtual e-detailing*, *e-detailing through a portal* for doctors, *scripted* e-detailing (R. Nalini, 2017)

PURPOSE OF STUDY

The overall purpose of study is to understand and evaluate the acceptability and effectiveness of Pharmaceutical E-detailing in view of healthcare professional (HCP) in COVID-19 pandemic situation.

RESEARCH OBJECTIVE

The survey instrument was designed keeping in view the following objectives to be measured:

- To evaluate the acceptability and effectiveness of e-detailing among Healthcare Professionals (HCP's).

- To evaluate the acceptability of e-detailing among Medical Representatives using 0iPads/Tablets for product promotion and understand the benefits and challenges of e-detailing.

RESEARCH METHODOLOGY

This is a qualitative study and exploratory in nature.

In this study opinion of 122 Medical representative and 100 Doctor's pan India were taken in to consideration. Purposive sampling was used. As the major criteria for the sample inclusion was complete lockdown in the geographical territory. It was predetermined that respondents in this study will be especially from those locations where complete lockdown is imposed by the government officials to fully understand the importance of digital promotion and impact of restrictions of physical interaction with HCPs.

The survey was done online between April 2020 to June 2020 during corona pandemic situation. This study is completely new; as pretested structured survey instrument/ questionnaire was not available. The design of questionnaire and construct considered were discussed with senior marketing and sales leaders of pharmaceutical organizations and based on their recommendations and further their adaptability, working condition, marketing promotion and sales promotion method the variables were opted. Further, during questionnaire formation, other variables such as customers opinion, advantages, drawbacks, ease of use, service delivery and problems faced by medical representative were kept in mind and taken into consideration. The questions were multiple choice questions and ranking order questions. The data was collected, tabulated and analyzed using SPSS 22 version.

RESULTS AND ANALYSIS

Health Care Professionals

THEME 1 – CUSTOMERS OPINION

		Frequency	Percent	Valid Percent	Cumulative Percentage
What are your views of kind of e-detailing					
Valid	I think it is a better way to promote product	67	66.3	***67.0***	67.0
	I think medical representatives are now detailing products that I want.	9	8.9	9.0	76.0
	Helps answer my queries better	3	3.0	3.0	79.0
	Helps me to profile patients better.	3	3.0	3.0	82.0
	I think it is just a gimmick	10	9.9	10.0	92.0

	I don’t think it adds value to me	8	7.9	8.0	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		
What are the advantages of e-detailing over printed visual detailing					
Valid	More interactive	46	45.5	***46.6***	59.0
	Eye-catching	27	26.7	27.0	86.0
	Easy to understand	14	13.9	14.0	100
	Any other	13	12.9	13.0	13.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		

The data analysis reveals and it can be concluded that when on being asked by customers(aka doctors) of their views on e-detailing than it was found that 67% of them responded that e-detailing is a better way to promote the pharmaceutical products.
Also, it has been found that 46% Doctors believe that e-detailing method is more interactive than as compared to traditional printed visual-aid detailing.

THEME 2 -ADVANTAGES TO MEDICAL REPRESENTATIVE

		Frequency	Percent	Valid Percent	Cumulative Percentage
Handle objections through the use of e-detailing					
Valid	Yes	67	66.3	***67.0***	67.0
	No	33	32.7	33.0	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		
Would you say that the medical representatives are better able to promote the brands using e-detailing					
Valid	Agree	*50*	*49.5*	***50.0***	*50.0*
	Slightly agree	*27*	*26.7*	***27.0***	***77.0***
	no comment	15	14.9	15.0	92.0
	Slightly disagree	3	3.0	3.0	95.0
	Disagree	5	5.0	5.0	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		

The responses to the above questions were very clear; it is clear that 67% of MRs are able to handle objections raised by the HCPs through the use of e-detailing. Also, 77% (agree + slightly agree) of Doctors agree with the statement that a Medical Representative is better able to promote the brands using e-visual tools.

