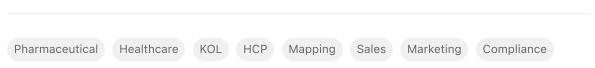
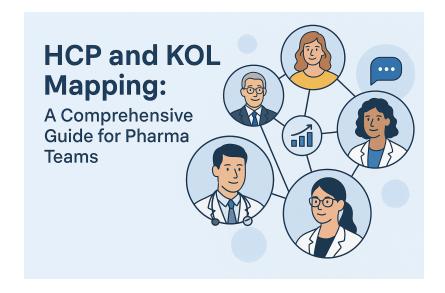


# HCP and KOL Mapping: A Comprehensive Guide for Pharma Teams (U.S.)

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# HCP and KOL Mapping: A Comprehensive Guide for Pharma Teams (U.S.)

Healthcare Professional (HCP) and Key Opinion Leader (KOL) mapping is an essential practice for pharmaceutical sales, marketing, and medical affairs teams. It involves identifying the right healthcare providers and influential experts, understanding their relationships and influence networks, and leveraging these insights to drive successful commercial strategy. This guide provides a detailed overview of HCP/KOL mapping tailored to pharma teams in the United States, including definitions, methods, data sources, tools, examples, best practices, and compliance considerations.

### **Understanding HCPs vs. KOLs (Definitions & Differences)**

**Healthcare Professionals (HCPs):** In pharma contexts, HCPs are healthcare providers such as physicians, pharmacists, nurse practitioners, and others involved in patient care and treatment decisions. They are the broad universe of clinicians that pharma companies may target for education or promotion of therapies. Essentially, HCP is an umbrella term for licensed professionals who can influence or decide on patient treatment.

Key Opinion Leaders (KOLs): KOLs are a subset of HCPs (and sometimes other experts) who are recognized as thought leaders in their field. They typically have high levels of expertise and credibility in specific therapeutic areas and can influence the opinions and practices of other HCPs (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas) (Key Opinion Leaders (KOL) in Healthcare and Pharma communication- Polk&Union). KOLs often gain their status through significant clinical experience, research publications, participation in clinical trials, speaking at conferences, and leadership in professional organizations. In other words, *all KOLs are HCPs, but not all HCPs are KOLs*. KOLs serve a dual role as medical experts and influencers, capable of swaying clinical approaches and treatment adoption among their peers (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas).

Differences in Roles: While everyday HCPs focus on treating patients, KOLs go a step further – they shape medical discourse and are frequently sought after for their opinions. For example, a community physician (HCP) might look to an academic specialist (KOL) for guidance on new therapies. Pharma companies engage KOLs for their thought leadership (e.g., to advise on clinical strategy, provide feedback on data, or educate other HCPs), whereas they engage broader HCPs for prescription and usage of products. In practice, HCP mapping often targets a wide pool of potential prescribers, whereas KOL mapping zeroes in on influential leaders. As one industry source notes, "drug companies typically engage key opinion leaders early in the drug development process for advocacy and feedback" (Key Opinion Leaders (KOL) in



Healthcare and Pharma communication- Polk&Union) – highlighting that KOLs are tapped for influence well before a product launch, while HCP outreach ramps up at launch and beyond.

### Why HCP/KOL Mapping Matters in Pharma Commercialization

Identifying and mapping HCPs and KOLs is **strategically critical** for successful pharmaceutical commercialization. It enables companies to focus their limited resources on the *right people* who can drive product adoption and advocacy:

- Effective Market Education: KOL mapping helps pharma teams find respected experts who can
  educate the market about a new drug or disease. Engaging credible KOLs early (often 12–18 months
  pre-launch in the case of medical affairs (KOL Mapping and HCP Targeting Two sides of the same
  (methodology) coin?)) ensures that when a product launches, there are knowledgeable advocates
  who trust the science and can influence their peers.
- Influence Networks: KOL mapping goes beyond simple identification by uncovering relationships and networks. By understanding "how providers are connected, and how professionals influence one another," companies can see the webs of influence in a therapeutic area (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). This network insight means a company can leverage KOLs to amplify messages through peer-to-peer channels. Instead of one-off engagements, mapping reveals clusters of HCPs and key connectors who can spread information. For instance, KOL mapping might show that a certain specialist is the hub of a referral network or a frequent co-author in research indicating they can sway many colleagues.
- Targeted Resource Allocation: Commercial teams benefit by focusing on high-potential prescribers and influencers. HCP mapping allows sales to identify "HCPs who see the patients for the indication and make treatment decisions ideally those with higher patient caseloads" (KOL Mapping and HCP Targeting Two sides of the same (methodology) coin?). Rather than casting a wide net, reps can prioritize calls on clinicians most likely to treat the target patient population or those most open to trying new therapies. This increases promotional efficiency and ROI. As one expert notes, blindly chasing top-volume prescribers can be inefficient if those doctors are entrenched with a competitor or hard to access (Strategic HCP Targeting Method HCP Targeting and Segmentation Physician Target Identification The Marketing Advantage) (Strategic HCP Targeting Method HCP Targeting and Segmentation Physician Target Identification The Marketing Advantage). Strategic mapping instead flags which HCPs are both high-value and likely to respond to engagement.
- Faster Uptake at Launch: By ensuring the "pre-launch support and alignment among KOLs,
   HCPs, patient advocacy groups, and even the investor community," companies set the stage for
   rapid uptake (Building the Framework for a Successful Launch Benchworks). Early KOL
   engagement can build disease awareness or guideline support that trickles down to frontline HCPs.
   Meanwhile, HCP targeting just before launch makes sure the sales force hits the ground running with
   an accurate list of targets when the product is approved (KOL Mapping and HCP Targeting Two
   sides of the same (methodology) coin?). In sum, mapping is the backbone of launch planning,
   ensuring no critical influencer or high-priority prescriber is overlooked.



