

**Summer Training at
MediaMedic Communications Pvt. Ltd, Mumbai**

**Study to Evaluate E-Detailing as an Acceptable and Effective
Pharmaceutical Marketing Communication tool: Views of Healthcare
Professionals, Medical Representatives and Digital Marketing Managers of
Mumbai City**

**By
Richa Pandey**

**Under the guidance of
Dr. Ashok Peepliwal**

**MBA Pharmaceutical Management
2017-2019**

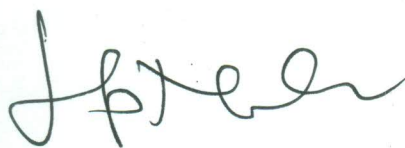
 **IIHMR UNIVERSITY**
School of Pharmaceutical Management
The IIHMR University, Jaipur
2018

CERTIFICATE

This is to certify that **Richa Pandey** has undergone summer training at **Mediamedic Communications** on topic **“A study to evaluate E-Detailing as an acceptable and effective Pharmaceutical marketing communication tool: Views of Healthcare Professionals, Medical Representatives and digital marketing managers of Mumbai city”** from April 01 to May 31, 2018.

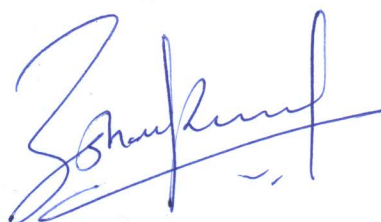
The candidate herself completed the project assigned to her during summer training. Her approach to the project was sincere and proactive. This summer training is in partial fulfillment of the course requirement recommended for the award of MBA in Pharmaceutical management.

I wish her success in all her future endeavors.



Dr. Sandeep Narula
Dean in charge (PM)

IIHMR University, Jaipur



Dr. Ashok Peepliwal
Associate Professor

IIHMR University, Jaipur



18th June, 2018

TO WHOMSOEVER IT MAY CONCERN

Sub.: Internship of Ms. Richa Pandey with our organization.

This is to certify that Ms. Richa Pandey, a student of IIHMR University has completed her internship with us from 1st April 2018 to 31st May 2018.

She undertook '*A Study to Evaluate E-Detailing as an Acceptable and Effective Pharmaceutical Marketing Communication tool: Views of Healthcare Professionals, Medical Representatives and Digital Marketing Managers*' as her summer internship project and has successfully completed the requirement of the project.

She also supported our internal team on some live Brand Management projects.

We wish her the very best for her future endeavor.

Thanking You,

For MediaMedic Communications Pvt. Ltd.;

Dinesh Chindarkar

Co-Founder & Director

Acknowledgement

I humbly owe the completion of this Summer Internship work to the almighty and my family whose love and blessings will be with me in every movement of our life .

I would like to extend my sincere gratitude to **Mrs.Priti Mohile** (Co-Founder & Managing Director) and Mr. **Dinesh Chindarkar** (Co-Founder & Director) for providing us an opportunity to learn and develop professionally.

I also extend my gratitude to our Project Coordinator **Mr.Athar Siddiqui** (Group Account Manager) for his valuable suggestions, support and keen interest throughout the study that helped us in completing this work. “I thank him for the freedom of thought, expression and trust which was greatly bestowed upon us. I would also like to pay my gratitude to the entire team of MediaMedic Communications Pvt Ltd. who has helped me by sparing their valuable time and extended their support and guidance to help me achieve my task successfully.

I would also like to thank **Dr Ashok Peepliwal** (Associate Professor, IIHMR University Jaipur) for all his support, motivation and providing me valuable guidance throughout the period of my summer internship.

I am very much indebted and thankful to all the Doctors, Medical Representatives and Digital/Marketing Managers of pharmaceutical organisations for their participation and cooperation. Last but not the least I would like to thank my family for supporting and standing with me in successfully completing the project.

Richa Pandey

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Organization Profile

MediaMedic Communications Pvt. Ltd. is an 'award winning' firm that provides insights-driven strategic communications grounded in the science of health, medicine and marketing; delivered creatively and through multiple channels.

MediaMedic provides Brand & Medical communication, HealthPR and Digital & Social media services. We have experts from the field of marketing, digital, PR, medical, nutrition and creative to meet the unique needs of clients in this segment, making us a reliable partner in Building Health Brands.

Pharmaceutical, nutraceuticals and healthcare communication needs a deep understanding of science, the doctor community, regulations and the market. Within this scenario, the communication needs to be creative yet strategic. Moreover, with the rapidly increasing usage of digital & social media; declining attention span of the customers, communication challenges are rising. No single media or methodology can give the best results. Integrated and multichannel marketing is the need of the hour.

Hence MediaMedic provides integrated communications services for health and life science industry, associations and institutions.

Vision

To be a preferred partner to pharmaceutical, wellness and healthcare organizations to deliver effective communication solutions across target audiences for impactful business outcomes.

Mission

To use communication in an innovative and creative manner to build health-brands so as to positively touch people's lives.

Introduction

Detailing in pharmaceutical industry is defined as the process of communicating the pharmaceutical product message to health care professionals (HCPs; primarily clinicians). As a marketing communication tool, it has a strong and lasting positive effect on physicians' prescription behaviour. Until the 20th century, the traditional tools used by the industry for communicating product messages to HCPs were visual aid, detail aid, and leave behind literature (LBL). These are the promotional tools used by the executives to communicate the product message relating to the disease and therapy area. Face-to-Face product promotion or product detailing is the most dominant promotional tool for pharmaceutical, medical equipment, and biotechnology companies, often making up 60–70% of their total promotional budget. Though companies spend a sizable amount of their marketing budget on product detailing, they are facing stiff barriers in recent times. For medical representatives, actual detailing lasts for only a few minutes, but the preparation and waiting time is very long. For physicians also, it demands a good amount of interest and involvement.

Usage of the internet by the pharmaceutical companies to promote pharmaceutical products to physicians is an increasing trend now. This is popularly known as e-promotion. Interactive e-detailing, video e-detailing and other physician online forums are part of e-promotion activities. E-detailing is defined as the use of online channel and information technology to promote pharmaceutical products. Internet is used as a medium of communication for pharmaceutical sales detailing to physicians. According to Bates et al., e-detailing is the use of digital technologies for enabling the interaction with the physicians and informs prescribers about products or diseases. Pharmaceutical organisations target physicians at pin-point accuracy with the help of e-detailing. The quest for a more effective and easy way of communication resulted in the emergence of electronic detailing (e-detailing).

Study Rationale

Healthcare in India is growing at a rapid pace, currently valued at US\$ 100 billion, and expected to touch US\$ 280 billion by 2020. Digital intervention in healthcare is expected to drive the industry at a CAGR of 23% by 2020. The Indian pharmaceuticals market is the 3rd largest in terms of volume, and the 13th largest in terms of overall value. The forecast for 2025 stands at an impressive US\$ 100 billion.

Digital technology has transformed the scenario of the world. Internet penetration in emerging countries is growing at a faster pace over the years. India, a fast-growing emerging economy from Asia, is in the forefront in terms of internet usage. Internet penetration in India currently stands at 35% with a 23% year-on-year growth in internet users. The country has also recorded second highest growth rate (44%) in terms of mobile active users. With an average internet speed of 4.1 Mbps, social media penetration in India currently settles at 14%. However, India projects an impressive third highest year-on-year growth in social media users globally. By 2020, India is expected to be home to 730 million internet users. Simply speaking, new businesses as well as consumers in India are getting online every day, paving the way for a sustainable digital ecosystem in the country. Through key policy initiatives and impactful infrastructure reforms, improvements in digital adoption are sure to drive growth of internet users in India. In a nutshell, India's digital juggernaut is only getting started.

In India, the concept of detailing as a marketing communication tool to promote pharmaceutical products has witnessed a transformational change in recent times. One such selling process recently adopted by the companies in India is e-detailing for communicating product messages to the HCPs through the e-detailing tools such as laptops, iPads, and large computer screens connected effectively with the internet and satellites. In India, the commonest practice adopted by the leading companies is the usage of iPads loaded with product messages as a communication tool. As a new way of communication, not much is known about the views of physicians, medical representatives, and pharmaceutical organisations about e-detailing. In this backdrop, the purpose of this study is to analyse the scope, acceptability and effectiveness of e-detailing concepts recently started by domestic as well as multinational pharmaceutical companies in India.

Study Objective

This is a primary research study conducted in Mumbai City to evaluate the acceptability and effectiveness of e-detailing concepts adopted by pharmaceutical companies for product message communication to the Healthcare Professionals (HCP's).

1. To evaluate the acceptability and effectiveness of e-detailing among Healthcare Professionals (HCP's).
2. To evaluate the acceptability of e-detailing among Medical Representatives using iPads/Tablets for product promotion and understand the benefits and challenges of e-detailing.
3. To evaluate the effectiveness of e-detailing in product promotion and understand benefits and challenges faced by digital marketing managers of pharmaceutical organisations (both domestic and multinational companies) in implementing e-detailing.

Research Methodology

Study Design: Cross-Sectional Surveys

Sampling Method: Doctors: Convenience Sampling

Medical Representatives/Digital Managers: Non-Probability Purposive Sampling

Sample Population: Doctors, Medical Representatives and Digital Managers

Sample Size: Doctors: 230; Medical Representatives: 180; Digital Managers: 16

Sample Area: Mumbai City

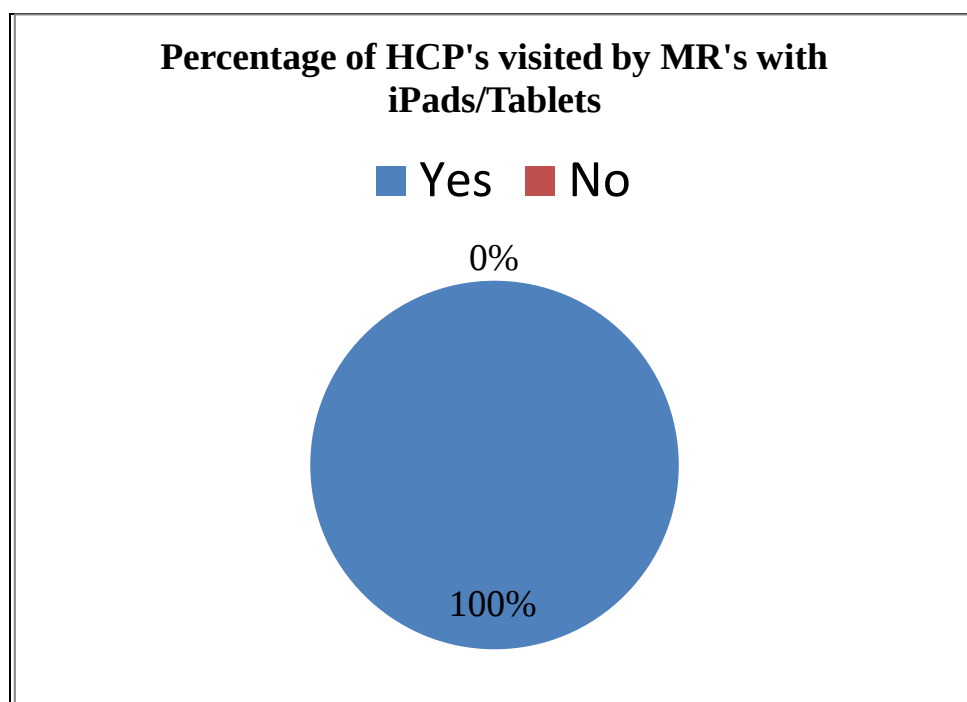
Time Period: 60 Days

Data Collection: Separate Survey Questionnaires were used to collect data from Doctors, Medical Representatives and Digital Managers.

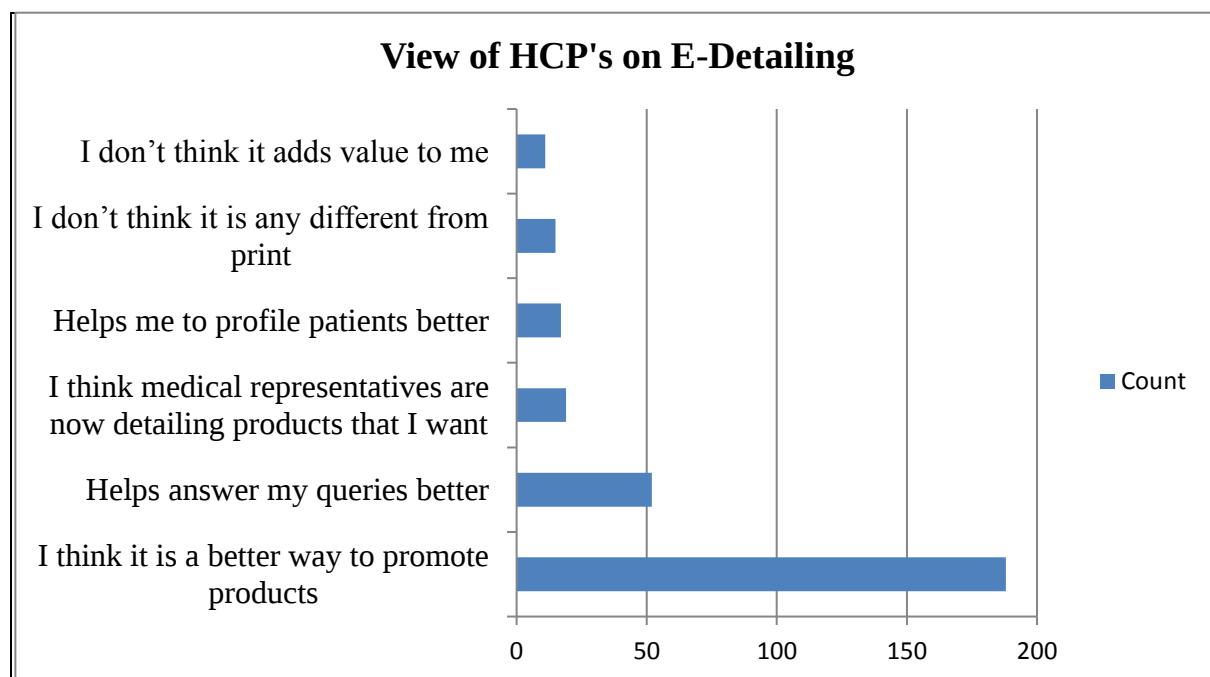
Data Analysis: Data analysis was done using MS-Excel and interpreted.

