



A WHITEPAPER ON

Is Your Pharma Brand Still Promotion Sensitive?

3 Lenses to Measure Your Brand's Promotion
Sensitivity and Not Guess It



Executive Summary

When growth slows, pharma leadership faces high-stakes questions: **should they reduce sales force investment—or is the market still responsive to high-quality promotions?**

Promotional sensitivity isn't a mystery—it's measurable. Leaders should test it—using past benchmarks, present quality-to-outcome linkage, and future exposure modeling—before touching budgets.

Here we articulate three different lenses to approach this question: Comparing Analogous Benchmarks (Past), Linking Quality to Outcomes (Present), and Quantifying the Cost of Silence (Future). Each lens stands alone; together, they form a robust decision framework for insight leaders. Sustain or sharpen sales investment when data shows sensitivity; reallocate confidently when signals indicate low sensitivity.

The Promotional Sensitivity Question

When brand growth slows, one question looms large: Are our reps still moving prescribing—or are we spending without impact?

Pull back too soon and leave revenue on the table. Keep investing blindly and risk wasting resources that could be deployed elsewhere. The answer lies in promotional sensitivity—the degree to which promotional / sales activity (especially rep-HCP interactions) still influences clinical considerations, choices and ultimately the prescribing behavior.

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Promotional sensitivity can be measured, not guessed.

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Two moments trigger this debate most often: brand maturity (have HCPs tuned out?) and landscape shifts (new entrants, evolving guidelines). Don't rely on assumptions—use data.

Three Lenses to Decode Promotional Sensitivity

PAST – ANALOGOUS BENCHMARKS

Compare your interaction quality to two anchors—averages for analogous brands and averages for your therapeutic area. If your mature brand meets or beats both, fatigue is unlikely.

PRESENT – LINKING QUALITY TO OUTCOME

Measure your sales calls by quality rating given by HCPs and test the relationship with their likelihood to prescribe. This examination will help understand what is working vs. what is not.

FUTURE – QUANTIFY THE COST OF SILENCE

Model HCPs' intended allocation for the next 10 eligible patients under different rep exposure scenarios (client-only, competitor-only, head-to-head). If presence protects share and silence triggers immediate erosion, reps are your primary firewall in dynamic markets.

“Measure effectiveness, not effort.”

These lenses provide a flexible framework that can be applied collectively for a comprehensive audit of your sales force or used individually to target specific questions depending on the challenge your brand faces.

To see these lenses in practice, let's look at three real-world cases. Each applies one lens—Past, Present, or Future—to answer the leadership question. Together, they show how data can replace guesswork when deciding whether to sustain or scale back sales force investment.

CASE #1

Past: The Fatigue Myth

Leaders often assume that promotional sensitivity declines with brand maturity. An oncology brand in market for a decade asked: "Have interactions become routine courtesy rather than valuable clinical exchanges?"

APPROACH

To determine if the brand was still promotionally sensitive, we assessed **Interaction Quality** relative to two specific benchmarks:

- **Analogous Brands:** How do other brands similar to mine perform (10+year brands)?
- **Therapeutic Area:** What is the average quality score for any brand in this specific indication?

EVIDENCE

Our analysis debunked the "fatigue" myth. The data revealed that across the oncology market, tenure does not inevitably degrade interaction quality.

	Indication Average	Oncology Average (10+ Yrs)	Oncology Average (5-10Yrs)	Oncology Average (0-5Yrs)
# of Rep Interactions Captured (Time Period: Jun '24 to Jun '25)	4.4K (11 Brands)	18.8K (25 Indications 22 Brands)	42.8K (39 Indications 50 Brands)	28.9K (38 Indications 45 Brands)
Likelihood to Increase Prescription (Rated 6,7)	61%	63%	64%	66%
Overall Quality of Sales Call (Rated 6,7)	73%	72%	72%	72%
Improvement in Overall Product Perception (Rated 6,7)	58%	65%	67%	66%

Note: Oncology Indications covered include Hematological cancers, Lung, Breast, Prostrate, Bladder, Skin, Melanomas, Gastric, Colorectal, Ovarian and Other Solid Tumors

When we measured the client's 10-year-old brand against these benchmarks, it didn't just meet the "old brand" standard—it exceeded the average for the entire indication, outperforming even recent launches on key quality metrics.



TAKEAWAY

If your mature brand is rated on par with or above industry standards, the "fatigue" hypothesis is likely false. **Promotional sensitivity remains high** because HCPs still engage and derive value from rep interactions. Keep investing—smartly.

