



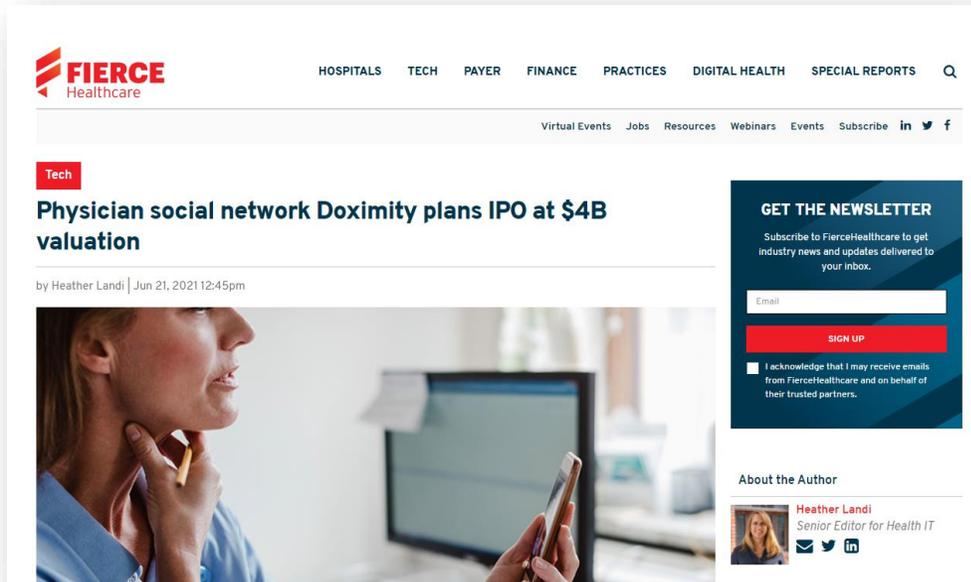
Why it is critical to monitor online clinician communities

Presented by:

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Online clinician communities: in the spotlight



Doximity's recent \$9.6B IPO signals:

- Accelerating growth in the online clinician community landscape
- Rising popularity and public awareness of online platforms for medical information-sharing
- Investment in the future of data mining and social listening for medical insight generation

▶ A closer look at Doximity's rapidly growing network:

1.8 Million health care professionals

80% Of U.S. health care professionals

50% all NPs and physician assistants

“

Journals and medical societies provide medical consensus, which provides credibility.... It's more important for entities like [medical professional associations] to reinforce the medical consensus and separate themselves from these [digital] platforms as a source of credible information, [since they are **peer reviewed.**]

Senior Executive,
Professional Medical Association

How legacy assumptions around influence are changing

01

Status quo: The term medical evidence is synonymous with publications published in peer-reviewed, often generated using randomized controlled trials

Evolution: Broader acceptance of the mosaic of evidence types including RWE, PROs, meta-analysis

02

Status quo: Medical consensus is created primarily through the dissemination of evidence from manufacturers and researchers to relevant HCPs