Research Findings:

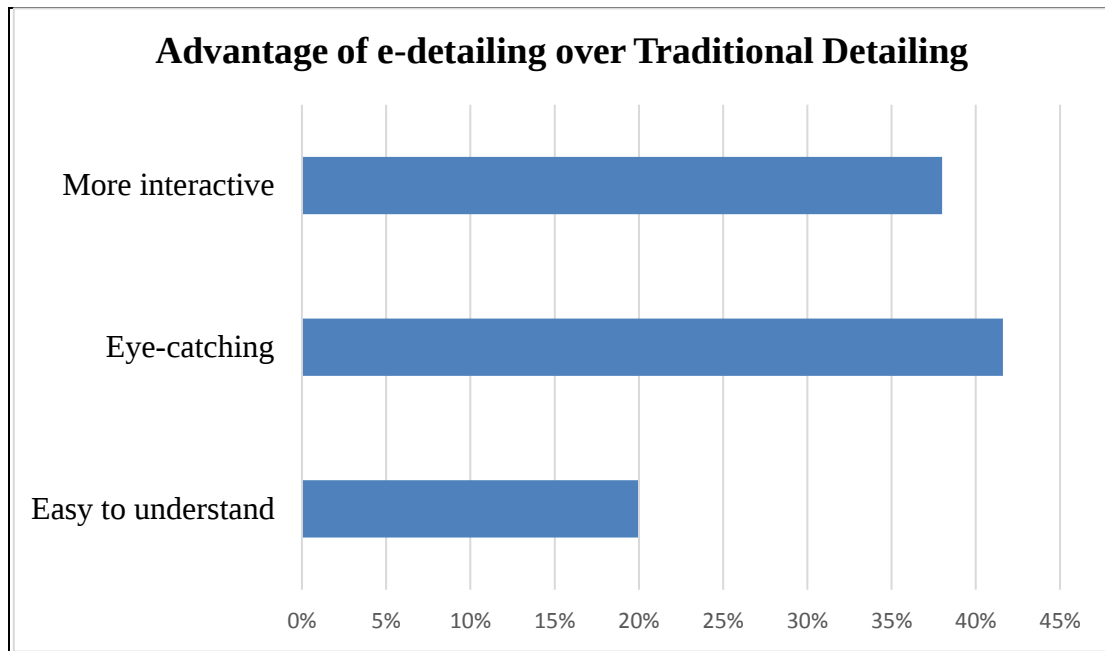
I. Healthcare Professionals' (HCP) Survey Findings:



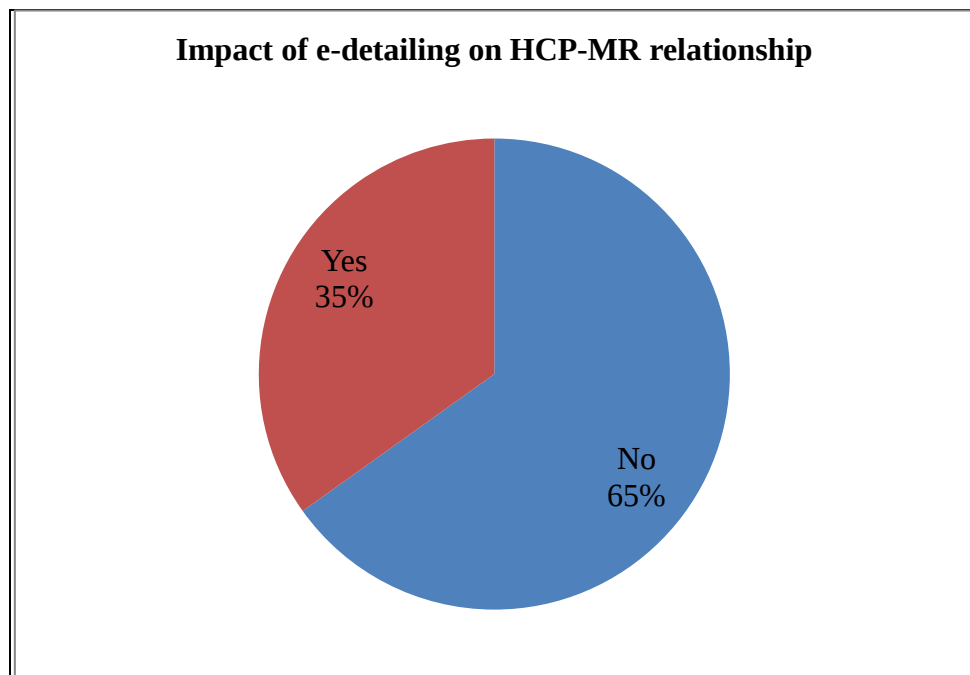
Out of 230 HCP's surveyed in Mumbai City, all 230 HCP's are visited by Medical Representatives with iPads/Tablets.



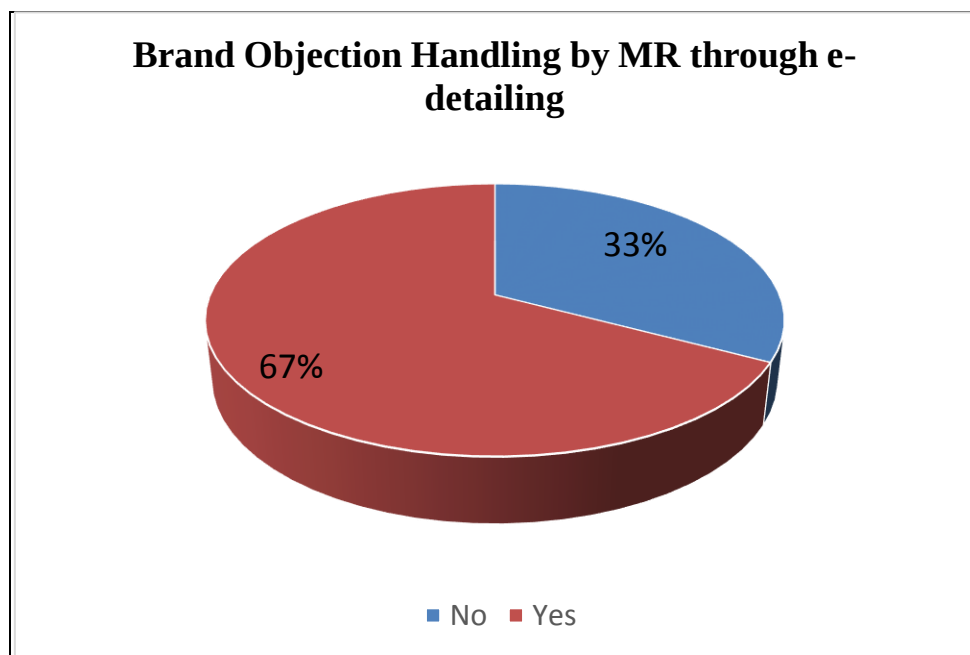
E-Detailing as a better way of product promotion is perceived by majority of HCP's.



42% of HCP's have responded that e-detailing is more eye-catching when compared to Traditional Detailing.



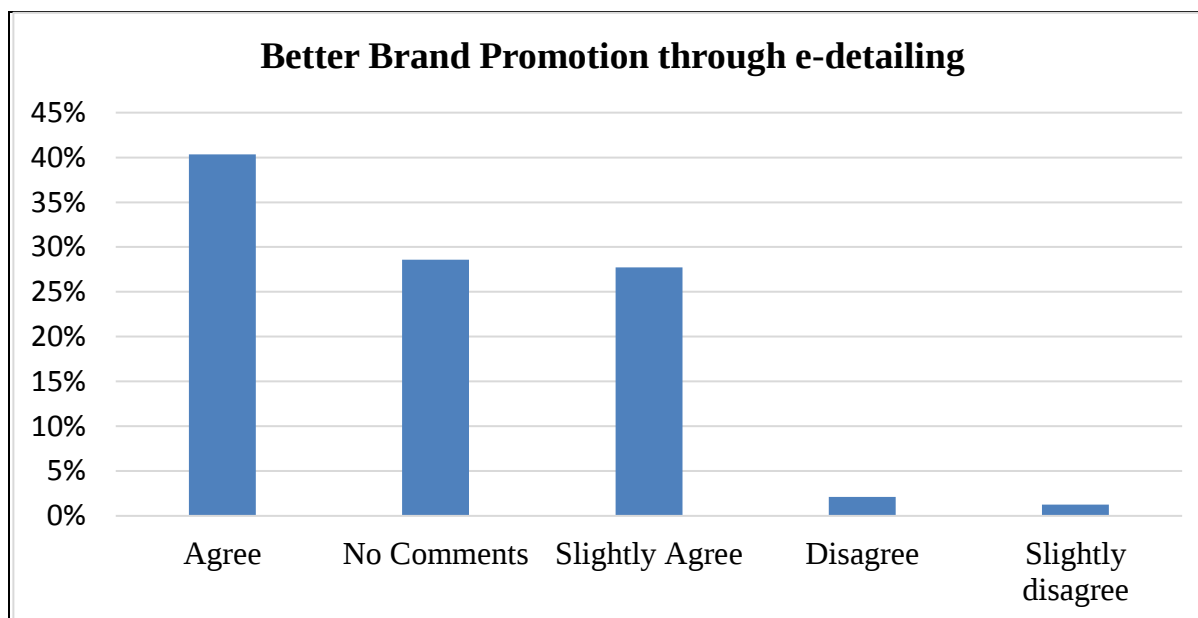
65% HCP have responded that e-detailing does not create any impact on their relationship with the Medical Representatives.



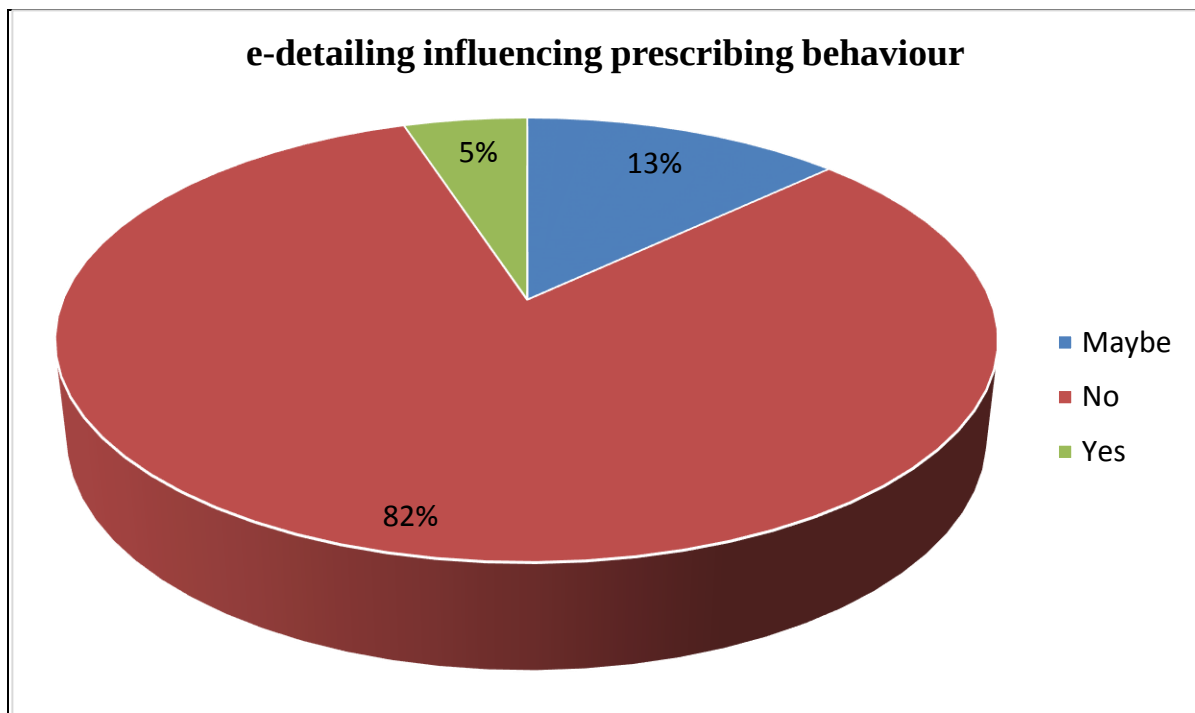
67% of HCP's have responded that Medical Representatives are now better able to handle objections through e-detailing.

