SUMMERBOOK 2023

BUNDLED BLOGS OPTINSIGHT

For Pharma & Life sciences

Produced by our experts

Martijn van den Corput

Erik Luttik

www.opt-insight.com

TABLE OF CONTENTS: Page

1. GDPR 3

2. CONSENT MANAGEMENT 9

3. OPTIN COLLECTION 18

4. PREFERENCES 24

5. DATACARE 26

6. AGENCIES 30

7. CRM 32

8. DATA QUALITY 34

9. ABOUT OPTINSIGHT 36

What pharmaceutical companies should know about the basics of the GDPR!

Personal data is sensitive.

Pharmaceutical companies are subject to the General Data Protection Regulation (GDPR), which governs the collection, storage and use of personal data within the European Union (EU). Here are some key things that pharmaceutical companies should know about GDPR (https://gdpr.eu/).

It is all about sensitive personal data. GDPR applies to any information that can be used to identify an individual, including names, addresses and online identifiers. Pharmaceutical companies often process sensitive personal data, such as consent, medical information and health records, which are subject to special protection under GDPR.

It requires robust data protection measures. GDPR requires organizations to implement appropriate technical and organizational measures to ensure the security of personal data. Pharmaceutical companies must ensure that they have robust systems in place to protect the sensitive personal data they process, including measures to prevent unauthorized access and loss of data.

Data minimization.

GDPR requires organizations to only collect the personal data that is necessary for a specific purpose. Pharmaceutical companies must ensure that they only collect and process the personal data that is necessary for their activities.

GDPR gives individuals control over their personal data. Individuals have the right to access their personal data and to have it deleted if they so choose. Pharmaceutical companies must provide individuals with this information in a clear and concise manner and must delete the data when requested.

It requires data protection impact assessments. GDPR requires organizations to carry out data protection impact assessments (DPIAs) in certain circumstances. Pharmaceutical companies must carry out a DPIA when they are processing personal data that is likely to result in a high risk to individuals' rights and freedoms.

Conclusion.

In conclusion, pharmaceutical companies must ensure that they are fully compliant with GDPR when processing personal data. They must implement appropriate technical and organizational measures to protect the sensitive personal data they process and must carry out data protection impact assessments when necessary. By doing so, they can ensure that they are operating in a manner that is consistent with the principles of GDPR and that protects the rights and freedoms of individuals.

What you might NOT know about the GDPR!

Introduction GDPR.

The General Data Protection Regulation (GDPR) is a regulation introduced in May 2018, which governs the collection, storage and use of personal data. While GDPR is considered one of the most comprehensive data privacy regulations in the world, there are still some aspects of the regulation that are not well known.

Many people believe that GDPR only applies to organizations based in the EU, but this is not the case. GDPR applies to any organization that processes the personal data of EU citizens, regardless of where the organization is located.

GDPR is about protecting personal data

GDPR applies to any information that can be used to identify an individual, including email address, telephone number, location data and online identifiers such as IP addresses and cookies. This means that organizations need to be mindful of how they use and protect this information.

One of the main principles under GDPR for organization that process personal data is accountability. Organizations should put in place appropriate technical and organizational measures and be able to demonstrate what they did and its effectiveness when requested. In addition to this, transparency is an important principle. Organizations need to be transparent towards people about the personal data they process, before they start the processing of the personal data. Last but not least, people whose personal data is processed have certain rights, e.g. the right to be informed about what data is being processed and the right to object to the data processing.

GDPR does not ban the transfer of personal data outside the EU, but it does set strict requirements for such transfers. Organizations need to ensure that the data is protected with the same standards as it would be under GDPR, assuring that appropriate safeguards are in place.

GDPR has a role for data protection officers (DPOs). Organizations that process large quantities of personal data or carry out data processing activities that form a high risk for the privacy of people (e.g. medical data), are required to appoint a DPO. The DPO is responsible for advising the organization on its GDPR obligations and monitoring its compliance with the regulation.

The maximum fine that can be imposed under GDPR is 4% of an organization's global turnover or €20 million, whichever is higher. This is a significant amount and serves as a deterrent for organizations that do not take their data protection responsibilities seriously.

Conclusion

In conclusion, while GDPR is widely known, there are still aspects of the regulation that are not well understood. Organizations must take the time to fully understand their obligations under GDPR and implement the necessary measures to protect personal data.

Reflections on Five Years of GDPR in the Pharmaceutical Industry.

Introduction.

It has been five years since the General Data Protection Regulation (GDPR) came into effect, revolutionizing data privacy and protection practices across various sectors, including pharmaceutical companies. As we reflect on this milestone, it is essential to assess the impact of the GDPR on the pharmaceutical industry and draw conclusions regarding its implications, challenges and opportunities. In this blog post, we will explore what can be concluded for pharmaceutical companies now that the GDPR has been active for five years.

Improved Data Protection Culture.

The GDPR has played a pivotal role in fostering a culture of data protection within the pharmaceutical industry. Companies have significantly enhanced their data security measures, implementing robust protocols, encryption techniques and access controls to safeguard sensitive information. As a result, pharmaceutical organizations have become more proactive in identifying and mitigating data privacy risks, ensuring the integrity and confidentiality when storing personal data, like opt ins/opt-outs and preferences.

Heightened Transparency and Accountability.

With the GDPR's emphasis on transparency, pharmaceutical companies have embraced a more accountable approach to data handling. Through improved consent mechanisms, clear privacy policies and accessible information, HCPs (and patients) are now more aware of how their personal data is used within the pharmaceutical ecosystem. This transparency has strengthened the relationship between pharmaceutical companies and HCPs, fostering trust and enabling individuals to make informed decisions about their data privacy.

Evolving Compliance Challenges.

While the GDPR has undoubtedly driven positive changes, it has also presented ongoing challenges for pharmaceutical companies. The dynamic nature of the regulation requires continuous monitoring and adaptation to evolving compliance requirements. For this, they need a flexible consent management solution. Companies must stay updated with regulatory changes, conduct regular audits and implement necessary adjustments to ensure ongoing compliance. The challenge lies in balancing stringent data protection measures with the efficient delivery of healthcare services.

International Data Transfers and Brexit Implications:

Pharmaceutical companies often operate on a global scale, necessitating the transfer of personal data across borders. The GDPR's strict guidelines for international data transfers have impacted pharmaceutical organizations, especially those based in the United Kingdom due to Brexit. Companies must navigate additional considerations when transferring data between the European Union (EU) and non-EU countries, ensuring compliance with both GDPR and relevant data transfer frameworks, such as Standard Contractual Clauses (SCCs).

Collaborative Compliance Efforts.

The GDPR has fostered collaborative efforts among pharmaceutical companies to address shared compliance challenges. Industry associations, conferences and forums have provided platforms for exchanging best practices, insights and challenges related to data protection. These collaborative initiatives have empowered organizations to learn from one another's experiences, develop standardized approaches and collectively navigate the complexities of GDPR compliance.

Conclusion.

Five years since the implementation of the GDPR, the pharmaceutical industry has undergone significant transformations in its data privacy practices. The regulation has created a more robust data protection culture, promoting transparency, accountability and trust. However, ongoing compliance challenges, international data transfer considerations and the need to balance privacy with innovation persist. Looking ahead, pharmaceutical companies must continue to adapt, evolve and embrace a privacy-centric approach to ensure the continued protection of personal data while driving advancements in healthcare and medical research.

