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## Developing a software for pharmaceutical promotional meeting planning

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Developing a Software for Pharmaceutical Promotional Meeting Planning

By

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ABSTRACT

Developing a Software for Pharmaceutical Promotional Meeting Planning

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## PART ONE

“It is a bad plan that admits of no modification.”

- Publius Syrus (42 B.C.) Bartlett, 2000)

### *Introduction*

“How wrong I was!” This admission from John H. Young (Young, 2006, p. 340) relates to his first exposure to pharmaceutical marketing more than 20 years ago. Young states he had been “sent to represent the medical group at a planning meeting of the launch of a new non-steroidal.” He felt competent he could hold his own at the meeting.

At the planning meeting, however, as competition, inventories, market segments, inventories, formulation issues, opinion leader development, and public relations campaigns highlighted discussions, Young learned he would out of his depth. He needed to, Young determined, learn about marketing and production as quickly as possible – before the next planning meeting.

The policy for marketing pharmaceuticals, like that for many global markets, is highly complex. Unlike most global industries, however, the pharmaceutical industry is highly fragmented. (Ibid. p. 342) In a similar sense, planning for pharmaceutical promotional meetings frequently proves to be disjointed, with individuals who work as marketing planners, at times, like Young, getting out of their depth.

### *Strategic Planning for a Buoyant, Yet Rigid Market*

Young (Ibid. p.343) stresses that the value of marketing to a product’s success cannot be underestimated. A marketing plan, which includes promotional meetings, needs to be well-thought out, executed, as well as, constantly revised and/or modified.

An increasingly competitive buoyant, yet rigid and regulated marketplace requires strategically planned, exceptional meetings to help accomplish key business objectives. Consequently, pharmaceutical companies have turned to promotional breakfast, lunch and dinner meetings where a select number of healthcare professionals, such as Young, are invited. During the course of these meetings, an approved speaker (trained by the pharmaceutical company) reports on a generic topic that relates to the particular product(s) the pharmaceutical company sells.

In his/her quest to sell particular products, the pharmaceutical sales representative (either by region or district) initiates the meeting which a meeting planner then plans. The meeting, attended by the representative, speaker and healthcare professionals must adhere to government rules and regulations. A few of the requirements a promotional meeting must adhere to include the amount of money spent on each person attending, speakers' fees and the minimum number of individuals needed to successfully support/attend an event.

When planning promotional meetings, to fulfill requirements and ensure adherences to rules, regulations and requirements, a meeting planner needs to answer a number of questions. The number one could be: Can a pharmaceutical company comply with current challenging constraints to planning a breakfast/lunch/dinner promotional meeting?

Another question deserving an appropriate assessment could be: How can a pharmaceutical company effectively plan and implement a "successful" pharmaceutical breakfast/lunch/dinner promotional meeting, yet simultaneously comply with the combined, constantly-changing company and government pharmaceutical rules and regulations?

An appropriate answer to both questions would be: A pharmaceutical company not only can, but must effectively plan and implement a "successful" pharmaceutical

breakfast/lunch/dinner promotional meeting, while simultaneously complying with the combined, constantly-changing company and government pharmaceutical rules and regulations!

Currently, “human” planners ensure the myriad of equipment, employee and attendee specifications are delivered and/or set up in place to fill the “clients need to produce a smooth running event or meeting.” (Event Partners, 2005) As more and more and more rigorous regulations, full-fledged, federal scrutiny, pricing pressures and a tarnished public image incessantly inhibit the meeting planning industry, in addition to the human touch, the need for an all-inclusive promotional pharmaceutical meeting planning clamors to be heard. During the course of this professional paper, I have related concepts to meet the criteria for the creation and development of PharmaSalve (PS) software, an innovative answer to this pressing need.