Brands	Count	Percentage
No Response	61	21.63%
Calpol	11	3.90%
Augmentin	6	2.13%
Invokana	6	2.13%
Ultracet	6	2.13%
Gemer	6	2.13%
Lantus	6	2.13%
Novomix	5	1.77%
Shelcal	5	1.77%
Becosule	5	1.77%
Trajenta	4	1.42%
Clopidab	4	1.42%
Pediasure	3	1.06%
Omez	3	1.06%
Ceregrow	3	1.06%
Pantocid	3	1.06%
Rosuvastatin	3	1.06%
Galvus	3	1.06%
Telmikind	3	1.06%
Janumet	3	1.06%
Jardiance	3	1.06%
Lyrica	3	1.06%

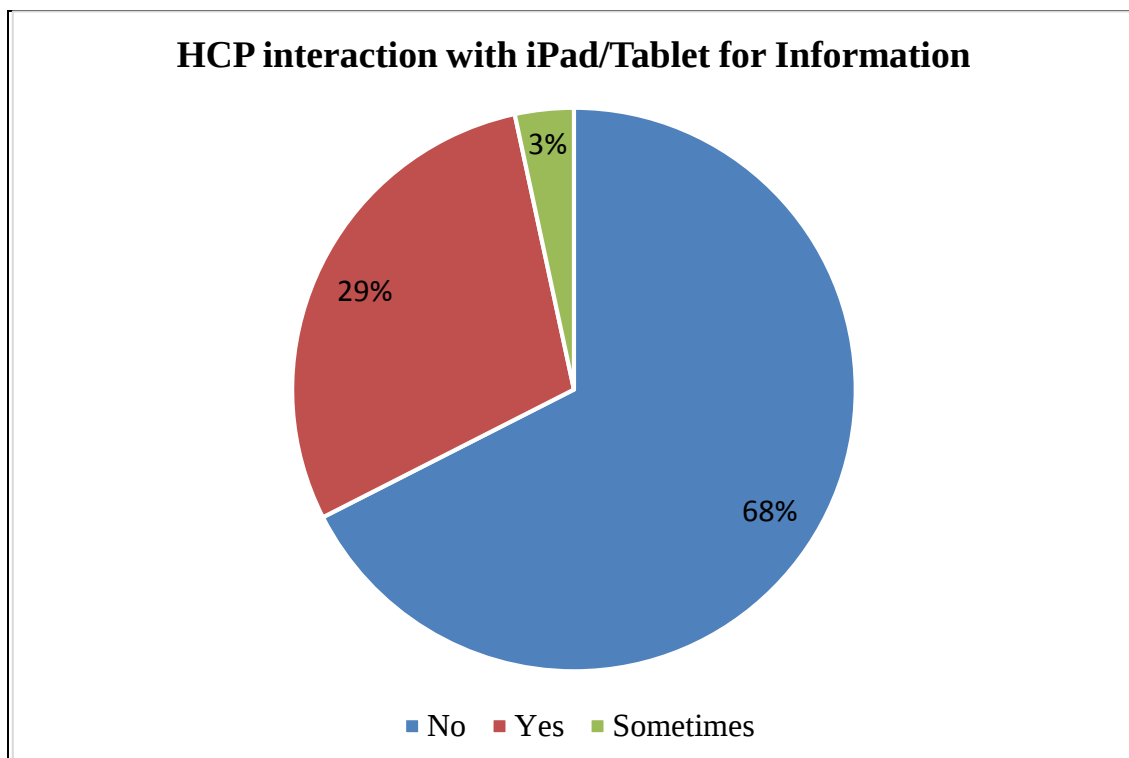
Brands	Count	Percentage
Pantocid DSR	2	0.71%
Momeflo	2	0.71%
Carvals	2	0.71%
Corex	2	0.71%
Amlogard	2	0.71%
Crestor	2	0.71%
Protinex	2	0.71%
Eltroxin	2	0.71%
CCM	2	0.71%
Entresto	2	0.71%
MoNobeta	2	0.71%
Gelusil	2	0.71%
Ovral G	2	0.71%
Allegra	2	0.71%
Calpol syrup	2	0.71%
Humalog	2	0.71%
Cardace	2	0.71%
Betnesol	2	0.71%
Taxim-O	2	0.71%
Zosyn	2	0.71%
Atarax	2	0.71%
Ciplox	2	0.71%
Others	160	56.73%



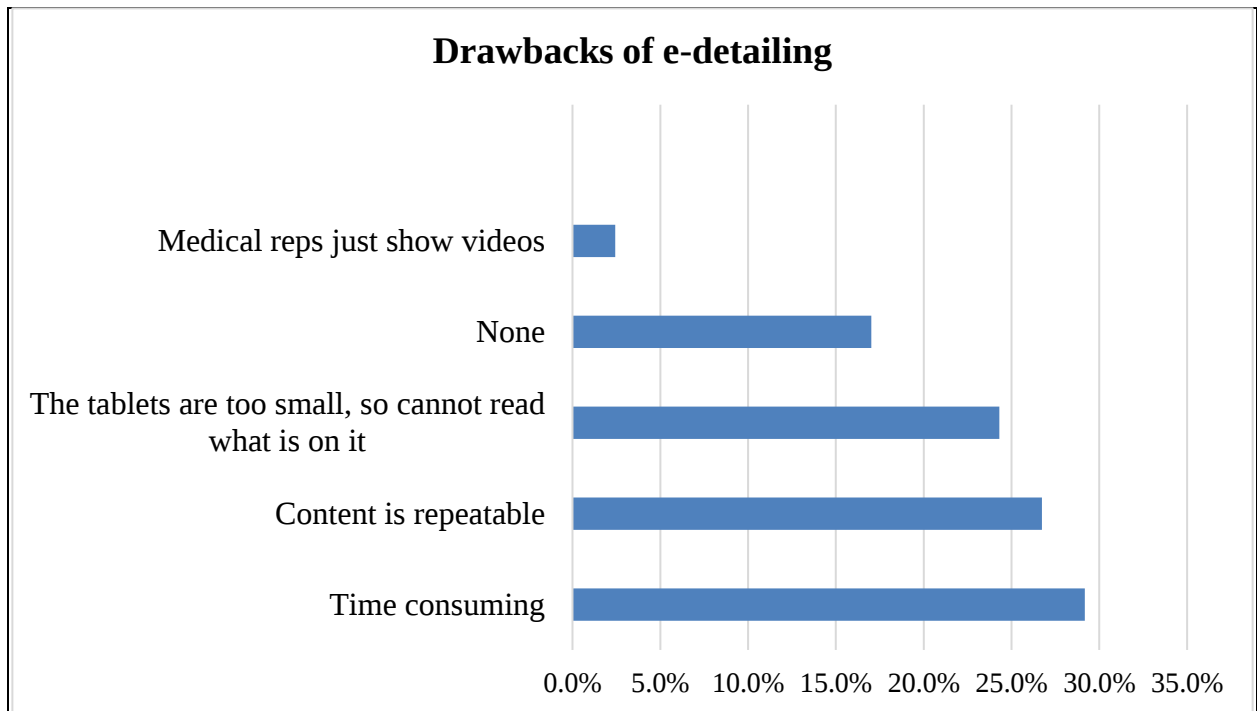
41.3% of HCP's have agreed that MR's are better able to promote their brands through e-detailing



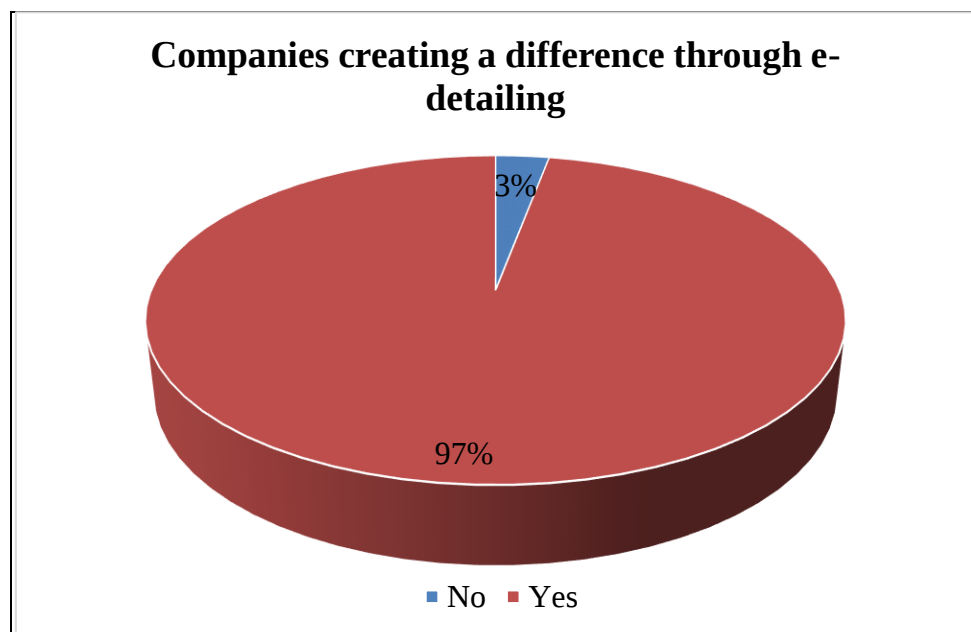
82% of HCP's have said that e-detailing does not influence their prescribing behaviour.



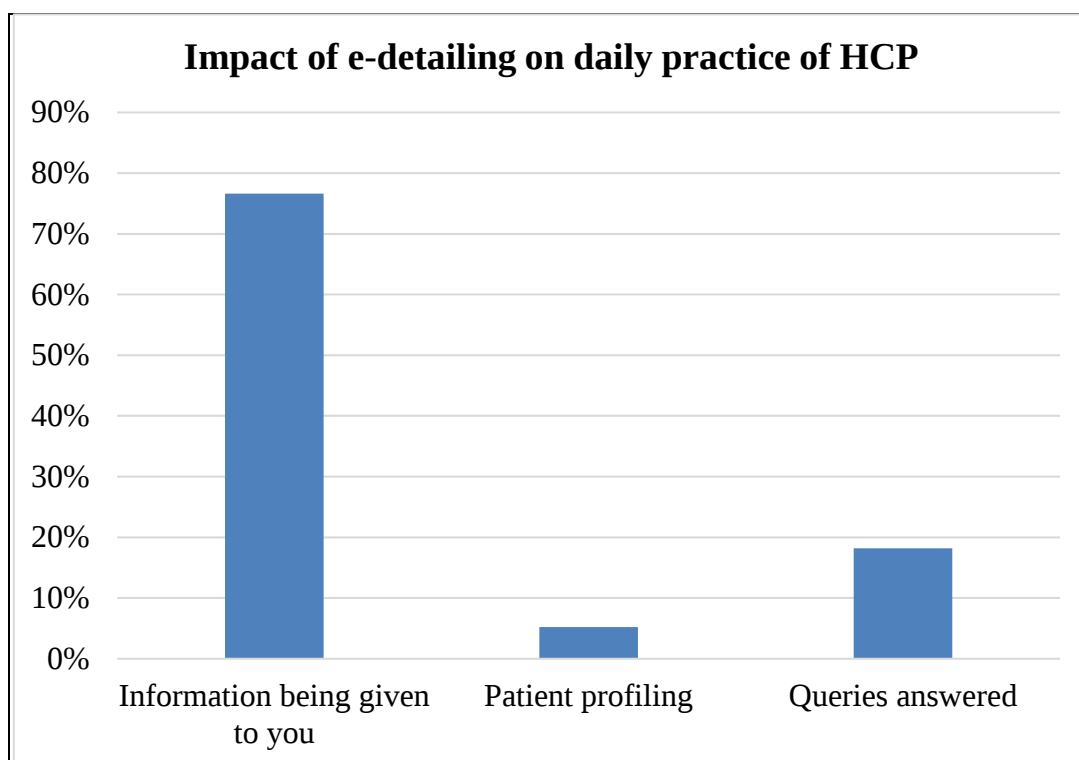
68% of HCP's have responded that they don't interact with the iPads/Tablet of Medical Representatives to choose the area of information they want.



29.2% of HCP's have responded that the major drawback of e-detailing is that they are too time consuming followed by 26.7% HCP's who said the content is repeatable.



97% of HCP's have responded that Pharmaceutical Organisations are trying to create a difference in product promotion through e-detailing.



77% of HCP's have responded that e-detailing creates an impact in a way the information being given to them, followed by 18% of HCP's who said e-detailing helps them get their queries answered.

Pharmaceutical Companies	Count	Percentage
GSK	43	12.91%
Sun Pharma	40	12.01%
Pfizer	35	10.51%
Lupin	31	9.31%
Cipla	25	7.51%
Dr.Reddy's	23	6.91%
Novartis	17	5.11%
MSD	14	4.20%
J&J	13	3.90%
Sanofi	9	2.70%
AstraZeneca	9	2.70%
Janssen	9	2.70%
Eris Lifesciences	8	2.40%
Torrent	7	2.10%
Alkem	7	2.10%

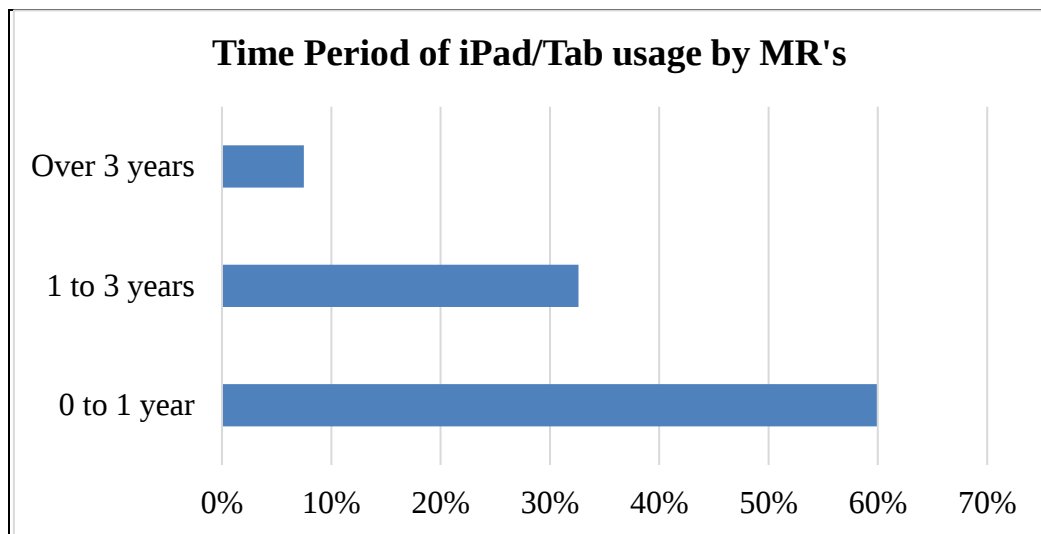
Pharmaceutical Companies	Count	Percentage
Eli Lilly	6	1.80%
Nestle	6	1.80%
Roche	6	1.80%
ZydusCadila	4	1.20%
BoehringerIngelheim	4	1.20%
NovoNordisk	4	1.20%
Abbott	3	0.90%
Danone	2	0.60%
Spectra	2	0.60%
Allergan	1	0.30%
Merck	1	0.30%
UCB	1	0.30%
Cadila	1	0.30%
Emcure	1	0.30%
BMS	1	0.30%

Table 2: Pharmaceutical Organisations which are good at e-detailing as per HCP response. GSK leads the table followed by Sun Pharma and Pfizer.