• Trust and Credibility: Perhaps most importantly, involving KOLs confers credibility. A recommendation or endorsement (even informal) from a renowned specialist can significantly impact other physicians' willingness to try a new treatment. KOLs help establish trust in a new drug by validating its use in the medical community. "One of the most valuable contributions KOLs make is helping pharma companies establish trust in the medical community," and mapping finds those well-respected voices (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). This is crucial in an era where physicians are cautious about pharma promotion – hearing information from a peer leader carries more weight than from sales reps alone.

In short, HCP/KOL mapping guides pharma companies "where to invest" their educational and promotional efforts by revealing who the influential players are (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). It aligns medical, marketing, and sales strategies to the realities of the prescriber landscape, which is a cornerstone of effective commercialization.

## Identifying and Segmenting HCPs and KOLs (Methodologies)

Mapping out HCPs and KOLs involves **both identifying the individuals and segmenting them** based on various criteria (influence, specialty, value, etc.). A range of methodologies – quantitative and qualitative – are used to build these maps:

• Quantitative Analysis (Data-Driven Ranking): Pharmaceutical companies start by collecting hard data on HCPs and KOLs. Common metrics include: number of publications and citations, clinical trial involvement, prescription volume or patient volume, guideline committee memberships, and more (KOL Mapping & KOL Identification I Miller Tanner Associates). By assigning scores or weights to these metrics, algorithms can rank experts. For example, a company might create a scoring model where each publication or trial leadership role adds to a KOL's score, while each prescription written in the therapy area adds to an HCP's score. This yields a ranked list from most to least influential or relevant. KOL mapping is often described as a quantitative approach that can pinpoint leaders at "local, regional, and national level... by share of voice and influence as well as adoption behavior," not just the obvious top prescribers (KOL Mapping: The GPS of Thought Leader Identification - PharmaVoice). Advanced analytics like machine learning can also be applied to large datasets (for instance, to predict which HCPs are likely early adopters based on past behavior).



• Social Network Analysis: Influence in medicine is a social phenomenon, so mapping often uses network modeling. Graph analytics can map connections between HCPs - such as co-authorship of journal articles, institutional collaborations, referral patterns (e.g., which primary care doctors refer patients to which specialists), or social media interactions (Identifying Key Opinion Leaders (KOLs) using Graph Analytics - IQVIA). By building an HCP network graph and applying measures like centrality, one can identify network hubs. For instance, an analysis might reveal that "Dr. Smith" (a specialist) co-authors frequently with many others and receives many patient referrals - indicating Dr. Smith occupies a central node in the professional network. Such a person might be a high-impact KOL even if their personal prescription volume isn't highest. Graph modeling also uncovers clusters groups of HCPs who interact closely - which can be useful in understanding regional or institutional influence clique patterns (Identifying Key Opinion Leaders (KOLs) using Graph Analytics - IQVIA). This method helps ensure you don't only target the top 5 famous experts who all know each other, but also include "bridge" figures who connect different HCP communities. (In one IQVIA analysis, simulations showed that focusing solely on the top 20 KOLs could miss parts of the network, whereas targeting some slightly lower-ranked but more network-diverse HCPs yielded greater overall reach (Identifying Key Opinion Leaders (KOLs) using Graph Analytics - IQVIA).)

(Identifying Key Opinion Leaders (KOLs) using Graph Analytics - IQVIA) Example: A simplified HCP influence network. Here, each circle is a provider and connections indicate professional relationships (such as co-authorship or referrals). "HCP 3" sits at the center of multiple connections and would likely be ranked as a key influencer in this network.

• Claims & Prescription Data Mining: In the U.S., robust prescriber-level data is available. Companies mine health insurance claims and prescription databases to identify which HCPs see the most patients with a given diagnosis and who prescribes relevant therapies most often. This is crucial for HCP targeting. For example, using claims data one could list all cardiologists treating patients with heart failure in a state and rank them by number of heart failure patients or by volume of prescriptions for a certain drug class. This reveals the "potential office-based prescribers" with high patient counts (KOL Mapping and HCP Targeting - Two sides of the same (methodology) coin?). HCPs can then be segmented into tiers (e.g., deciles by volume). Many companies historically used decile ranking (top 10% prescribers = decile 10, etc.) to choose sales targets. However, volume alone is not everything - modern approaches refine this by also considering factors like growth potential or openness to new treatments. For instance, an HCP who writes slightly fewer scripts but frequently tries new therapies might be a better target than a higher-volume HCP who is extremely loyal to a competitor brand (Strategic HCP Targeting Method - HCP Targeting and Segmentation -Physician Target Identification — The Marketing Advantage) (Strategic HCP Targeting Method - HCP Targeting and Segmentation - Physician Target Identification — The Marketing Advantage). To segment intelligently, some firms use behavioral metrics such as a "propensity to switch" score or "loyalty index" for each doctor (Strategic HCP Targeting Method - HCP Targeting and Segmentation -Physician Target Identification — The Marketing Advantage). These metrics gauge prescribing habits (e.g., does the doctor stick to one drug or rotate among several?). An HCP likely to switch brands in response to new data would be a prime target in a launch.