THEME-3-CHANGE IN DOCTORs PERCEPTION

		Frequency	Percent	Valid Percent	Cumulative Percentage
Would you say that the use of e-detailing has influenced your prescribing behaviour					
Valid	Yes	19	18.8	19.0	19.0
	No	43	42.6	***43.0***	62.0
	Maybe	38	37.6	38.0	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		
Do you feel it makes an impact on					
Valid	Information being given to you	72	71.3	***72.0***	72.0
	Patient profiling	11	10.9	11.0	83.0
	Queries answered	17	16.8	17.0	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		

e-detailing is also capable of changing the Doctors perception. Although the responses given by HCPs to some extent are contradictory -when asked does e-detailing influences your prescribing behavior- 43 % responded No, but when asked that does it makes an impact on the information given to you then ~72% responded Yes. It need further detailed probing and survey to the accurate information. But if we combine the response of Yes and May be in context to the influence of e-detailing ,then the total workout to be 57% which to a great extent matches with the response to doe sit makes an impact.

THEME-4- DRAWBACKS

		Frequency	Percent	Valid Percent	Cumulative Percentage
What are the major drawbacks observed of e-detailing					
Valid	The tablets are too small, so cannot read what is on	25	24.8	25.0	25.0
	Medical reps just show video	24	23.8	24.0	49.0
	content is repeatable	13	12.9	13.0	62.0
	Time consuming	38	37.6	***38.0***	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		
Do you think Companies are trying to make a difference through e-Detailing					
Valid	Yes	83	82.2	83.0	83.0
	No	17	16.8	17.0	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		

			Gender		Total
			Male	**Female**	
What are the major drawbacks of e-detailing	The tablets are too small	Count % within year of practice	16 64.0%	9 36.0%	25
	Med Reps just show videos	Count % within year of practice	17 70.8%	7 29.2%	24
	Content is repeatable	Count % within year of practice	9 69.2%	4 30.8%	13
	Time consuming	Count % within year of practice	28 73.7%	10 26.3%	38
Total		Count	70	30	100

When Doctors were asked about the major drawbacks, around 38% of the Doctors said it is *time consuming*.

When the objection Time consuming was contrasted with Gender, then it was Time objection was more pronounced in Males as compared to Females. Also, nearly 49% of Doctors (Males Doctors -71%) said the Med. Reps *just show only the video* (may be they are not able to read the content as the Tablet given to them is too small).

THEME-5-CUSTOMERS/ (aka) DOCTORS SUPREMACY

		Frequency	Percent	Valid Percent	Cumulative Percentage
Do you prefer pre-recorded online detailing or face-face online detailing					
Valid	Prerecorded	34	33.7	34.0	34.0
	face-to-face online detailing	66	65.3	***66.0***	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		
What is the most appropriate time for online detailing to you					
Valid	Morning	8	7.9	8.0	8.0
	Afternoon	45	44.6	***45.0***	53.0
	Evening	28	27.7	28.0	81.0
	late evening	19	18.8	19.0	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		

Overall, how many brand exposures you would have like to have for online detailing					
Valid	Less than three brands	43	42.6	***43.0***	***43.0***
	Three brands	24	23.8	24.0	***67.0***
	Four brands	10	9.9	10.0	77.0
	five brands	6	5.9	6.0	83.0
	more than five brands	17	16.8	17.0	100.
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		
Post Covid period, will you prefer the continuation generic substitution with your branded drugs					
Valid	Yes	41	40.6	***41.0***	***41.0***
	No	39	38.6	39.0	80.0
	Can't say	20	19.8	20.0	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		
Post COVID period, which of the following brand/product detailing communication method will you prefer from the Pharmaceutical companies					
Valid	Online digital face-to-face product detailing communication	35	34.7	***35.0***	***35.0***
	Prerecorded online product detailing communication	22	21.8	22.0	57.0
	Personal visit of Medical Rep (coming &detailing as done earlier)	12	11.9	12.0	69.0
	Combination of Personal visit + Digital product communication	31	30.7	31.0	100.0
	Total	100	99.0	100.0	
Missing	System	1	1.0		
Total		101	100.0		

