

EXPLORIA

Building Community Networks™

Closed Loop Speakers Bureau™
A Web to Desktop Portaling Solution

exploria®
Building Community Networks

BUILDING COMMUNITY NETWORKS™

CLOSED LOOP SPEAKERS BUREAU™

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Table of Contents

Overview	1
Websites vs. Community Networks™	1
Compliance and Fair Balance vs. User Flexibility	6
Seamless Online/Offline Activity	9
Return on Investment	11
Architecture	13
Conclusion	15

Overview

A promotional Speakers Bureau can be an effective marketing

tactic for a pharmaceutical brand by motivating, enlightening, teaching and ultimately influencing potential customers and peers. An uncontrolled bureau, on the other hand, can have disastrous consequences for a pharmaceutical company, especially with the intense regulatory scrutiny the industry faces today. When considering a solution for the management of speaker content and activities, including contracting and training, a pharmaceutical company must consider how to balance the need to maintain this control and security, with the flexibility their speakers require to be effective. This paper outlines a Closed Loop Speaker Bureau solution, which can successfully maintain this balance, while automatically controlling corporate content on the speaker's desktop and dynamically capturing back valuable metrics on how that content is being used in a *web to desktop portaling* platform.

Websites vs. Community

Networks™

Securely disseminating and managing content, for key opinion leaders, speakers, brand teams and sales representatives, continues to be a challenge for pharmaceutical Speaker Bureaus. On the pharmaceutical company side, there exists both the challenge of control and segmentation of the content. On the KOL/speaker side there is the challenge of managing this content.

Websites

Websites or brand portals are common ways pharma distributes information to its KOLs and speakers. This medium is useful for disseminating streaming video, interactive CME and training programs. It is also a useful communication tool for setting up internal dynamic databases, including KOL management tools and centralized data warehousing. But when it comes to content dissemination and managing content remotely, pharma loses control of their branded content once it is downloaded to their speaker's computer. What if labeling suddenly changes and immediate regulatory edits are needed? What if content needs to be retrieved? How can pharma be sure the correct version of their regulatory approved promotional content is being used? Will the appropriate sections of the presentation be fair balanced and in compliance? There is a high probability that these busy healthcare providers have not gone back to the website to download the new content and if they do, how sure can pharma be that their speakers are successfully managing the content and replacing the out of date versions? Not only can the brand message be compromised by speakers using old content, but FDA and OIG mandates may also be violated if speakers continue to use inappropriate or inaccurate content. Whether content dissemination is done via a secure website or via multiple CDROM mailings or e-mail, all have the same end result – pharma loses control of their information once it reaches their speaker's computer and pharma must rely on their busy speakers to battle content management on their own.

A website is by design a unidirectional solution for the dissemination of content. A speaker logs in and selects material that is then downloaded to their desktop. Pharma loses the ability to track their content and how it is being used once it leaves the website (Fig-1). While website metrics, such as how many times a page or particular link has been accessed can be easily measured, metrics including how many times a slide kit or individual slide has been viewed or how much time does one spend on each piece of content is no longer attainable once the content