CASE #2

The Present: The Power of Precision

A brand with strong performance in an established indication was facing a shifting landscape. As competitors gained ground and treatment guidelines evolved, leadership questioned whether the current promotional efforts were sustaining share, or if the market shift was inevitable regardless of rep activity.

APPROACH

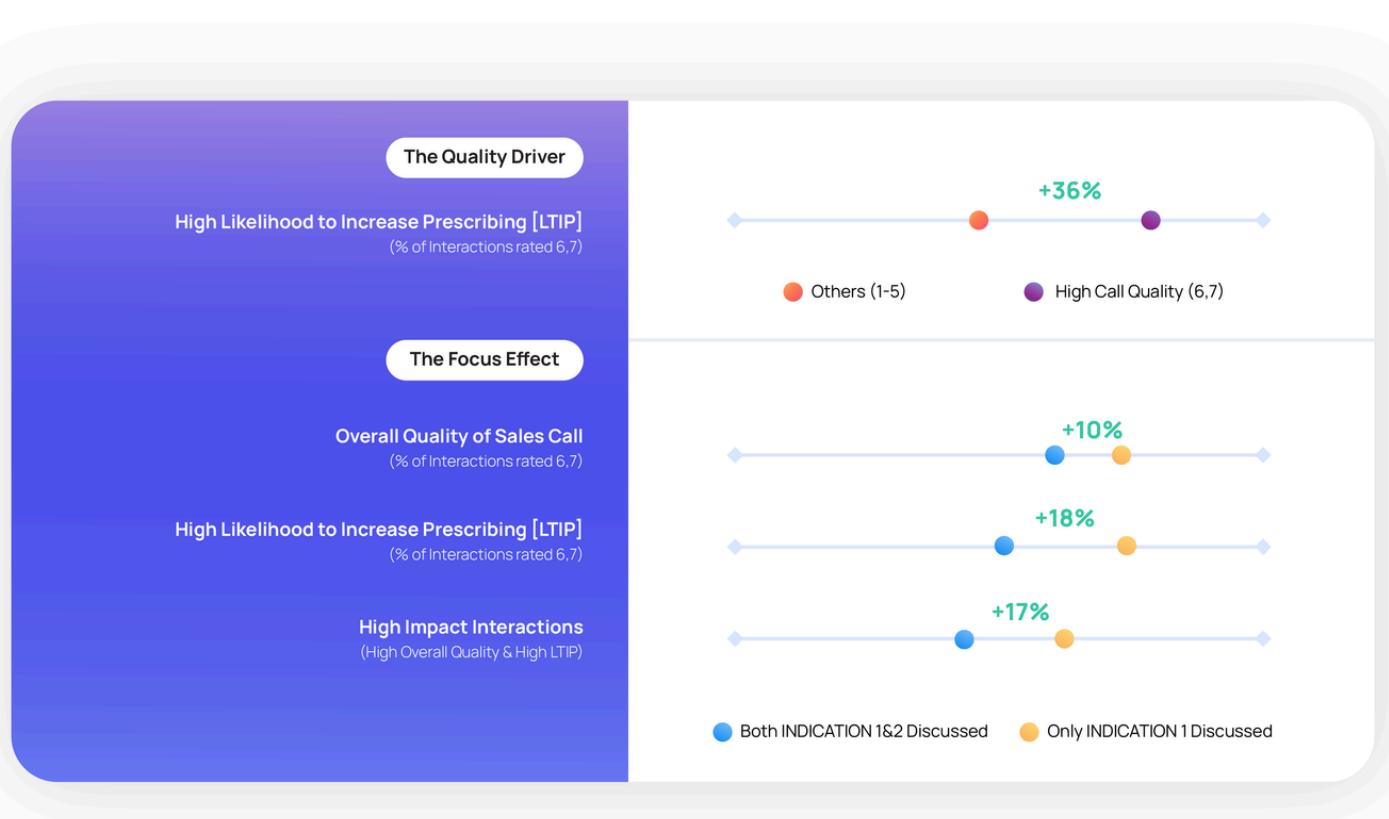
To diagnose sensitivity using current performance data, we analyzed a robust dataset of interactions to find the functional link between **Call Quality** and **Outcome** (Intent to Prescribe).

- First, we segmented interactions into **High Quality** (rated 6 or 7) and **Others** (rated 1 to 5) to measure the impact on prescribing intent.
- Second, we analyzed if discussing **Single Indication** vs. **Dual/Bundled Indication** impacted that dynamic.

EVIDENCE

The analysis confirmed a direct link between quality, focus, and outcome:

- **The Quality Driver:** We found a statistically significant 36-percentage-point difference in "high likelihood to prescribe" between the High-Quality vs Others segment.
- **The Focus Effect:** Interactions focused exclusively on the established indication consistently outperformed bundled interactions. They were significantly more likely to be rated as "High Quality" and drove higher prescribing intent compared to calls that covered multiple indications.