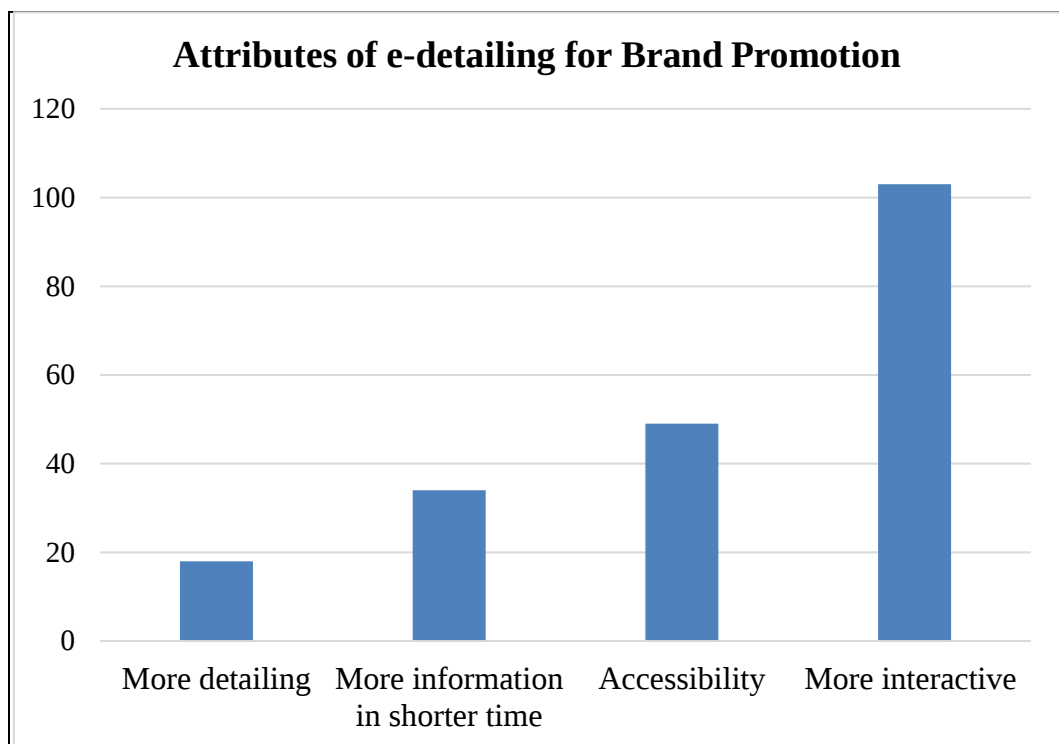
S.No	Suggestions by HCP's
1	E-detailing must be supported with information not just slogans and adjectives
2	Clinical data should be shared
3	Content should be updated
4	Medical reps should have more knowledge about drugs.
5	Company should provide more technical data
6	Software should be user friendly
7	Content should be more visually interactive
8	Email the videos so they can be watched later at the doctors convenience
9	Concise Information, Quick navigation
10	Train the MR better with technology in order to be able to navigate better to answer queries

Table 3: Suggestions by HCP's for further improvement of e-detailing.

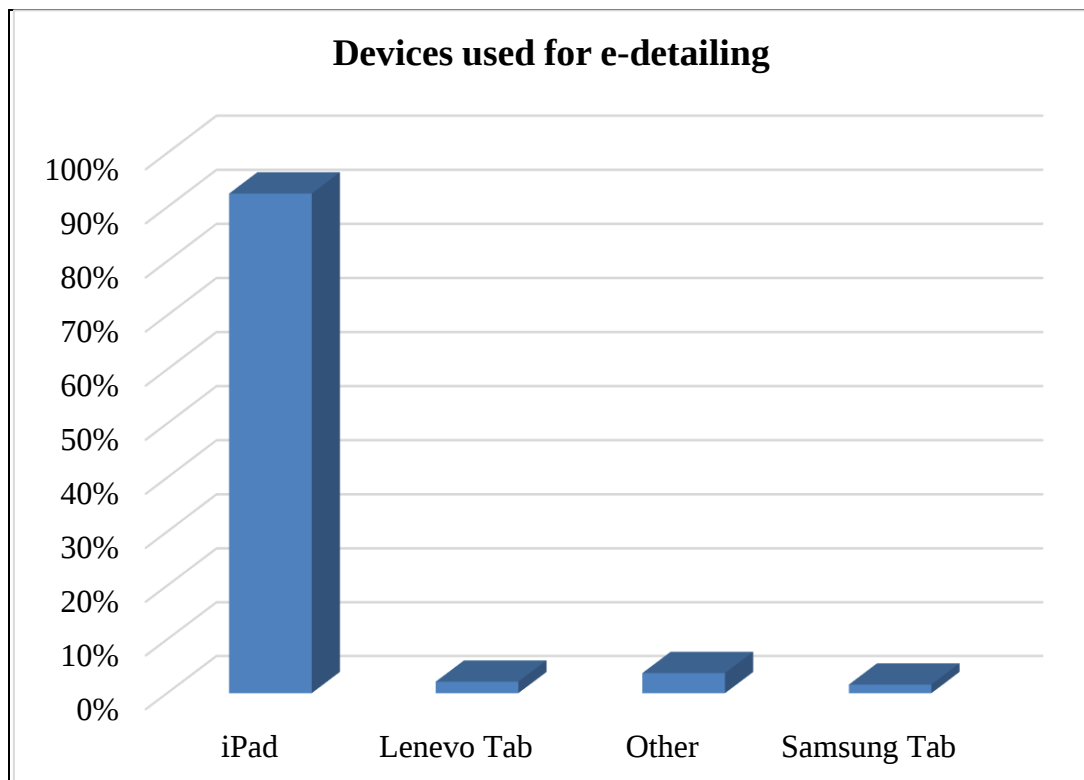
II. Medical Representatives (MR) Survey Findings



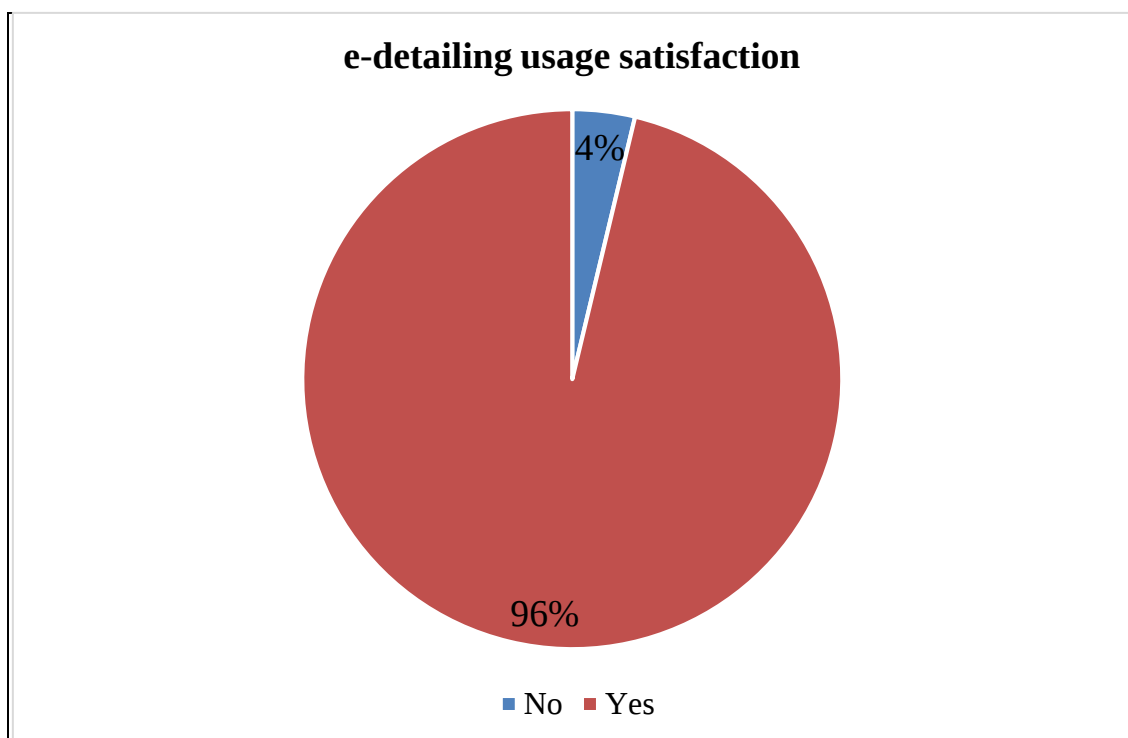
60% of Medical Representatives have been using iPads/Tablets for a period of 0 to 1 year.



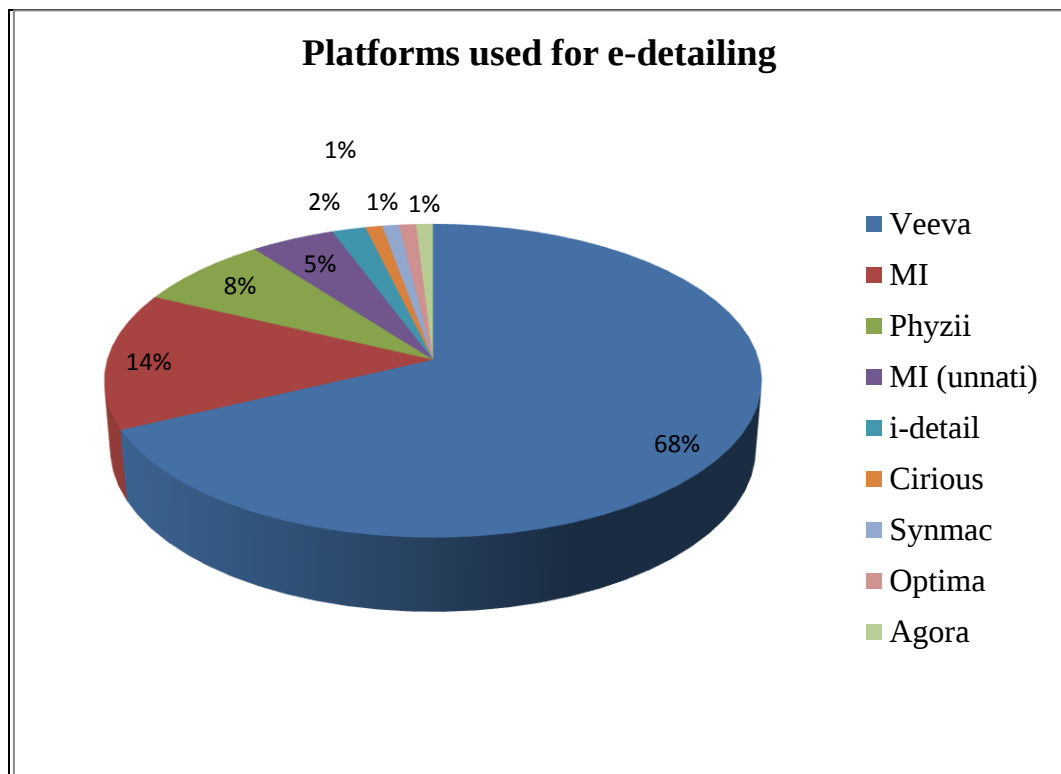
103 Medical Representatives have responded that e-detailing is more interactive and helps in Brand Promotion.



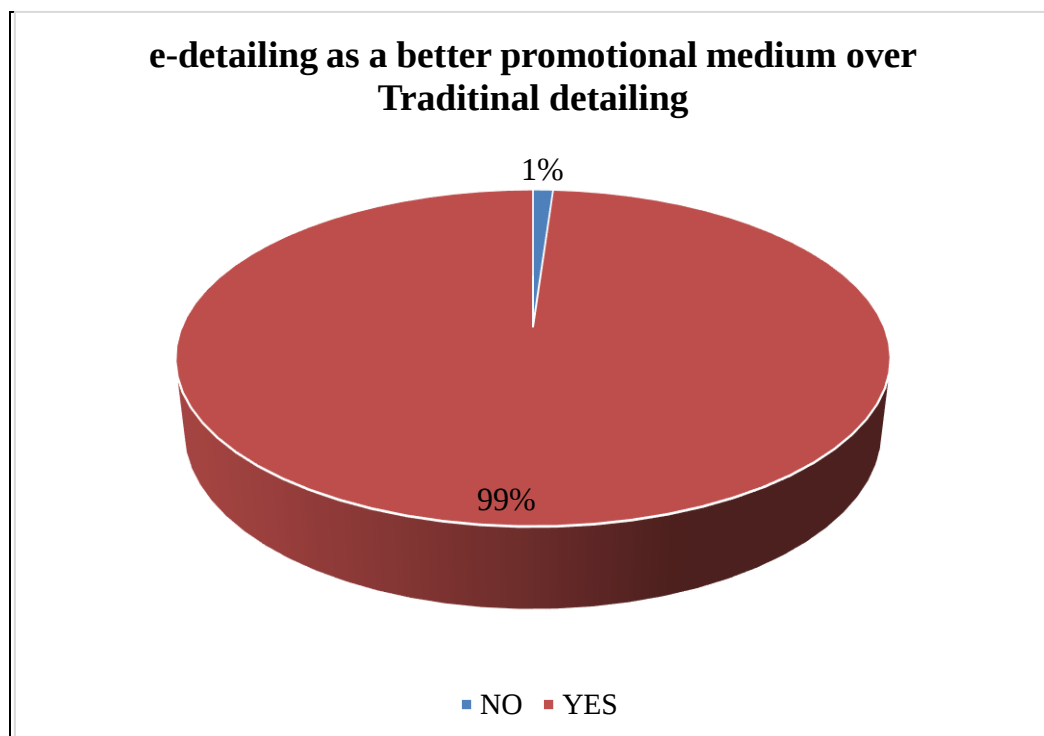
93% of Medical Representatives have responded that they use iPads for e-detailing in the field.



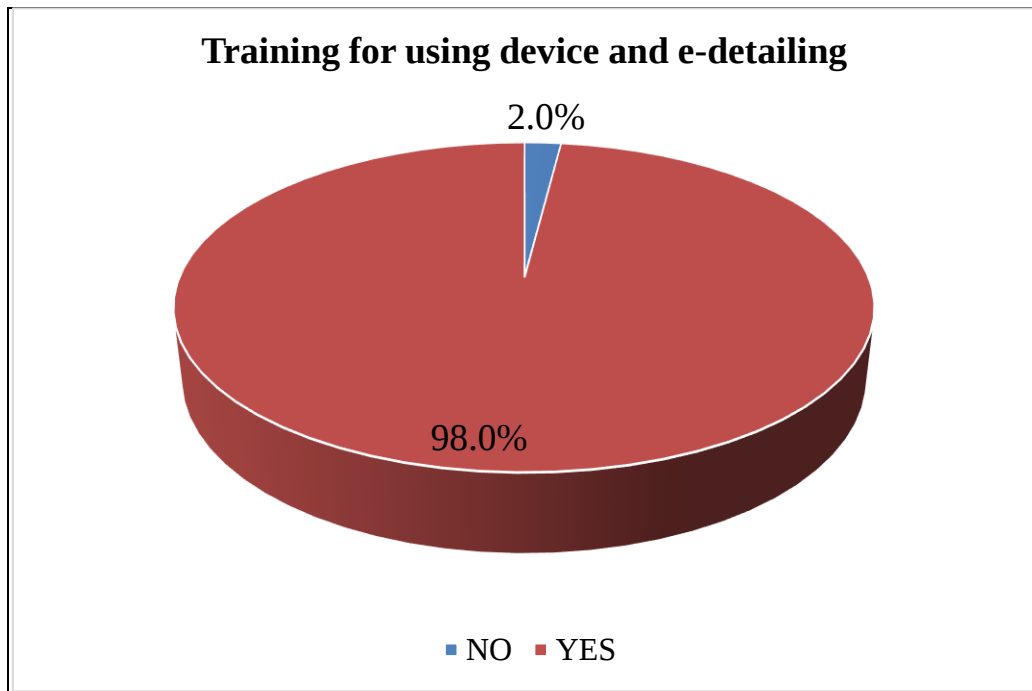
96% of Medical Representatives have responded that they are happy using iPads/Tablet for e-detailing.