How OptInsight empowered 5 years of GDPR Compliance.

OptInsight has been at the forefront of assisting organizations in achieving and maintaining GDPR compliance. Here's how OptInsight's suite of features has made an impact:

Consent Management and Preference Center.

OptInsight provides organizations with a powerful consent management solution that enables them to obtain and manage user consent in a transparent and compliant manner. It offers a customizable preference center, giving individuals control over their consent preferences across multiple channels and touch points. All personal data acquired by an organization is synchronized real-time with the OptInsight solution providing all employees a single source of truth.

Flawless connection to other applications.

To rule out human mistakes and to limit manual labor, tools and application used by pharmaceutical companies, like their CRM system, are connected with the OptInsight solution. In this way, companies are unburdened and can focus on other topics. The built in Match & Merge functionality compares opt-ins collected with the data already in the database. When there is a match, the records are merged and in this way the creation of duplicate records is prevented.

Data Subject Request Management.

OptInsight streamlines the handling of data subject requests, including access, rectification and erasure requests. Its intuitive interface allows organizations to efficiently manage and track these requests, ensuring compliance with the GDPR's strict timelines.

Privacy Impact Assessments (PIAs) and DPIAs.

OptInsight facilitates the creation and management of PIAs and DPIAs, providing organizations with the tools to identify, assess, and mitigate privacy risks. It guides organizations through the process, ensuring that all necessary aspects are considered and documented.

International Data Transfers.

OptInsight assists organizations in navigating the complexities of international data transfers. It enables the implementation of necessary safeguards, such as SCCs and provides guidance on compliance with relevant frameworks, ensuring the lawful transfer of personal data outside the EU.

Conclusion.

As we celebrate five years of GDPR, it is crucial to acknowledge the contributions of tools like OptInsight in empowering organizations to navigate the complex terrain of data protection and privacy. OptInsight's comprehensive features have played an important role in simplifying GDPR compliance, helping organizations build trust with their customers and demonstrate their commitment to safeguarding personal data. With its ongoing commitment to innovation and compliance, OptInsight continues to be a valuable ally in the journey toward a more privacy-centric digital landscape.

Considerations for pharma & life science companies to embrace a consent & preference management solution.

After various lawsuits with a consent base, the Schloendorff vs The New York hospital in 1908 became the checkmark case. Mary Schloendorff was admitted to the hospital with a stomach problem. The medical professionals diagnosed a tumor and suggested surgery, which she declined. The doctors went ahead anyway and because of this Mary developed gangrene. Her fingers had to be amputated. Mary filed a lawsuit and won. Consent became a legal issue.

What's your objective?

The commercial ambition of most pharma companies is to enable their stakeholders as well as the internal users to be able to easily deliver the right message/content, to the right person, at the right time and on the right channel.

Through consistent preference management, customers' trust should be increased by providing them with meaningful choices and control over how brands communicate with them.

We briefly explain what the considerations for different levels in the organization could be to choose for a solution that drives customers' trust in a digital era.

Strategic considerations.

Success in the marketplace for pharmaceutical companies is highly connected to the Health Care Professionals (HCPs) that treat the diseases these companies manufacture products for. Therefore, maintaining trust between the company and those HCPs is an essential component of that success. While there are many components to this trust, one of the foundation of this trust should be a system of consents and preferences that drives what information is given to the HCPs, when and how it is delivered. The main question to answer is how trust related to HCP data is positioned in companies' strategies.

Tactics.

Consents, in this context, are 'legally binding' expressions of permission/denial to communicate with HCPs with respect to a given channel. There are strict rules that marketers and the sales force must adhere to when attempting to engage with their customers.
The scope of the consent varies from region to region; the scope may contain the engagement channel, the product or therapeutic area or a combination of multiple criteria.

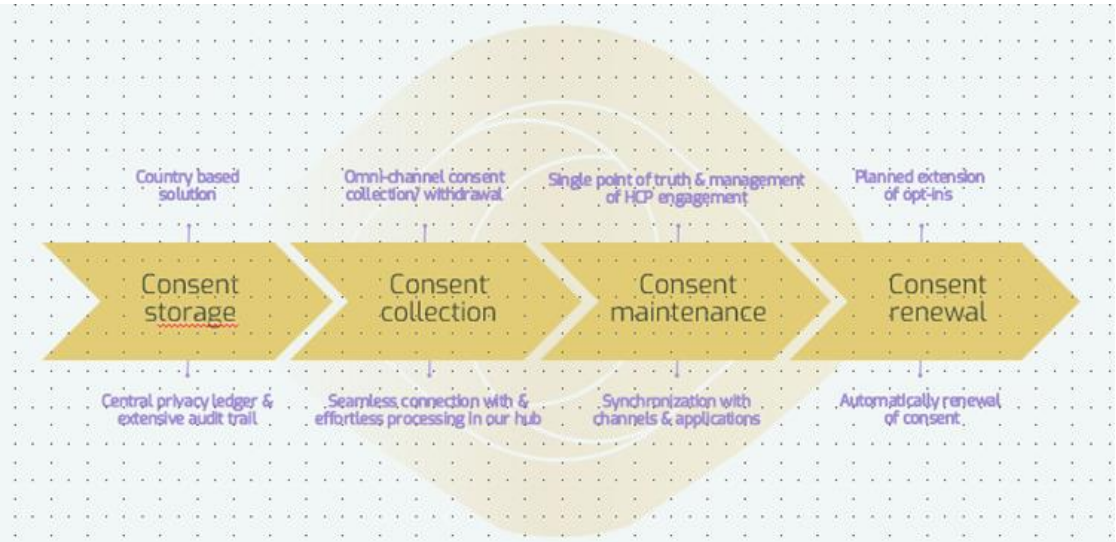
Preferences are clear expressions of HCPs telling the company what interests them (e.g. subscriptions for communications such as newsletters, frequency, channel, etc.), but does not restrict the company from contacting them with topics outside these preferences.

Operational.

To find the right solution for what is described above, it should be able to:
• provide a global SaaS-based cloud solution for consents and preferences across countries and systems.
• save capacity, because current processes for capturing & managing consent are largely manual, inefficient and time consuming.
• provide a solution that integrates easily into the company's existing IT, Marketing & Sales application landscape.
• provide a single source of truth for Consents and Preferences for all relevant customer communications.
• enable a platform and solution as well as relevant data storage, security and overall management measures and global scaling.
• offer a platform in which HCP consent is readily accessible to marketing, medical affairs, business support and privacy teams.
• support a global rollout/implementation with specific privacy laws and legal regulations on a country (tenant) level.
• offer clear auditability of consent status.

The main challenge here is how we are able to collect, manage & turn data into action in a such a way that we can align the needs and preferences of a doctor. Does our current infrastructure enables this or not?

Do you actually know, that basically you should look at consent management (opt-ins and opt-outs) as a journey as?