- Qualitative Research (Peer Input & Profiling): Numbers don't tell the whole story, so qualitative methods complement the data. One traditional approach to KOL identification is peer nomination surveys, where physicians are asked, "Who do you regard as a leader in X field?" This can surface respected clinicians who may not publish much but are locally influential. Additionally, interviews with KOLs themselves can map out networks (e.g., a KOL might mention who their mentees or close collaborators are). In fact, after gathering initial data, conducting "in-person or virtual interviews with KOLs" in the field can validate their interests and get insights on their views and networks (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). These conversations can be used to cross-check the data (maybe Dr. Jones was flagged by data as influential, but an interview reveals she is about to retire critical context you wouldn't get from numbers alone). Qualitative KOL profiling also assesses less tangible factors like a KOL's communication skills or willingness to work with industry. Many pharma companies distinguish KOL tiers: for example, Global/National KOL vs Regional KOL vs Local thought leader. These tiers might combine quantitative rank with qualitative reputation. A local community opinion leader might not publish research but could be Tier 3 KOL because their peers follow their lead for patient management.
- Segmentation and Scoring Frameworks: Once data is collected, companies develop scoring rubrics to segment HCPs/KOLs into categories. A common practice is to assign each identified person a score for different dimensions - e.g., clinical expertise, influence level, volume, and compatibility with the company's goals. The Livestorm KOL mapping guide suggests breaking down each expert's profile into key dimensions such as "therapeutic area, level of influence, clinical interests, viewpoints on trends, alignment with your organization, and main strengths (e.g., speaking skills)" (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). Each dimension can be given a value or grade. This comprehensive profile then determines the engagement approach. For instance, a KOL strong in research and aligned with the company might be tapped for advisory boards, while a high-volume HCP with lower influence might simply be a target for sales calls. Ranking & Tiering: Ultimately, the goal is to rank or tier the HCPs and KOLs. There is no one-sizefits-all formula - companies weight factors based on their strategic needs (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). For example, if launching a first-in-class rare disease drug, clinical trial experience and publication might weigh heavily (to find experts who understand the science), whereas for a new diabetes drug in a crowded market, having high patient volume and peer influence might be weighted more. The output could be a list of, say, 50 "Top Tier" KOLs nationwide, 200 secondary influencers, and 5,000 target HCPs for sales – each segment with a defined strategy.

In practice, **HCP/KOL mapping is an iterative process**. Data are updated regularly and the maps are refined over time. Early on, broad mapping finds all potential targets; then segmentation focuses effort on the most relevant groups. By combining the above methods – data-driven analytics and human insights – pharma teams can confidently identify "the right experts to help achieve the team's goals, regardless of location or specialty" (KOL Mapping & KOL Identification I Miller Tanner Associates).

#### **Key Data Sources for HCP and KOL Mapping**

Successful mapping relies on gathering data from a variety of sources. In the U.S., teams have access to rich datasets that can be leveraged (while adhering to privacy rules). Here are key



data sources and what they offer:

- Healthcare Claims Data: Medical and pharmacy claims (e.g., insurance billing records) are gold mines for understanding HCP activities in the real world. Claims data reveal diagnoses made, procedures performed, and medications prescribed by providers. By analyzing de-identified claims, one can see which HCPs manage the most cases of a given condition and their treatment patterns (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). For example, claims can show that Dr. A treated 120 patients with rheumatoid arthritis last year and started 30 of them on Biologic X indicating Dr. A is a high-volume prescriber in that space. Claims data provides insight into HCP clinical workload and experience, helping identify "providers at the forefront of trends" (those who see many relevant cases or adopt new treatments early) (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). It can also highlight referral patterns (e.g., primary care doctors referring patients to certain specialists).
- Prescription Data: Closely related to claims, prescription data (from sources like retail pharmacy sales or longitudinal patient databases) lets companies see which HCPs are prescribing which medications, and in what volume. This is often used to rank HCPs by decile in terms of prescription counts for a therapeutic class. If launching a new cholesterol drug, for instance, one might get data on which cardiologists and PCPs write the most prescriptions for cholesterol meds in each region. This helps pinpoint high prescribers who are likely key targets. Prescription data is sometimes aggregated into prescriber-level profiles (available from data vendors in the U.S. due to the legal ability to use prescriber data, as upheld by the Supreme Court in the Sorrell v. IMS Health case). It's worth noting that such data must be handled in compliance with patient privacy (only non-identifiable patient trends) and prescriber privacy choices (some states or associations allow doctors to opt out, though in the U.S. most prescription data is accessible to industry).
- Affiliation and Reference Data: These data sources describe where HCPs work and what organizations they're connected to. They include profiles of providers with details like hospital affiliations, group practice membership, academic appointments, board certifications, and professional society memberships (KOL Mapping Key Opinion Leader Strategy) (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). This helps map the "institutional networks". For example, knowing Dr. B is the chief of cardiology at a major medical center and on the board of the American Heart Association is crucial context that status makes him a likely national KOL. Affiliation data can show that two physicians practice at the same clinic or that a KOL sits on a guideline committee. It reveals "how different groups connect across the KOL landscape" (e.g., a pharma company may find that many top prescribers all trained under the same KOL at one university) (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas).
- Scientific Publications: KOLs are often identified through their publication record in medical journals. Data can be gathered from PubMed, Google Scholar, or scientific citation databases on how many articles a doctor has published in the relevant disease area, and how often those are cited. High publication volume and citation counts generally indicate a thought leader. Companies will list the "medical publications providers have contributed to" and topics of those papers (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). This indicates the KOL's specialties and the weight of their scientific voice. For example, if launching an oncology drug, seeing which doctors have authored pivotal studies or review articles on that cancer type is key. Publication data also shows collaborations (co-authors), which helps map the academic network. Some tools rank KOLs by "bibliometrics" a purely publication-based influence score.