### *Purpose*

The phrase “problem definition” proves particularly important in that it simply states the situation being discussed and rectified in this professional paper. The entire process and sections of the paper are based on this definition. To resolve a specific problem of compliance and pharmaceutical meeting planning, the ideal outcome would be the development of software that can obtain all compliance rules and regulations needed for each client and use these during the meeting planning process. For example, seventy-two hours before the event the client states, “The sales rep has to have at least 3 attendees RSVP for the dinner meeting or the meeting is automatically cancelled.”

At the designated time, seventy-two hours prior to the start time, the software program analyzes this particular meeting and informs the meeting planner the program does not meet all conditions to this rule and consequently, the meeting is cancelled. PS: The software can also be set to automatically send the cancellation notice to the involved parties (i.e. planner, rep and

district managers). This software would also need to include a user-friendly formula whereby compliance issues and rules may easily be updated, if necessary, even hour by hour.

To begin to fill the pressing need for software such as PS, current criteria for government compliance was explored as well as client needs and meeting planner's objectives. As the researcher, I investigated government and pharmaceutical companies' requirements, along with those of the meeting planner.

Next, along with securing internal advisements from current industry employees and external information from reliable and scholarly sources, I accessed more than 20 publications. Ultimately, to support this study venture, I must conclude that the necessary data needed to fulfill this study's projected plan, to lay the foundation to create and develop PPMP software, to assist client needs in the aspect of promotional meeting planning proves "perfected." The PS software, as suggested by the introductory quote, remains open to positive modifications.

The following specific research objectives, which evolved in response to my quest to arrive at destination PS, are met during the course of completing this professional paper:

*Objective 1*

Identify government/company compliance rules and regulations mandated for promotional breakfast/lunch/dinner pharmaceutical meetings.

*Objective 2*

Determine correspondence and reporting needs, regarding rules and regulations from objective one, needed to achieve a successful event, which a meeting planner needs to communicate to:

- a. The client,
- b. The venue,

- c. To speaker, and
- d. To sales representatives.

*Objective 3*

To develop software with the ability, as well as vital tools, to host all rules, regulations, dollars and databases to create a complete system for the company and the meeting planner.

*Objective 4*

To assess costs in savings to companies, gained from utilizing a more efficient alternative possessing the ability to empower meeting planners to become more productive; reporting results in less time.

*Justification*

When contemplating criteria to convey support for PS, my mind returned to challenges continually confronted when associated with Advogent. During this particular, employment tenure, issues repeatedly arose with client compliance, office operations and communication, which ultimately intensified and culminated myself resigning my position after two and a half months on October 31, 2007. Consequently, I determined to relate these issues in writing as they may easily be resolved and, in turn, improve the working environment, while simultaneously contributing to employee retention.

Contrary to components contributing to the concept of retention, Advogent's record of repeatedly being transferred by a number of buyouts (i.e. Cardinal Health) turned the entire pharmaceutical marketing process inside out. Without solid, leading guidelines, the office routine fell by the wayside, leaving employees to deal with a myriad of confusing choices on their own. In addition, experiencing a dearth in the number of employees needed to complete necessary work additionally complicated Advogent's situation.

### *Client Compliance*

As Project Manager for meeting planning on the Abbott Humira team, I repeatedly encountered challenges connected with compliance issues. It seemed that not one sentence could be spoken with the word “compliance” tangled somewhere in-between words and phrases.

“Get it in writing.”

“Get it approved.”

“Show proof.”

“Keep hard copies of everything.”

“Record all conversation notes.”

“Get all the required back-up.”

These phrases comprise everyday lingo when it comes to planning promotional meetings for the Humira Sales Representative. My previous manager, in contributing to ensuring client compliance in planning marketing meetings, efficiently organized her team, and simultaneously created conscientious checklists to ensure that I and other team members crossed all the necessary “t’s” and dotted all the vital “i’s”.

This subject of client compliance continually compels me, due to personal involvement in numerous audits and constant checks of the planning program coordinators’ files and programs.

If one could not prove what he/she proposed, he/she did not get paid. Simple.