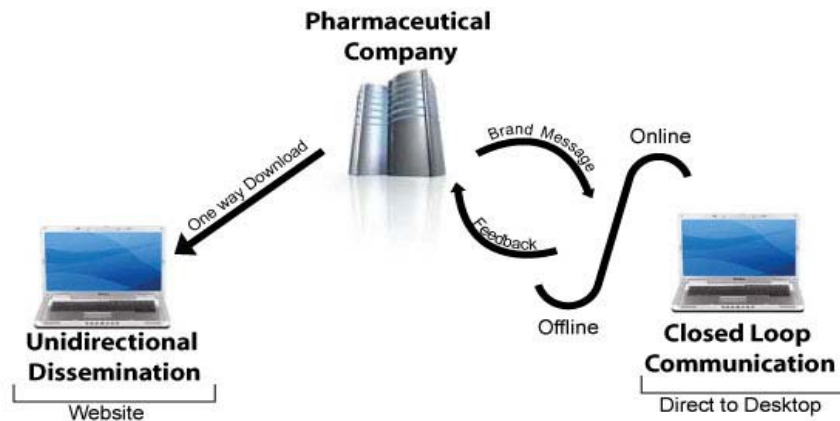


Figure-1: Website vs. Direct to Desktop

reaches the speaker’s computer where it is actually employed for the task at hand. These “out of reach for a website” types of metrics are important not only for regulatory monitoring, but also for empowering a brand marketing team to use this feedback to tweak or recast their brand message. Such tracking data and feedback may in fact point out or make clearer what opportunities the brand team should take advantage of in future messaging for their product and its positioning in its therapeutic area. Given this technological barrier of a website, something else is needed to complete the solution.

Direct-to-Desktop Community Network

For the dissemination of Speaker Bureau content and other information, a direct to desktop solution broadcasts promotional content from a web server to a “receiving” application on the speaker’s desktop. When this *web to desktop portaling* is secured and set with permissions within a Community Network™, this approach allows both automatic control of the content on the speaker’s desktop as well as the ability to capture back valuable metrics on how that content is being used, both functions achieved whether on- or off-line. Unlike a website, this direct to desktop approach is a controlled closed loop between the internal

brand team, the sales representative and the external speaker (Fig-1). Content is disseminated and managed automatically for the speaker, maintaining the appropriate version of promotional content. Activity within the application is tracked, packaged and sent back to pharma automatically creating a closed loop network for pharma's Speakers Bureau activities that can run continuously in this cyclic loop.

One of marketing's "holy grail" offshoots of this is the granular segmentation of promotional assets including contracts, training modules, and content such as slide decks, which is difficult and non-scalable in a pure website approach. Brand teams are able to sort users on an individual basis or into groups allowing for the dissemination of specific content targeted to members of a Community Network™ of all speakers. One application can serve as a single solution for the distribution and management of activities for various levels of speakers, specific advisory boards, and internal groups including brand teams, medical science liaisons and the field force. This technology facilitates the collaboration and interaction between users based on the information they utilize and share, encouraging the peer to peer flow of information and community structure.

“Exploria has expressed the most far reaching understanding of market challenges and the most unique approach to addressing them”.

(Forrester Research, June, 2006)

A Happy Marriage

The optimal way to build a complete closed loop speaker bureau solution resides in the ability to seamlessly integrate those activities which inarguably work well on the web, such as

live webcast
trainings and
dynamic intranet
based databases
with those
activities that
need to be
managed directly
on the desktop,
such as offline
content usage,
tracking and

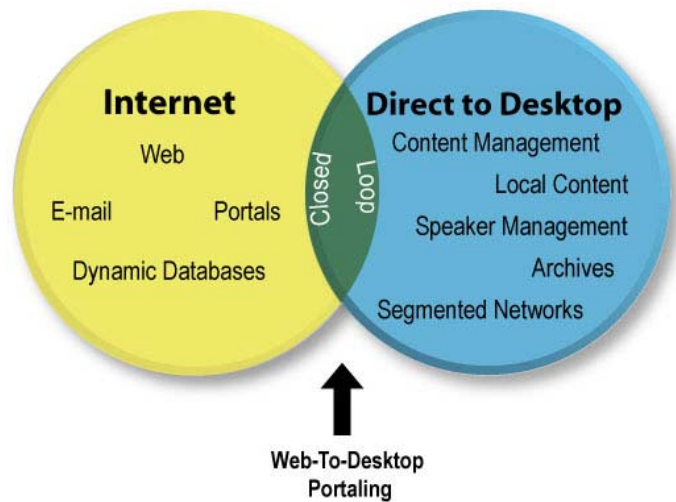


Figure-2: A Happy Marriage

content management (Fig-2). This happy marriage of the two solutions, *web to desktop portaling*, allows for the integration of multiple business activities into an enterprise solution with a single point of entry on the desktop for both internal and external members of the Community Network™. This creates a consistent resource for both speakers and brand teams, which proves to be important in today's pharma environment where the KOL is often a longer standing fixture within a company than the ever-evolving brand team constituents.