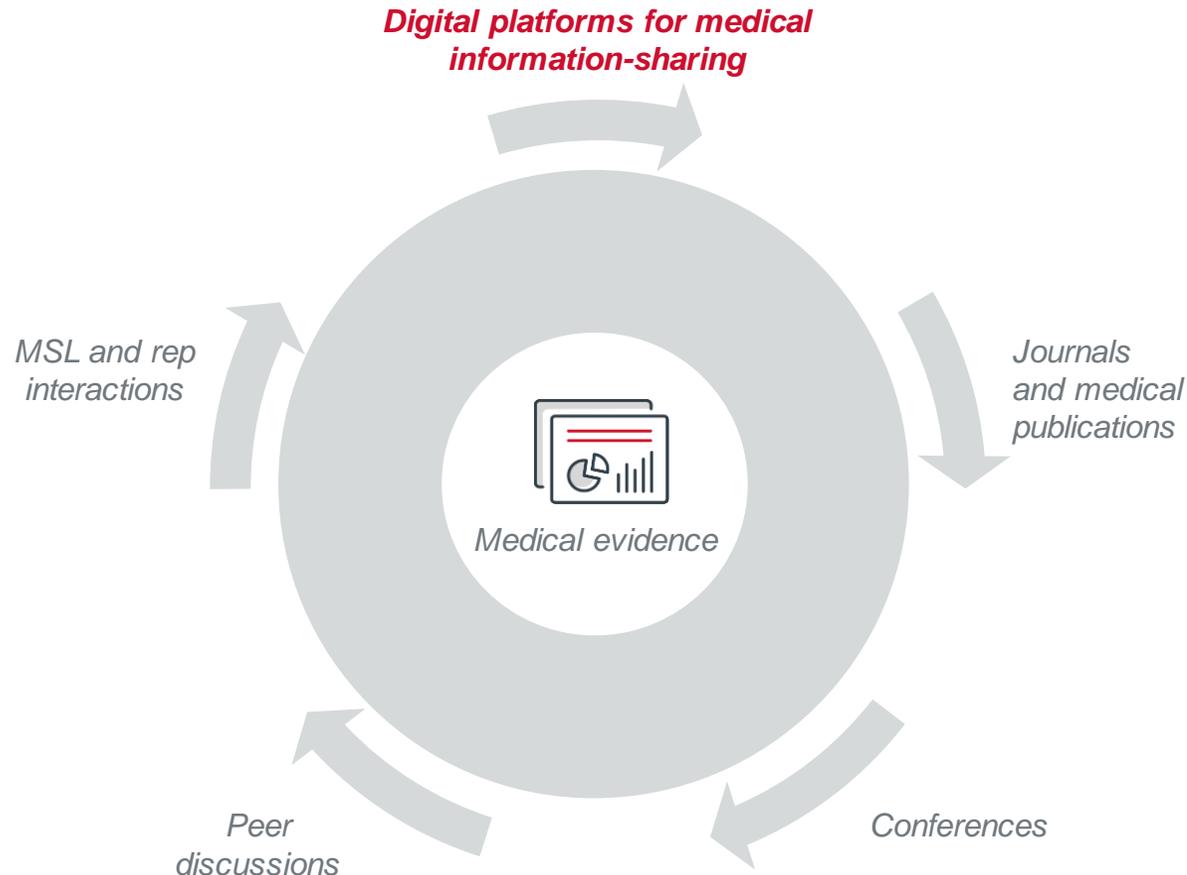
Evolution: Medical consensus is created by the circulation of various types of evidence, increasingly via digital channels

03

Status quo: Recognition that (KOLs) are no longer the sole means of HCP-to-HCP influence

Evolution: Digital Opinion Leaders (DOLs) emerging as a complement and future alternative to traditional KOL model

A closer look at the circulating landscape for evidence



▶ **Three ways that digital platforms are challenging the traditional model of evidence dissemination:**

- 1** Platforms allow HCPs to discuss and debate evidence from multiple sources in real-time
- 2** That commentary is directly informing HCP decisions and becoming new evidence itself
- 3** Discussions are increasingly happening outside of medical leaders' vision and control

Social medicine: Digital platforms meet HCP needs

Two types of digital platforms for medical information-sharing:

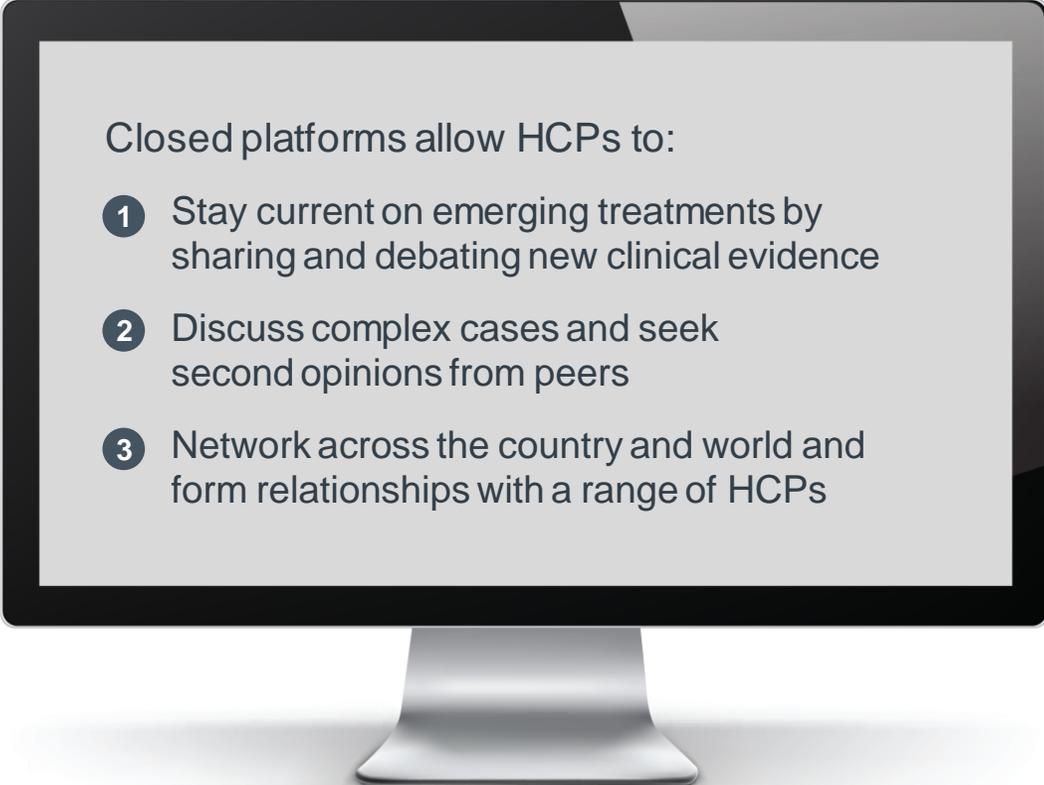
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Open platforms (e.g., Twitter, Clubhouse)