### *Office Operations*

From the disproportionate turnover and owner change rate represented in planning programs, I purports that the company’s entire operations constitute a “mess”. As interesting as this topic appears to me, I choose not to focus on this concern, however, since it involves three offices (east coast, west coast and the mid-west). With every company being unique, I perceived

that no cookie cutter technique exists to fix these types of problems. During the two and half months, I noted the company employing me changed owners once and the organizational structure five times!

In time, the company hired an “expert” to restart the company; to reassess all records, as well as, each and every person. A number of employees related they were worried about their jobs. This concern contributed immensely to my decision to leave this particular position.

### *Communications*

What organized company does not have a distribution list for all employees? For the mid-west office, this company has not yet created a simple distribution list to simultaneously send emails to the entire office for informational emails and meeting requests. My name has repeatedly been left off meeting requests because an individual forgot to add my name, as the newest employee, to the email.

Several times in the past, the 20+ employees would be sitting in the conference room, attending an informal meeting when I walked by to check the fax machine. In passing, I then peered into the room, silently questioning, “Are we having a meeting”? Unfortunately, the absurd truth regarding this scenario only depicts the beginning of the problems associated with the communication for the office.

As the pharmaceutical meeting planning industry is inhibited by the ever-changing compliance and reporting needs of their pharmaceutical clients, the PS software will assist this industry specific meeting planning companies in client management. In turn, meeting planning companies can more readily meet company specific goals. Less client turnover will prove to be an additional benefit from using PS software. The ability to house all vital data in one location

embodying specific bits of information the client needs will prove to contribute positive results and higher revenue for all parties involved.

### *Constraints*

Self-imposed constraints constitute the only currently recognized inhibitor to the final development of the PS software. A dearth of applicable funds to invest in the PS platform makes the full-fledged development of the dream software unattainable at this time. The final step in this professional paper presents the intact blueprint and associated research to assist in software development. This study concludes with the hopes of one day securing partners and investment dollars for PS. PS constitutes a solid, salient creation that will revolutionize the medical meeting planning industry.

The following figure (1) depicts the perception of PS, the ultimate meeting planner software, which according to Publius Syrus's measurement, depicts a good plan, open to modifications.



Figure 1 - Perception of PS, the ultimate meeting planner software

## PART TWO

“...Where no plan is laid, where the disposal of time is surrendered merely to the chance of incidents, all things lie huddled together in one chaos, which admits neither of distribution nor review.” Hugh Blair (1718–1800) (Respectfully Quoted, 2003).

### *Laying Plans*

“The marketing strategies of the world's biggest drug companies now aggressively target the healthy and the well.” (Moynihan & Cassels, 2005, p. ix) This bold statement reflects one primary challenge pharmaceutical companies currently contend with, which, in turn, challenges pharmaceutical marketing planners to, when planning promotional meetings, target

### *Key Dynamics*

During 2007, the global pharmaceutical market which grew 6 - 7 percent is predicted to grow at a 5 - 6 percent pace in 2008. In its 2008 forecast, IMS, world's leading provider of market intelligence to the pharmaceutical and healthcare industries, identifies a number of key market dynamics, of which the following depicts a few:

- Growth contribution from top seven markets falls. In the U.S. and the five largest European markets, sales growth in 2008 is expected to range from 4 - 5 percent. This marks a historic low for the U.S. Japan market growth is forecast to grow 1 - 2 percent next year, down from the 4 - 5 percent pace expected in 2007....
- “Pharmerging” market growth accelerates. The seven “pharmerging” markets of China, Brazil, Mexico, South Korea, India, Turkey and Russia are expected to grow 12 - 13 percent next year, to \$85 - 90 billion.... Ongoing economic growth in the developing world will continue to shift the focus away from infectious

diseases and toward cardiovascular, diabetes and other chronic illnesses.....