Since Pharma selling is an indirect selling, as Pharmaceutical companies cannot sell directly to the Customers aka Patients, hence Customers here are Doctors and hence it is very important for Pharmaceutical organizations to understand the perceptions of the Doctors ((Arun G, 2020). The above analysis reveals a paradigm shift from the traditional personal visit interaction to online interaction. As, 66% Doctors prefer face-to-face online interactive detailing and that too around afternoon or evening, as 73% HCPs opted afternoon or evening as preferred time. Also, 67% HCPs mentioned that they would like to have three or less than three brand exposure in one single interaction (although 43% Drs. opted for less than three brands). This is a significant observation as it have the previous

studies also emphasize the same point during face -to-face detailing((Jain, 2011). Moreover, in pharmaceutical selling ,ethically, the HCP prescription substitution is not allowed (Kairi, 2017), but since Covid is an exception condition, hence 41% of the HCPs agreed to the substitution as the availability of the medicine is more important.

The most significant observation of the study can be attributed to finding that even post covid, HCPs are willing to have online interaction with the pharmaceutical professionals at digital platforms, but they prefer the same in person or face-to-face detailing and communication. In this, the percentage of Male and Female HCPs is almost the same, around ~35%.

Another revealing and striking information is HCPs don't want to abandon the face-to-face interaction with Pharmaceutical field professionals whether online or offline. In option asked to whether you would like to have a combination of personal visit + Digital communication, against a towering 47% yes response from Female HCPs, only ~24% Male HCPs said yes.

This is certainly a new normal , a paradigm shift in the marketing and business communication of the pharmaceutical companies which may certainly lead to new selling and business models in the pharmaceutical industry.

Contrasted with Gender :

			Gender		**Total**
			Male	**Female**	
What is the preferred convenient time for e-detailing					
	Morning	Count % within year of practice	6 8.6%	2 6.7%	8
	Afternoon	Count % within year of practice	31 44.3%	14 46.7%	45
	Evening	Count % within year of practice	19 27.1%	9 30.0%	28
	Late Evening	Count % within year of practice	14 20.0%	5 16.7%	19
How many brands exposure you prefer					
	Less than three	Count % within year of practice	29 41.4%	14 46.6%	43
	Three	Count % within year of practice	20 28.5%	4 13.3%	24
	Four	Count % within year of practice	5 7.14%	5 16.6%	10
	Five	Count % within year of practice	5 7.14%	1 3.33%	6
	More than five	Count % within year of practice	11 15.7%	6 20.0%	17

Post COVID which brand product method					
	Online digital face-to-face product detailing commn.	Count % within year of practice	24 34.3%	11 36.7%	35
	Pre-recorded online product Detailing commn.	Count % within year of practice	18 25.7%	4 13.3%	22
	Personal visit of Medical Rep (coming & detailing as done earlier)	Count % within year of practice	11 15.7%	1 3.3%	12
	Combination of Personal visit +Digital product commn.	Count % within year of practice	17 24.3%	14 46.7%	31
Total		Count	70	30	100

The most preferred time for e-detailing opted by the Male and females is almost the same where around ~45% of the males and females preferred afternoon and nearly 27% male HCP opted for evening (preferably between 3.30pm-5 pm) whereas 30% females too opted for same evening slot.

THEME-6 - CONTRASTING THE RESPONSES of *Drawbacks, Customer supremacy* WITH GENDER & YEARS OF PRACTICE

Gender			Year of practice				Total
			1 to 5 Yrs	6 to 10 Yrs	11 to 15 Yrs	More than 15 Yrs	
What are the major drawbacks of e-detailing							
Male	The tablets are too small	Count % within year of practice	6 26.1%	7 25.9%	0 0.0%	3 20.0%	16
	Med Reps just show videos	Count % within year of practice	8 34.8%	6 22.2%	1 20.0%	2 13.3%	17
	Content is repeatable	Count % within year of practice	3 13.0%	1 3.7%	0 0.0%	5 33.3%	9

	Time consuming	Count % within year of practice	6 26.1%	13 48.1%	4 80%	5 33.3%	28
Total		Count	23	27	5	15	70
Female	The tablets are too small	Count % within year of practice	5 29.4%	2 33.3%	1 100%	1 16.7%	9
	Med Reps just show videos	Count % within year of practice	3 17.6%	2 33.3%	0 0.0%	2 33.3%	7
	Content is repeatable	Count % within year of practice	3 17.6%	1 16.7%	0 0.0%	0 0.0%	4
	Time consuming	Count % within year of practice	6 35.3%	1 16.7%	0 0.0%	3 50.0%	10
Total		Count	17	6	1	6	30