Do not require physicians to verify their credentials prior to engaging in medical discussions; accessible to all

Closed platforms (e.g., Doximity, Sermo)

Requires physicians to verify their credentials prior to engaging in medical discussions; exclusive communities



Closed platforms allow HCPs to:

- 1 Stay current on emerging treatments by sharing and debating new clinical evidence
- 2 Discuss complex cases and seek second opinions from peers
- 3 Network across the country and world and form relationships with a range of HCPs

Helping you focus on the platforms most relevant to you

Online clinician communities watchlist
for life sciences leaders

Online clinician communities to watch

Advisory Board has flagged these online communities as ones to watch. Their growing user base, expanding scope of services, and extensive network make them worth prioritizing for engagement today.

About the online clinician communities:

Doximity
Professional medical network for clinicians.

Sermo
"Virtual doctors' lounge" that facilitates medical collaboration and crowdsourcing.

Medscape Consult
Online community where physicians ask and answer clinical questions as well as share and discuss clinical challenges.

Source: [Doximity Website](#), [Sermo Website](#), [Medscape Consult Website](#)



	Doximity	Sermo	Medscape Consult
Users	75% of doctors and 45% of all NPs and physician assistants are verified members	Over 800,000 verified doctors spanning 150+ countries	Not publicly available
User types	<input checked="" type="checkbox"/> Physicians <input checked="" type="checkbox"/> Specialists <input checked="" type="checkbox"/> Surgeons <input checked="" type="checkbox"/> PCPs <input checked="" type="checkbox"/> Medical students <input checked="" type="checkbox"/> NPs, APPs ² , PAs ³ <input checked="" type="checkbox"/> Pharmacists <input checked="" type="checkbox"/> Institutions	<input checked="" type="checkbox"/> Physicians <input checked="" type="checkbox"/> Specialists <input checked="" type="checkbox"/> Surgeons <input checked="" type="checkbox"/> PCPs <input type="checkbox"/> Medical students <input type="checkbox"/> NPs, APPs, PAs <input type="checkbox"/> Pharmacists <input type="checkbox"/> Institutions	<input checked="" type="checkbox"/> Physicians <input checked="" type="checkbox"/> Specialists <input checked="" type="checkbox"/> Surgeons <input checked="" type="checkbox"/> PCPs <input type="checkbox"/> Medical students <input type="checkbox"/> NPs, APPs, PAs <input type="checkbox"/> Pharmacists <input type="checkbox"/> Institutions
Primary use cases	<input checked="" type="checkbox"/> Network with peers <input checked="" type="checkbox"/> Stay current on emerging treatments <input checked="" type="checkbox"/> Discuss clinical cases <input type="checkbox"/> Get personalized feedback on skills <input type="checkbox"/> Access clinical decision support tools <input checked="" type="checkbox"/> Earn CME credit <input type="checkbox"/> Connect with featured KOLs/experts	<input checked="" type="checkbox"/> Network with peers <input checked="" type="checkbox"/> Stay current on emerging treatments <input checked="" type="checkbox"/> Discuss clinical cases <input checked="" type="checkbox"/> Get personalized feedback on skills <input checked="" type="checkbox"/> Access clinical decision support tools <input type="checkbox"/> Earn CME credit <input type="checkbox"/> Connect with featured KOLs/experts	<input checked="" type="checkbox"/> Network with peers <input checked="" type="checkbox"/> Stay current on emerging treatments <input checked="" type="checkbox"/> Discuss clinical cases <input checked="" type="checkbox"/> Get personalized feedback on skills <input checked="" type="checkbox"/> Access clinical decision support tools <input checked="" type="checkbox"/> Earn CME credit <input checked="" type="checkbox"/> Connect with featured KOLs/experts
Free or pay	Free	Free	Free
Speed and scope of growth	Slow/none Moderate Rapid	Slow/none Moderate Rapid	Slow/none Moderate Rapid
Sector relevancy	Pharma and device	Pharma and device	Pharma and device
Advisory Board's take	<ul style="list-style-type: none"> Primarily known for Doximity Dialer and U.S. News ranking, but social use rapidly expanding Tracks content consumption and platform utilization to personalize content for user Open to life sciences partnership 	<ul style="list-style-type: none"> Offers unique drug rating system that lets clinicians comment on specific drugs Strong relationships with life science companies and open to partnership Growing in capabilities and ability to leverage users and data for research 	<ul style="list-style-type: none"> Moderation prevents misinformation spread and/or poor clinician conduct Integration with Medscape's Drugs & Diseases reference database offers unique integrated clinical decision support Benefits from Medscape brand reputation