- Implications for Pharmaceutical, Biotech and Generics Manufacturers

“These indicators paint the stark reality of a marketplace in transition,” said Aitken. “The actions being taken by companies to reinvent themselves will need to continue at an accelerated pace. Today, commercial strategies and tactics are being re-assessed to better align with future opportunities, while portfolio strategies are being adjusted to capture growth in emerging markets and reflect shifts in product values. In this market environment, building relationships directly with patients as they become better educated and take a more active role in their own healthcare also is essential. And, the industry must continue engaging the broader healthcare community in a rational and positive dialogue about the delivery of higher-quality healthcare to patients at lower cost.”

*Examining the Contemporary, Critical Concern*

PS effectively fills the need for pharmaceutical promotional meeting planning software to provide a “simple”, salient solution for contemporary, critical concerns in planning marketing meetings. PS software will assist in employee efficiency, as it provides the tools necessary to create a more professional internal environment. Consequently, PS will contribute to the cultivation of more satisfied clients and less client turnover. Another benefit to PS, internal to the company, will be the better service employees provide, as PS contributes to employees experiencing more confidence in their work. During client interactions, the client will note the higher employee morale PS produces.

*Measurement*

Measurement is the process observing and recording the observations that are collected as part of a research effort. There are two major issues that will be considered here.

First, you have to understand the fundamental ideas involved in measuring. Here we consider two of major measurement concepts. In *Levels of Measurement*, I explain the meaning of the four major levels of measurement: nominal, ordinal, interval and ratio. Then we move on to the reliability of measurement, including consideration of true score theory and a variety of reliability estimators.

Second, you have to understand the different types of measures that you might use in social research. We consider four broad categories of measurements. Survey research includes the design and implementation of interviews and questionnaires. Scaling involves consideration of the major methods of developing and implementing a scale. Qualitative research provides an overview of the broad range of non-numerical measurement approaches. And unobtrusive measures presents a variety of measurement methods that don't intrude on or interfere with the context of the research. (Trochim, 2006)