After looking into more details the study shows that there are many reasons contributing to the drawback of e-detailing like male practitioner with experience between 5 to 10 years felt uncomfortable with tablet size as it was too small and also found it to be more time consuming; experts with less than 5 year experience felt that MRs are just showing videos and the content is repeatable. However on the Female practitioner part, majority reviews came from doctors who had less than 5 years of experience in their speciality and their views were almost same as of male of being tabalet too small, time consuming, content repeatable with full of videos.

Gender			**Years of practice**				Total
			1 to 5 Yrs.	6 to 10 Yrs.	11 to 15 Yrs.	More than 15 Yrs.	
How many brand exposure you prefer							
Male	Less than 3	Count % within year of practice	9 47.3%	11 42.3%	1 14.2%	8 44.4%	29
	Three	Count % within year of practice	5 26.3%	10 38.4%	3 42.8%	2 11.1%	20
	Four	Count % within year of practice	1 5.26%	3 11.5%	0 0.0%	1 5.55%	5
	Five	Count % within year of practice	2 10.5%	0 0.0%	0 0.0%	3 16.6%	5
	More than Five	Count % within year of practice	2 10.5%	2 7.69%	3 42.8%	4 22.2%	11
Total		Count	19	26	7	18	70
Female	Less than 3	Count % within year of practice	10 55.5%	4 57.1%		0 0.0%	14
	Three	Count % within year of practice	2 11.1%	0 0.0%		2 40.0%	4
	Four	Count % within year of practice	4 22.2%	0 0.0%		1 20.0%	5
	Five	Count % within year of practice	0 0.0%	1 14.2%		0 0.0%	1
	More than Five	Count % within year of practice	2 11.1%	2 28.5%		2 40.0%	6

Total		Count	18	7		5	30
What is the approx. time for e-detailing							
Male	Morning	Count % within year of practice	2 33.3%	2 33.3%	0 0.0%	2 33.3%	6
	Afternoon	Count % within year of practice	7 22.6%	13 41.9%	4 12.9%	7 22.6%	31
	Evening	Count % within year of practice	6 31.6%	9 37.4%	1 5.3%	3 15.8%	19
	Late Evening	Count % within year of practice	8 57.1%	3 31.4%	0 0.0%	3 21.4%	14
Total		Count	23	27	5	15	70
Female	Morning	Count % within year of practice	2 100%	0 0.0%	0 0.0%	0 0.0%	2
	Afternoon	Count % within year of practice	6 42.9%	5 35.7%	1 7.1%	2 14.3%	14
	Evening	Count % within year of practice	5 55.6%	1 11.1%	0 0.0%	3 33.3%	9
	Late Evening	Count % within year of practice	4 80.0%	0 0.0%	0 0.0%	1 20.0%	5
Total		Count	17	6	1	6	30

Above data shows that majority of male doctors prefer afternoon as best time for conversation with MRs. However few doctors with less than 5 years of experience in the field like morning interaction and doctor with over 15 years of experience choose evening time for interaction. However, in the case of female doctors the opinion is mixed.

Pharmaceutical Professionals (aka) Medical Sales Representatives

THEME-1- MEDICAL REPRESENTATIVE PERCEPTION

		Frequency	Percent	Valid Percent	Cumulative Percentage
What are your views on using e-detailing for the promotion of brands					
Valid	Accessibility	28	23.0	23.0	23.0
	More interactive	22	18.0	18.0	41.0
	More detailing	15	12.3	12.3	53.3
	More information in shorter time	55	45.1	***45.1***	98.4
	Nuisance	2	1.6	1.6	100
	Total	122	100	100	
Which device do you use for e-detailing					
Valid	I-pad	93	75.4	***75.4***	76.2
	Micromax Tab	2	1.6	1.6	77.9
	Samsung Tab	8	6.6	6.6	84.4
	Lenovo Tab	8	6.6	6.6	91.0
	I-ball Tab	1	0.8	0.8	91.8
	Visual Aid	10	8.2	8.2	100
	Total	122	100	100	