- Clinical Trials and Research Grants: Information from ClinicalTrials.gov and other registries can identify which HCPs are investigators in clinical trials for related conditions (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). If a physician has served as a principal investigator on multiple trials of a similar drug class, they likely have expertise and peer recognition (and possibly experience with your product if they were in its clinical trial). Likewise, data on grants (e.g., NIH grants or foundation funding) can signal research leadership (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). KOLs who receive research grants are often at the cutting edge of developing or understanding new treatments engaging them can yield deep insights. These data sources help companies find "rising stars" in the field as well e.g., a younger doctor who recently got a major research grant might be an emerging KOL to cultivate.
- Conference and Speaker Activity: Major medical conferences (ASCO for oncology, AHA for cardiology, etc.) publish their speaker lists and abstracts. By tracking conference agendas and proceedings, one can see who is giving presentations or sitting on panels these are usually KOLs or subject matter experts. Conference activity is a strong indicator of a KOL's visibility and peer recognition. Pharma teams often review "lists of speakers and panelists at sessions related to your therapy" to identify high-profile KOLs attending a conference (How to Engage KOLs at Medical Conferences KOL Engagement). If Dr. C is delivering the keynote talk at a national congress, she is clearly an important voice. Additionally, companies track which HCPs frequently serve as faculty for continuing medical education (CME) programs or speaker programs, as this also signifies thought leader status.
- Social Media and Digital Presence: In the era of Digital Opinion Leaders (DOLs), an HCP's online influence is another data source. Social media data (Twitter, LinkedIn, medical forums) can uncover HCPs who have large followings or actively discuss health topics (KOL Mapping Key Opinion Leader Strategy) (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). For example, some physicians host popular podcasts or have tens of thousands of Twitter followers ("MedTwitter" influencers). These digital KOLs can be important for reaching audiences via non-traditional channels. Social media listening tools (e.g., looking at conference hashtags on Twitter to see which doctors are most mentioned/retweeted) can identify influential voices. Social data also provides qualitative context posts can reveal a KOL's attitudes and interests (for instance, a KOL's tweet about a new study can indicate their stance on a therapy) (KOL Mapping Key Opinion Leader Strategy). Companies increasingly include DOLs in mapping exercises, especially for therapeutic areas where patient and professional communities are active online.
- Internal Data CRM and Medical Insights: Pharma companies have their own data from past interactions. Sales call records and customer relationship management (CRM) systems contain info on which doctors have been detailed, their responsiveness, and past sales volumes. Medical science liaisons (MSLs) often record insights from KOL meetings. All these internal data points (e.g., "Dr. X attended our advisory board last year and was very positive about the new data") are valuable for mapping and segmentation. They can help refine target lists (removing an HCP who has consistently been uninterested, or tagging a KOL as an advocate based on their engagement history).

- Open Payments (Sunshine Act) Data: The U.S. Open Payments database (Sunshine Act data) publicly lists payments made to physicians by pharma (for consulting, speaking, etc.). While this is primarily for compliance, it can incidentally be used to see who is frequently engaged as a speaker or advisor in the industry. If certain physicians show high consulting fees across multiple companies, that signals they are sought-after KOLs (though caution is needed, as over-reliance on the same KOLs is exactly what transparency laws scrutinize). Nonetheless, Sunshine data can highlight if a target KOL already has financial ties to competitors or has been active in industry-sponsored programs, which might affect how you approach them.
- Patient Advocacy and Community Leaders: Beyond clinicians, sometimes patient advocates or
  advocacy group leaders are important voices (especially in rare diseases). Data on who leads
  patient organizations or is active in disease communities can be pertinent. This extends the concept
  of "KOL" beyond HCPs, but in modern mapping exercises, identifying these Key Stakeholders can
  be part of a holistic approach. For instance, a nurse or a patient who runs a large online support
  group could be influential for disease awareness efforts.

Multi-Source Integration: Each data source gives a piece of the puzzle. To build an accurate map, teams combine multiple sources. As Definitive Healthcare notes, "claims data for real-world clinical influence, reference and affiliations data for professional networks, and social media data for digital reach" together provide a holistic view (KOL Mapping - Key Opinion Leader Strategy). By overlaying these data, patterns emerge (e.g., a doctor who scores high on all counts – many publications, many patients, high social media presence – is clearly a top-tier KOL to engage). It's important to corroborate data across sources; for example, if prescriptions are high but publications are low, that person might be a high-volume practitioner but not a thought leader, so the engagement approach would differ. In summary, "each data source can only tell you so much. That's why reviewing more than one and combining them yields a more nuanced map." (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas)

### **Tools and Platforms for HCP/KOL Mapping**

A number of specialized tools and platforms have been developed to help pharma companies gather the above data and perform mapping efficiently. These platforms often aggregate data from public and proprietary sources and provide analytics and visualizations. Commonly used tools in the industry include:



- Definitive Healthcare's Monocl Expert Suite: Monocl (part of Definitive Healthcare) is a comprehensive KOL intelligence platform. It maintains a database of over 15 million global experts across therapeutic areas (Best KOL Mapping Software of 2025). Users can search for experts and see detailed profiles including publications, clinical trials, conference presentations, and even social media engagement (Best KOL Mapping Software of 2025). Monocl provides dynamic maps that visualize the locations and connections of KOLs, and offers modules like Monocl ExpertInsight (for deep profiles), ExpertConnect (CRM integration), and ExpertClaims (linking to medical claims data) (Best KOL Mapping Software of 2025) (Best KOL Mapping Software of 2025). This tool helps identify and rank KOLs, track their activities (with real-time updates and alerts on new publications, etc.), and manage relationships. Example: Using Monocl, a user could quickly find the top 20 oncology KOLs in California, see their latest research, who they collaborate with, and which conferences they've spoken at.
- H1 (HCP Universe): H1 is another leading data platform focusing on HCP and KOL insights. H1's HCP Universe provides a 360° view of healthcare providers, including their clinical history, scholarly work, clinical trial activity, and even information on their patient populations. It is marketed as an "Alpowered KOL mapping & engagement" tool that enables both headquarters and field teams to access the latest information on HCPs (KOL Mapping & Engagement H1). H1 aggregates public and proprietary data and uses algorithms to highlight "rising stars" as well as established experts. The platform supports use cases from medical affairs (finding trial investigators, advisory board members) to commercial (targeting high-potential prescribers). H1 also emphasizes connecting disparate data (clinical, social, etc.) for optimal mapping (KOL Mapping & Engagement H1). Some pharma companies use H1 to improve conference planning e.g., identifying which KOLs to meet at a conference as noted in a case study where a top 10 pharma used it to exceed conference engagement goals (per H1 marketing).
- Veeva Link (Key People): Veeva Systems, known for its CRM, also offers a data product called Veeva Link for Key People (formerly known in some segments like "Veeva Oncology Link"). This is a curated database of KOLs and digital opinion leaders with profiles of their influence networks. Veeva Link integrates directly with Veeva CRM, which is convenient for sales and MSLs to access KOL insights within their workflow. It provides deep data on experts (publications, affiliations, social media) and can surface connections between KOLs. Companies like Veeva, Monocl, and H1 have effectively moved KOL mapping from one-time consulting projects to continuous data-driven platforms with near real-time updates (KOL Mapping and HCP Targeting Two sides of the same (methodology) coin?). These tools ensure that as new information comes out (a KOL publishes a new paper or a physician moves institutions), the maps stay up-to-date.
- IQVIA and Other Data Analytics Firms: Major healthcare data firms like IQVIA offer both data and services for HCP/KOL mapping. IQVIA has vast datasets (prescriptions, medical claims, affiliations via their OneKey database) and also employs advanced analytics (as evidenced by their work on graph-based KOL identification (Identifying Key Opinion Leaders (KOLs) using Graph Analytics IQVIA)). While IQVIA's offering might be more custom or consultant-driven, they do provide software as well. For instance, IQVIA's KOL mapping solutions might integrate with their CRM or be delivered via dashboards. Other companies like Clarivate (DRG), Symphony Health, or emerging analytics startups can provide mapping tools or data feeds. Some specialized analytics companies (e.g., Axtria Insights or EVERSANA) also have platforms or services for KOL identification that integrate multiple data sources (A Single Source of Truth for KOL Mapping Pharmaceutical Executive).

- MDOutlook Lumineer and Other Niche Platforms: There are niche players and platforms that focus
  on KOL identification in certain domains. MDOutlook's Lumineer platform, for example, offers HCP
  mapping and "blueprinting" capabilities, aiming to empower marketing/sales teams with insights
  on HCP engagement (according to MDOutlook's site) (Healthcare Provider Engagement Services MD Outlook). These platforms might combine data and expert human analysis to deliver KOL lists
  and profiles, often tailored to specific client needs (e.g., a project to map KOLs in rare diseases).
- Social Media Analytics Tools: For mapping Digital Opinion Leaders, tools like Symplur (which
  tracks healthcare social media hashtags and influencers) or general social listening tools adapted to
  healthcare (e.g., Meltwater, Sprinklr with HCP filters) are used. Symplur's "Healthcare Hashtag
  Project" can identify which individuals (often HCPs) are most active in online conversations about a
  disease or conference. These tools complement the traditional KOL databases by highlighting the
  digital influence aspect.
- CRM and BI Tools Integration: Many pharma companies integrate mapping data into their CRM
   (customer relationship management) systems like Veeva CRM or Salesforce, so reps and MSLs have
   a single interface. Some use business intelligence (BI) dashboards (Tableau, PowerBI) to visualize
   HCP/KOL maps for example, plotting target physicians on a map by territory, color-coded by tier, or
   showing network graphs of how KOLs connect to community doctors. Custom in-house tools or
   dashboards might be developed especially by larger companies with the resources to build
   proprietary mapping systems.
- Consultancy Services: It's worth noting that aside from software, consulting firms (ZS Associates, IQVIA, EVERSANA, etc.) often provide KOL mapping as a service, delivering detailed reports and target lists. They may use the above tools in the background but present the findings in a tailored way. For example, a consultancy might deliver a "KOL Universe" report for a new product launch: identifying 1000 potential HCPs, segmenting into priority tiers, and providing profiles for each of the top 50 KOLs with engagement recommendations.

Each platform has its strengths, but all aim to streamline the process of finding and understanding key HCPs and KOLs. The choice may depend on the company's budget, existing systems, and specific needs. Some companies use **multiple tools** – e.g., a dedicated KOL platform for medical affairs and another data source for sales targeting – then reconcile the insights. What's clear is that technology has "transformed the project approach in KOL mapping into a data subscription model with near real-time updates," making it faster and easier to maintain current maps (KOL Mapping and HCP Targeting – Two sides of the same (methodology) coin?). Pharma teams no longer need to manually comb through journals or conference books – a good platform will surface the important people and information in a few clicks.

#### **Real-World Examples and Use Cases**

To illustrate how HCP and KOL mapping is applied, here are a few real-world scenarios and use cases in pharmaceutical sales and marketing:



- Product Launch Planning: A mid-sized pharma company is preparing to launch a new biologic for psoriasis. Twelve months before anticipated FDA approval, the medical affairs team conducts a KOL mapping project to identify national and regional thought leaders in dermatology. Using publication and clinical trial data, they identify the top 25 dermatologists in the U.S. who have done significant research in psoriasis (many have published in Journal of the American Academy of Dermatology on psoriasis or led Phase III trials of biologics). These become their primary KOL targets for early engagement. The company forms an advisory board with these KOLs to get input on launch plans and data messaging. Meanwhile, the commercial team uses claims and prescription data to map treating HCPs: they find approximately 5,000 high-prescribing dermatologists and rheumatologists (since rheums treat psoriatic arthritis) and segment them by prescribing decile. Just before launch, sales reps are given a target list focusing on the top two tiers (about 1,500 HCPs) who treat the majority of moderate-to-severe psoriasis patients. The result is a highly focused launch. Early KOL advocates (some of whom participated in clinical trials and advisory boards) speak about the new drug at launch meetings and webinar events, lending credibility. Within six months post-launch, the product sees rapid uptake because the groundwork with both KOL endorsements and targeted highvolume treaters was laid via mapping. This mirrors common industry practice where "pharma companies recruit KOLs to speak at product launches and advisory meetings" and ensure those KOLs are aligned and educated to drive adoption (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas) (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas).
- Disease Awareness Campaign: Imagine a scenario with a new therapeutic area: a company has a treatment for an rare disease that many general physicians are not familiar with. Before any product promotion, the company sponsors a disease awareness campaign. Using KOL mapping, they identify a handful of key physicians (perhaps academic experts in that rare disease) who can serve as the "face" of the awareness initiative. For example, these KOLs may be professors who run the only specialized clinics for that disease in the country. The company works with these KOLs to develop unbranded educational materials about the disease - symptoms, importance of early diagnosis, etc. These materials are disseminated through medical conferences and webinars. Because the content is delivered or endorsed by well-known experts, other HCPs pay attention. One real example: a pharma company in oncology ran an awareness campaign on a rare cancer, enlisting top oncologists from major cancer centers to present epidemiology data and patient stories. By mapping who the opinion leaders were (e.g., authors of clinical guidelines for that cancer), they ensured the campaign featured the most respected voices. The outcome was increased disease screening and diagnosis rates, benefiting patients and ultimately increasing the treatable population for their drug. KOL mapping was crucial here to find the authoritative voices needed for a credible campaign. As noted by communications experts, KOLs can be central in campaigns for "scientific medical content, a disease awareness campaign, [or] the launch of a new drug" - they lend authenticity and authority to the messaging (Key Opinion Leaders (KOL) in Healthcare and Pharma communication- Polk&Union).



- · Local Influencer Engagement (Regional Strategy): A large pharmaceutical company shifting from a purely "national KOL" strategy to also include Community Opinion Leaders uses mapping to adjust its approach. They find that in certain regions, some local physicians (not famous nationally) nonetheless have outsized influence - for instance, a particular endocrinologist in a mid-sized city who runs the biggest diabetes support network and frequently gives talks to local clinicians. By mapping referral networks and professional connections, the company identifies these "community KOLs." In practice, they create a tier of Regional KOLs. During a new insulin launch, they engage not just the ADA guideline committee members (national KOLs) but also these regional figures. They invite them to speaker training and provide resources for them to hold local peer-to-peer education dinners. This approach was informed by mapping that showed how certain regions had their own key influencers. The impact: better grassroots adoption, as local physicians often trust a respected peer from their area more than a distant famous professor. PharmaVoice in 2011 highlighted this trend from "KOL to COL (Community Opinion Leader)" as companies saw that regional influencers are critical especially as access to top KOLs became constrained (From KOL to COL: Regional Influencers are Critical to Commercial Model Re-invention - PharmaVoice) (From KOL to COL: Regional Influencers are Critical to Commercial Model Re-invention - PharmaVoice). The result is a more robust field strategy that doesn't solely depend on a few star doctors, but rather a network of many "micro-influencers" across the country (Thought Leadership - KOL Insights).
- Sales Force Deployment and Territory Alignment: An example on the sales operations side: a company with a cardiovascular drug uses HCP mapping to optimize territory alignment. By analyzing the geographic distribution of cardiologists and their patient volumes (from claims data), they map out "hot spots" of high disease prevalence and influential HCPs. They might discover, for instance, that certain metropolitan areas have a high concentration of target HCPs, warranting an extra sales rep, whereas some rural areas have very few targets. They adjust their sales territories and call plans accordingly, ensuring each rep's territory has a manageable number of high-potential HCPs. They also use the mapping to set call frequency targets e.g., Tier 1 HCPs (top prescribers or influencers) should get a personal visit bi-monthly, Tier 2 maybe quarterly, etc. This example shows mapping's role not just in who to target, but also in field force strategy and resource deployment. It moves the company away from flat or outdated targeting to a data-driven model focusing effort where it can have the most impact.

• Medical Science Liaison (MSL) Outreach and Scientific Exchange: On the medical affairs side, mapping is used to guide MSL activities. For instance, an MSL team for a new oncology drug uses a KOL map to decide which physicians to engage for scientific discussions. The map might highlight 50 oncologists who are key clinical trial investigators and another 100 who are rising stars (perhaps younger doctors publishing interesting case studies). The MSLs prioritize these for visits to discuss the upcoming drug data, gather insights, and possibly recruit them for future research or speaking. A use case could be at a scientific congress: before ASCO, the MSLs use a mapping tool to see which important KOLs (based on publications and influence) are attending (via the conference agenda). They set up meeting requests with those individuals. This targeted approach is far more effective than trying to meet "whoever comes by the booth." As Definitive's guide suggests, using multiple data sources (claims, publications, social media, news) to identify and prioritize experts attending a conference allows the team to maximize their on-site engagements (How to Engage KOLs at Medical Conferences - KOL Engagement) (How to Engage KOLs at Medical Conferences - KOL Engagement). In one case study, a top pharma improved their conference planning by using HCP mapping to ensure their team focused on the highest-impact experts, resulting in better follow-up and relationships post-conference.

These examples underscore how mapping is applied in practice: from broad strategic planning (launches, campaigns) to tactical field execution (rep call plans, MSL outreach). In all cases, the common theme is that mapping enables **more informed and focused decisions** about who to engage, how, and when. By tailoring efforts to the insights from mapping, pharma teams can accelerate product adoption, educate the market more effectively, and build stronger relationships with the healthcare community.