Compliance and Fair Balance vs User Flexibility

Overview

In light of the ever-increasing world of regulation, pharmaceutical companies must be prepared, thoughtful, and deliberate in their approaches and strategies for promotional activities and relationships. The use of unapproved or off-label content in a promotional setting is a serious offense, where both the pharmaceutical company and the speaker can be held liable.

How can the pharmaceutical company be assured that their speakers are being regulatory compliant and using the required fair balance content during the promotional events they are speaking at on the company's behalf? Different strategies have been devised and "broken into". For example, PowerPoint® presentations saved as slide show or .pps view only files are easily manipulated by renaming as a .ppt file and then editing. Converting PowerPoints® into jpeg, other bitmap and pdf formats still allows copy/paste editing, and has the added disadvantage of removing all animations, transitions and moving indicators that may help emphasize a particular message point. Password protecting utilities in PowerPoint® only work for PowerPoint 2002® and above, leaving many speakers with older versions of PowerPoint® free to edit.

Rules and Permission Based Regulatory Compliance

In a Community Network™ application, the content can be controlled in a variety of "bullet proof" ways: (1) a locked slide deck can be given to the speaker for use "as is" or (2) specific rules or permissions can be set to ensure that regulatory requirements for content use are adhered to with the option of some flexibility for

the speaker to customize the slide deck presentation. Such rules or permissions may include mandatory slide inclusions such as fair balance and safety content, which must be included in every promotional presentation. Bundled slides or slides that must be shown in succession is also possible. Nested bundles, “black holes” for speakers to input their own selections, rules based slide sorting, all allow the pharmaceutical company to manage both internal policies and external regulations. Also, in a controlled application, if content needs to be retrieved it can be done automatically. The same is true for required changes in slide decks which can be broadcasted to the speaker at the moment they are mandated and approved without the wait for CD duplication, e-mail and website dissemination which are all “elective” at the speaker’s end.

At a higher level beyond how the assets can be used, in a closed loop Speakers Bureau application, various business sub-activities can be controlled within the networked community. Specific workflow permissions for these sub-activities can be set on a per group or per person basis, thus automating those workflows. For example starting with a newly nominated speaker, they must first be asked to digitally submit a CV and sign a contract. Only when this is completed will the application allow the speaker to have access to available speaker trainings. When the speaker completes 100% of the required training sessions, the slide content for promotional use is automatically unlocked and available to them on their desktop. In this closed loop solution, all activities whether on- or off-line are monitored, tracked and reported on a per speaker or per group basis to ensure asset security and program compliance.

OPINIONS of the Key Opinion Leaders

All this control over the use of the content is important, the right thing to do, and has to be done. But pharmaceutical companies should keep in front of them the reason they assemble and nurture a Speaker Bureau – it should be to embrace the OPINIONS of their key opinion leaders who go out and influence all those other

doctors who might prescribe that drug brand. Thus, each pharmaceutical company and every brand within that company, needs to find the right balance between controlling the information and user flexibility.

The Real Balancing Act

The real balancing act for pharma is to manage the speaker's content while still enabling enough flexibility in a presentation which will allow the speaker, especially the KOLs to be engaging and able to attract interested audiences

