TRIANGLE INSIGHTS GROUP
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Launching Digital Therapeutics Vol 3

Design an Appropriately Sized Field Force and Selling Model(s):

Determining a fit-for-purpose sales strategy based on the specific market conditions associated with a Digital Therapeutic (DTx)

Unique assets require unique solutions. Digital therapeutics often do not reap the benefits of a traditional pharmaceutical field force model at launch as there is limited ability to pull through their efforts due to existing market barriers (e.g., lack of widespread coverage and access at launch). Digital therapeutic manufacturers should seek unique approaches to developing a field force that is fit-for-purpose for digital therapeutics, including pre-approval and non-branded education.

As digital therapeutic manufacturers consider commercialization of their assets, a field force akin to a pharmaceutical launch in the same indication may not be the most suitable approach at launch. There are meaningful differences within the market that initially create limitations for digital therapeutics relative to pharmaceuticals. For example:

- Reimbursement is often delayed for digital therapeutics due to a lack of clear coverage /digital formularies from payers.
- Timing to product integration into ePharmacies and provider workflows can limit the widespread adoption and commercial reach for digital therapeutics.
- Provider awareness of how and when to prescribe digital therapeutics may be more limited than pharmacotherapy.

Given these factors, digital therapeutics may not need a large field force at launch compared to a pharmaceutical launch. Rather, manufacturers should consider targeted and phased alternative approaches to drive commercial success:

- Focus pre-launch on digital therapeutic education amongst relevant providers.
- Initially, target post-launch efforts on key targets and geographies where access is likely attainable closer to launch, before scaling up the sales/field force as access and other infrastructure are enabled.
- Consider hybrid and/or virtual models before and at launch to accomplish key objectives, leveraging lower cost and flexible resourcing.
- Preliminary resources should focus instead on driving reimbursement, ensuring accessible infrastructure (e.g., ePharmacy), and promoting the utility of digital therapeutics to key stakeholders.

More specifically, manufacturers should thoughtfully develop a pre- and post-launch field-facing strategy to 'right-size' and target digital therapeutic entries into the market. For example:

1. **To combat challenges with widespread adoption by key stakeholders, education is required to prime the market through avenues such as targeted MSL engagements or unbranded digital therapeutic awareness.**

Due to a lack of familiarity from key stakeholders (i.e., physicians, payers, regulators), additional investment is required to support the validity of digital tools for therapeutic treatment. To combat this skepticism, digital therapeutic manufacturers have significantly invested in increasing awareness of the product benefits in facilitating better patient care. Organizations like the Digital Therapeutics Alliance allow DTx manufacturers to present a unified voice to support the use case for DTx.

While this advocacy helps to start the conversation with key stakeholders, additional non-branded disease education and non-branded digital therapeutic awareness may be warranted to prime target audiences ahead of launch. These efforts may support earlier utilization as well as product coverage and adoption at launch.

2. **While market access remains a significant barrier for DTx, manufacturers can benefit from waiting to ramp up their field forces until they have successfully achieved widespread reimbursement and appropriate supportive infrastructure (e.g., ePharmacy, integration into provider workflows).**

Immediately pre-launch when market access may be more limited for some DTx, companies can strategically focus their field efforts on predetermined targets where there is a higher likelihood of success (e.g., large centers with robust administrative support, geographies covered by plans with an existing digital formulary). Companies like Akili have utilized this strategy to first drive demand with specific targets and expand sales and marketing initiatives once there is uptake in key prescriber segments.

In addition, smaller, virtual, or hybrid sales forces at launch allow the company to focus efforts on ensuring market access and structural support systems are in place for DTx, while driving appropriate demand that does not exceed coverage and retains resources to scale commercial efforts. Companies can then deploy a larger field force and increase marketing spend, once they have ensured there will be appropriate pull-through and reimbursement.

Significant market access barriers at launch may lead certain physicians to form a negative perception of the asset despite its clinical benefits. Certain early adopters can become champions for the product and may be more willing to go through market access hurdles to drive adoption. Appropriate targeting of these early adopters should be a focus of initial sales and marketing efforts. Strategic execution of the field force deployment ensures stakeholders are accessed at the appropriate time, such that market access will not hinder early perceptions.

In conclusion, balancing product-specific promotion through sales force deployment and pre-launch product agnostic education, all while leveraging a 'right-sized' field force, supports early awareness and drives demand commensurate with the access and ability to get DTx to patients.

Reach out to Triangle Insights Group to learn more about our approach to commercialization strategy and tune in for our next installment in the series, focused on strategies to ensure cohesive implementation for DTx.