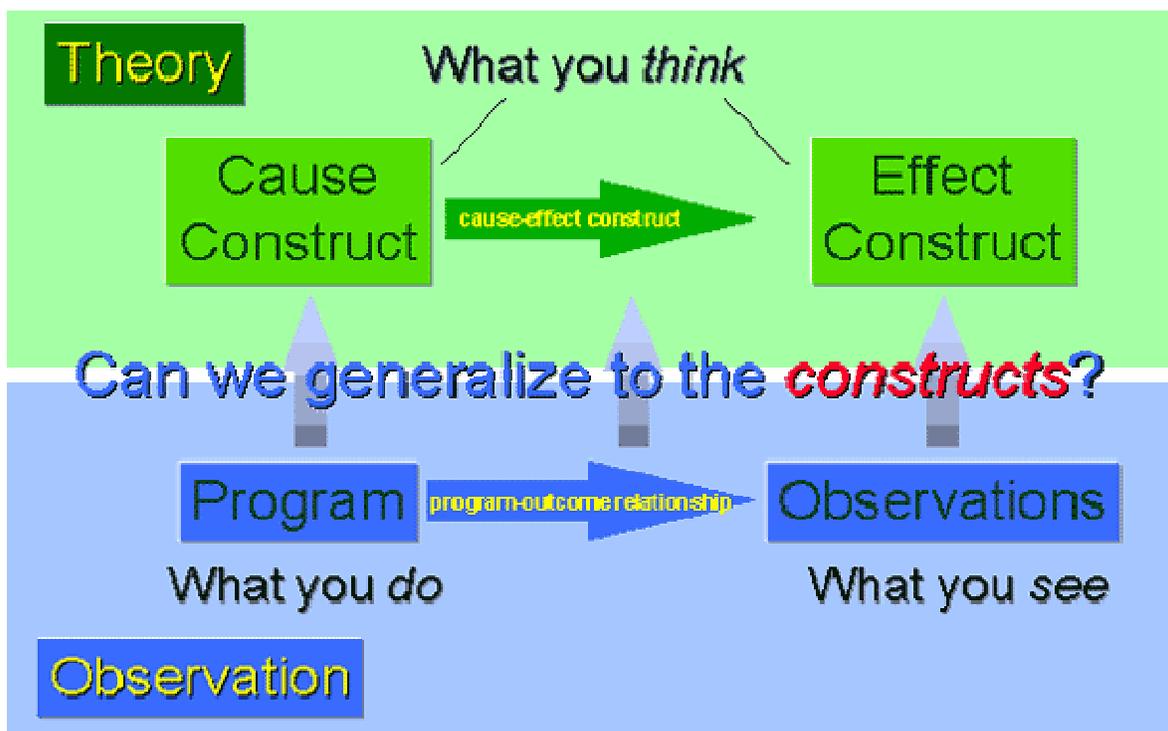
### *Construct Validity*

In explaining construct validity, which denotes the degree from which inferences may be legitimately developed from the operationalizations in a study to the theoretical constructs on which those operationalizations were based. Trochim (2006) divides the issues into two broad territories, as he purports this helps some individuals:

1. The "land of theory", consists of mental strategy; ideas; hunches; hypothesis about world. The land of theory depicts what occurs inside a person's mind and his/her effort to explain or articulate this to others.

2. The "land of observation" constitutes what a person sees happening in the world around him/her, along with the public manifestations of that world. In the land of observation, an individual discovers his/her actual program or treatment; actual measures or observational procedures. (Trochim, 2006)

Trochim's (2006) admonition for a researcher to construct the land of observation based on his/her theories. In turn, I developed the concept for PS to reflect my "land of theory."  
(Trochim, 2006)



In the testing realm, Likert Scaling proves to be more popular than a number of other scaling systems because it is easier. (Dunn-Rankin, Knezek, Wallace & Zhang, 2004, p. 105)

Likert (1932) argued that:

1. category intervals are generally equal;
2. category labels can be preset subjectively and

3. the judgment phase of creating a scale can be replaced by an item analysis performed on the results of the respondents' responses.

Likert's arguments contend that in Likert scaling, the strength of a person's preference about all the psychological objects replaces the direction and intensity of the specific objects that a respondent would have judged. Successive Interval Scaling and Likert Scaling, when carefully applied, often yield similar results. The best way to measure construct(s) is by using the Likert Scale. Consequently, the following survey was developed to interview employees and help determine how these individual perceive the need for an all inclusive meeting planning software for promotional meetings by pharmaceutical meetings.

### *Surveys*

Surveys can be divided into two broad categories: the questionnaire and the interview. Questionnaires are usually paper-and-pencil instruments that the respondent completes. Interviews are completed by the interviewer based on the respondent says. Sometimes, it's hard to tell the difference between a questionnaire and an interview. For instance, some people think that questionnaires always ask short closed-ended questions while interviews always ask broad open-ended ones. But you will see questionnaires with open-ended questions (although they do tend to be shorter than in interviews) and there will often be a series of closed-ended questions asked in an interview. (Trochim, 2006)

Directions to survey participants: Please indicate your agreement or disagreement with each statement by checking the appropriate numbered box to indicate whether you:

1 - Strongly Agree

2 - Agree

3 - Neutral

4 – Disagree

5 - Strongly Disagree

1. Client compliance surfaces as a constant issue in my job.
2. Client compliance varies from client to client.
3. Changes and additions to client compliances can occur each day.
4. In regard to compliance issues, constant, sometimes daily, email and phone communication occurs.
5. Regarding approved speakers, routine, sometimes daily, email and phone communication must occur.
6. Any meeting with a compliance issue must be routed through an approval process.
7. In regard, to question number 6, this approval process consists of a myriad of steps.
8. I am constant communicating with my manager and/or client regarding compliance issues.
9. Many steps are involved in the process of planning a promotional meeting.
10. Current procedures to perform my job are very inefficient.
11. Too much of my time is spent completing administrative work that could be streamlined.
12. There are too many documents and spreadsheets I have to update daily (sometimes hourly) which can easily result in errors.
13. I could be work more efficiently and be a better meeting planner if I did not have to make appearances in so many locations to obtain and/or update information for each meeting.
14. My company loses money and wastes valuable time, due to inefficient practices related to planning meetings.