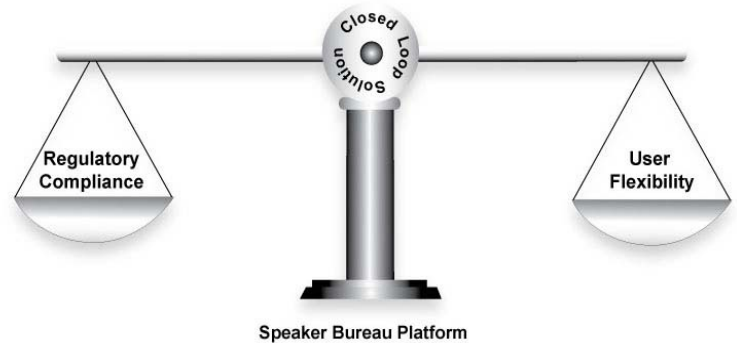


Figure-3: The Real Balancing Act

(Fig-3). Today pharma runs the risk of their speakers losing credibility with their peers if their presentations are so strictly promotional that the speaker appears not as a credible source of well-rounded information, but as an obvious paid consultant for the brand. How can a pharma company achieve this delicate balance of branded messaging, regulatory control and speaker flexibility? With a closed loop Speaker Bureau, the corporate content is controlled with automatic rules and permissions which may also include the ability for speakers to add their own disease state information within the presentation, but on their own personal slide templates so as not to implicate the pharmaceutical company as the source of that content.

There are many different interpretations of the acceptable way to set speaker bureau workflows and secure promotional content by pharma companies today. A closed loop solution can accommodate the strictest of federal and state interpretations to the most flexible policies as determined by various pharma legal

departments today. The question is: Should pharmaceutical companies track information in this closed loop Speaker Bureau, such as, what is being created and used outside of the corporate assets? It seems that although “tracking” may be perceived as an intrusion of privacy, having an audited report of content usage will actually help to mitigate or prevent violations that may cause either pharma or its speakers to assume certain liabilities.

Seamless Online/Offline Activity

In today’s world, which is highly connected via the Internet, many daily computer related tasks are executed online through some sort of browser. Since the Internet began in March of 1989, the time we spend online has grown substantially.

Interestingly, for a variety of factors including no or weak Internet access, we still spend a significant

amount of time working in desktop applications in offline mode. Thus, it would be beneficial to engage a task such as managing and working the content in a Speaker Bureau within an application that provides a seamless working environment whether on- or offline.

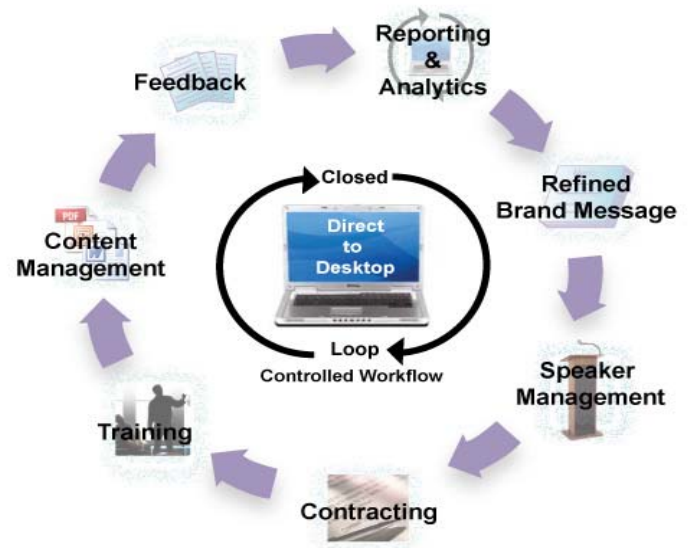


Figure-4: A Closed Loop Controlled Workflow

Unlike a web-based solution, which requires the user to have a connection to the Internet, a direct to desktop solution based on the Community Network™ platform is a hybrid application, which allows both online, and offline activity. When connected to the Internet, content and workflow permissions are pushed to the speaker's application automatically. In return, as part of the closed loop, tracking information and speaker activity such as signed contracts, surveys and self-tests are sent back to the administrators of the Speakers Bureau program(Fig-4).

From the speaker's point of view, they have the ability to use the content that has been broadcasted to them in an offline mode allowing them to continue to study content and prepare presentations when there is no internet access available, such as while traveling or at an actual promotional event. Self-paced trainings, testing and surveying can also be completed offline as automated 'store and forward' algorithms allow offline usage, with the need to be online only for updates and feedback.