1) Nurse practitioners 2) Advanced practice providers 3) Physician assistants
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Advisory Board's **Online Clinician Community Watchlist** provides a deep-dive on **three** platforms worth monitoring

Get access to this resource today at our booth

The evidence and influence tipping point

Six factors contributing to the emergence of a new status quo

1

Accelerating pace of medical knowledge generation

2

Generational shifts in the HCP workforce

3

Increasingly complex patients not captured in research

4

Growing HCP preferences towards practical content

5

Technology-enabled HCP communication at scale

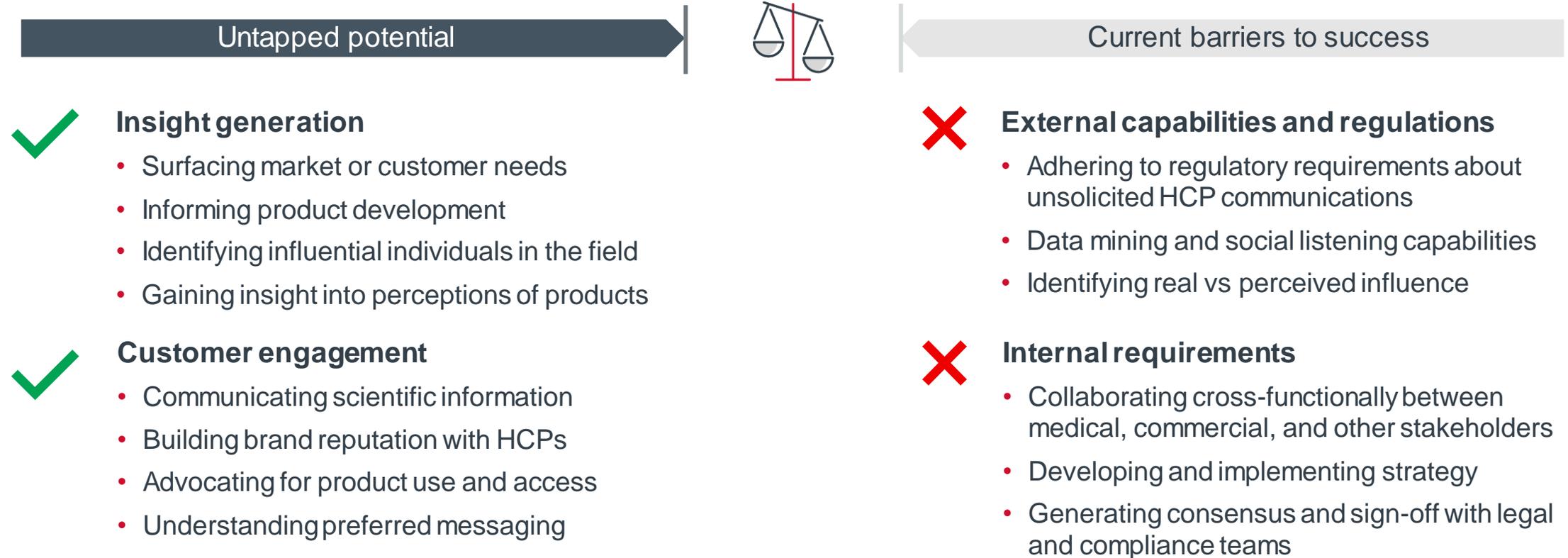
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Increasing wariness of the traditional KOL model