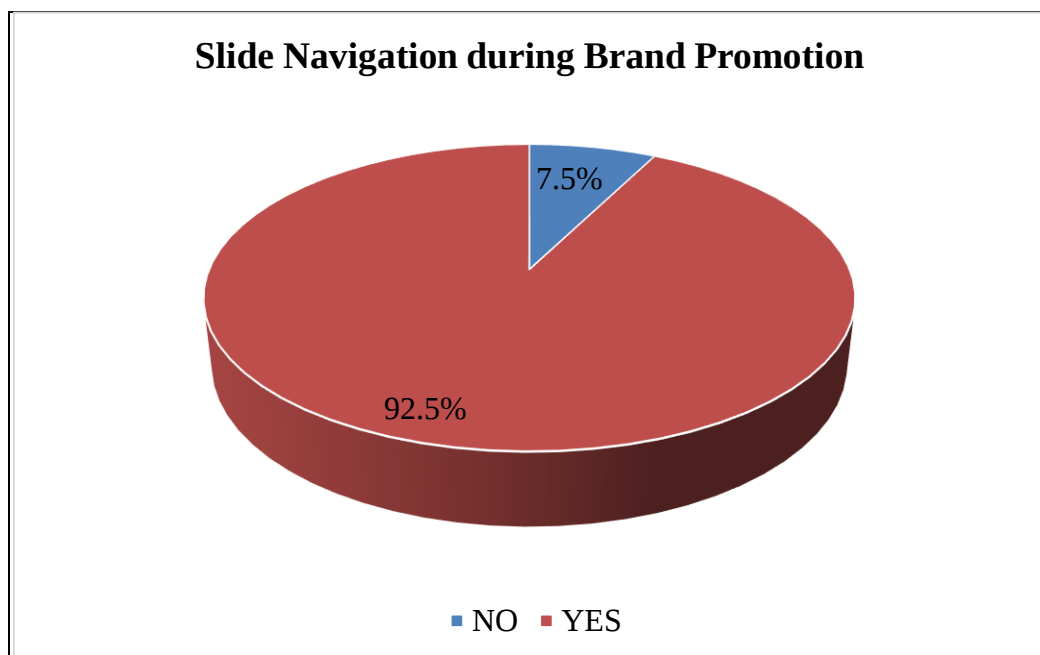
68% of Medical Representatives have responded that they have Veeva installed in their device as a platform for e-detailing.



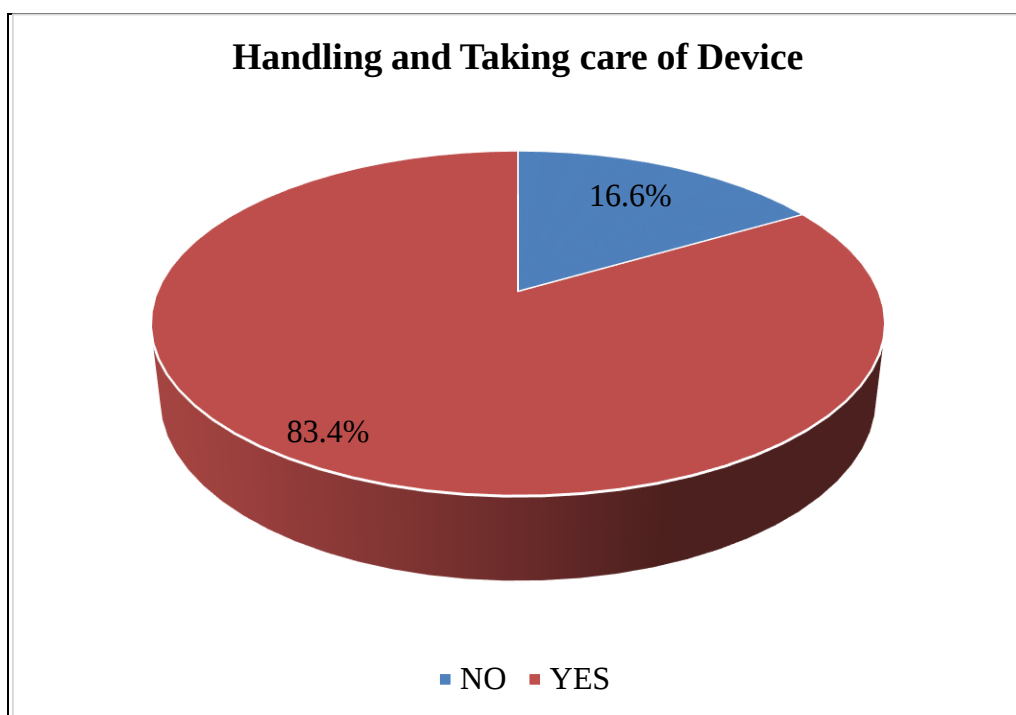
99% of Medical representatives have responded that e-detailing is a better mode of product promotion compared to Traditional detailing.



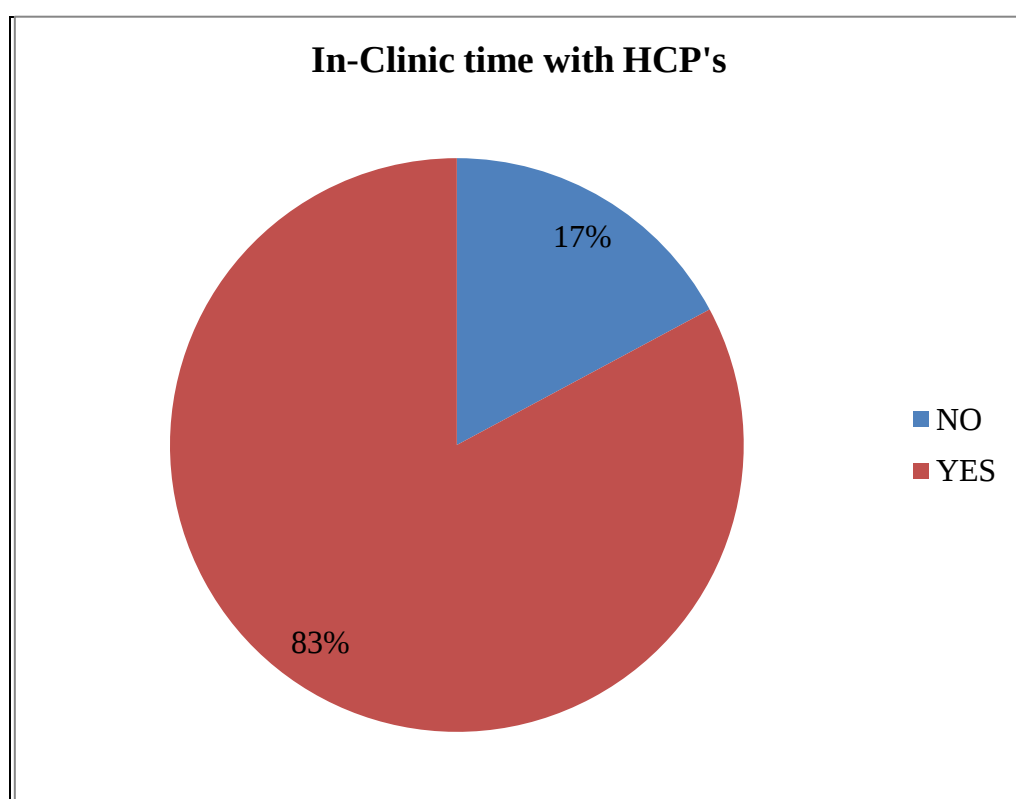
98% of Medical Representatives have responded that they were trained for using the device and perform e-detailing in field.



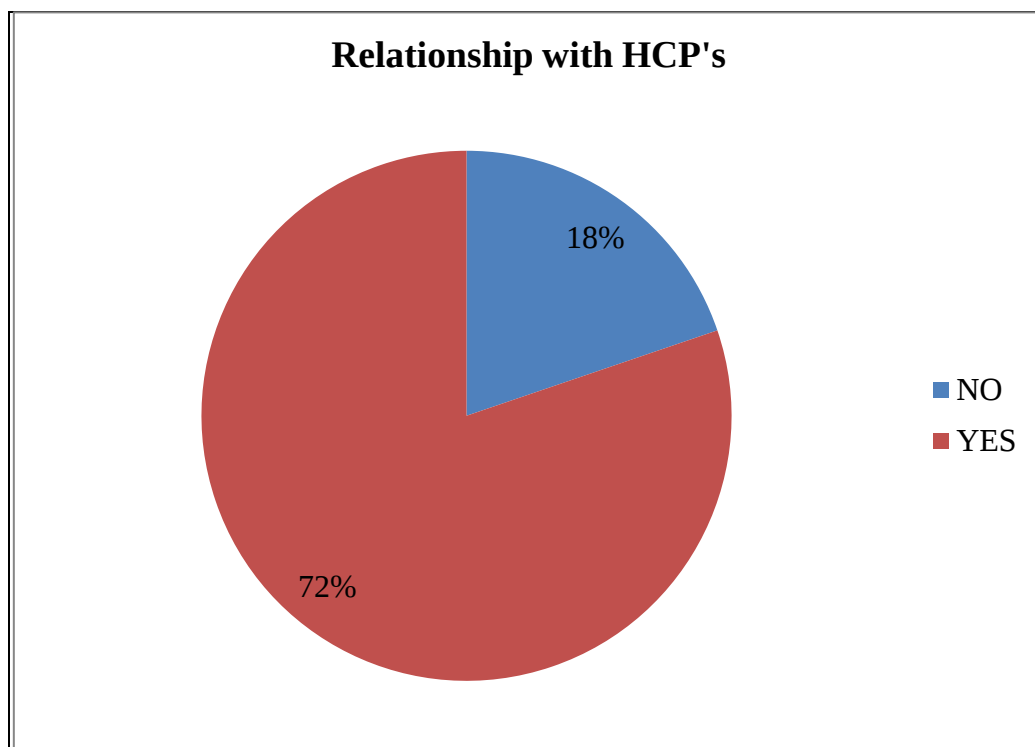
92.5% of Medical Representatives have responded that are comfortable with slide navigation during in-clinic brand promotion.



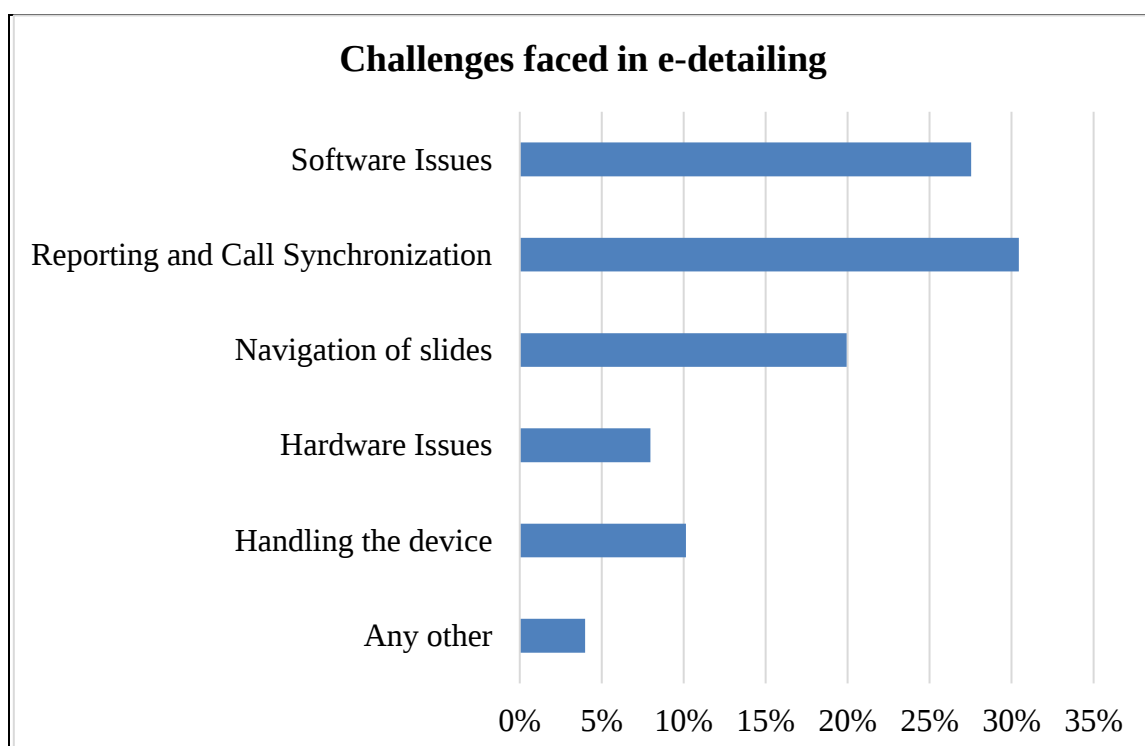
83.4% of Medical Representatives have responded that they were comfortable in handling and taking care of the device.