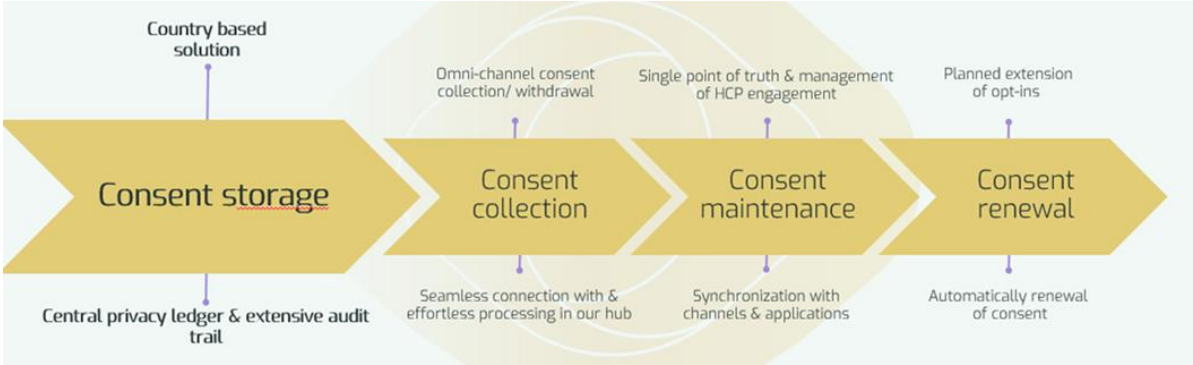
In this journey, you need to pay attention to each step, being Consent storage, Consent collection, Consent maintenance and Consent renewal.

Consent management is an essential good. Streamlining your personal data management process will lower your legal risk rates and increase trust within your organization and it will help you to be relevant to your target audience.

You should look at consent management as a journey in which you need to pay attention to each step, being Consent storage (One single source of truth according to data protection rules), Consent collection (Collecting consent through different channels), Consent maintenance (Consent stored should be kept and should not turn into an opt-out) and Consent renewal (Due to regulations or internal business rules, consent might expire).

For every step you carefully need to consider what you want and how you want to do it. And as many colleagues have to work together on this topic, it is crucial that marketing & digital, legal & compliance and IT colleagues collaborate to establish the consent management journey. Because at the end it is all about the HCP and what he or she wants from you (or not).

How to store your opt-ins?



Before you even start thinking about collecting opt-ins and unfortunately, also opt-outs, you have to decide on how and where to store the consent collected. And what are the (local) legal requirements?

The management of the consent status is an issue pharma is experiencing. Scattered data is one of the essential problems in data management. Data centralization is absolutely necessary for sailing a

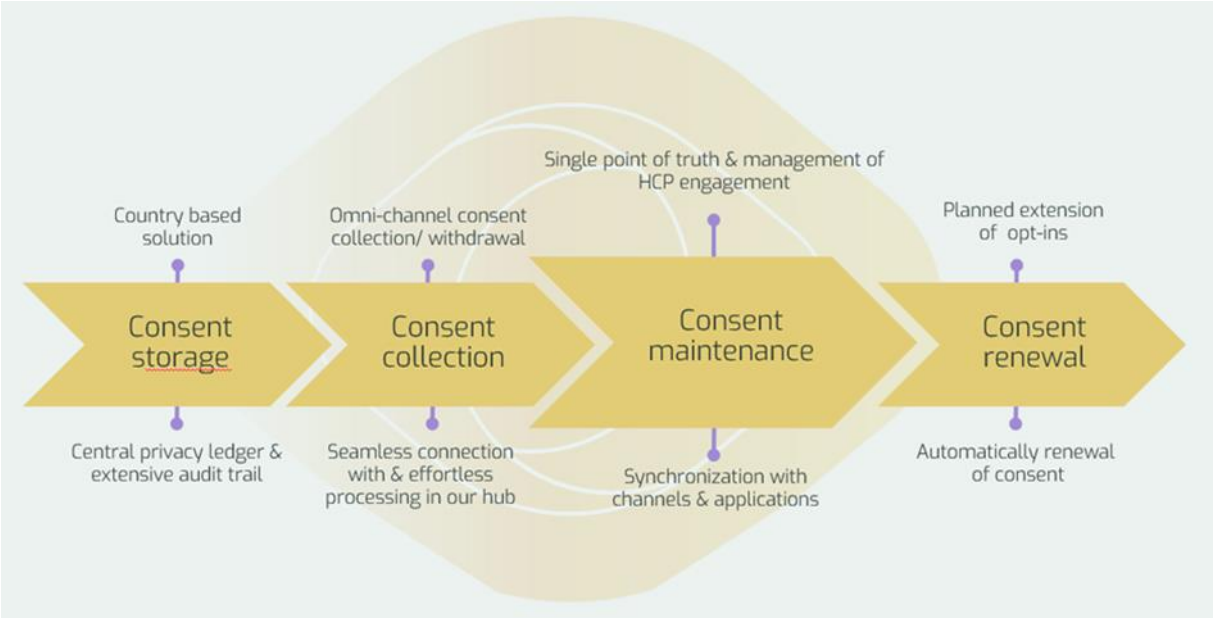
smooth course. For example, data protection has a lead time. Do you know when an opt-in will expire when your data is scattered through various systems? If not, you might be working in opposition to the GDPR, CCPA, other local regulations or internal business rules.

The consequences of not having your consent management in order are serious. Neglection of this process can cost you, literally. GDPR consent accountability implies obligation to prove per individual subject: clear affirmative action of HCP, consent freely given, should be specific and unambiguous and can easily be withdrawn (opt-out).

Externally, not having your consent management in order may result in issues such as high fines. Internally, an unclear system and/or process will lead to discomfort within your team. You do not want internal discussions about the completeness and lawfulness of data: you want clarity because the HCP demands a consistent approach.

BY THE WAY, have you ever thought about what kind of consent you are storing? Value based or customer based consent? It should be customer based consent, because the consent given should be linked to a person and not to an email address, which can change and then the consent will be lost.

How do you deal with expiration of your opt-ins? Do you know when they expire?



Data-protection is about proving that you are a good custodian with regard to the personal data of an individual. It is not just about storing an opt-in/opt-out in the right way (according to e.g. GDPR, CCPA), but in our daily practice we also see that quite some pharmaceutical companies have additional business rules. Such a business rule can demand linking an expiry date to an opt-in. This implies, that after 2 or 3 years an opt-in expires and your data protection policy requires to renew this consent, because it is no longer valid.

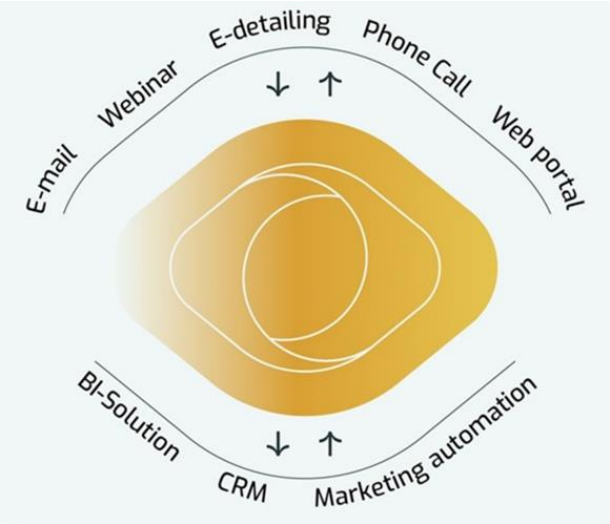
Is this a challenge? Not all! In our platform these expiry dates are listed and you can easily see whether action is required.

