

Pharmaceuticals & Medical Products Practice

The biopharma marketer of the future: Closing the gap

Commercial leaders share the new skills brand marketers need in the digital era to move from brand building to revenue acceleration.

by Agnes Claye, Laura Furstenthal, and Laura Moran



“The boat is leaving, and we still have one foot on the dock.” So said a commercial leader of a large US biopharmaceutical company before the COVID-19 pandemic, estimating the readiness of the company’s brand marketers to take on emerging challenges.

That company was not alone. McKinsey interviewed 30 commercial leaders from more than 20 biopharmaceutical companies in Europe, Japan, and the United States about the future role of brand marketers and the skills they require.¹ The majority—58 percent—felt that although their marketers were highly talented and had some of the necessary skills, significant gaps remained, particularly relating to the digital world. None felt their marketers were fully prepared for what the future held (Exhibit 1).

Companies’ expectations of marketers are high. Fast-changing technology, a proliferation of channels, and the incisive power of data and analytics offer the potential to transform what marketers can achieve, enabling them to move far beyond the traditional support role of brand building. In some fast-adapting sectors of the

economy, marketers now play a key role in driving revenue growth by using digital tools to build a fluid, complex picture of customers’ experiences, and to formulate strategies that maximize the lifetime value of each customer.

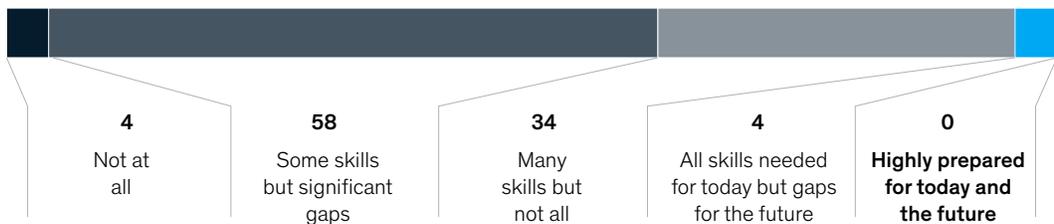
Many biopharma companies, however, have been slow to adopt available tools, the importance of which has been accentuated during the COVID-19 pandemic as consumers and corporations have flocked to digital channels. Indeed, some biopharma marketers report relying more, not less, on conventional tactics as their companies scramble to deliver results in competitive markets. One marketer told us that pressure to meet internal and external expectations on time forced the team to resort to conventional levers for quick wins, rather than taking the time to think strategically about how best to use the data and channels available.

Of course, quick fixes are sometimes required. But growth opportunities lie increasingly within digital channels, which means high-performing marketers have no option but to acquire new skills. The question is, which ones?

Exhibit 1

The majority of biopharmaceutical companies feel that although their marketers are talented and have some of the necessary skills, significant gaps remain.

Preparedness of brand marketers to deliver on the company’s growth aspirations,¹ % of respondents²



¹Question: How well equipped are your brand marketers to deliver on the company’s growth aspirations?

²Thirty commercial leaders from more than 20 biopharmaceutical companies from the United States, Europe, and Japan were interviewed. The first interviews were conducted at McKinsey’s Integrated Commercial Model Roundtable, held in November 2019. Follow-up interviews were conducted up to September 2020.

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The skills gap

From a list of new skills required of a marketer in the digital era, we asked our interviewees to identify the three most important ones (Exhibit 2). The ability to interpret the results of advanced analytics and plan appropriate action was the skill gap most commonly identified. The need to understand the big-data landscape and what vendors and new technology platforms could offer came in second, followed closely by the effective use of new channels. The fourth skill commonly identified was cultivating an innovation mindset.

Interpret findings from advanced analytics

Interviewees share the view that the more powerful data analytics has become, the more it is regarded as a specialist subject understood only by experts. This needs to change if marketers are to harness its potential. Indeed, the ability to interpret the results of advanced analytics and plan appropriate action accounted for 28 percent of responses.

It is a skill that can uncover powerful insights. For example, one specialty-brand team was convinced, by findings based on years of traditional quantitative and qualitative physician surveys, that diagnostic testing was the leading trigger for writing a new prescription for a biologic drug. However, quantified advanced analytics of the patient journey revealed that only a small portion of newly prescribed

patients had received a diagnostic test. Data triangulation and deep analytics went on to show that the accumulated number of acute intervention medication scripts and repeat office visits were more reliable triggers—a finding that drove the team to change its messaging and its target, resulting in a fast sales uplift.

Getting to grips with advanced analytics is no easy task. But it is a skill marketers need if they are to turn insights into effective strategy. And while they are not expected to become technical experts capable of conducting the analyses, they should understand the fundamentals and be able to ask the right questions.

Understand big-data sources, vendors, and technology partners

Most marketers already feel inundated with data, be it their own or purchased. However, they are still continually approached by data vendors or technology platform developers who believe they have the crucial missing component marketers need to understand and unlock the customer journey.

Marketers, meanwhile, struggle to understand which data set could be “the one” to close the gap—a task that is not going to get easier as more data become available from more sources. These include data platforms that knit together multiple

Exhibit 2

High-performing brand marketers have to acquire new skills, such as analyzing AI findings, understanding big data sources, and deploying new channels.

