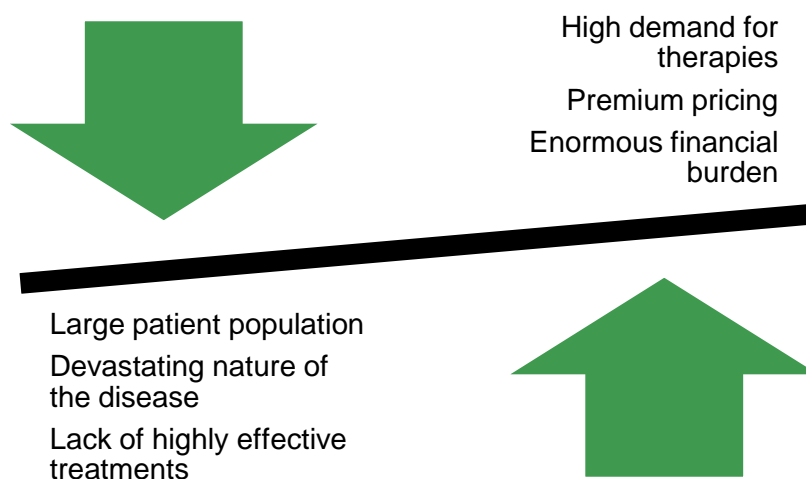


# Whitepaper: MSL and Sales Strategies for the US Oncology Market

Oncology: where an expansive market opportunity interests with an extremely high cost of failure. Companies have been built, sold, and failed based on trying to improve the therapy options cancer patients have at their disposal. Combine the epidemiological factors with the high-priced treatments and it is no wonder the Oncology landscape has many highly motivated players.

While this is not groundbreaking news to our industry, stating it out loud sets a base from which to have discussions around how the landscape of Oncology sales and communication strategies are changing and their effects on physicians and pharmaceutical companies.



## About this whitepaper...

ISR collected insights from 102 practicing oncologists and hematologist-oncologists in the US and asked them what information they find most valuable and from whom and how they want to receive this information.

Within this whitepaper we focus on:

- Oncologist's views as to the restrictive nature of MSLs and Sales Rep visits including, comparing Academic Medical Center and Private Family Practice restrictions
- Understanding what Oncologists believe are the most valuable links/ introductions a pharmaceutical representative can make by looking at how they rank six linkages
- The type of information US Oncologists prefer from peer-based literature and eDetail sessions (online or memory stick)

This whitepaper is based on findings from ISR's  
"MSL and Sales Strategies for the US Oncology Market" report  
published in June 2012.

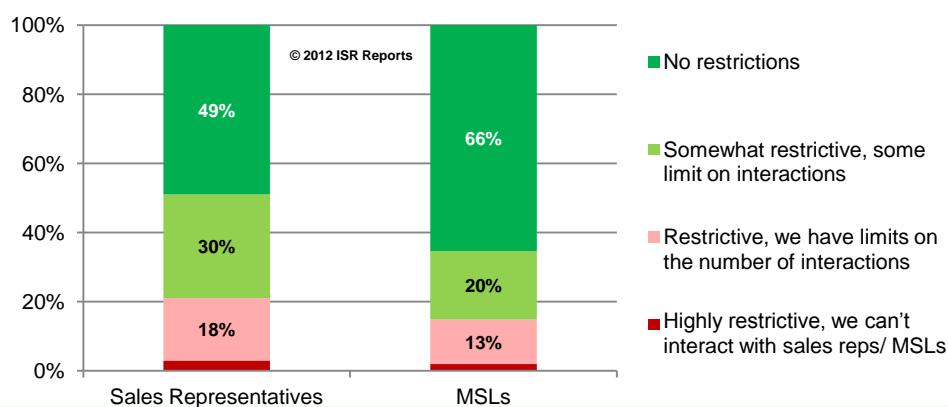


## From the Section of the Report Titled: “Access to Oncologists”...

The good news for pharmaceutical companies is that there seem to be few restrictions affecting pharma representatives' ability to get an audience with Oncologists. However, a healthy minority of Oncologists indicate there are some substantial restrictions. Nearly half of the respondents (49%) reported no restrictions in place regarding seeing traditional pharmaceutical sales representatives while two-thirds of respondents (66%) indicated no restrictions regarding seeing MSLs.