When asking an HCP for renewal of his/her consent, this is also a very good moment to “measure the temperature”. How is your company, your way of communication, your content, etc. perceived by the HCP?

When the respective HCP is visited by your salesforce, re-consent can be asked during the visit. But many HCPs do not want to be visited or are outside of your face-to-face target group. For these HCPs we offer the possibility to send an automated e-mail asking for consent renewal. This email is triggered by the expiration date of the opt-in as captured in our platform.

When asking for an opt-in renewal, you should offer the HCP relevant information according to his/her preferences, which are also stored in our platform. And when you are executing a planned customer journey, it can be an option to integrate the consent renewal in this journey.

No more internal discussions about the validity of e-consent collected? A single source of truth is the solution to save costs!



Since we work within the pharmaceutical industry, which is regulated by strict laws and regulations concerning data protection, scattered data can literally cost you. Scattered opt-ins through your organization can cost you money. Having a clear overview of the consent journey of the HCP will help you minimize room for error. This means that the status of the opt-in is always up to date and easy to find without manual labor e.g data stewards that bring data together from different systems and channels. What you want to prevent at all costs is losing the view on the HCP consent and even worse, not using opt-ins because you don't know that they exist. Opt-in statuses can easily get lost in different channels and applications you use. And how can you manage what you can't find? By using a single source of truth system, you will be able to monitor the HCP journey.

Our technology enables organizations to collect, manage and process personal data. We collect,

manage and integrate HCP data. Our ready-to-use, compatible solution saves time and offers instant clarity regarding opt-in and opt-out administration.

We offer a single source of truth solution. A centralized HCP data & consent point to flawlessly connect all applications you are using to digitally interact with HCPs. We've noticed that scattered data is one of the main issues in the digital world. When your data is scattered you lose a solid overview. Even more important, getting the most out of your data

What are the benefits of using our hub? The world of personal data is a complex one. We are here to collaborate with you on this digital quest. We're in the business of unburdening you.

From a commercial point of view, we're also offering a cost-effective way of communication. All the work is going through digital channels. Another cost benefit of using OptInsight is the impact on your internal team. Eliminating manual data entering and especially maintenance will give you the opportunity to put your team in their strength which will make your culture flourish.

Another point of focus: risk management. Because you do not want to get fined because you're not working aligned with the GDPR or other local regulations. Also, you do not want to lose overview of your consent journey. What if an HCP opted-out, but because of your scattered data you've missed the opt-out and continue to contact them?

Real-time connections for up-to-date consent and preference management.

Applications should seamlessly connect in order to improve efficiency, productivity and user experience. When applications are connected, they can easily share information and resources, eliminating the need for manual data entry and reducing errors. This can save time and effort for users, as well as improve the accuracy of the data.

For consent management, seamless connectivity also allows for better collaboration between different teams and departments like marketing/digital, legal & compliance and IT within your organization. When applications and tools are connected, opt-ins (but also opt-outs) are stored in one single source of truth, independent of the application/tool used.

Additionally, connectivity can improve the user experience by providing a more seamless and efficient workflow, based on the preferences of an HCP stored. When applications are connected, users do not have to constantly switch between different applications or manually transfer and manage information, which can be frustrating and time-consuming. Instead, they can easily access the information and resources they need, without interruption.

In summary, seamless connectivity between channels and applications is important because it improves efficiency, productivity and user experience. It enables storing information in one central location, improves collaboration and communication.

Why you need a SaaS based consent management solution in pharma.

OptInsight SaaS solution.

The OptInsight e-consent management solution for pharma is a SaaS solution. Software as a Service (SaaS) is a way of using software applications without having to buy, install or maintain them on your own computer or server. Instead, you access the software over the internet, usually through a web browser.

The provider of the software hosts and maintains it, so you don't have to worry about updates, security or hardware. SaaS can be used for a variety of applications, such as email, project management, customer relationship management (CRM), accounting and more.

Here are some advantages of using a SaaS solution.

Lower upfront costs:

SaaS solutions generally require little to no upfront investment for clients in hardware, software or IT infrastructure, which can save businesses a significant amount of money. For using the OptInsight solution you pay a yearly fee per tenant (country) and a small, one off implementation fee.

Easy and fast deployment:

Since the software is hosted in the cloud, there is no need for installation, which makes deployment quick and easy. Once we decided on how to set up our platform for a tenant, we can remotely configure this is a day. This means that your solution is up and running.

Scalability:

SaaS solutions can easily scale up or down depending on the needs of the business, without the need for additional hardware or infrastructure. And as our solution is tenant based, it is really easy to add additional tenants in just days.

Automatic updates:

SaaS providers take care of software maintenance, updates and security, so users don't have to worry about managing these tasks themselves.

Accessibility:

SaaS solutions are accessible from anywhere with an internet connection, which makes it easy for remote workers or teams in different locations to collaborate. The OptInsight solution is acting as a single source of truth for opt-ins/opt-outs and is accessible for everyone within the company. This means for instance, that a digital marketeer can easily create a list of target HCPs.

Integration:

Many SaaS solutions are designed to integrate with other cloud-based applications, which can help businesses streamline their workflows and increase productivity. Our solution seamlessly connects to the current applications in your organization where personal data are recorded and/or processed. We also connect to the communication channels where personal data is collected plus we always have a localized solution.

Success factors for receiving an opt-in from an HCP and being GDPR compliant.

The opt-in challenge.

We all know, that it is a challenge to collect opt-ins from HCPs. HCPs might not know your company well enough, they might not trust you yet or they might not be interested, because you are offering content which is not appealing enough. Getting opt-ins from HCPs for promotional purposes requires a thoughtful and strategic approach. You should also use a variety of channels, such as websites, webinars, an HCP portal, LinkedIn, post-grade education offerings, direct mail, telephone or in-person meetings. In general it is all about relevance. And relevance starts where the value (or capabilities) meet the needs of an HCP.

Here are some general steps you can take to obtain opt-ins from HCPs:

1. Before reaching out to HCPs, it is important to have a clear value proposition that highlights the benefits of opting in to your promotional communications. This could include access to educational resources, information on new treatments or therapies or invitations to events or webinars.

2. Develop targeted messaging that speaks directly to the needs and interests of the HCPs you are targeting. This could include highlighting the relevance of your promotional communications to their practice area or patient population.

3. Capture the evidence regarding the opt-ins collected. Demonstrate a clear audit-trail on individual level that proofs that is was freely given, specific, unambiguous, informed, revocable and well documented. Just a checked box in CRM is not enough. Take into account that capturing consent from different channels requires a single source of truth to not lose control.

4. Make the opt-in process as easy as possible for HCPs. This could include providing a simple online form, pre-populating the form with their contact information or providing a link to a landing page that highlights the benefits of opting in. Be aware that you always have to provide an easy opt-out process if they want unsubscribe.