### **Integrating Mapped Insights into Sales Strategy and Marketing Campaigns**

Identifying HCPs and KOLs is only the first half of the battle – the next step is integrating those insights into actionable strategies for your field sales and marketing teams. Here are **best practices** for leveraging mapped insights:

• Ensure Cross-Functional Alignment: The insights from HCP/KOL mapping should be shared and understood across Medical Affairs, Sales, and Marketing. It's important that all teams agree on who the priority KOLs and HCP targets are. For example, if Medical Affairs has engaged Dr. Smith as an early KOL, the marketing team should know to feature Dr. Smith (with appropriate permissions) in educational content or invite her to speak at company symposia, and the local sales reps should be aware that Dr. Smith is a key figure in their territory. A cross-functional "targeting committee" can be useful to review mapping results and stratify the targets (e.g., labeling certain HCPs as "must-see" for reps or certain KOLs as "advisory board pool" for medical). This alignment prevents siloed efforts and ensures a consistent approach to the external stakeholder. Everyone rowing in the same direction amplifies impact (Building the Framework for a Successful Launch – Benchworks).



- Incorporate Mapping into CRM and Call Plans: The HCP target lists and KOL information derived from mapping should be integrated into the CRM system used by sales reps and MSLs. Each target HCP profile in the CRM can include relevant data points from the mapping (e.g., specialty, patient volume decile, influence tier, and any relationships to KOLs). Reps can then tailor their call plans for instance, scheduling more frequent visits or detailed discussions with high-priority physicians. The mapping should also inform segmented messaging: marketing can prepare different sales aids or talking points depending on the segment (a high-volume prescriber might get a cost-effectiveness discussion, whereas an early-adopter influencer might get more cutting-edge mechanism-of-action data). Essentially, use the mapping to personalize the engagement. One advanced practice is to map not just who to target, but also who influences whom a rep might learn that "Dr. A is a KOL who influences Dr. B and C in your territory." The rep can then, for example, arrange for Dr. A to give a local peer-to-peer talk that includes Dr. B and C, thus indirectly influencing them through their peer. Incorporating network insights in this way transforms the call plan from isolated visits to a coordinated influence strategy.
- Develop Tailored Marketing Campaigns: Marketing teams can use mapping insights to create more effective campaigns. For example, if the mapping reveals that certain KOLs are very active on social media or YouTube, the marketing team might create a digital campaign featuring those KOLs (such as a live Twitter chat Q&A with a KOL, or a short video series with a KOL discussing patient management tips). If the mapping shows some KOLs have a large patient following (some might run patient seminars or blogs), the company could support an *unbranded* patient education initiative led by that KOL. Additionally, segmentation of HCPs can guide channel strategy: tech-savvy younger doctors (identified via data like social media) might be reached via digital channels, whereas others might prefer traditional channels. Content personalization is another angle knowing an HCP's particular interests (from their publications or profile) means marketing can send them tailored content (for instance, an email with a whitepaper on a topic the HCP has shown interest in, rather than generic material). The key is that mapping tells you who to talk to and what might resonate based on their characteristics.
- Leverage KOLs in Peer Influence Programs: One direct way to integrate KOL insights is to set up peer-to-peer programs (speaker programs, roundtables, webinars) featuring those KOLs, targeting the mapped HCP audiences you want to influence. Since the mapping identified, say, 10 key regional KOLs in a therapy area, the marketing team can organize local dinner programs in 10 regions, each with one of those KOLs as the speaker to discuss the new therapy. Sales reps in those regions invite their target HCPs to attend. This way, the influence network comes alive KOLs disseminate the info to HCP targets. As one source noted, despite regulatory scrutiny, companies still find value in identifying the best KOLs to speak at conferences, conduct seminars, or attend dinner meetings KOL mapping provides that "laser-like" ability to pinpoint the right voices (KOL Mapping: The GPS of Thought Leader Identification PharmaVoice) (KOL Mapping: The GPS of Thought Leader Identification PharmaVoice). Best practice here is to choose the right KOL for the right audience (a community pharmacist opinion leader might be better to influence other pharmacists, whereas a prestigious surgeon might draw other surgeons). Mapping helps you make those matches.



- Monitor and Adjust Strategy Continuously: Integration is not a one-time thing at launch it's ongoing. The pharma environment is dynamic: physicians move, guidelines change, new KOLs emerge. It's important to keep the mapping updated (many tools update data continuously) and adjust targeting or strategy as needed. For example, if the mapping data shows that a previously low-volume physician is suddenly treating many new patients (perhaps due to a local competitor leaving or new clinic opening), that HCP might move up in priority for sales targeting mid-year. Or if a KOL who was not engaged before suddenly publishes influential research, the medical team might now target them for outreach. Regularly reviewing mapping outputs (e.g., quarterly) as part of sales ops and marketing planning ensures the field strategy stays aligned with reality. Also, incorporate feedback from the field: reps and MSLs can report if they encounter new local opinion leaders that weren't on the radar, feeding that back into the mapping process.
- Educate and Empower Field Teams: Simply giving reps a target list isn't enough you should train your sales and MSL teams on how to use the mapping insights. For instance, reps should understand why Dr. X is a priority (e.g., "Dr. X treats 200 patients like our target profile and is an early adopter type") and how to approach them (maybe with more in-depth scientific data if they are an influencer). MSLs should be briefed on each top KOL's profile (research interests, recent activities) so they can have informed scientific discussions. Some companies hold "KOL profile review" meetings where MSLs discuss the backgrounds of the KOLs in their region, often using mapping dossiers. The more knowledgeable and prepared the field force is, the more effectively they can engage. Moreover, provide them with custom tools e.g., a network map visualization from the KOL mapping that a rep can glance at to see how HCPs in his territory connect (which might inform how he coordinates meetings or local events). By empowering the field with the why and how, you ensure the mapped insights translate into meaningful actions, not just names on a list.
- Integrate with Content Strategy: Marketing content (brochures, websites, webinars, etc.) should reflect mapping insights too. If your KOL mapping shows certain topics are frequently addressed by KOLs (say, many top endocrinologists are concerned about a specific side effect), you might develop content pieces focusing on that topic to equip your reps and also to share online. In some cases, companies co-create content with KOLs (like a KOL writing a blog on your disease awareness site). Use the mapping to identify which KOLs are good for which content e.g., who is a good speaker vs. who is a good writer vs. who has a patient-friendly communication style. Always ensure compliance (content created with KOL input might be considered promotional if not done carefully), but harnessing KOL expertise can significantly enrich your marketing materials.