From the marketing brand's point of view, this strategy provides valuable information about their speakers such as what presentation material is being studied, what presentations are being used, when activities are executed and direct dynamic feedback that will allow some calculation of return on investment (ROI). The ability to track both the online and offline activity of their speakers will help to identify behavioral patterns that can be used in the future to optimize efficiency.

Return on Investment

Overview

In almost every activity in pharma, there is a desire to try and determine the ROI for engaging that activity. This is true even for something that normally is difficult to abstract a quantitative ROI from such as a Speaker Bureau for a specific product brand. Utilizing a Direct to Desktop Community Network™ approach for a Speaker Bureau, there are two primary ways to quantify this:

Cost savings

The Speaker Bureau platform is available as a single re-usable resource over the lifetime of the brand product that it supports. With its Auto-updating engine, media of a variety of formats (PowerPoint®, movie, pdf) can be easily updated on the desktops of all speakers at any time and as many times as required. Starting with initial deployment of content and throughout the lifecycle of that content, changes can be made and broadcasted to the speakers automatically, absolutely ensuring that each speaker has the most up to date content for presenting. This eliminates costly CDROM duplication and mailing fees, along with human resource costs for follow-up.

Additional cost savings can be realized if you employ electronic contracting with signature capture. An added ROI for electronic contracting is described below. Finally, the integration of other activities such as training and surveying with asset management provides higher level cost savings because they are automatically organized into well defined and executed workflows within a single resource, again eliminating some human resource requirements.

Immediate Time to Market

The sooner the speaker is engaged in the process during the course of a one year contract, the more return is realized from that speaker's activities. Electronic contracting has been shown to "capture" speaker compliance twice as fast in the first 30 days of the Speakers Bureau than when traditional paper contacting is employed (Fig-5). The difference in the two curves (blue shaded region) is the

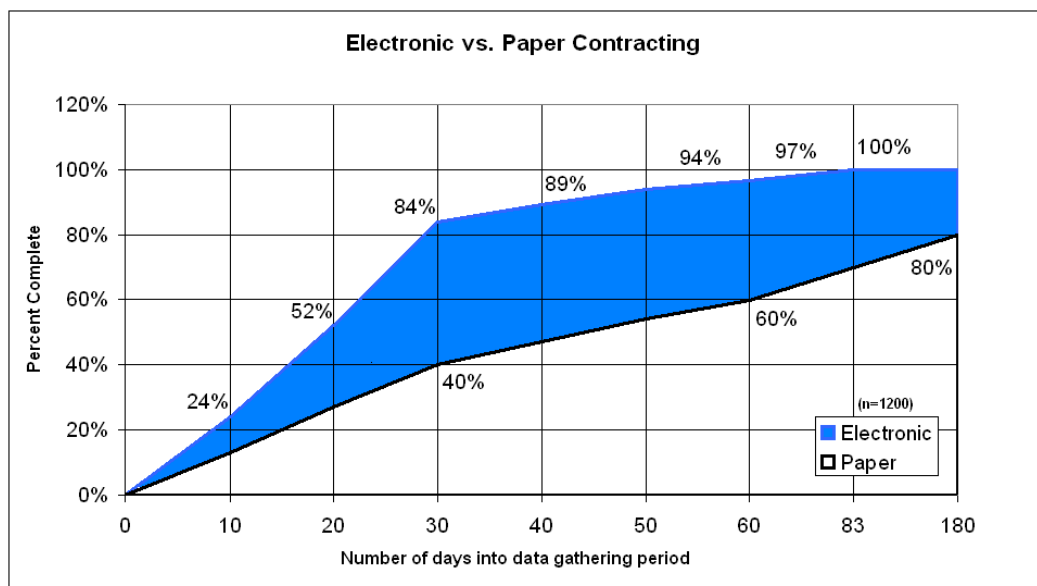


Figure-5: Paper vs. Electronic Contracting

time value of getting the speakers out there faster doing the intended task.