5. Once HCPs have opted in, it is important to respect their preferences for communication. This includes allowing them to choose the frequency and type of communications they receive or providing an option to opt-out at any time. To prevent that they will opt-out, you can always provide the possibility (before opting out) to change their preferences. Otherwise you have to respect this.

6. Monitor opt-in rates and adjust your approach as needed to improve your results. This could include adjusting your messaging, targeting different segments of doctors, using/adding other channels or refining your opt-in process.

Overall, successfully collecting opt-in data from HCPs requires careful consideration of these and other potential challenges, as well as efforts to build trust and provide clear communication around the benefits of participation. Also remember that doctors are busy and receive a lot of promotional communications, so it is important to provide added value.

Leveraging Social Media for opt-in collection from doctors.

Introduction

In today's digital age, social media platforms have become powerful tools for connecting people from all walks of life. Among the myriad of users are doctors, who are increasingly turning to social media for networking, information sharing and professional growth. Recognizing this trend, pharmaceutical companies have discovered an innovative approach to collect opt-ins from doctors through social media platforms. This blog explores the strategic utilization of social media to engage doctors and secure their valuable opt-ins for pharmaceutical companies.

Enhancing Reach and Visibility

Social media platforms provide a vast network for doctors to engage with peers, patients and industry professionals. By establishing a strong presence on platforms like LinkedIn, Twitter and Facebook, pharmaceutical companies can effectively tap into this virtual ecosystem. Through compelling content, including informative articles, research updates and thought-provoking discussions, companies can attract doctors' attention and drive engagement. As doctors actively participate in these platforms, pharmaceutical companies gain enhanced visibility and the opportunity to convey their objectives and solicit opt-ins.

Engaging Doctors with Relevant Content

The success of any social media campaign lies in the delivery of relevant and valuable content. Pharmaceutical companies should tailor their content to cater to doctors' interests and preferences, addressing topics such as clinical research, advancements in medical technology or emerging treatment options. By providing insights, educational materials and thought leadership, companies can establish themselves as valuable resources within the medical community. Engaging doctors with well-crafted content fosters trust and credibility, making them more likely to consider opting in to receive updates and information from pharmaceutical companies.

Building Trust and Credibility

Doctors value transparency and authenticity when interacting with pharmaceutical companies. Social media platforms offer an avenue for companies to showcase their commitment to ethical practices, compliance and patient well-being. By sharing success stories, testimonials and collaborating with reputable medical professionals, pharmaceutical companies can reinforce their trustworthiness and credibility. Establishing relationships with key opinion leaders and renowned doctors through social media also bolsters their reputation. When doctors perceive a company as reliable and aligned with their values, they are more inclined to opt-in and explore potential collaborations.

Compliance and Privacy Considerations

While social media presents tremendous opportunities, it is essential to navigate compliance and privacy regulations carefully. Pharmaceutical companies must ensure that their opt-in processes adhere to relevant legal requirements and safeguard the privacy and confidentiality of doctors' information. Clear consent mechanisms, secure data storage and transparent privacy policies are crucial elements in establishing trust with doctors. Companies should maintain strict protocols to prevent data breaches and unauthorized sharing of doctors' information. By prioritizing compliance and privacy, pharmaceutical companies can create a secure environment conducive to opt-in collection.

Conclusion

Social media has transformed the way professionals connect and interact and the medical field is no exception. Pharmaceutical companies are harnessing the power of social media to engage doctors, disseminate valuable information and ultimately collect opt-ins. By enhancing their reach, delivering relevant content, building trust, and prioritizing compliance, these companies can effectively tap into the vast pool of doctors on social media platforms. As this trend continues to evolve, social media will play an increasingly vital role in facilitating transparent and mutually beneficial relationships between pharmaceutical companies and doctors.

Enhancing opt-in collection in the pharmaceutical industry through a robust HCP portal.

Introduction

The pharmaceutical industry relies heavily on the collection of opt-in data from healthcare professionals, particularly doctors, to gather valuable insights, conduct clinical trials and promote their products effectively. In this digital age, the development of a well-designed and user-friendly HCP portal has proven to be instrumental in streamlining data collection processes and fostering stronger relationships between pharmaceutical companies and healthcare professionals. In this blog, we will explore how a good working portal for doctors can contribute to opt-in collection within the pharmaceutical industry.

Simplified Registration and Opt-In Process

A user-friendly HCP portal can significantly simplify the registration and opt-in process, making it easier for doctors to provide their consent to participate in pharmaceutical research and marketing initiatives. By implementing clear and concise opt-in forms and ensuring the process is straightforward, pharmaceutical companies can enhance the rate of opt-ins and not to forget, HCP preferences. This streamlined approach respects the time constraints faced by HCPs and eliminates any unnecessary hurdles, thereby encouraging higher participation.

Personalized Communication and Education

An effective HCP portal enables pharmaceutical companies to deliver personalized communication and educational materials to doctors. By leveraging the data collected through opt-ins, pharmaceutical companies can tailor their messaging to the specific interests, specialties and preferences of healthcare professionals.

This personalized approach not only increases engagement, but also establishes trust and fosters stronger relationships between HCPs and pharmaceutical companies.

Efficient Clinical Trial Recruitment

Recruiting participants for clinical trials is a critical aspect of pharmaceutical research. An HCP portal provides an efficient platform for identifying and engaging potential participants among the registered doctors. By leveraging the opt-in data, pharmaceutical companies can match eligible doctors with relevant clinical trials based on their specialization, location and patient demographics. This targeted approach streamlines the recruitment process, reduces costs and accelerates the development of innovative medical treatments.

Continuing Medical Education (CME) Opportunities

Pharmaceutical companies often collaborate with HCPs to provide continuing medical education opportunities. A robust HCP portal can facilitate the delivery of CME courses, webinars and conferences, keeping healthcare professionals updated with the latest advancements in their respective fields. By offering such educational resources, pharmaceutical companies can deepen their engagement with doctors, reinforce their expertise and establish themselves as trusted partners in professional development.

Ethical Considerations and Data Privacy

When developing an HCP portal, pharmaceutical companies must prioritize ethical considerations and data privacy. Transparency regarding data usage, consent management and compliance with relevant privacy regulations is crucial to maintain trust with doctors. Implementing strong data protection measures, such as secure user authentication, encryption and anonymization, ensures that doctors' personal information is safeguarded appropriately.

Conclusion

A well-designed and efficient doctor portal can significantly contribute to opt-in collection within the pharmaceutical industry. By simplifying the registration process, delivering personalized communication, facilitating data management and analytics, streamlining clinical trial recruitment and offering continuing medical education opportunities, pharmaceutical companies can enhance their engagement with HCPs. Furthermore, by prioritizing ethical considerations and data privacy, companies can build trust and foster long-term partnerships with healthcare professionals. As technology continues to advance, leveraging a robust doctor portal will remain pivotal in driving innovation, research and better patient outcomes in the pharmaceutical industry.

What kind of consent are you collecting?

Once you decided on how to store and manage your opt-ins/opt-outs, you can start collecting. But are you collecting value based or customer based consent?