Are you happy with this device					
Valid	Yes	116	95.1	***95.1***	95.1
	No	6	4.9	4.9	100
	Total	122	100	100	
Do you think e-detailing is a better mode of promotion than print visual aid					
Valid	Yes	110	90.2	***90.2***	90.2
	No	12	9.8	9.8	100
	Total	122	100.0	100.0	
Did your company train you for use of the e-detailing software					
Valid	Yes	109	89.3	***89.3***	89.3
	No	13	10.7	10.7	100
	Total	122	100.0	100.0	
Are you happy when the change was made from print visual aids to e-detailing					
Valid	Yes	107	87.7	***87.7***	87.7
	No	15	12.3	12.3	100
	Total	122	100.0	100.0	

The above analysis helps to gauge the perceptions of Pharmaceutical field professionals. The data shows that 45% of the MRs agree with the stand that e-detailing method delivers more information in less time.; supporting to this fact 75% of them said that I-pad is the most commonly used device and 95% percent of them are happy in using this device for their routine task. Also,90% pharmaceutical field professionals are in favour that e-detailing is a better mode of promotion of detailing compared to print visual aid and for this 89% said that they are been given training on e-detailing software by their organization.

THEME-2--EASE OF USE

		Frequency	Percent	Valid Percent	Cumulative Percentage
Are you comfortable with the navigation of slides in presentation?					
Valid	Yes	109	89.3	***89.3***	89.3
	No	13	10.7	10.7	100.0
	Total	122	100.0	100.0	
Are you comfortable with handling and taking care of I pad or any other tablet					
Valid	Yes	106	86.9	***86.9***	86.9
	No	16	13.1	13.1	100.0
	Total	122	100.0	100.0	

On the ease of using software, 89% pharmaceutical field professionals conveyed that navigation of

presentation through slides is very easy and handy and, 87% of them said that handling and taking care of I-

pad or tablet is very easy and not a hard task. These are very encouraging trends as it shows the acceptability and adaptability towards new technological advancements and their willingness to comply the changes.

THEME-3- SERVICE DELIVERY

		Frequency	Percent	Valid Percent	Cumulative Percentage
Has E detailing increased your call time with doctors					
Valid	Yes	91	74.6	***74.6***	74.6
	No	31	25.4	25.4	100.0
	Total	122	100.0	100.0	
Has E detailing improved your relationship with doctor					
Valid	Yes	94	77.0	***77.0***	77.0
	No	28	23.0	23.0	100.0
	Total	122	100.0	100.0	

Technology is undoubtedly an enabler and it facilitates the customer services and responsiveness. Almost three fourth of the MRs came to opinion that their call time duration with doctor has increased in the post COVID duration and due to this updated method of e-detailing 77% of them believe that it has helped them in enhancing good relationship with the doctor.

THEME-4- PROBLEMS YOU FACE

Gender	*For how long have you been using iPad / tablet for e-detailing*		Year of practice				Total
			Less than one year	One to Three Years	Three to Five Years	More than 5 Years	
Probs you face while delivering e-detailing							
Male	Handling the device	Count %within year of practice	22 ***51.2%***	16 37.2%	1 2.3%	4 9.3%	43
	Navigation of slides	Count % within year of practice	9 ***50.0%***	4 22.2%	1 5.6%	4 22.2%	18
	Software Issues	Count % within year of practice	8 26.7%	12 ***40.0%***	4 13.3%	6 20.0%	30
	Hardware Issues	Count % within year of practice	6 22.2%	11 ***40.7%***	3 11.1%	7 25.9%	27
	Reporting and call synchronization	Count % within year of practice	4 15.4%	13 ***50.0%***	4 15.4%	5 19.2%	26
	Any other	Count % within year of practice	8 23.5%	18 52.9%	4 11.8%	4 11.8%	34
Total		Count	28	50	15	23	116
For how long have you been using iPad / tablet for e-detailing							
Female	Handling the device	Count % within year of practice		3 100.0%		0 0.0%	3
	Navigation of slides	Count % within year of practice		1 100.0%		0 0.0%	1
	Software Issues	Count % within		0		1	1

		year of practice		0.0%		100.0%	
	Any other	Count % within year of practice		2 100%		0 0.0%	2
Total		Count	17	3	1	1	4

On the question of problem faced while using software, there were mixed opinions and it can be divided on the basis of years of experience .