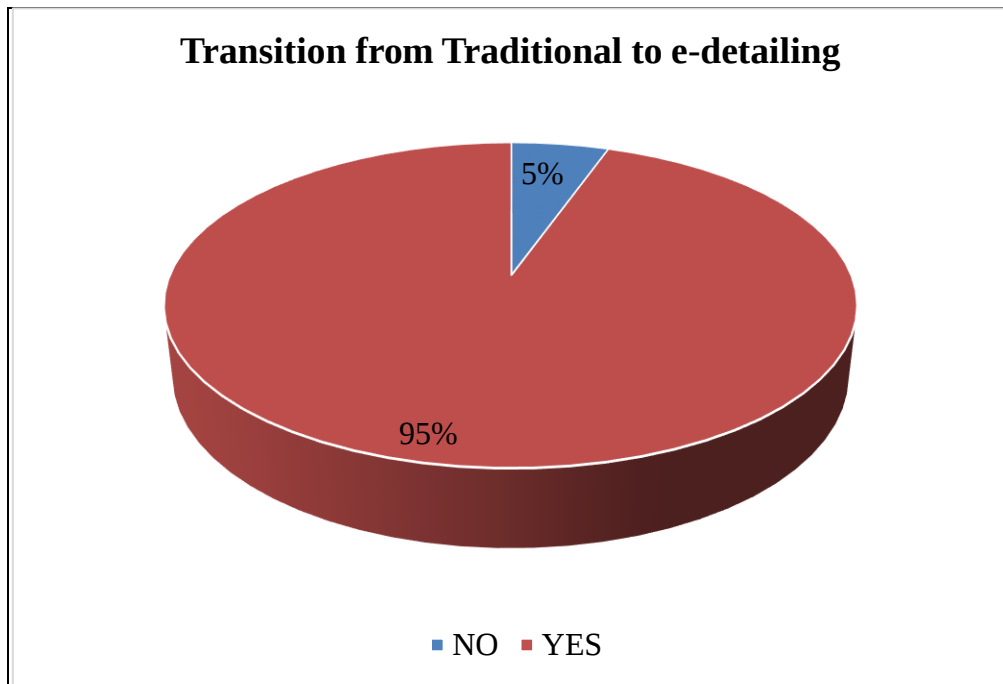
83% of Medical Representatives have responded that e-detailing has increased the in-clinic time with HCP's.



72% of Medical representatives have responded that e-detailing has helped them to improve their relationship with HCP's.



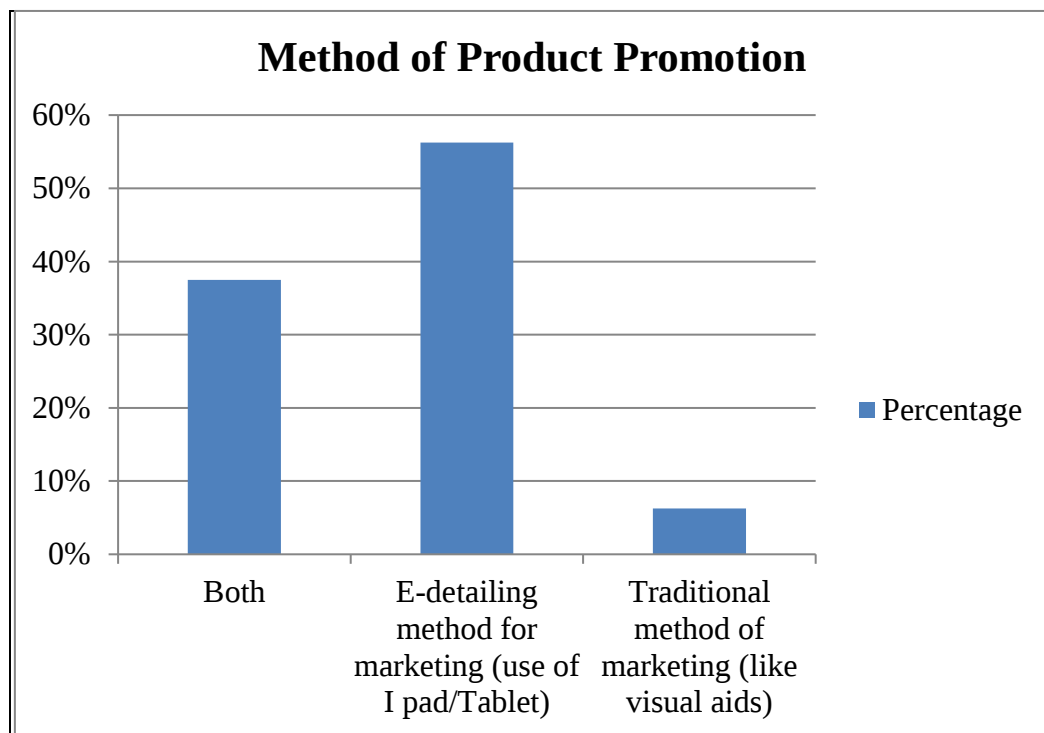
30% of Medical Representatives have responded that Reporting and Call synchronization is the major challenge faced in e-detailing followed by software issues.



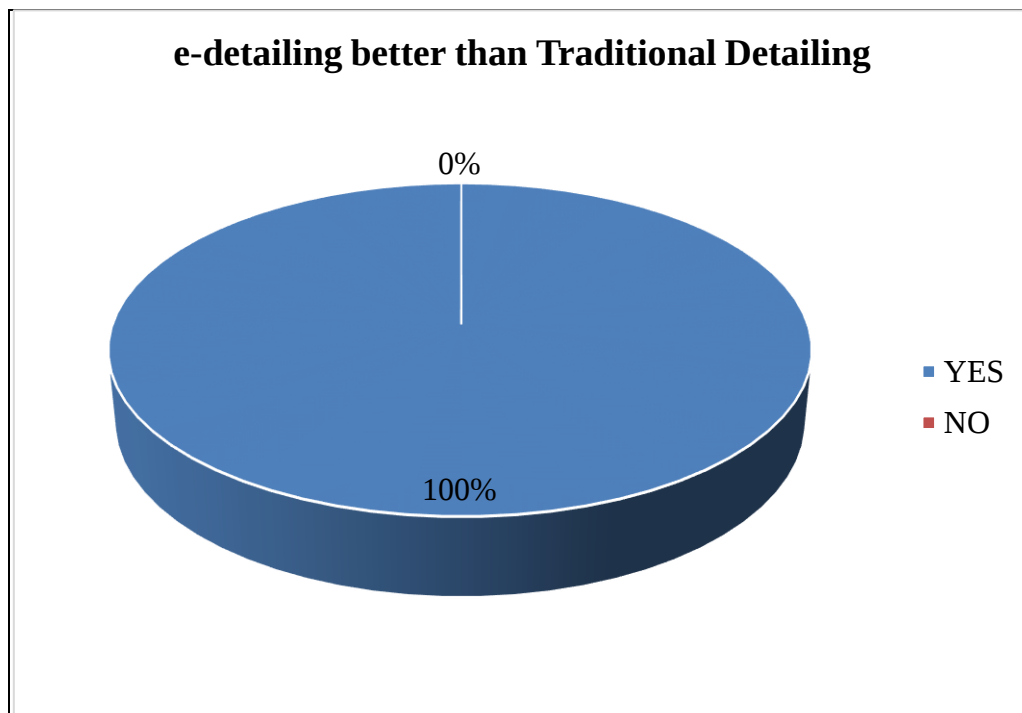
95% of Medical Representatives have responded that they are happy with the transition from Traditional detailing to e-detailing.

III. Digital Marketing Manager Survey Findings:

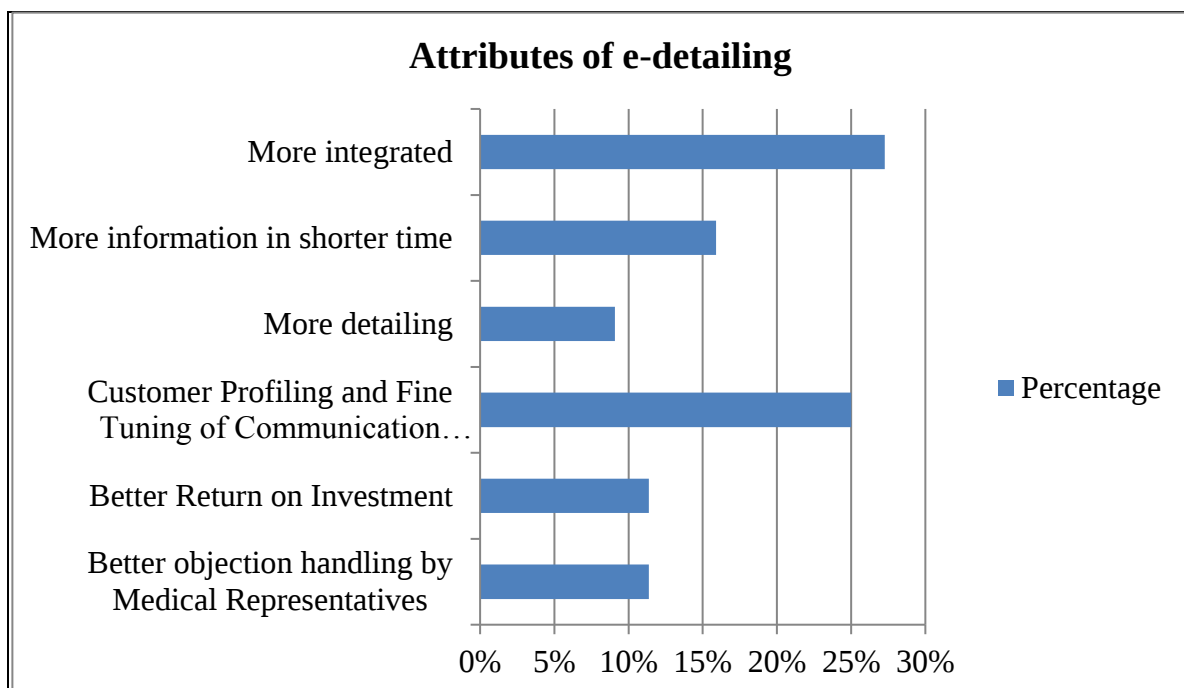
16 Digital Marketing Managers were surveyed from both domestic and multinational companies which included GlaxoSmithKline, Novartis, Roche, AstraZeneca, Sun Pharma, Glenmark, Lupin, Janssen, Cipla, Alkem, MSD, Wockhardt, RPG Lifesciences, Biocon, Sanofi, BoehringerIngelheim.



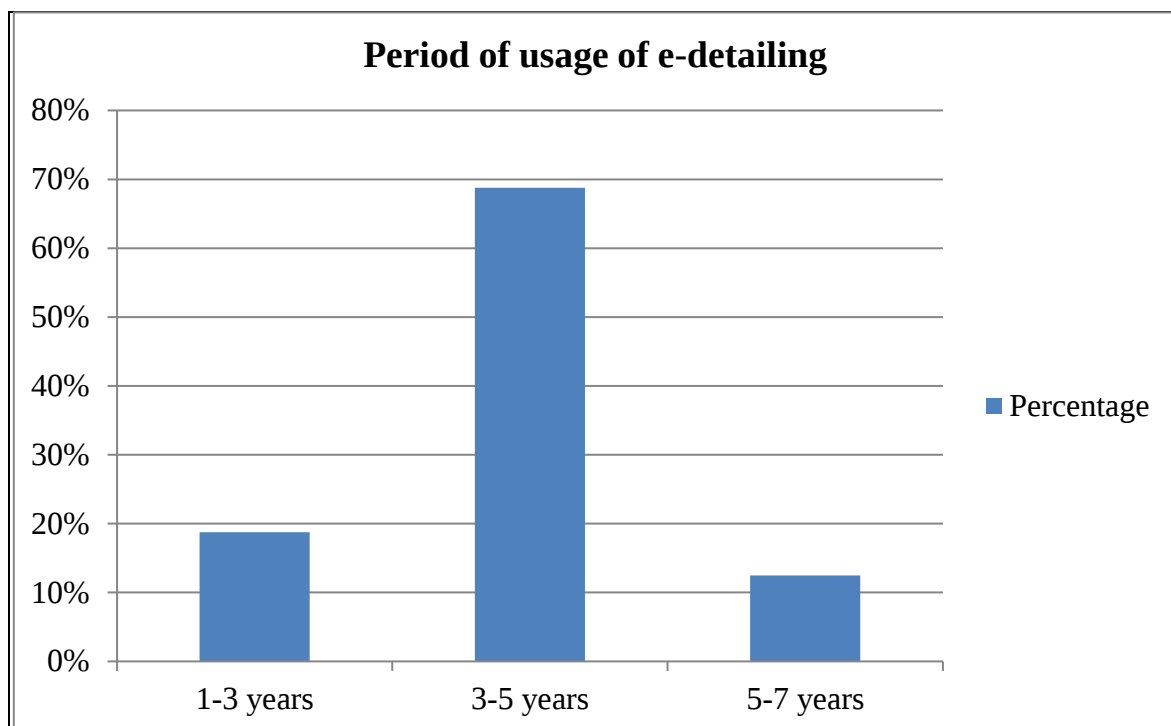
56% of Pharmaceutical Organisations are using e-detailing as a marketing communication tool for product promotion.



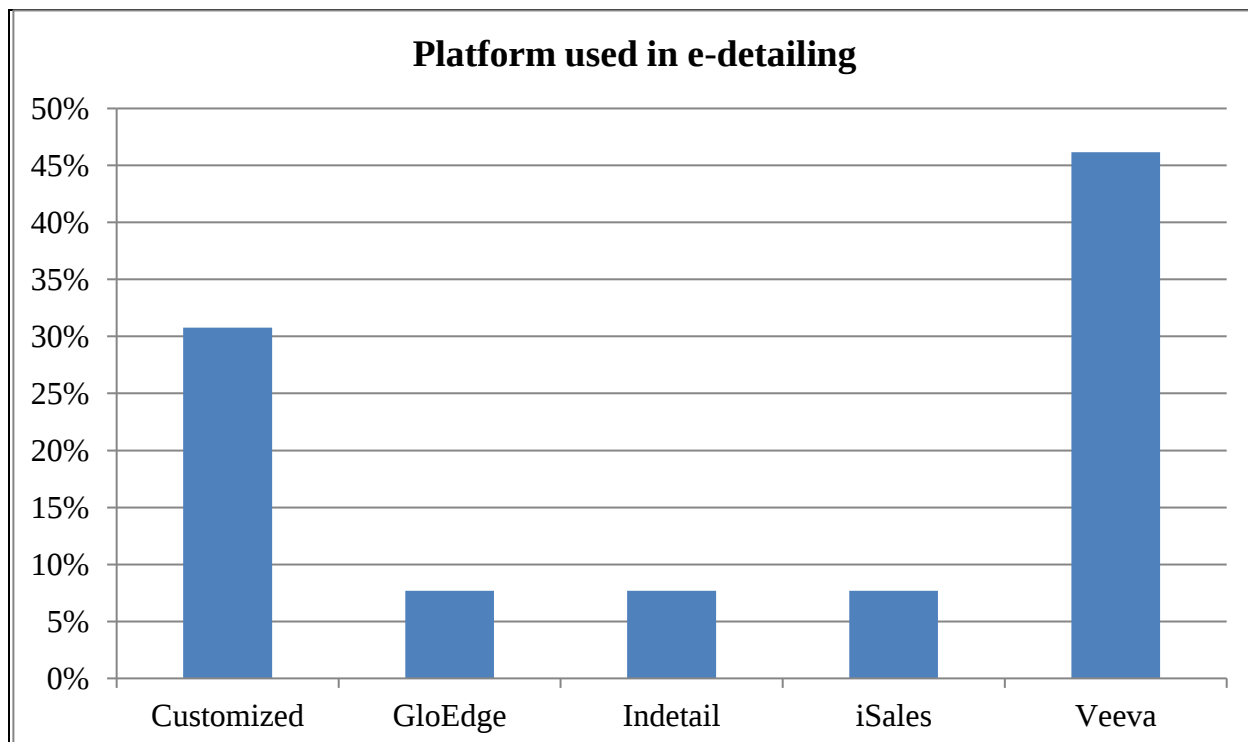
Of the 16 digital managers surveyed, all of them agreed e-detailing to be a better way of product promotion compared to traditional detailing.