What kind of consent you are collecting is often driven by the consent management tool you are using. Many tools register value based consent. This is consent, which is given for an email address. Does an HCP change his/her email address, then the consent will get lost. Have you collected info@mailaddresses ? One opt-out given mean you lose all HCPs using that email address. For the above reasons, you should consider a platform, which registers customer based consent. This means, that consent is linked to an HCP and whenever an email address changes, the consent will be preserved.

The OptInsight solution guarantees the most up-to-date insights into whether you may use this personal data and for what purposes e.g. promotional communication, medical communication, profiling.

The collection of opt-ins can be done in many ways. You can use your people in the field, webinars, post grade education, LinkedIn, use a call agency, send a paper mail and so on.

Building trust by being relevant. Adapt your message to the preferences provided by the HCP.

The real game starts when an HCP has provided his/her opt-in for e.g. promotional purposes. Although it is a clear affirmative action of trust, it is time to prove your company can be knowledgeable/valuable. Your position in the HCP journey moved from knowing that you are there (awareness) to the situation where the HCP is receptive for your information. In this part of the journey being relevant is key in maintaining an opt-in.

Based on our experience we advise to keep the following drivers for relevance in mind:

· Tune your message based on the preferences you collected from the HCP. Preferences are e.g. related to communication channels (email, personal portal, sales rep etc.) and therapeutic areas they are interested in.

· Put the recipient central and keep messages short.

· Provide HCPs the freedom and convenience to change preferences, but also to rate your messages/content. Learn from them and let them tune what they need and want over time. This is also a way to prevent losing them (opt-out).

· Enter into a dialogue with your target audience and listen. If there is a need and space to use other channels than digital, vary in personal touchpoints e.g. visit or phone/remote call to listen to how they perceive you as a company and the content you provided.

· Always keep in mind: Commerce is about building trust. Trust = showing genuine interest in the person + bringing value to the table.

The importance of capturing HCP preferences.

In recent years, digital communication has become an increasingly important tool for pharmaceutical companies to engage with healthcare professionals (HCPs). However, the preferences of doctors for digital communication can vary widely and understanding these preferences is essential for pharma companies to successfully connect with HCPs.

Here are a few reasons why it's so important for pharmaceutical companies to capture preferences of doctors for digital communication:

Personalization.

One of the most significant advantages of digital communication is the ability to tailor messages to individual doctors' preferences. By capturing and understanding doctors' preferred channels, timing and content, pharmaceutical companies can provide personalized experiences that resonate with individual HCPs. This can increase engagement and build stronger relationships between pharma companies and doctors.

Efficient communication.

Digital communication channels can be more efficient than traditional methods such as face-to-face meetings or phone calls, although the mix of channels will certainly contribute Understanding doctors' preferences for digital channels such as email or social media can help pharma companies to streamline their communications and reduce the time and resources required to engage with HCPs.

Meeting HCPs where they are.

As digital communication becomes more ubiquitous, doctors are increasingly using digital channels to access information and communicate with each other. By capturing HCPs' preferences for digital communication, pharma companies can meet doctors where they are and provide information in a way that is convenient and accessible to them.

Compliance.

Regulatory compliance is a critical concern for pharmaceutical companies and digital communication introduces new challenges in this area. Capturing HCPs' preferences for digital communication can help pharma companies to ensure that they are communicating with doctors in a compliant manner, while still providing engaging and effective messaging.

Overall, capturing doctors' preferences for digital communication is essential for pharmaceutical companies to effectively engage with HCPs in a way that is personalized, efficient and compliant. By doing so, pharma companies can build stronger relationships with doctors, increase engagement, and ultimately improve patient outcomes.

How challenging is collecting e-consent for you as a product/brand manager in pharma?

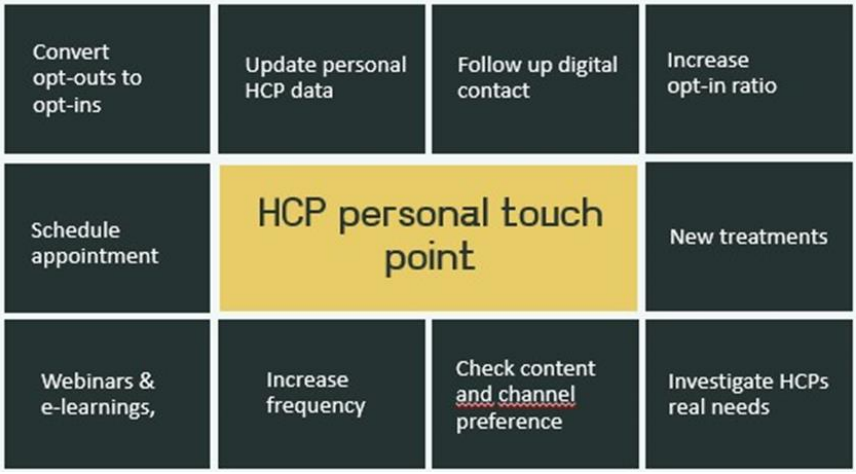
Having an opt-in is the enabler to start the digital journey with doctors. What we see is that a lot of pharma companies have challenges in acquiring the permission to digitally engage with their target group. One of the success factors is to make that first impression to doctors personal. Based on our experience we conclude that personal calls have a positive effect on the number of opt-ins.

Data care is more than just collecting opt-ins. It is the practice of actively protecting and maintaining the integrity and privacy of data. It involves a set of actions and processes that organizations and individuals can take to ensure that their data is accurate, secure and protected from unauthorized access or misuse. One important aspect of data care is data privacy, which includes ensuring compliance with regulations such as GDPR and CCPA and protecting personal data from breaches and unauthorized access. For this I invite you to have a look at the OptInsight consent management solution.

Another important aspect is data quality, which involves ensuring data is accurate and up-to-date. Data care also involves being transparent about data collection, use and sharing and obtaining consent for data collection.

This is where we can help you with our DataCare solution. With DataCare, powered by Tele-SalesDirect and OptInsight, we combine smart technology with the power of high-quality telephone customer contact. With opt-in ratios of up to 70%, this is an effective way to collect e-consent. We turn fragmented and incomplete data into a clear, accessible, up-to-date and usable customer database, the OptInsight e-consent management solution. With this GDPR opt-in based customer database in one central location, acting as a single source of truth, your company can be “back in the lead” again.

Phone calls with HCPs: no go area or a must have?



Building a relationship.

As a product/brand manager, understanding the touch points in the customer journey of a doctor is crucial in building and maintaining a positive relationship with healthcare professionals. By identifying these touch points, pharmaceutical companies can provide doctors the necessary content, support and resources to inform them on how to deliver better patient care.

Pharmaceutical companies have a responsibility to provide doctors with accurate and up-to-date information about their products. They need to provide doctors with educational materials that highlight the benefits, risks and appropriate use of a product. This education can occur through a variety of channels, such as rep visits, in-person meetings, webinars, phone calls or online resources.

Sales and medical representatives play a crucial role in the customer journey of a doctor. These representatives are the face of the pharmaceutical company and are responsible for providing doctors with information about new products and treatment options. They also provide support to doctors by answering questions, providing product samples and offering educational resources. Most interactions of a rep are face-to-face, but also phone calls can be useful for a rep. If you want to support your reps with additional touch points, high quality telephone calls are a well-accepted option.

How to support HCPs?