50% Pharmaceutical field professionals with less than one year of experience faced difficulty in handling of device while MRs with one to five years of experience faced other type of difficulty such as problem with navigating the slide and both software and hardware issues. While in the case of Female MRs their opinions are almost similar to their counterpart.

CONCULSION

On the basis of above qualitative survey findings once easily deduced that online digital promotion has started gaining acceptance from the HCPs. Among digital promotion, online e-detailing has certainly knocked the doors and to some extent HCPs has shown its acceptance too. E-detailing especially, the format of online face -to-face detailing and personal visit + digital online promotion is the most acceptable format and HCPs have appreciated this. E-detailing is more interactive and is highly acceptable by HCPs. But its full usage is not yet experienced , as lot of regulatory frameworks need to be addressed and there is a lack of uniformity among the technology providers too ((Heutschi L. S., 2003)

The other factors which lead to the success of the adoption of e-detailing at a large scale is primarily the operation capabilities and training to the pharmaceutical professionals, in case if e-detailing needs to be taken as a major marketing tool((Banerjee Saikat, 2011).

The brand exposure to the HCP's ,whether it is online or it is offline, the number of products exposure per interaction remains the same, and there is no change in any of the period, whether it is precovid or even during the covid.((Jain, 2011)

As desired by the customers, e-detailing is undoubtedly a better tool to promote product in shooter time. Though it is more interactive but do not impact on prescription behaviour of HCPs. There is similar output observed in gender wise data like they both believe that drawback of e-detailing is its being time consuming. If seen from the point of view of age, it is found that Doctors who are less than five years' experience, they like the morning and doctors with more the fifteen years' experience like to engage with MR in evening

Although, the mandate is still not clear, as expressed and desired by the HCPs, there is still a belongingness towards the personal visit/face-to-face interaction , and that too at both the

platforms-online and offline, and even the combination of personal visit + digital promotion is the most preferred option by the HCPs.

MANAGERIAL IMPLICATIONS AND FUTURE RESEARCH

Digitalization is spreading at remarkable pace, E-detailing is highly acceptable among healthcare professionals and likely to reduce marketing cost. From the qualitative research, according to customers (aka doctors) opinion e-detailing is better way to promote the product and hence it has potential to establish more stronger bonds with Healthcare professionals and offer many advantages to pharmaceutical companies. Marketing communications add value to the product and benefit both customer and company. E-detailing is a stronger sales tool that deliver more information in shorter time and it is better way to promote the product. This study can help the pharmaceutical companies to understand factor influencing towards e-detailing. Pharmaceutical companies can take e-detailing as major marketing tool to enhance the sales and it helps the company to make a roadmap on how e-detailing can increase their business

With the limited sample size, the study although with a lower probability, but still hints out that in the day to come, the selling and business model of the pharmaceutical company is bound to change. If not fully digital , it is expected that a *Phygital* (Physical + Digital) model may be the new normal for the Pharmaceutical sales and marketing communication and the companies will have to adopt for Multi channel and Omnichannel marketing, which will be a complete paradigm shift in the pharmaceutical marketing and drug promotion.

LIMITATIONS AND SCOPE FOR FURTHER RESEARCH

Being a qualitative study ,the sample size is too small to generalize the findings in order to formulate the desired conceptual framework, hence the study needs to commissioned for further research and should be done pan India level including the big, mid, and small size companies and also, all the hierarchies of the sales function should be included in the study starting from Medical rep to Vice President Sales.

Since pharmaceutical companies are slow in digital adoption and transformation, hence the scope of the study should be expanded further to investigate the exact reasons for the delay in digital transformation. The study should be carried out to understand the role of Culture, business processes and operations and process change in the pharmaceutical business organizations.

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