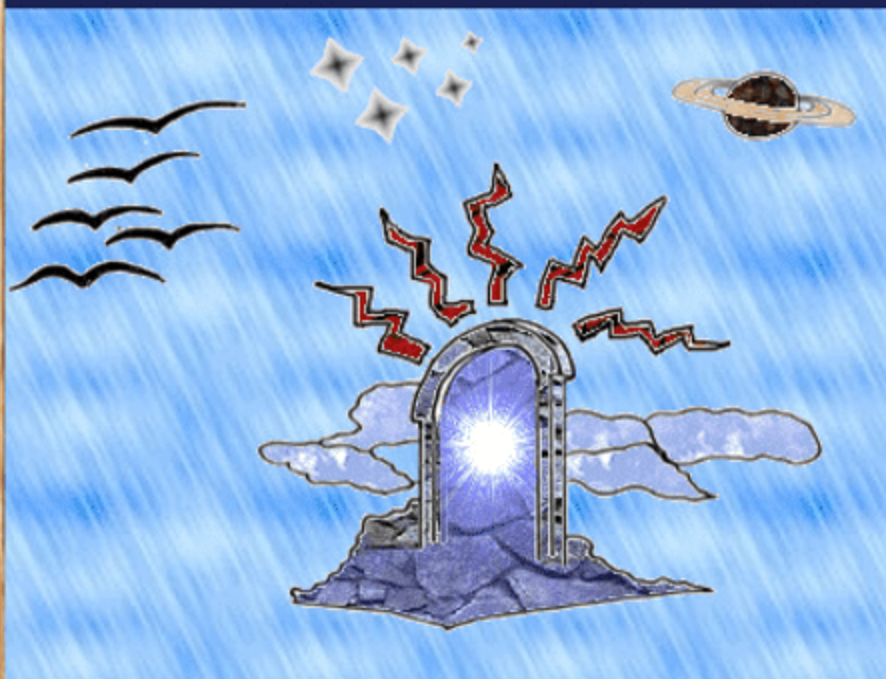


Unconventional Wisdom Series

# KOL Mapping and Spheres of Influence



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If you have not yet identified KOL's for your brand, now is the time. If you did so a couple of years ago, a refresh may be in order. The reason is that many physicians have severed old relationships and burnished new ones because of the confluence of the following dynamics:

1. ACO's (Accountable Care Organizations). ACO's, the latest invention of the Healthcare Reform, puts a new spin on the old HMO model by stipulating that any savings left over (reimbursement from payers minus costs incurred to deliver care) be shared among providers. This is driving physicians to radically change their referral patterns (either away from hospitals to newfound business partners or to hospitals where they have financial interest).
2. EMR's. Note: The adoption of EMR's got a big boost thanks to ARRA 2009. An EMR implicitly defines who gets to talk with whom, just like individuals that speak a language naturally seek out and gravitate around other individuals that speak the same language. Take a physician located in north Chicago. Once the physician adopts EpicCare, the physician is immediately connected to all physicians associated with the North Shore Hospital System since patient information can seamlessly be moved back and forth. If that same physician had adopted Compuware (why such a decision?), annoying file exports/imports would be required. Undoubtedly, the ongoing adoption of EMR's is redefining the referral habits of physicians, who understandably favor physicians that use the same EMR as they do, everything else being equal.
3. Concierge Medicine. That's a new trend that has seen a steady surge in the past few years. In a nutshell, the patient cuts out the middleman (the insurance company) and pays the physician a monthly premium directly, in return for which the patient gets the full attention of the physician, on very short notice. Thanks to the comfortable premium, the physician can cut back on the number of patients to look after. Freed from the yoke of managed care, the physician can prescribe treatments and refer to

specialists, as the physician sees fit. That dynamic has played an important role in the shift in referrals we are observing.

4. Unlike the previous generation, newly minted physicians prefer to dedicate their lives solely to what they have been trained for: taking care of patients. They abhor the hassle of running a company, and unequivocally value quality of life over money. That is indeed the driving force behind the ongoing exodus of physicians to hospitals and large physician organizations, and the shrinking of referrals between smaller group practices (large multi-specialty facilities tend to not let go of the patient). Little wonder then that the KOL landscape is seeing such a change.

Would you like to know more about KOL mapping and spheres of influence? We'll be delighted to talk with you. By the way, we have publications and PowerPoint presentations that we can share.