As healthcare professionals, doctors need to stay up to date with the latest advances in medicine. Pharmaceutical companies can support doctors by providing them with continuous medical education (CME) opportunities. This can include seminars, conferences and online resources that cover a range of medical topics. Once an HCP attended such a CME event, a phone call is a great channel to ask for their experience and how they rate the event.

Pharmaceutical companies can also offer patient support programs that provide doctors with resources to help their patients manage their health. These programs can include patient education materials and disease management tools. To pre-screen whether an HCP is interested, a high-quality phone call is a cost-effective channel.

By identifying the right touch points, pharmaceutical companies can build the right customer journey and provide doctors with the right and necessary information, support and resources through the right channel and at the right time.

A Client Case: Increased contact frequency by 50+ % using the phone channel.

Client situation

A pharmaceutical company with focus on the Benelux had the aim to increase their contact frequency and coverage with healthcare professionals, especially GPs. They experienced that creating personal touch points contributed to a better understanding of their treatments. Their additional goal was to find out how their target group liked to be contacted regarding content & channels, enabling them to improve their contact frequency.

Challenges

Although they have several sales reps, the organization concluded that the coverage and frequency of their sales reps was limited. They also wanted to contact their target group in a more effective and efficient way. They were facing a limited number of opt-ins to contact HCPs by email to find out channel & content preferences. Another conclusion was that they were suffering from opt-outs from GPs they wanted to contact digitally.

Solution direction

Although they have several sales reps, the organization concluded that the coverage and frequency of their sales reps was limited. They also wanted to contact their target group in a more effective and efficient way. They were facing a limited number of opt-ins to contact HCPs by email to find out channel & content preferences. Another conclusion was that they were suffering from opt-outs from GPs they wanted to contact digitally.

Approach

To be successful ,we made a clear segmentation of the target group. The aim was to determine who we wanted to contact and why? And very important is to select the right content to be offered for the right segment of GPs.

To come up with a not too lengthy script for the call, we discussed with our client what 3 questions we should ask to find out how the company can be relevant for the GP? In this way, we collected the content & channel preferences for communication with the GPs.

All data collected was logged in a GDPR proof way and also the dialogues with the GPs were captured, giving our client the possibility to deep dive into the details of the conversations. And off course a summary of the highlights was provided.

We also apply a test and learn approach. After a series of dialogues, we evaluated the results with the client. And where needed we adapted the approach to improve the results.

Results

- Collected from more than 50% of GPs specific channel & content preferences.
- Of the GPs without an opt-in, we received from more than 70% an opt-in.
- Turned more than 40% of opt-outs into opt-ins.
- The marketing team was able to engage digitally with GPs based on provided opt-ins and preferences.

Why digital and advertising agencies that specialize in supporting pharmaceutical companies should actively advise their clients on consent (opt-ins/opt-outs) management.

Consent management is more than just checking a box!

The pharmaceutical industry is heavily regulated and agencies must ensure that their clients comply with regulations such as the General Data Protection Regulation (GDPR). Comprehensive consent management can help to ensure that clients are obtaining, storing and managing consent (opt-ins AND opt-outs) and preferences from individuals in accordance with these regulation. According to GDPR conditions for consent, firms should comply with the accountability obligations. This means you have to prove on an individual level, that

- the HCP did a clear and affirmative action
- consent was freely given
- is specific
- unambiguous
- can easily be withdrawn (opt-out)

This should be the foundation for all further commercial activities, which are part of the (digital) customer journey.

Why should advertising agencies bother about consent management?

It is all about the HCP! By obtaining clear and informed consent from an HCP, solid consent management can improve the customer experience and build trust with customers. Why? Because it is clear for the HCP for what purposes his/her data is or is not used. HCPs should be tempted to provide their personal data and consent, based on relevant content which is offered by the pharma company.

It is all about your customer! When you are using multiple channels to communicate and to collect this data, you should connect all these channels to one single source of truth to guarantee all data is captured in a legally compliant way. The data should also be easily accessible for all relevant stakeholders in the company.

Scattered data.

What we often see is that data and consent are stored in Excel or separate applications. This results in scattered data and your customers run the risk of not using the latest data, such as latest consent status, preferences or even the latest email address. That might lead to not engaging with the right message to the right person at the right time.

Consent management should provide a centralized and automated way to manage consents, making it easier to keep track of which consents (opt-ins and opt-outs) have been obtained and ensuring that individuals' preferences are respected. It’s crucial to take the preferences of an HCP into account, when starting the customer journey.

Overall, a consent management solution can help agencies and their clients to ensure that they are compliant with regulations, protecting personal data, improving the customer experience and managing data effectively.

How a consent and preference management solution improves the value of a CRM.

Why a consent management tool?

“Why do I need a consent management solution, we already have a Customer Relation Management system”. A statement we often hear if we meet potential new pharma clients.

Let us be clear: A consent management solution is not a substitute for a CRM and vice versa. But a consent & preference management solution can definitely improve the HCP personal data in a CRM system. To understand we have to go back to the origin of a CRM. For a long time CRM was mainly used by field force. The basic HCP data was uploaded from e.g. OneKey and the additional data collected was reported by the reps. If a rep did not capture any information in CRM, the CRM stayed empty.

Due to Covid-19 more and more digital channels came in place to communicate with healthcare professionals. Pharma companies initiated e-mail campaigns, build dedicated HCP portals, organized online post grade education, etc. Also reps were trained to switch to digital initiatives like remote meetings and presentations.

Data collection

If the data collected via these channels is not directly ingested in applications such as CRM, this results in scattered data throughout the organization. This means a lot of manual work for data stewards, because ideally all data is stored in one central database. Another important consequence of having different data sources, is the fact that HCP records are not up to date and incomplete. If a marketeer wants to use HCP data, it should be guaranteed that the data is correct, especially in case an HCP opted out.

A consent & preference management solution can prevent having scattered data and feed your core applications such as CRM real time with the latest HCP data that is collected. This could be an opt-in that is received via another channel than a rep or a channel preference that has changed together with an email address.

Combining consent management and CRM.

A consent and preference management solution can be combined with your Customer Relationship Management (CRM) system, like VEEVA, OCE, Salesforce or Platforce to strengthen the use of the system in several ways.

Compliant Consent Collection.

The OptInsight consent management solution ensures that opt-ins and opt-outs are collected and managed in a compliant manner, reducing the risk of non-compliance. This information will be integrated into the CRM system, making it easy to access and use by your salesforce.

Better Data Management.

A consent and preference management tool can ensure that accurate and up-to-date data is stored, no matter from what source. This is your single source of truth, which will be integrated into the CRM system. This will improve the accuracy of your customer data and make it easier to track customer behavior and preferences for all personal involved. So not just field force.

Targeted Communication.

The preference management tool captures HCP preferences regarding the content they want to receive and how they want to receive this information, such as email, mail or field force visits. This information will be uploaded into the CRM system and it can be used by the reps to tailor personal communication to ensure that HCPs receive the relevant messaging.

Personalized Marketing.

By combining consent and preference data with targeting, segmentation and adoption data in the CRM system, pharmaceutical companies can create targeted marketing campaigns that are tailored to specific HCP preferences. This will improve engagement, built trust, improve the (digital) relation and ultimately drive sales.

