Summary of Medical Affairs Professional Society (MAPS) Puerto Rico Roundtable hosted by Randi Goeckeler and Holly Henry on March 25, 2024

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Discussion Summary

Healthcare is undergoing a seismic shift driven by science, technology, and advances in patient empowerment. In this dynamic environment, medical affairs teams must evolve their approach to key opinion leader (KOL) engagement. Transactional interactions focused solely on clinical expertise are no longer sufficient. Today's KOLs are multi-faceted, wielding influence across research, patient advocacy, and health policy. To this end, medical affairs teams must forge strategic, integrated partnerships that leverage KOLs' diverse spheres of influence.

So, what are the challenges and opportunities of this new era? Drawing on insights from a roundtable of industry leaders convened by Klick at the recent MAPS conference, let's look at how viewing the KOL holistically can lead to new avenues of engagement and more multifaceted relationships.

Assessing the Current State: The Stakeholder Maturity Index

To gauge the industry's readiness for this shift, Klick developed the Stakeholder Maturity Index (SMI), a proprietary framework that evaluates an organization's KOL engagement capabilities across four key pillars:

STAKEHOLDER IDENTIFICATION
- How are KOLs identified/prioritized?
- Are selection criteria aligned with strategic objectives?
- Is there a systematic process for reviewing and refreshing the KOL roster?

COMPETITIVE LANDSCAPE
- How well does the organization understand the competitive landscape and the evolving needs of KOLs?
- Is there a process for gathering and analyzing market intelligence?
- Are KOL insights systematically captured and shared across the organization?

ENGAGEMENT PLANNING
- How are interactions with KOLs planned, executed, and tracked?
- Is there a clear engagement strategy tailored to each KOL's unique profile and preferences?
- Are engagements coordinated across functions to provide a seamless KOL experience?

OPERATIONS & PROCESS
- Are robust systems and processes in place to support KOL engagement?
- Is data integrated across platforms to provide a holistic view of the KOL relationship?
- Are there clear roles, responsibilities, and governance structures for KOL engagement?

The SMI defines four maturity levels for each pillar: Crawl, Walk, Run, and Fly. "Crawl" represents a rudimentary capability with ad hoc processes, siloed data, and limited cross-functional coordination. At the same time, "Fly" indicates best-in-class performance with seamless integration, data-driven decision-making, and demonstrable impact on strategic objectives.

Stakeholder Maturity Index (SMI)©

		CRAWLER	WALKER	RUNNER	FLYER
1	STAKEHOLDER IDENTIFICATION	• Identification is done primarily through desktop research and personal contacts • SME solely determines initial prioritization of KOLs • SME is aligned to KOLs	• Overarching strategic objectives drive KOL/DOL identification • Identification of KOLs is through a data-driven approach "Top 50-100" • Identification of personas and attributes is aligned to KOL/DOL engagement opportunities	• Personas and attributes are strategically developed to inform insight generation • Update/refresh existing KOLs/DOLs, initiate identification of emerging leaders as business needs evolve • Evaluate intersectional opinion leaders and their role within the ecosystem	• Personas and attributes positively impact measurable outcomes • Maintain KOL/DOL relationships and analyze historical engagements • Foster long-term relationships with rising stars/emerging leaders
2	ENGAGEMENT PLAN	• Engagement plan is not developed based on a stakeholder engagement strategy • Ad-hoc KOL outreach for initial conversations	• Initiate inaugural engagement plans; initiatives are tactical, with limited centralization and coordination • Move past initial conversations; identify and prioritize KOLs/DOLs to serve as supporters • Develop stakeholder objectives	• Shift to a comprehensive stakeholder engagement plan: stakeholder strategies aligned with stakeholder objectives and initiatives • Refresh plans as appropriate • Develop strategic partnerships with key stakeholders • Equip relevant internal stakeholders to move past siloed transactional engagements to collaborative strategic engagements	• Refresh engagement plans and serve as a gold standard across the organization • KOLs/DOLs proactively seek opportunities for strategic partnerships • KOLs/DOLs are strong advocates and speak in support of your organization • Based on a data-driven approach, KOL/DOL engagements transcend transactional engagements and are strategically focused
3	COMPETITIVE LANDSCAPE	• Identify the competitors	• Assess competitor stakeholder landscape	• Use competitor landscape analysis to drive stakeholder initiatives and market differentiation • Identify KOLs to serve as advocates and strategic partners	• Lead with innovative stakeholder tactics and strategies against the competition • Garner the recognition and support of priority stakeholders
4	OPERATIONS & PROCESS	• History of Stakeholder engagements is shared with limited internal stakeholders • External stakeholder communication is not streamlined	• Develop tactics and identify opportunities to partner with the stakeholder ecosystem based on the business and stakeholder objectives • Establish timelines, cross-functional roles, and processes to ensure transparency and efficiency of stakeholder engagement • A KOL/DOL database exists but only shared with a select few	• Actively explore future opportunities for engagements, leveraging deep knowledge of KOLs/DOLs' expertise and their broader ecosystem connectivity • Centralize KOL/DOL database, accessible and adaptable for all relevant internal stakeholders • Leverage platform or systems to track stakeholder engagement	• Establish processes to ensure cross-functional transparency, efficiency, and resource optimization internally • Establish relationships and experience working with KOLs/DOLs, groups, and COEs to expedite stakeholder objectives and allow for ongoing collaboration and identification of mutually beneficial opportunities • Leverage platform or systems to orchestrate future stakeholder engagement

During the MAPS roundtable, participants self-assessed their organizations using the SMI. Most teams ranked themselves as "walkers," indicating early-stage maturity with significant room for improvement. Key challenges included fragmented KOL data across siloed systems, inconsistent execution between global and local teams, and difficulty demonstrating the impact of KOL engagements. The SMI-based discussions reinforced the need for a new approach to KOL engagement that views relationships as part of a dynamic, integrated ecosystem.