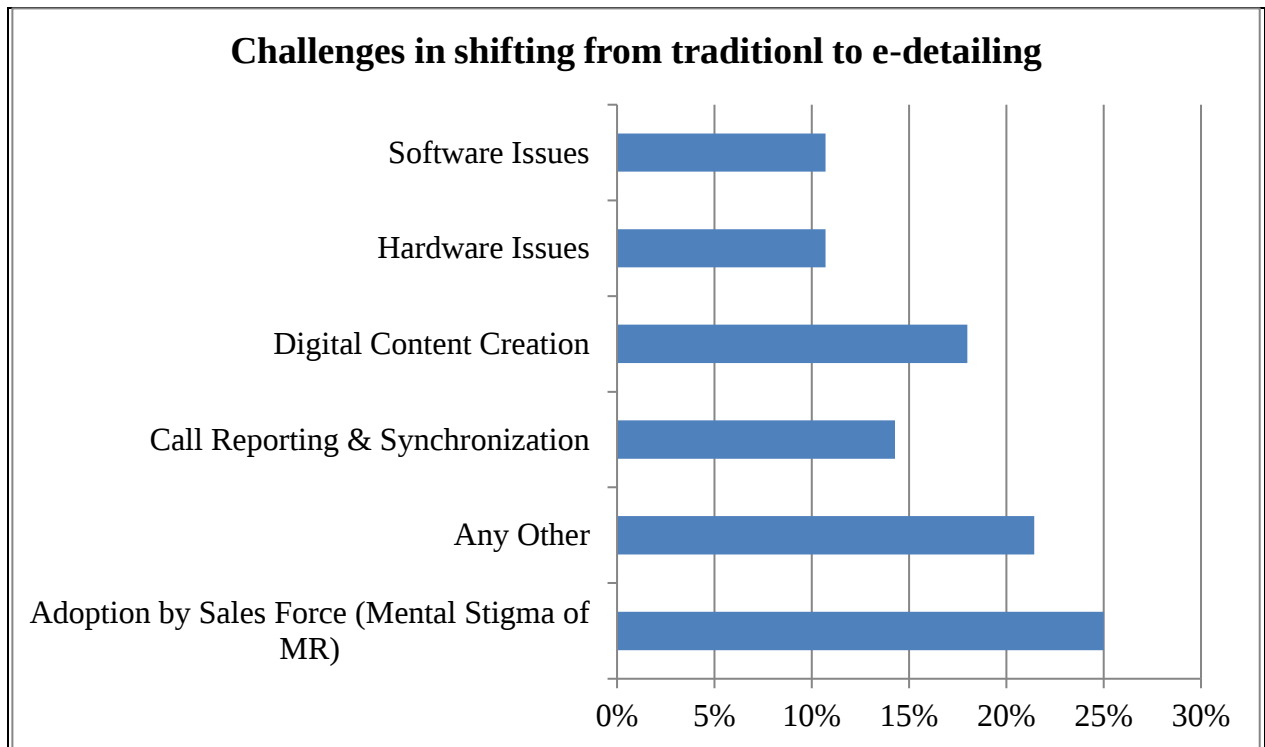
E-detailing being “more integrated” and helps in “customer profiling and fine tuning of communication strategies” are the two main attribute that makes e-detailing better than traditional detailing.



69% of the pharmaceutical organisations have been using e-detailing as a marketing communication tool for last year 3-5 years in India.



46% of pharmaceutical organisations are using Veeva as a platform for e-detailing in India, followed by 31% organisations who said they have their own customized platforms.



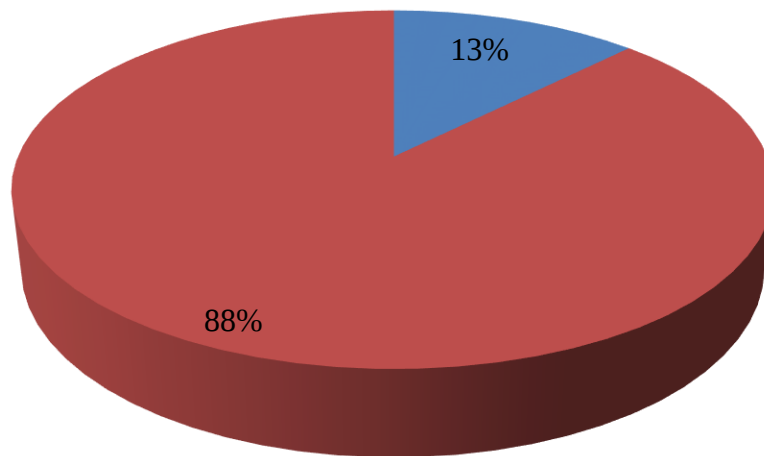
25% of Digital Managers have responded that adoption of e-detailing by the sales force was a major challenge in the initial stages of implementation of e-detailing.

S.No.	Role of E detailing in Marketing Strategies
1	The analytics derived from e-detailing clearly helps the marketing teams to identify which areas need more focus, fine tuning and also helps understand what works well and what does not.
2	Analytics e.g. Brand exposure, Time spent ,Detailing Pattern are really helpful
3	To understand the effectiveness of communication strategy
4	Provides better transparency, faster promotion through various different visual activities. Doctor engagement is more
5	Interactive and data can be stored for future references
6	Monthly basis reports can be generated, analytics
7	Closed loop marketing

Table 4: Role of e-detailing in improving marketing strategies (Closed Loop Marketing) as shared by Digital Managers.

e-detailing in building better connections with HCP's

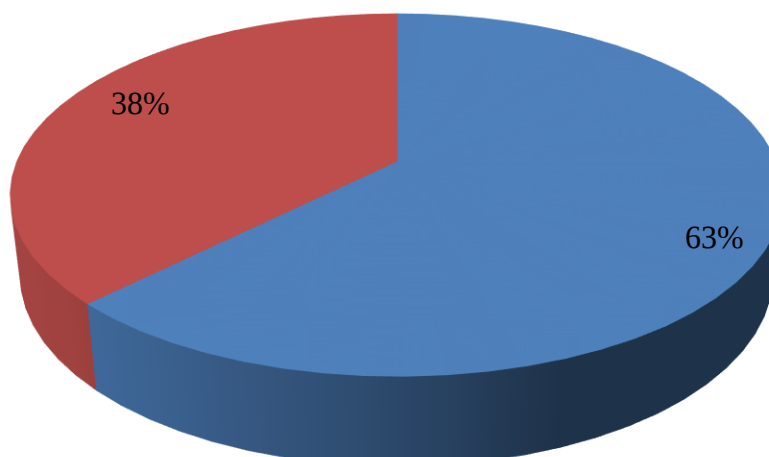
■ NO ■ YES



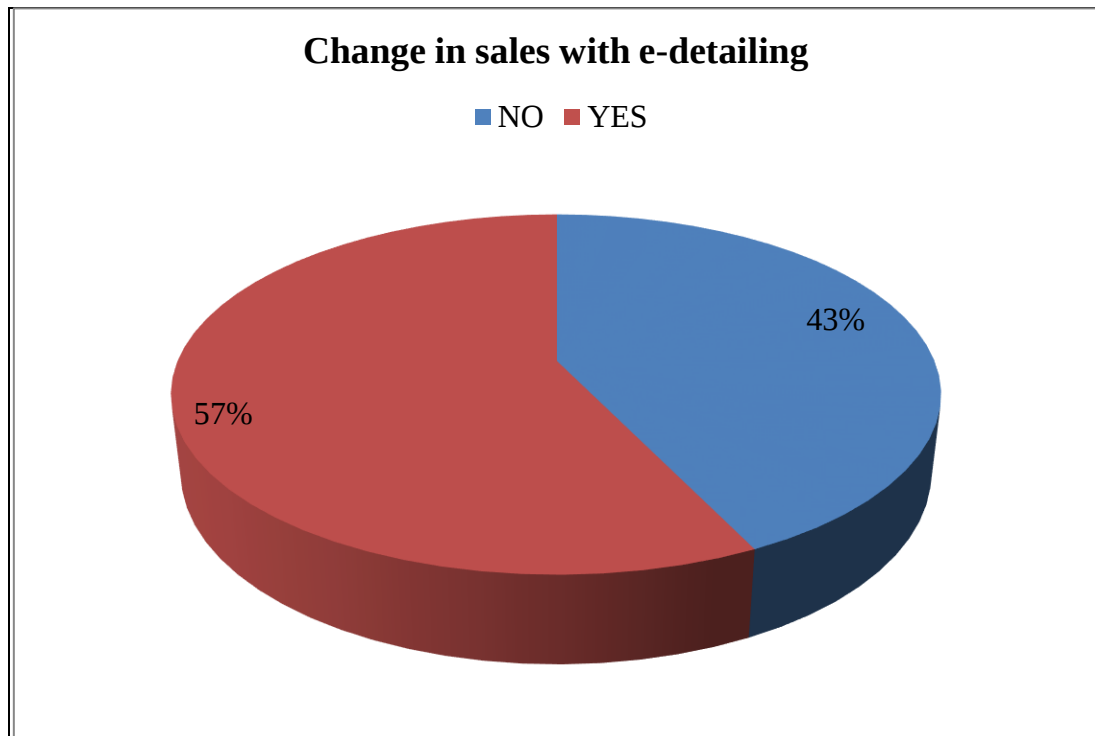
88% of Digital Managers have responded that e-detailing helps the sales and marketing teams in building better connections with doctors.

Adoption of e-detailing by MR's at initial stages

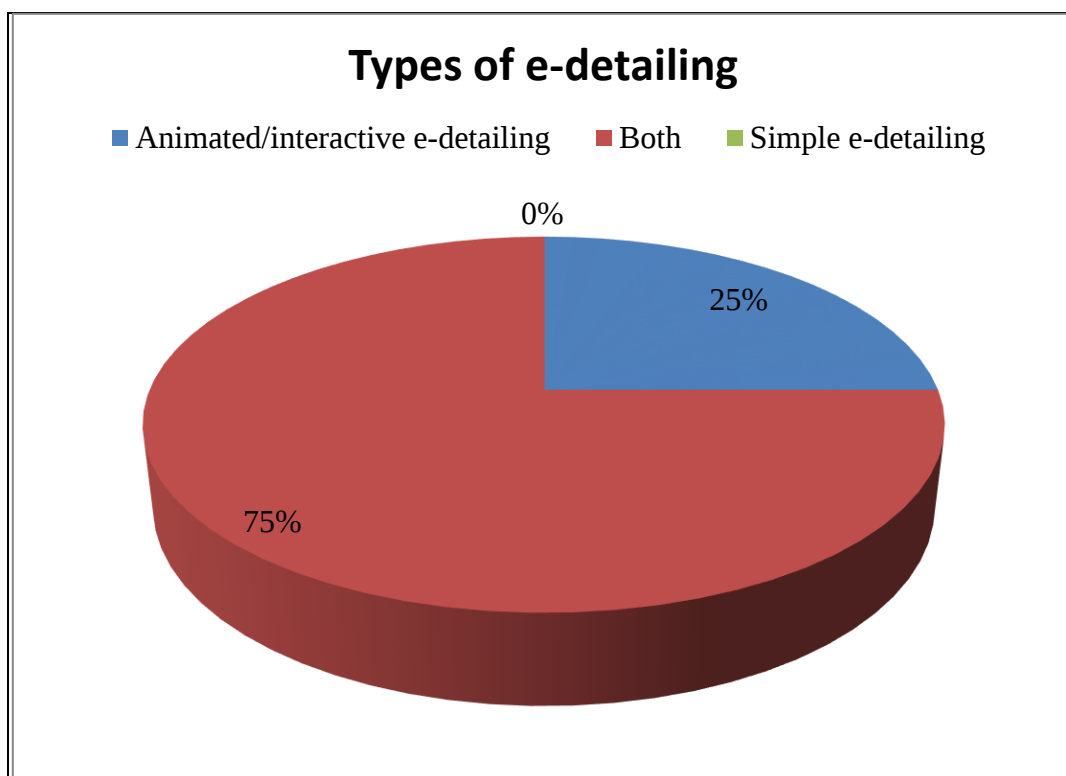
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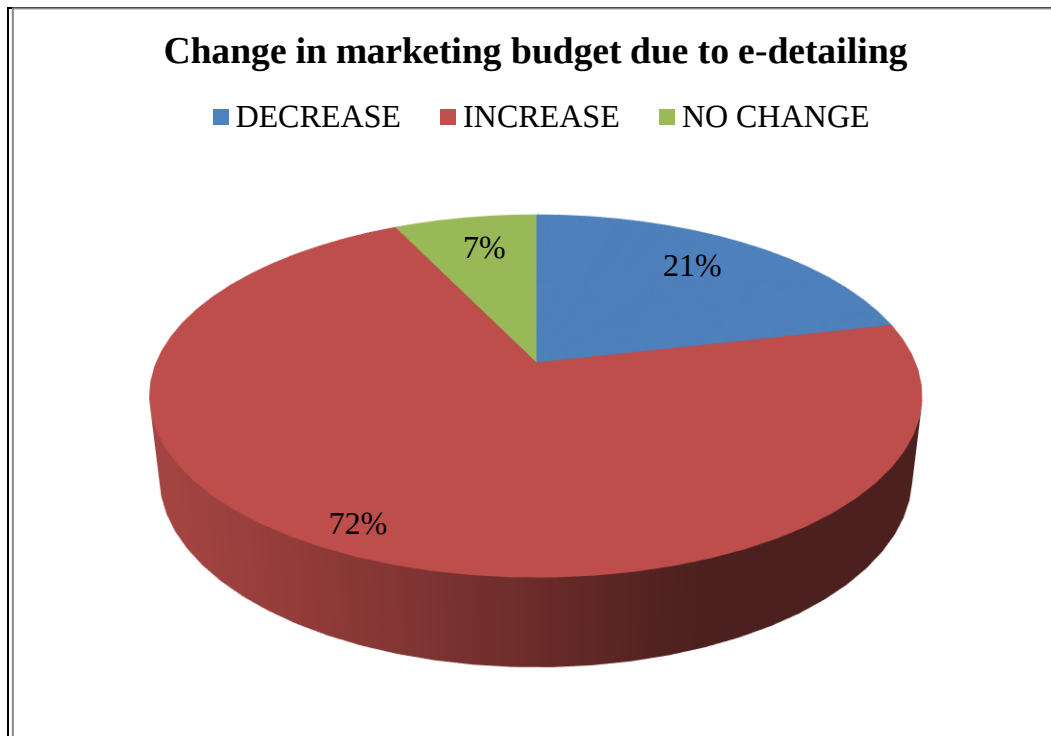
62% of Digital Managers have responded that adoption of e-detailing by medical representatives was a challenge at initial stages.