15. My company could easily correct a number of problems related to planning meetings if a software program existed to host all the necessary documents, reports and at a bases needed to plan a promotional meeting.
16. Employee morale related to planning meetings is sometimes low.
17. Employee morale would likely improve if a meeting planner software program were available.
18. I do not feel my company perceives my worth due to the inefficient way a number of procedures are currently run.
19. If given the right tools, I can be much more productive in my position.
20. I would like to excel in my position.

### *Software Considerations*

Preventing problems that could threaten the effectiveness of software, according to Piazza (2005, p. 39) makes more sense than doing what car manufacturer sometimes do, rush a new model to market and then find a problem exists. Ramifications such as security and other potential glitches software sometimes experiences have to be considered.

Although software vendors do not typically recall their products when security holes or other glitches surface; rather, but send out patches and updates, each time this occurs denotes a reminder that the original work was not done right. Kenneth R. van Wyk, coauthor of the book *Secure Coding: Principles and Practices*, questions: "...Why is it so hard to write secure code in the first place?" (Piazza, 2005)

Wyk answers his own question, noting: "Software developers develop 'functional spec....They're told to write a piece of software that does this and that, but they're not really good at considering security ramifications, such as imagining how someone could deliberately and

maliciously misuse the application.” (Piazza, 2005)

Ted Julian, vice president of marketing for AppSecInc purports that anticipating problems in software, “...more often than not, I suspect it's a judgment call....because it depends on how [a] function is used within the context of the broader application. Whether or not what appears to be an issue is an issue at all, or how severe an issue is, is not an easy thing to automate.”

“Under normal circumstances,” Wagner (2006, p. 8) notes, regarding times when decisions have to be made in stressful situations, “team members can readily gather and share the information they each need to make a decision and develop an appropriate response to problems. But in situations where there is no time to get the needed information and reason out a response, team performance suffers--and so do decisions (and outcomes).” According to Wagner (2006, p. 8) decision-making software system developed for military applications could help human partners make the right decisions at the right time, particularly when they are “under fire.”

### *The Power of Software*

To see why software is similar to physical architecture but profoundly more powerful, we need to examine how software is written and used. The story begins with a programmer who has in mind some task she would like a computer to carry out. She attempts to envision as precisely as possible the details of the process by which she would like that task carried out. This precision is necessary because she must express her intention in the text of a computer program--a list of instructions, written in one of a number of artificial languages intelligible to a computer. Compared with human languages, these languages are highly constrained. Each of her instructions carries a fixed and precise meaning. Once she has finished editing the program, her role ends. She turns the program over to the computer on which it will

run. As long as the computer is supplied with power and is free of mechanical and electronic glitches, it will read her instructions and carry them out. A user may now encounter the program-that is, be regulated by it. This encounter has an important dual quality. On the one hand, the software enables functionality. When I type in a chat room and my words appear on your screen, this communication has been enabled by the chat program, which in turn reflects the programmer's design decisions. Without her program, the communication could not happen. On the other hand, software also limits behavior (Grimmelamnn, 2005).

Drug companies struggle with balancing pressing health needs and return on investment demands (Agres, 2007)

John MacCarthy, IMS' head of client thought leadership group, told The Financial Times. The average difference between countries where a drug sold best and where it sold worst was 26%, indicating that modifying marketing strategies to fit local factors was essential to boosting sales.

## PART THREE

“You can never plan the future by the past.”

- Edmund Burke (1729–1797) (Columbia)

### *In the First Place*

“When you're under attack, making the right decision quickly is difficult,” Wagner (2006, p. 8) stresses, “no matter how well trained your team is.” Wagner’s contention that a military decision-making software system developed for military applications could help individuals “under fire” make better decisions. PS will help marketing planners, contrary to practices in the past, better plan their future pharmaceutical promotions. Planning how to avoid and prevent future problems constitutes not only a prime consideration for the development of PS, but also the “guts” of this software, envisioned to serve marketing planners. As Piazza (2005, p. 39) notes, it anticipate and prepare to head off potential problems prior to their disruptions, to prevent the problem in the first place.