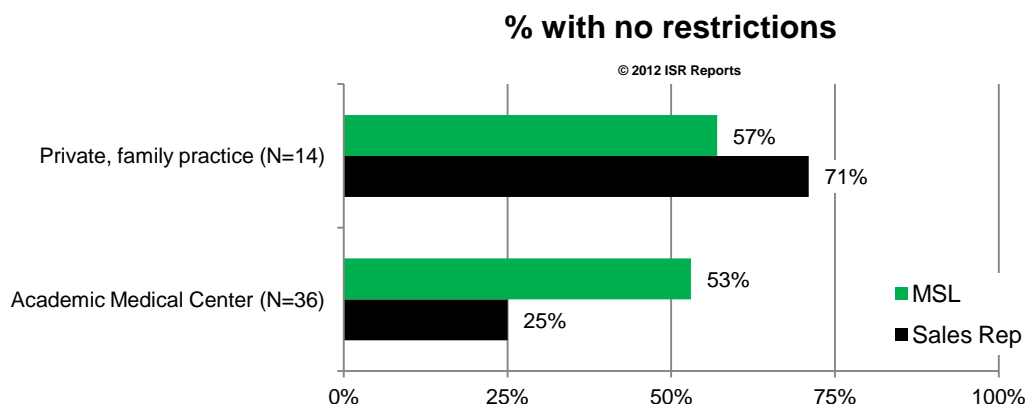
*“How restrictive is your practice/ organization regarding your interaction with pharmaceutical sales representatives?” (Base = 102 respondents)*

*“How restrictive is your practice/ organization regarding your interaction with Medical Science Liaisons (MSLs)?” (Base = 102 respondents)*



*“How restrictive is your practice/ organization regarding your interaction with Medical Science Liaisons (MSLs)?” (Base = 102 respondents)*

*“How restrictive is your practice/ organization regarding your interaction with pharmaceutical sales representatives?” (Base = 102 respondents)*



### Other topics covered in this section of the report...

- Likelihood of taking a meeting with MSLs vs. Sales Reps
- Frequency and duration of visits
- Most valuable topics and industry connections for MSLs
- MSL topic appropriateness



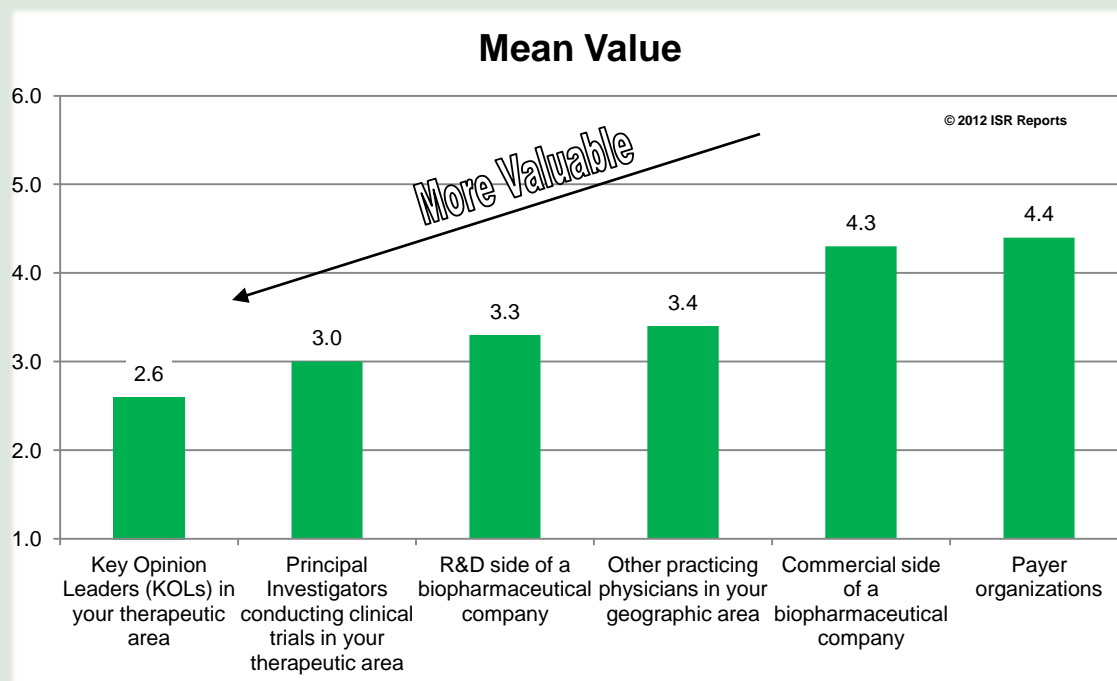
From the Section of the Report Titled:

## ***“The MSL Interaction Environment”...***

ISR’s study shows there are many pieces of information MSLs can use to increase their chances to get their “foot in the door.” One is developing a solid package of both peer-reviewed articles coupled with summaries of conference findings/ presentations, but there is another important avenue that Oncologists would prefer MSLs would do more often: make connections to other members of the healthcare community. Oncologists view the linkage between themselves and KOLs in their therapeutic area as the most valuable connection a MSL can make.

Not only do they want this connection to KOLs, but other report data shows they also want to have practicing peer-to-peer discussions rather than rely on the MSL to gather the information.

*“MSLs can serve several purposes and have various roles. Please rank the following options in terms of how valuable the following linkages are to you with 1=most valuable and 6=least valuable.” (Base = 102 respondents)*



### **Other topics covered in this section of the report...**

- *Driver for interacting with MSLs*
- *Increasing the likelihood of taking a MSL meeting*
- *Most important MSL traits*
- *Relative value of interaction topics*
- *Appropriateness of MSL interactions*
- *Value vs. Appropriateness of MSL interactions*
- *How drug type impacts pharmaceutical communications strategies – First in class products*



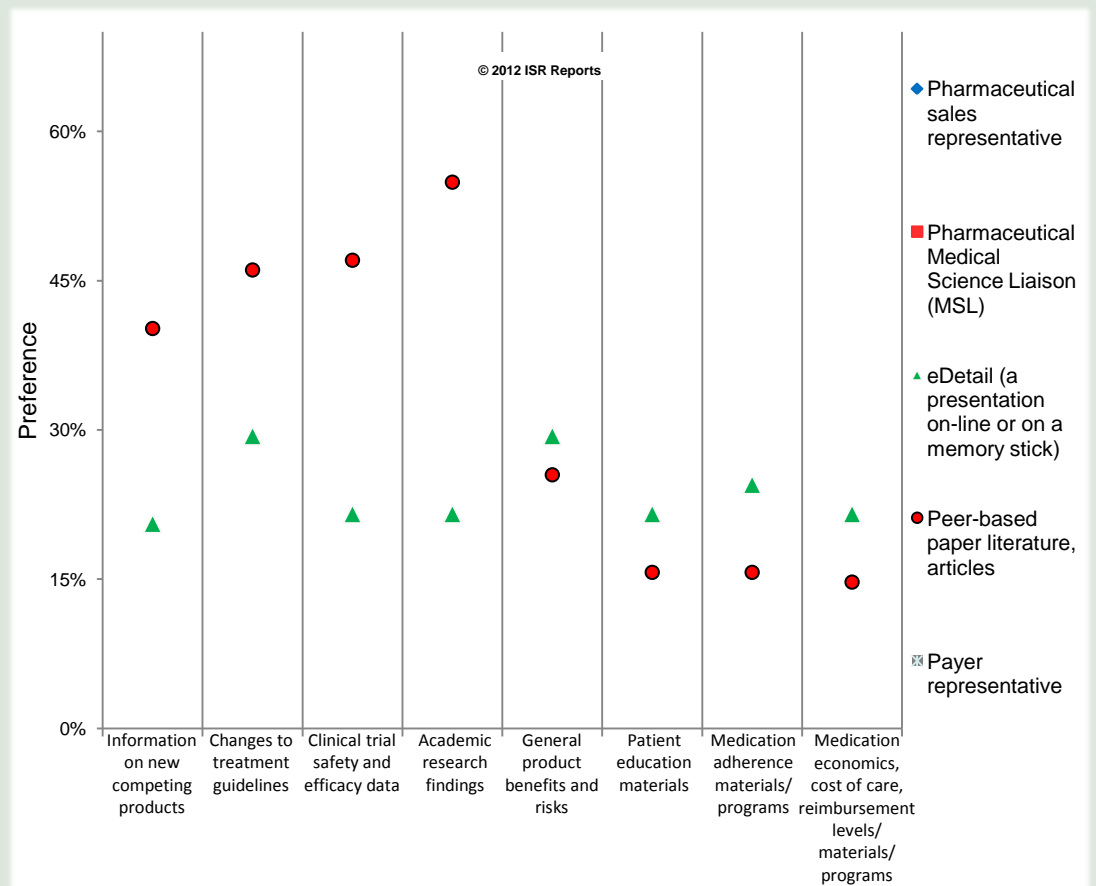
From the Section of the Report Titled:

## ***“Preferred Information Dissemination Vehicles”...***

Oncologists can receive information from a variety of sources; peers, scholarly articles, the pharmaceutical industry, payers, and web-based applications. There are certain types of information they prefer to receive from specific communication vehicles/sources.

It is interesting to note that Oncologists look to peer-based literature as one of the top sources for both clinical trial and academic research findings. Another important finding is how the type of clinical trial (with or without a comparator) has a dramatic impact on an Oncologists' preference.