————— Covid-19 accelerated existing trends in medical knowledge transfer —————>

The promise and peril of these digital platforms

Our March discussion highlighted how conversations on digital platforms can provide important product and customer insight



Don't wait – engage today

Four imperatives for medical leaders' insight generation and customer engagement strategies:

1

Identify prominent channels in which conversations exist for your products

2

Determine the scope of your ambition with digital platform engagement

3

Assess how insights from digital platforms can augment product lifecycle strategy

4

Collaborate across functions while cementing medical's role in platform strategy

Identify relevant channels for your products and TAs

Five questions for medical leaders to consider:

1

Where are the conversations happening?

2

How often are the conversations happening?

3

How widespread or concentrated are the conversations?

4

Who is driving the conversations online?

5

How do people signal that they are part of the conversation?

Determine your ambition with platform engagement

Medical leaders must identify how and when they want to engage:

Social listener

Data miner

Insight integrator

- **Identify** platforms most relevant to your products and TAs
- **Monitor** online conversations and “influencers” periodically
- **Ask** your HCPs/KOLs how they utilize platforms today

- **Assess** different vendors for social listening and data mining
- **Engage** legal and compliance colleagues to understand practical regulations and limitations
- **Track** platforms and HCPs on platforms

- **Lead** a cross-functional platform engagement strategy
- **Partner** with platforms and vendors to run robust analysis
- **Embed** platform insights into evidence generation and customer engagement plans



Available at our booth: Advisory Board’s online clinician engagement archetypes infographic

Evaluate how insights can inform myriad product questions

Pre-clinical	Phase I	Phase II	Phase III	Phase IV
<ul style="list-style-type: none">• Understand unmet treatment needs• Identify product enhancements• Gain insight into physician and patient perspectives	<ul style="list-style-type: none">• Understand treatment landscape to improve product positioning• Inform trial design and endpoint selection	<ul style="list-style-type: none">• Identify investigators for trial expansion• Improve patient recruitment via provider networks	<ul style="list-style-type: none">• Identify and engage with thought leaders pre-launch• Understand emerging perceptions of products	<ul style="list-style-type: none">• Identify evidence gaps and prioritize new studies• Understand HCP and patient perceptions of products

▶ Questions to ask yourselves:

1. Where in the product lifecycle would insight from digital platforms be (or would've been) most helpful to you and/or your team?
2. How could insight from digital platforms strengthen your relationship with cross-functional colleagues?



Develop and operationalize your online clinician community engagement strategy

Visit our booth today to access these resources



- Excerpt: Online Clinician Community **Watchlist**
- **Maturity Model:** Online Clinician Community Engagement Strategy
- **Our Take:** Online clinician communities: Why the health care ecosystem needs to pay attention

Resources available through membership



- **Decision Guide:** Online Clinician Community Engagement
- **Readiness Assessment:** Online Clinician Community Engagement
- Online Clinician Community **Watchlist**
- **Cheat sheet:** Online clinician communities
- **Key takeaways:** How digital platforms impact HCP evidence-gathering and influence networks
- **Report:** Engaging clinicians in a digital world: Lessons learned from Covid-19 and beyond



Want to learn more about our latest research?

Visit our booth or find any member of the Advisory Board team to discuss.

MSLs can lead online clinician community engagement

New opportunities for impact



Next steps for MSLs



- Gain in-depth insight to better understand your HCPs and customers
- Know what kinds of content resonate and tailor your messaging accordingly
- Develop more meaningful interactions and relationships with HCPs
- Generate more robust insights and add value to the organization

- Ask your HCPs if and where they find community online and collect data
- Practice social listening to identify where your TAs are relevant and discussed
- Delineate when insights from online communities are supplementary or net new
- Talk to your commercial colleagues to see if and how they are monitoring these platforms

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Advisory Board offers a subscription-based research service for medical, RWE, and HEOR executives at leading life science, medical device, and health tech firms. Through Advisory Board's rigorous, objective research process and expansive cross-industry relationships, we generate insights on health care market dynamics and how they impact customer decision-making, in order to catalyze a more compelling, holistic evidence strategy.

OUR TRADITIONAL FOCUS AREAS

- How HCP and payer decision making is evolving
- The evolution of RWE strategies
- The increasing impact and influence of HTAs
- Clinical Trial innovation
- The evolving role of medical affairs

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