

# Pharmaceutical Executive

FOR GLOBAL BUSINESS AND MARKETING LEADERS

October 2003 / [www.PharmExec.com](http://www.PharmExec.com)



## Make the Most of Advisory Meetings

Mark Zitter

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## WELL DESIGNED PROGRAMS CAN ENHANCE PHARMA'S SUCCESS IN MANAGED CARE MARKETS.

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**P**harma companies continue to sponsor live advisory meetings for their key managed care customers, yet they increasingly question the value of those programs for two reasons: (1) The regulatory climate has changed dramatically, exposing sponsors to criminal penalties if they don't comply with still-to-be-clarified laws and guidelines, and (2) advisory programs' effectiveness has diminished. Many of the most important accounts keep their staff from attending, and the dominant format—facilitated qualitative discussion—has limitations.

This article outlines the regulatory and content problems that keep advisory meetings from reaching their potential

and offers creative approaches to addressing those issues.

### Regulations and Risks

Although final guidelines have yet to be written and each company's legal department will respond differently to the rules, pharma companies would be well advised to follow a few general principals:

**Listen, don't lecture.** Although there often is a communication component, the primary purpose and design of the meeting should be to gather advice, not to persuade attendees of a viewpoint. Anyone who is paid to attend a meeting is considered an advisor/consultant. Payment should be at market rates.

**The right advisors.** The number and nature of advisors selected should be appropriate to the advice needed. The more that an advisory panel looks like a list of key customers, the greater the risk that a state attorney general or other official will consider the program an attempt to induce product usage.

**Content and location.** Similarly, the meeting's setting, agenda, and activities

should reflect its advisory purpose. Meetings held at exotic locations or at extravagant facilities, agendas with too high a proportion of presentations compared with listening to advisors or too many entertainment activities compared with programs, all could appear to investigators as inconsistent with a business advisory panel.

### Plan Ahead

To further minimize risks, here are some specific directives to follow:

- Define the program objectives clearly at the outset, leaving a paper trail demonstrating that the meeting is advisory in nature.
- Create an appropriate target recruitment list. Include key accounts, but be sure to invite others as well. Prospective customers and executives who recently left major MCOs often make excellent candidates.
- Establish targets for the number of advisory meetings held and determine a reasonable number of advisors, given the nature of the advice sought.
- Ensure that at least half of program content involves discussion and advisor feedback and devote at least six hours per program day to content.
- Avoid resorts and facilities outside of the continental United States, unless warranted by special circumstances.
- Ensure that recreational or entertainment activities are moderate in nature and scope and do not exceed allotted program time.
- Create a moderator guide based on the program's original objectives.
- After the meeting, generate written summaries that tie the original program objectives to the questions asked and the responses received. Include recommendations on how to use the information generated.

### Falling Short

Just because an advisory program is legally acceptable doesn't mean that it will be effective. Successful programs draw the desired number and quality of advisors and elicit the important insights they have to share. Unfortunately, many advisory programs fall short of their potential. The most common reasons are:

**No-shows.** Many large managed market accounts restrict their staffs from attending advisory programs sponsored by pharmaceutical companies. Some allow attendance but not acceptance of honoraria or travel reimbursement, reducing a prospective advisor's incentive to attend.

**Uninspired format.** The standard format is unimaginative and limited in its ability to elicit information. Focus group formats are often dominated by one or two individuals, typically do not allow all advisors to answer any given question, and often fail to generate feedback on sensitive topics that advisors don't want to share with their competitors.

**Too much of the same thinking.** Most advisory groups consist only of managed

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care executives, and thus are limited to a narrow range of perspectives.

**No follow-up value.** Advisory groups typically meet once and then disband, eliminating the opportunity to provide subsequent or ongoing feedback.

**Too many lectures.** Most program agendas contain too many didactic presentations and not enough time for digestion, discussion, and advisory feedback.

**Add value to their jobs.** Use faculty who will draw desired advisors while contributing to program objectives. For example, a sponsor with a chronic care product might hire an expert on patient medication compliance. That would help advisors within their own organizations while raising an issue important to the sponsor's business.

**Lack of tie-ins.** There often is no connection between an advisory board and other managed care initiatives that the pharma company sponsors. Nor do companies make full use of the content of the advisory discussion.

### Make It Work

Each of those shortcomings can be addressed with creative approaches.

**Know the attendees.** Many corporate policies that restrict their people from attending pharma-sponsored meetings have exception clauses. For instance, they may prohibit participation in product-specific meetings but permit disease-specific discussions. A well crafted agenda may allow key customers to attend.

**Let them speak.** Many managed market organizations allow their staffs to attend meetings at which they make formal presentations. Incorporating peer-to-peer presentations into an agenda can help attract desirable advisors and enhance the program at the same time.

**Timing is everything.** Some MCO policies restrict staff from attending advisory meetings on company time. Meetings held on weekends will allow some advisors to attend who otherwise could not.

**It doesn't have to be live.** Tele-meetings, including real-time web presentations, can generate a great deal of advice at a reasonable cost. Though they typically will be shorter than live meetings, they may draw participants who otherwise would be unable or unwilling to attend. An interesting topic might be a sufficient draw for a customer/advisor to join a two-hour tele-meeting, even if that same advisor wouldn't fly to a weekend program without receiving a consulting fee, which might be prohibited by his or her organization.

**Get a new format.** Varying the standard focus group format can generate optimal feedback. For issues that merit input from all advisors, pose questions with multiple choice answers and use electronic keypads for response. For sensitive topics, have advisors write confidential responses to preprinted questions. Networked laptops allow advisors to respond to all questions anonymously, providing detailed information that can be further clarified in subsequent discussions.

**Expand the guest list.** Invite not only managed care decision makers but also academic thought leaders, practicing physicians, health economists, and other individuals with valuable viewpoints. Even if MCO managers make up 75–80 percent of the group, the inclusion of

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other perspectives typically enhances the discussions and provides a much richer sense of the market.

**Meet regularly.** Some of the most effective advisory panels meet on an ongoing basis. Although it's difficult to get advisors to commit to more than two meetings annually, quarterly contacts—two weekend meetings interspersed with brief teleconferences—keep advisors engaged throughout the year. More frequent meetings are often more productive because advisors are familiar with key issues and one another. Advisors signing on for a full year usually are open to receiving brief ad hoc calls to comment on issues that emerge between meetings.

**Keep it interactive.** Didactic presentations are efficient ways to convey information but are relatively ineffective in terms of audience retention. Adult learners are most likely to grasp, retain, and enjoy material that they interact with in some way. The agenda should include interactive elements such as discussions,

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case studies, tests, calculations, or even content-based games.

**Re-purpose, reconnect.** Companies should leverage the content of an advisory board meeting that generates interesting or validating information. For example, the content can form the foundation for a white paper or be published as a journal supplement. Advisors, whose names might appear on those publications and who might be willing to serve as speakers at symposia, can be cultivated as advocates.

Although they will be fewer in number, live advisory meetings will continue to be



an important tool for enhancing pharma's success in managed markets. But to make the most of those meetings, sponsors must discard preconceived notions and use program objectives to design optimal gatherings. "Smart" programs that pass legal muster and incorporate new techniques will flourish and deliver real value for their sponsors. ■



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