TAKEAWAY

Promotional sensitivity isn't just about activity—it's about impact. If higher-quality engagements consistently correlate with better outcomes, the market is still responsive to promotion. Leaders should measure effectiveness, not effort: when quality drives intent, pulling back can erode performance. Thus if quality engagement is moving the needle then that promotional channel remains strategically relevant.

CASE #3

The Future: The Cost of Silence

Pharma brands often face newer innovations from well-funded entrants. The incumbent brand leadership is put in a dilemma on whether to continue investing or pulling back promotions, operating under the fatalistic assumption that the new competitor's adoption was inevitable and erosion was unavoidable. They needed to know: Is the sales force actually protecting share, or is the loss inevitable?

APPROACH

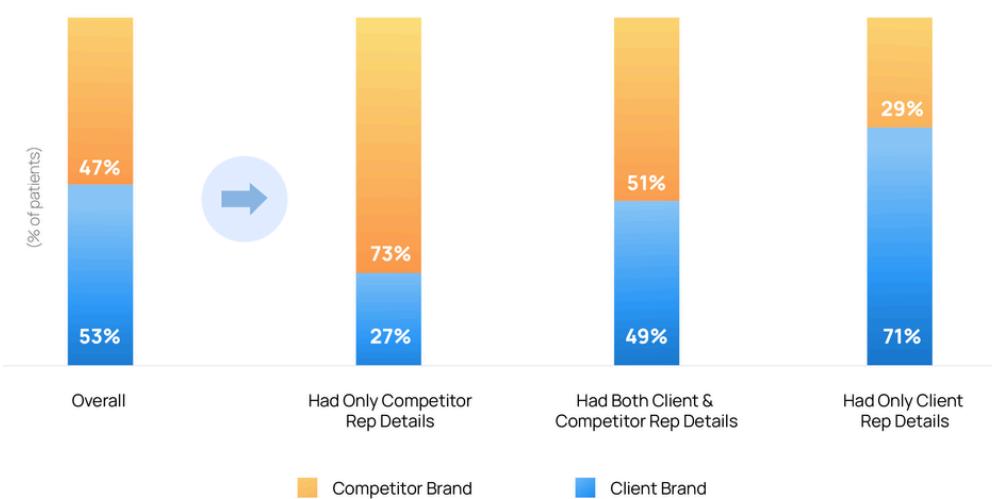
To assess the future impact of removing promotion, we measured **Intended Prescribing Behavior** (specifically, the allocation of the next 10 eligible patients) reported by HCPs. We analyzed the differences in these intentions by isolating HCPs based on their actual rep exposure scenarios to calculate the "Cost of Silence."

EVIDENCE

The results from the three exposure groups were stark:

- **Competitor-Only Exposure:** When the competitor detailed the HCP but the client did not, intended usage dropped by double-digit percentage points.
- **Head-to-Head Exposure:** When HCPs saw both reps, the client successfully protected their share, neutralizing the competitor's impact.
- **Client-Only Exposure:** When HCPs saw only the client's rep, intended usage was at its peak.

Share of Next 10 Eligible patients Likely to Start on Each Therapy



TAKEAWAY

Presence matters. The sales force is the primary firewall against immediate erosion. Where silence increases risk, promotional sensitivity is high, and pullback is likely value-destructive. When competitors are active, absence can accelerate loss. Before reducing promotional presence, leaders should model the potential impact of silence. In dynamic markets, maintaining a strategic presence often prevents rapid erosion and preserves long-term value.

A counter-case: When Pullback is Prudent

Not every brand is promotion sensitive. Consider the opposite signals:

- Quality benchmarks have fallen below tenure peers and indication standards.
- High-quality calls do not correlate with increased intent to prescribe.
- Removing promotion shows no meaningful impact on modeled share (“no Cost of Silence”).

TAKEAWAY

When these red-flag conditions hold, cut personal promotion without hesitation and reallocate to more efficient channels (non-personal tactics, clinical education, digital, or other brands). The data says the market isn’t responsive; move the budget to where it will work harder.

Conclusion: Making the Data-Driven Call

Promotional sensitivity is not a mystery; it is a measurable metric. By applying these diagnostic lenses—whether individually or in combination—you can make strategic and tactical decisions based on evidence rather than intuition.

These diagnostics clarify the path forward. They distinguish between a brand that has truly hit a ceiling and one that is simply facing headwinds. The opportunity exists—if you measure correctly and promote strategically.



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