Two delivery methods have been provided for this whitepaper.



### **Other topics covered in this section of the report...**

- Preferred communication vehicle by study type/ data
- Importance that specific study/ data types play in Oncologists' prescribing decisions
- Most important study type/ data source in making prescribing decisions
- Discussion frequency vs. Importance of discussion in prescribing influence
- Private/ Government payer influence over prescribing past, current, and future



## What you will learn in ISR's full report:

- How US Oncologists want to be interacted with.
- The types of interactions Oncologists view as being appropriate or inappropriate.
- The pieces of information Oncologists find most valuable and how this changes based on the type of data/ information being presented.
- How much individual prescribing power Oncologists will have in the near future and what information is vital to them in making prescribing decisions.
- Which pharma companies have the best MSLs and the traits that Oncologists want to see in them.

To view the report page visit:

<http://www.isrreports.com/industry-reports/msl-sales-strategies-oncology-market>

If you have any questions or comments please contact ISR via:

Phone: +1 919.301.0106

Email: [info@ISRreports.com](mailto:info@ISRreports.com)

## About Industry Standard Research...

Industry Standard Research (ISR) is a leading provider of off-the-shelf market intelligence and custom market research services for the pharmaceutical industry. We provide novel, primary market research-based reports on topics and with decision-makers you can't get anywhere else in a syndicated report – our reports use custom market research methodologies combined with analytics and recommendations to give you the “inside information” quality of custom reports at a syndicated price.

[Info@ISRreports.com](mailto:Info@ISRreports.com)

©2012 Industry Standard Research

[www.ISRreports.com](http://www.ISRreports.com)