Embracing an Ecosystem Approach

How will we define success in this new era? It begins by recognizing the multi-dimensional roles that KOLs can play. While leading KOLs are expert clinicians, they are also influential researchers, patient advocates, and trusted voices in their communities.

In this regard, medical affairs teams must break down internal silos and embrace cross-functional collaboration. These teams must think exponentially, aligning with clinical development to engage KOLs in research and trial design, partnering with patient advocacy to amplify the patient voice, and working with policy teams to shape the healthcare environment.

Roundtable participants emphasized that relationships in medical, advocacy, and professional society can no longer operate in isolation. Just as KOLs cannot compartmentalize their roles, neither can the organizations that engage with them. Integrated engagement is the only way forward.

Building the Foundation: Processes and Technologies

To operationalize this ecosystem approach, roundtable participants stressed the importance of robust processes and enabling technologies. Integrated CRM platforms provide a solid foundation but are not a complete solution. Well-defined processes for capturing and sharing KOL insights across the organization are equally critical.

The SMI provides a roadmap for building these foundational capabilities. For teams in the "walker" stage, priority actions include establishing clear KOL tiering criteria, systematically tracking engagements, and investing in platforms that provide a unified view of KOL interactions.

As teams progress to the "runner" stage, the focus shifts to more sophisticated analytics and insights generation. Moving beyond merely logging interactions, the emphasis is on deriving meaningful insights from engagement patterns and KOL feedback over time to identify trends, inform strategy, and measure impact.

KEEPING THE END-GOAL IN MIND:

Klick's Proprietary Framework Moves Beyond Siloed Stakeholder Engagement and Sets Our Clients up for Success
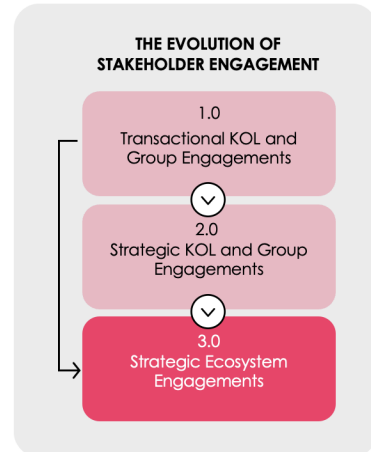
This framework transcends transactional and strategic stakeholder engagements by focusing on the opportunity to engage multiple stakeholder groups together and leveraging this ecosystem for shared interest and mutual benefit

Triangulate key stakeholders while keeping a KOL-centric approach with PAGs, PMAs, and COEs

We are interconnecting the silos to create an integrated network of best-in-class stakeholder opportunities to enhance global integration and transparency

THE EVOLUTION OF STAKEHOLDER ENGAGEMENT

1.0
Transactional KOL and Group Engagements

⌄

2.0
Strategic KOL and Group Engagements

⌄

3.0
Strategic Ecosystem Engagements

Redefining the Role of Medical Affairs

Underlying this capability buildup is a fundamental redefinition of medical affairs' role. No longer a support function at the margins, teams are increasingly positioned as strategic leaders driving scientific excellence and patient-centricity.

Elevating KOL engagement requires starting with a clear articulation of scientific objectives. Interactions must be purposeful by anchoring the KOL strategy in key questions around evidence gaps and practice-changing insights.

This strategic orientation calls for new skills and mindsets within medical affairs, combining deep scientific expertise with curiosity, business acumen, and the ability to connect the dots across the ecosystem. While it's a tall order, it's crucial for driving impact. Alongside this skill shift, roundtable participants advocated reframing success measures. Metrics must evolve from activity counts to meaningful outcomes, tracking how KOL engagements shape clinical practice, drive evidence generation, and ultimately improve patient lives.

Navigating the Path Forward

The journey from transactional to transformational KOL engagement is not a quick one. It requires sustained investment in capabilities, culture, and talent. However, the roundtable participants were united in their conviction that the effort was worthwhile.

Engaging KOLs as true partners creates an unprecedented opportunity to accelerate medical progress. Co-creating research agendas, uncovering real-world insights, and tangibly improving patient care provide a compelling "why" to galvanize teams.

The Klick roundtable itself modeled the kind of ecosystem thinking that will drive the future of KOL engagement. The gathering seeded new ideas and collaborations by convening a diverse group of industry leaders, fostering candid dialogue, and sharing best practices.

Conclusion

The new era of KOL engagement demands significant change, but medical affairs teams that embrace the challenge will shape the future of healthcare. The Klick roundtable demonstrated the industry's readiness to meet this mandate. By sharing learnings and co-creating solutions, medical affairs leaders can chart a bold new course for KOL engagement that leverages the power of the ecosystem to drive transformative impact. As the healthcare landscape evolves, the role of KOLs and medical affairs teams has never been more vital. With strategic vision, collaboration, and unwavering commitment to patients, they hold the power to shape the future.