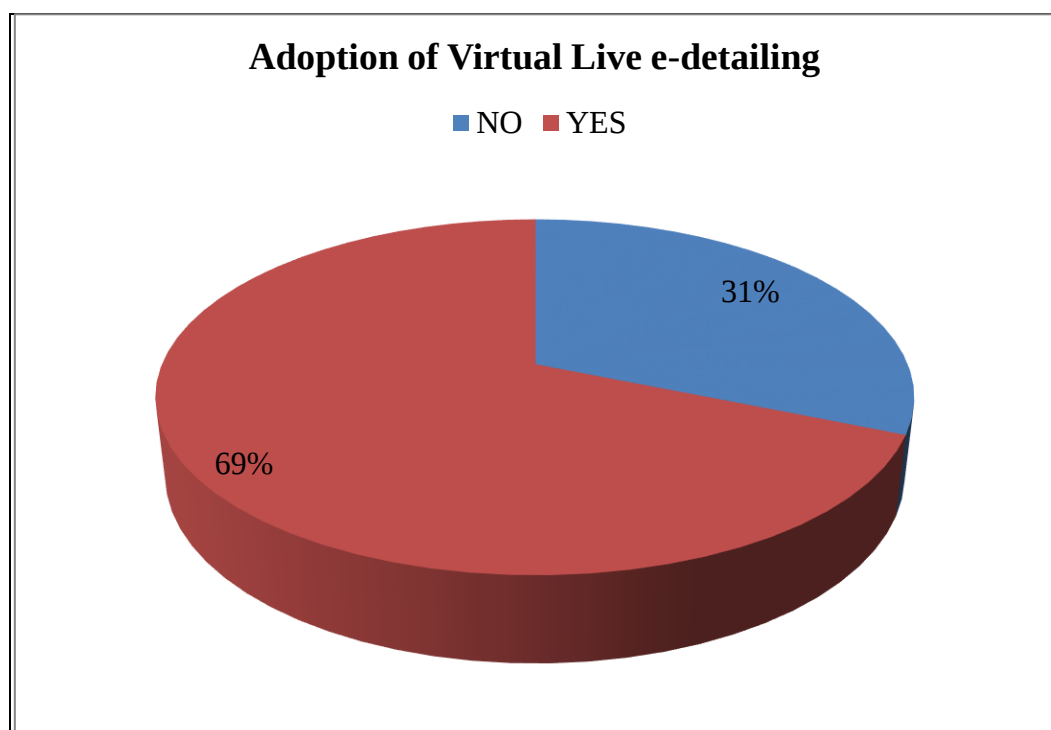
57% of digital managers have responded that there has been a change in sales due to e-detailing being implemented by their organisation.



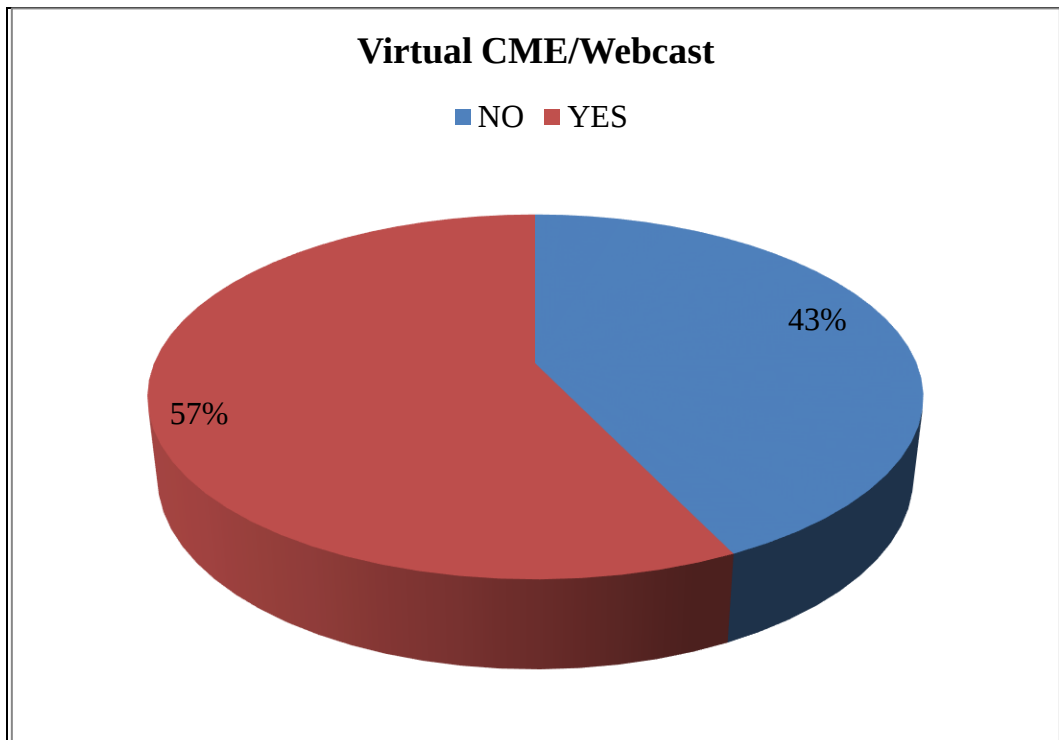
75% of digital managers have responded that they are using a combination of simple and interactive e-detailing for product promotion.



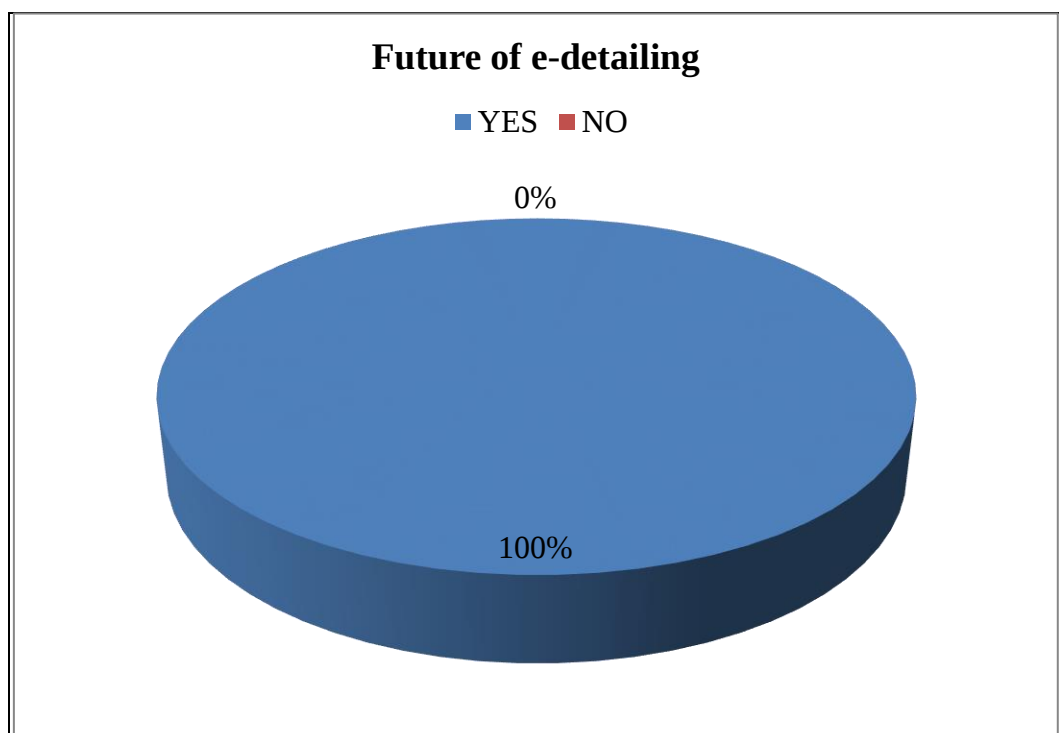
72% of digital managers have responded that implementation of e-detailing has resulted in **Increase** in marketing budget for the organisation.



69% of digital managers have responded that virtual live e-detailing will be soon adapted by the pharmaceutical industry.



57% of digital managers have responded that that they utilise iPads/Tablets for conducting virtual CME and webcast programs.



All 16 digital managers surveyed have responded that they have future plans of rolling out e-detailing to all sales divisions across organisations.

Result & Discussion

From the data, it is seen that all the 230 HCP's surveyed in Mumbai City are visited by Medical representatives with iPad/Tablets for e-detailing. Majority of the HCP's have agreed that e-detailing is a better way to promote products and also helps in answering their queries. The HCP's surveyed have also agreed that Medical Representatives are better able to promote products through e-detailing (41.3% respondents) and are better able to handle brand objections (67% respondents). It has also been seen from the data that 65% of HCP's have said that e-detailing does not create any impact on the Doctor-MR relationship and 82% of HCP's have said that e-detailing does not influence their prescribing behaviour. The major drawbacks of e-detailing as shared by 29.2% of HCP's is that they are time consuming followed by 26.7% HCP's saying the content is too repeatable. 97% of HCP's have agreed that pharmaceutical organisations are trying to make a difference in the way product information is communicated through e-detailing. Pharmaceutical organisations which are better in e-detailing as perceived by HCP's include GSK, Sun Pharma, Lupin, Pfizer, Novartis, Cipla, Dr Reddy's, MSD and Janssen. Some of the suggestions given by HCP's for further improvement of e-detailing include, "e-detailing must be supported with information and not just slogans and adjectives", "content should be updated", "content should be more visually interactive", "concise information and quick navigation", etc.

Data from 180 Medical Representatives survey findings shows that 60% of medical representatives are using iPads/Tablets for a period of 0 to 1 year. Majority of the medical representatives (103 respondents) have shared that e-detailing is more interactive compared to traditional detailing. 93% medical representatives have been found to be using iPads as a device for e-detailing. Veeva has been found to be the leading platform used for e-detailing. 98% of medical representatives have said they were trained by their organisations for using iPad/Tablets for e-detailing. 92.5% of medical representatives have said they are comfortable with slide navigation and 83.4% medical representatives are comfortable with handling and taking care of the device. 83% of medical representatives have responded that e-detailing has increased their call time with doctors and 72% have also said that e-detailing has helped them to improve their relationship with HCP's. Reporting and Call Synchronization is one of the major challenge faced by medical representatives in e-detailing followed by software issues. Lastly, 95% medical representatives have shared that they are happy with the transition from traditional to e-detailing.

Data from the survey done with 16 Digital Marketing Managers shows that 56% of pharmaceutical organisations are using e-detailing as a pharmaceutical marketing communication tool. E-detailing being “more integrated” and “helps in customer profiling and fine tuning of communication strategies” are the attributes that make e-detailing better than traditional detailing. 69% of pharmaceutical organisations are using e-detailing for last 3 to 5 years in India. 46% of digital managers have shared that Veeva platform is used for e-detailing followed by 31% who said they have their own customized platform. 25% of digital managers have shared that adoption of e-detailing by sales force was a major challenge in shifting from traditional to e-detailing. 88% of digital managers have said that e-detailing has helped the sales and marketing teams to build better connections with doctors. 62% of digital managers said that adoption of e-detailing by sales force was a challenge in the initial stages. 57% of digital managers have shared that there has been a change in sales due to e-detailing. 75% of digital managers are using a combination of simple and interactive e-detailing for product promotion. 72% of digital managers surveyed said that there has been an increase in marketing budget after adoption of e-detailing. 69% digital managers are of the opinion that virtual live e-detailing will be soon be adopted by the pharmaceutical organisations and 57% digital managers said they utilise iPads/Tablets for conducting virtual CME or webcast programs. All 16 digital managers were of the opinion that e-detailing will be implemented for all sales divisions within the organisation in future.

Recommendations

To improve relation with the doctors and influence their prescribing behaviour:

E-detailing should be incorporated into the company's Customer Relationship Management (CRM) strategies and all the sales activities and information gathered by sales force should be integrated into the company's marketing system to better serve the physicians. Understanding of the physician segment and designing the brand communication accordingly will also help to influence the prescribing behaviour.

To increase the capability of Medical Representatives:

Medical Representatives should be trained well by the organisations regarding the use of iPads/Tablets and pharmaceutical organisations should have a dedicated tech support team to resolve issues in call reporting or any other software or hardware issues faced by the sales force in day to day activities.

For Pharmaceutical Organisations:

Pharmaceutical organisations should have a separate digital marketing team headed by a digital marketing manager, who can work in close co-ordination with the product management teams for better implementation of brand strategies digitally and also assist the product management teams with closed loop marketing (CLM) like capturing customer insights, in-clinic activities by the medical representatives, etc.

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