Most important new skills required by brand marketers,¹ % of responses²



Note: Numbers may not sum to 100%, because of rounding.

¹Question: Which are the most important new skills required by brand marketers?

²Thirty commercial leaders from more than 20 biopharmaceutical companies from the United States, Europe, and Japan were interviewed and asked to choose three skills from among those listed. The first interviews were conducted at McKinsey's Integrated Commercial Model Roundtable, held in November 2019. Follow-up interviews were conducted up to September 2020.

sources, customer-relationship-management (CRM) agencies that pull in a company's own customer data, and new sources of material, such as raw patient information and claims data. It is a huge challenge for marketers to find the time to explore all these sources: "If you are on a brand team, you have almost no chance to explore the evolving data-vendor landscape and innovative offerings," said one commercial leader. Yet, in 22 percent of the responses, it was regarded as one of the most important skills that marketers have to master to improve their understanding of big-data sources, data vendors, and data-technology partners.

It is easy to become overwhelmed by the task. The starting point, therefore, has to be a clear view of which data gaps need filling and which should be prioritized. That makes it easier to keep scanning the evolving data landscape for ideas and solutions. Such data-navigation skills improve with experience, though some marketers make progress by working closely with an internal center of data excellence that can analyze the landscape and procure and integrate the best data available.

Deploy new channels more effectively

Even though most of the commercial leaders interviewed said their companies were investing heavily to promote digital channels, they still felt those channels were not being used as effectively as possible. In many companies, the field force still dominates. One commercial leader said the field was responsible for driving more than 80 percent of the addressable revenue for an average brand. It is little surprise, therefore, that in 21 percent of responses, knowing how to deploy new channels more effectively was identified as one of the most important new skills to acquire.

Most of the commercial leaders we spoke with said their marketers had not yet acquired the microsegmentation skills needed to regularly conduct successful campaigns at scale. They need to be able to test and validate the right messaging and channels to reach specific audiences based on various demographic and behavioral data—for example, the right messaging and channel for

reaching young adults who are well educated about their disease and have mild symptoms, as well as variations of messaging and channels to reach other demographically and behaviorally unique segments of the population with the disease. Interviewees noted that marketers also need to be adept at navigating company processes and structures if they are to obtain the myriad approvals required to conduct such campaigns.

Another identified challenge is the frequent pressure marketers find themselves under from colleagues to copy the latest digital tactic they have spotted competitors or other industries deploying. It can be a major source of distraction from the hard, disciplined work required to build a holistic, omnichannel strategy. Marketers need to build and execute a strong "backbone" for a campaign—one that delivers the right message through the right channel for the right audience. But, at the same time, they must remain alert to respond flexibly to changing signals from the marketplace. That, coupled with constant fact-based testing and monitoring, is what makes for effective, agile marketing.

Cultivate a mindset that fosters innovation

In 14 percent of responses, interviewees felt marketers needed a more innovative mindset in order to drive results. Innovation often stems from collaboration, which has long been integral to the marketer's role. Yet, the commercial leaders we interviewed felt collaboration needed to go further today than it had in the past. Marketers must work more closely with more functions—with policy, advocacy, medical, and innovation, for example—as well as with more external partners in order to innovate with data, the customer experience, personalization, and digital marketing.

An innovative mindset also pushes for fast, customer-led results. So marketers need to be agile. The pace is no longer set by a yearly brand plan, but instead by weekly or even daily experiments. Such experiments might include randomly assigning messages to different channels and segments or simply changing the placement of the "click for

more information” button on a website, and then processing the results quickly and testing again. It is the marketer who orchestrates all this, bringing together a broad mix of colleagues with different experiences and insights.

Removing obstacles

These are not, of course, the only new skills and capabilities required. Interviewees noted that marketers today need better knowledge of government policy and regulation and have to monitor emerging treatments that may drive changes in service models and regulatory and pricing regimens. And in nearly every therapy area, marketers must advocate a shift from promoting the features and benefits of drugs and services to focusing on patients’ and prescribers’ experiences. These abilities are required alongside scientific, clinical, and medical experience, as well as the capacity to manage a team of finance, field, communications, and technical people. It is an extraordinarily broad skill set.

As a result, many interviewees felt that companies should bring in marketing expertise from outside

the industry, as well as invest in training to develop existing talent. They also identified certain processes that are an obstacle to marketing excellence: people processes that do not target the right skills, annual brand planning processes that impede agility, and approval processes for new marketing materials that take months to complete when a marketer might need to send out 50 different digital messages a day. Marketers alone cannot drive the future. The ecosystem within which they operate must evolve and change.

The starting point for corporate leaders is to embrace the role of and the skills required by the new marketer. Leaders can then start to invest to ensure their companies are packed with the people who have those skills and who work in an environment where they can achieve success. Awareness of the accelerated pace of digital adoption fueled by the COVID-19 pandemic might be just the right push to get everyone on board, rather than left on the dock.

Agnes Claye is a senior expert in McKinsey’s New Jersey office, where **Laura Moran** is a partner. **Laura Furstenthal** is a senior partner in the San Francisco office.

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