Brand Message Tracking

Understanding what kinds of presentations are being used by the speakers in your bureau is critically important for a brand team to know. Preserving the brand message structure by imposing "rules" on the content is important, but also knowing how long your speakers spend on certain sections of the branded presentation provides some level, even if crude, of "commitment" to the brand message by the speaker. Tracking both on- and offline presentation usage thus can provide the brand team with feedback to develop more effective presentations.

Architecture

Network Architecture

The Exploria Community Network™ operates using a client-server model. The client side desktop application connects to the database server in order to authenticate and synchronize all data that applies to that client's application. All communications are achieved through simple HTTP posts in order to maintain maximum compatibility through various firewalls and proxy setups. The application also connects to a file server to download all files that accompany the synchronized data. File transfers occur using FTP. If FTP is not available, HTTP is used. The remote databases and files can be stored on a single server or multiple servers. Data is broadcast to the servers in much the same way as it is retrieved. The client side application posts data to the server via HTTP and uploads files to the server via FTP or HTTP.

Custom Database Interfacing

Multiple solutions have been implemented for data transfers between various applications and the Exploria solutions in accordance with the needs of the pharma companies. These solutions include: file passing via FTP and HTTP, parameter passing via a server side page (PHP, JSP, ASP, CGI) and SOAP web services. The preferred method of data transfer has been SOAP because of its extensibility and error handling. Custom SOAP solutions were designed for multiple companies to satisfy their specific needs. In addition, secure URLs have been used for all security sensitive services by implementing IP filters or password protection.

Asset Management and Security

All assets imported into the application are compressed and stored in a database located on the user's hard drive. Storing the data in this way allows for greater management and security of the assets and a more efficient use of the user's hard disk space. Since the assets are stored as binary data inside of a database, the user of the application is not able to simply browse their hard disk for the assets because there are no external files to be found. The user cannot open, modify or delete these assets without explicitly using the interface of the application, which can manage whether or not the user has permissions to perform these actions. Because the assets are compressed upon entering the database, file size downloads are minimized and they take up less space on the user's hard disk. Another advantage to this method is that all of the assets that are specifically segmented for that speaker are stored in a single centralized and local database providing a unique "fingerprint" of content for that speaker.

Asset Downloading

A number of strategies have been devised to provide the most efficient downloading of assets as possible. These strategies range from intricate processing of the assets to simple workflow enhancements to improve the user experience. High-end compression techniques have been used to decrease the size of the assets, thus decreasing the time and network activity required to obtain them. A key approach involves assigning a "fingerprint" of each asset with a unique identifier to ensure that each one is uploaded and downloaded only once, reducing the amount of redundant data to and from the speaker over the Internet. To enhance the user experience, we have implemented asynchronous and partial downloading of assets. This allows the user to continue working with the application while any required data is streamed down in the background. These downloads are also prioritized, ensuring that the assets that are most important to the user are available as soon as possible. The user can interrupt the download of assets at any time by quitting the application. The next time the user enters the

application while connected to the network, the partially downloaded assets automatically resume downloading. This allows for better network efficiency since packets are not lost if an asset download is interrupted.

Conclusion

In the past, the Speaker Bureau has been a marketing activity that was run with little oversight and certainly much less scrutiny as to what was presented by speakers. This has changed dramatically in the past decade with new regulations to govern the ground rules of exactly what pharmaceutical companies and speakers can and cannot do. There is clearly an awareness of oversight now with fines, rulings and even imprisonment for breaching these regulations. As this scrutiny has evolved, the toolsets to keep up with this have lagged behind as companies were under the impression that content management for a Speaker Bureau could be completely controlled by a website. Clearly now it is recognized that there are technological limitations to utilizing websites and other approaches for maintaining proper controls to protect both physician speakers and pharmaceutical personnel.

Closed Loop *Web to Desktop Portaling* approaches have the right technological underpinnings for automatically enforcing mandated regulations, while providing an appropriate level of flexibility to allow the Speaker Bureau to function in the best interest of both the speaker and the brand team. Couple this with the capability to maintain this balance whether on- or offline, and we should begin to see renewed value in this critically important channel of communication for the pharmaceutical industry.

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