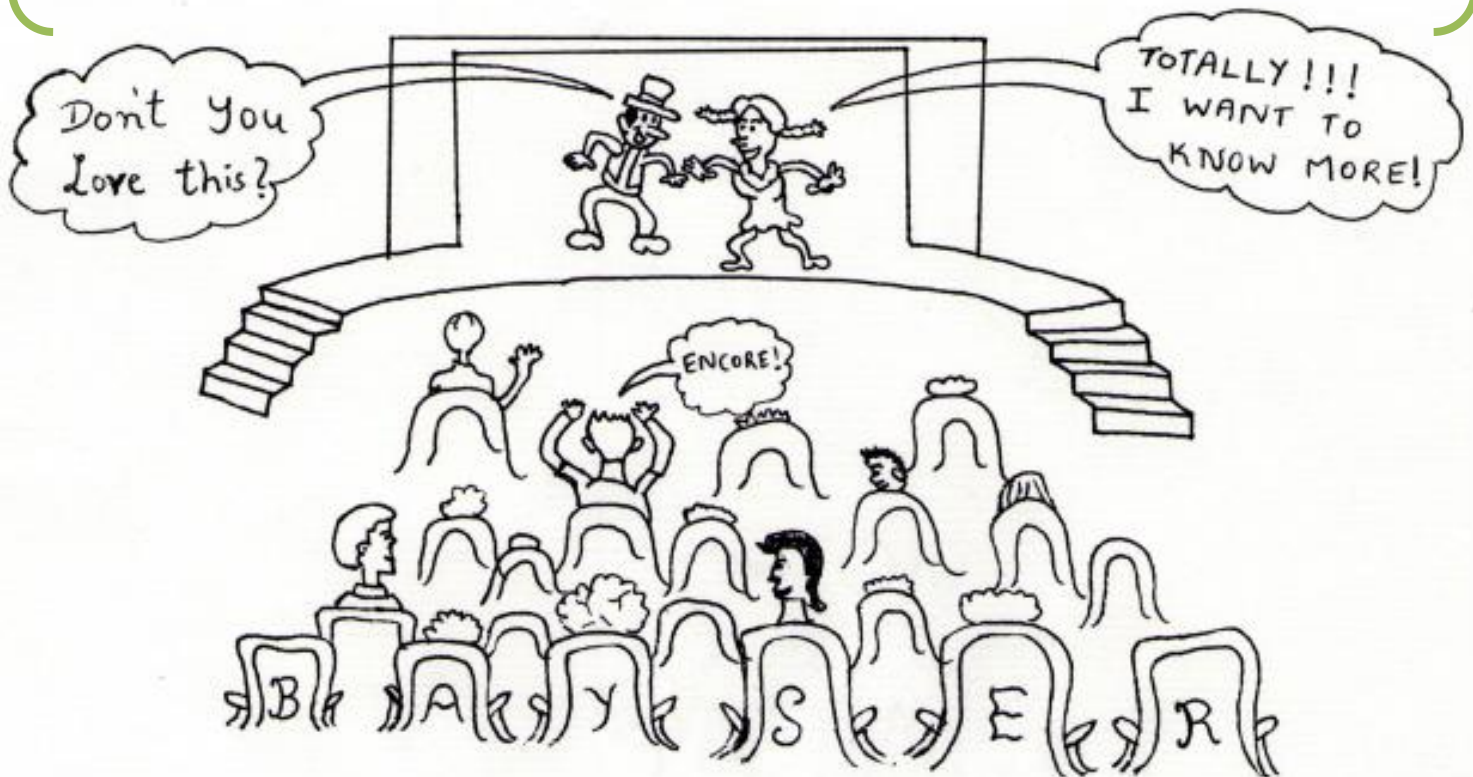


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*Jean-Patrick Tsang is the Founder and President of Bayser, a Chicago-based consulting firm dedicated to pharmaceuticals sales and marketing. JP has worked on 250+ projects to date including ROI optimization, data strategy, and study design to mention just these. JP publishes and gives talks on a regular basis and runs one-day classes on various subjects related to data and analysis.*

*In a previous life, JP deployed Artificial Intelligence to automate the design of payloads for satellites and was the adviser of two PhD Students. JP holds a Ph.D. in Artificial Intelligence from Grenoble University and an MBA from INSEAD in France. He was also the Recipient of the PMSA Lifetime Achievement Award in 2015. He can be reached at (847) 920-1000 or [bayer@bayer.com](mailto:bayer@bayer.com).*



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