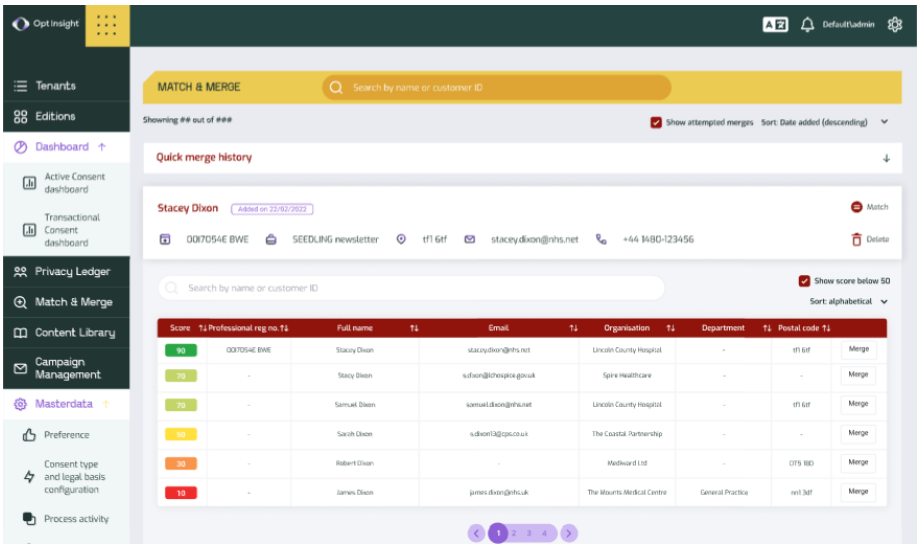
Accessibility.

Basically, a CRM system is for providing the field force all HCP information they need to do their job. But accessibility for others than field force is limited. When a (digital) marketeer needs a list with email addresses of selected HCPs for a marketing campaign, only authorized personnel is able to provide such a list. In the OptInsight consent and preference management solution, it is very easy to create your own selection and produce your own list, which will only show HCPs who opted in.

Conclusion

In conclusion, combining a consent and preference management tool with a CRM system can strengthen the pharmaceutical industry’s use of the system by providing more personalized and compliant customer experiences. By using these tools together, pharmaceutical companies can improve data management, improve customer trust and engagement and ultimately drive sales.

Do you want to improve the quality of your HCP data?



The OptInsight consent management platform contains a unique “Match & Merge” algorithm . This feature can automatically detect duplicate customer records based on input parameters such as First Name, Last Name, Specialty, etc. When duplicated records are detected, the system will propose a “merge” to the most complete customer record (e.g. the record with a OneKey ID), vastly improving data quality. For one of our clients, we were able to reduce the number of records from 100.000 to 65.000 in two weeks. This was an improvement in undoubled record of 35%.

Also, the advanced integration capabilities avoid data conflicts and ensure the correct source data is used to populate the customer record.

All consent registrations fed into the OptInsight client tenant for which the personal data records are incomplete (e.g. via a web form or the blank consent channel) can be processed by the Match & Merge functionality. This is a best practice to ensure that consent registrations that can’t be directly linked to a contact in the Privacy ledger will not pollute the customer database with invalid consent registrations.

When the IQVIA OneKey database, often used to fill the privacy ledger, is incomplete, unknown HCPs can be added to the privacy ledger. In this way, the database is enriched with missing doctor’s data.

The M&M functionality executes an automatic matching process via an algorithm (based on Initials, Last name, Postal Code, email and Professional Registration number), and in case of a failure in automatic matching, it facilitates the manual matching by making suggestions for matching.

Consent collected, which cannot be matched, is recovered, because it is stored in Match & Merge until further actions are taken.

How to improve your HCP data quality? A case study.

Prevent duplicate customer records and keep your database clean!

The OptInsight e-consent & preference management solution contains a unique “Match & Merge” algorithm. This feature can automatically detect duplicate customer records based on input parameters such as First Name, Last Name, Specialty, etc. When duplicate records are detected, the system will propose a “merge” to the most complete customer record (e.g. the record with a OneKey ID), vastly improving data quality.

All HCP data fed into the OptInsight client tenant for which the personal data records are incomplete can be processed by the Match & Merge functionality.

OneKey database.

When the IQVIA OneKey database, often used to fill the privacy data ledger, is incomplete, unknown HCPs can be added to the privacy ledger. In this way, the database is enriched with missing doctors’ data.
The M&M functionality executes an automatic matching process via an algorithm (based on Initials, Last name, Postal Code, Email and Professional Registration number) and in case of a failure in automatic matching, it facilitates the manual matching by making suggestions for matching.
HCP data collected, which cannot be matched, is recovered, because it is stored in Match & Merge until further actions are taken.

Fact sheet data quality

One of our clients had a real issue with scattered HCP data and incomplete HCP records stored in several applications. We were able to clean up and combine these databases and this action reduced the number of records from 100.000 to 65.000 in a short period of time. This was an improvement in undoubled record of 35%. With all HCP records ending up in one database, we provided a single source of truth.

About OptInsight

The foundation: building bridges between HCPs and Pharma
OptInsight supports healthcare communication by building bridges between the pharma industry, healthcare professionals & patients. The foundation of this bridge consists of compliant, reliable and relevant healthcare professional data to support effective communication. We are a vendor-agnostic company, and with our technology and services, we enable pharma & life science companies to engage with the right message, to the right HCP, through the right channel at the right time based on the right legal basis and simultaneously supporting with collecting, managing and integrating data.

Our mission: reliable exchange of information between pharma and HCPs
At OptInsight, our mission is to streamline the management of personal data for pharmaceutical companies and their intended audience. We strongly value the continuous advancement of digital technology, as well as data security and fostering trustworthy communication between pharma and life sciences firms, healthcare professionals, and patients. Our goal is to facilitate a seamless, pertinent and reliable exchange of information between these parties.

Our focus: the HCP Data, consent and preference management journey
Our solutions and services are designed for easy use and compatibility, saving time and providing clear information about HCP data, opt-in and opt-out, preferences. We are dedicated to supporting pharma and life science companies in engaging effectively with their target audience. Our focus is on the HCP data, consent and preference management journey, serving both biotech and global pharma players. All with the aim to improve reach.

We are experts in the field of pharma, data and data protection
Our extensive knowledge and expertise in data protection, compliance, commercial excellence, technology and the Pharma & Life Sciences industry span over two decades. We recognise the crucial role that effective communication plays between healthcare professionals and pharmaceutical companies, as well as the significance of the application landscape and the associated business and regulatory compliance processes, including GDPR (General Data Protection Regulation). Our way of working is characterised by short and efficient communication lines, flexibility, enthusiasm, energy, diligence and commitment.

Our team
OptInsight is a company composed of individuals with extensive backgrounds in pharmaceuticals, compliance, technology and commercial effectiveness. Our team of experienced professionals established the company to transform the communication dynamic between pharmaceutical companies and healthcare professionals into a more meaningful and trustworthy exchange of information.

For more information:

www.opt-insight.com

or follow us via: https://www.linkedin.com/company/optinsight/

July 2023

©OptInsight 2023