### *Discussion*

The worldwide pharmaceutical market is expected to more than double to \$1.3 trillion by 2020. Along with the growth, the pharmaceutical industry faces a myriad of challenges, which include regulatory uncertainty, anemic pipelines, investment pessimism, and diminishing public perception. Consequently, the pharmaceutical industry worldwide stands at a crossroads. Agres (2007) purports that “Big Pharma” needs to:

- Address the composite changes currently occurring in the "payer landscape" as patients, consumers, and public and private insurers more and more and more define value for money.

- Obtain a better grip on safety and regulatory issues, along with seizing opportunities in emerging economies, and challenges from developing countries.
- Deliberately deal with "reputation management" issues, as the market holds Big Pharma responsible for common concerns such as managing risk, predatory pricing, , and macro-emphasizing "me-too" drug development , yet simultaneously downplaying innovative research.

As this study examined research related to policies, procedures and current plans for marketing pharmaceuticals and planning promotional meetings, it was found that, as projected, these too frequently prove to be disjointed, with marketing planners, at times, becoming overwhelmed and overworked, yet underproductive. At this time, according to research related by current research, no rational, reasonable answer to this problem exists.

### *Research Objectives*

The following specific research objectives, which evolved in response to the quest to arrive at destination PS, are met during the course of completing this professional paper:

#### *Objective 1*

Identify government/company compliance rules and regulations mandated for promotional breakfast/lunch/dinner pharmaceutical meetings.

#### *Objective 2*

Determine correspondence and reporting needs, regarding rules and regulations from objective one, needed to achieve a successful event, which a meeting planner needs to communicate to:

- a. The client,
- b. The venue,

- c. To speaker, and
- d. To sales representatives.

*Objective 3*

To develop software with the ability, as well as vital tools, to host all rules, regulations, dollars and databases to create a complete system for the company and the meeting planner.

*Objective 4*

To assess costs in savings to companies, gained from utilizing a more efficient alternative possessing the ability to empower meeting planners to become more productive; reporting results in less time.

*Preventing Problems in the Real World*

Unlike Event Partners' (2005), as well as, a number of other businesses who market business planning, the claim that a person or company can always host the perfect meeting, without a glitch does not match my personal experience of the understanding gained from completing this professional paper. Companies are not always able to empower their employees to invest the ideal amount of time to produce quality work in the meeting planning fields. Time constants commonly contribute to this dearth.

PS, nevertheless, will afford, allot, and/or help allocate more time for meeting planners as this software manages, some of the currently, sometimes seemingly unmanageable details involved in hosting marketing meetings. This study conclusively confirms this my initial contention that PS, aka PhamaSalve, "the" answer to simplifying planning of pharmaceutical promotional meetings is not only needed, but, will hopefully, soon be marketed to meet desired and mandated needs.

PS will help prevent real world problems, particularly when circumstances, as Wagner (2006, p. 8) notes, prove stressful, during times when decisions have to be made quickly and no time exists to obtain needed information and reason out detailed responses.

### *Recommendations*

PS can compliment “the market” Big Pharma contends with as it will be designed to:

- Note value patients, consumers, and public and private insurers define; include in planning meetings.
- Adhere to regulatory issues, and relate techniques to seize opportunities emerging opportunities present.
- Constructively cope with contemporary concerns; reveal challenges, while simultaneously revealing and encouraging innovative marketing strategies.

### *On Target*

Contrary to the point Burke notes at the start of this final chapter, that one can never plan the future by the past, I propose that noting past problems can serve to illuminate needs and help one more accurately aim to meet his/her goals. PS targets and effectively fills the need for pharmaceutical promotional meeting planning software to provide a “simple”, salient solution for contemporary, critical concerns in planning marketing meetings.

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