In essence, make the mapping the foundation of your engagement strategy. As one guide suggests, after mapping, you should develop a robust engagement plan: define clear objectives for KOL/HCP interactions, decide which channels (face-to-face, virtual, digital) to use, and tailor messaging to each segment (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas) (KOL Mapping: How to Identify KOLs in Key Therapeutic Areas). For KOLs, plan out how you will partner with them – whether it's on advisory boards, speaker programs, or content creation – and ensure those plans align with their strengths and your goals. For HCPs, align your multichannel marketing (sales calls, emails, webinars) to their preferences and influence level. When done right, mapped insights lead to smarter targeting, more relevant messaging, and ultimately a more efficient and effective commercialization effort.



## Compliance and Privacy Considerations (HIPAA, Sunshine Act, etc.)

While mapping HCPs and KOLs provides great benefits, it must be done in compliance with legal and ethical standards. Pharma teams should keep the following considerations in mind for the United States:

- HIPAA and Patient Privacy: The Health Insurance Portability and Accountability Act (HIPAA) protects patient health information (PHI). When using data like claims or prescription records for mapping, ensure that the data is properly de-identified. Under HIPAA, sharing patient-level data is permissible only if it has been stripped of personal identifiers (or if it falls under a limited data set with a data use agreement). Most commercially available claims/prescription datasets used for mapping are indeed de-identified. This means all direct identifiers (names, addresses, etc.) are removed or encrypted. According to HHS, de-identification "makes sharing information HIPAAcompliant by removing protected health information (PHI) and personally identifiable information (PII)" (Understanding de-identified patient data, how to use it - TechTarget). So, when analyzing which doctor treats X patients, you're looking at aggregate counts or coded data, not anything that would reveal patient identities. Best practice: Use reputable data sources/vendors that certify HIPAA compliance, and never attempt to re-identify any patient from the data. Additionally, any data analysis should be done in secure systems to prevent unauthorized access. If you incorporate patient data into your mapping (e.g., patient journeys connecting to HCPs), ensure only authorized analysts access it and that field teams only see aggregated insights (like "Doctor A has 100 patients with condition Y") rather than raw data. By respecting HIPAA, you avoid legal penalties and maintain trust – HCPs and patients expect that their data is handled responsibly.
- Sunshine Act (Open Payments): The Physician Payments Sunshine Act requires pharmaceutical and device manufacturers to report virtually all transfers of value to physicians and teaching hospitals. This includes speaking fees, consulting payments, meals, travel, and more, which are then published in the Open Payments database. When engaging KOLs (who are often physicians) for consulting, speaking at events, or any paid activity, you must track and report these payments. Transparency is key: it's not illegal to pay KOLs for legitimate services, but it must be reported. The law's threshold is low (generally payments over \$10 must be reported, and certainly anything over \$100) (From KOL to COL: Regional Influencers are Critical to Commercial Model Re-invention -PharmaVoice). Non-compliance can lead to fines and reputational damage. Best practice: Involve your compliance or Med/Legal team early when planning KOL engagements. Ensure contracts with KOLs specify that their compensation will be reported as required. Also, be mindful of state laws and institutional policies - some states have stricter rules (e.g., caps on gifts or meals to doctors), and many academic medical centers have policies limiting how much their faculty can be paid by industry (From KOL to COL: Regional Influencers are Critical to Commercial Model Re-invention -PharmaVoice). Those limits (often around \$20,000 per year per company) mean you should plan KOL engagements within reasonable bounds and perhaps spread out engagements so as not to overutilize one KOL. It's wise to check the Open Payments database for KOLs you plan to engage - if a physician already has very high payments recorded, consider whether additional payments could raise red flags or if that physician or their institution might have restrictions in place.



- Fair-Balance and Promotional Compliance: When integrating KOLs into marketing efforts, ensure that all promotional regulations are followed. For example, if a KOL is speaking about your product, that likely makes it a promotional speaking engagement (unless it's an independent CME program) and thus you need to provide fair balance information (present risks as well as benefits), use approved slide decks, and avoid off-label discussions. Your company's medical/legal review committee should vet any content involving KOLs in promotional settings. Even for non-promotional (medical affairs) settings, like an advisory board, there are norms: honoraria should be reasonable for the work done, there should be genuine advisory need (not a pretext to pay a prescriber), and the meeting should be documented. Avoid any quid pro quo implication (i.e., do not ever suggest that payment or inclusion in mapping is tied to prescribing that would be unethical and illegal).

  Compliance training for field reps is important here: reps must not misuse mapping data. For instance, if reps know Dr. X is a high prescriber of a competitor, they can position their message competitively, but they should not say "we know you prescribe a lot of Competitor, you should switch to ours" in a way that violates promotional guidelines or patient privacy. Use the insights intelligently but within the bounds of approved messaging and respectful communication.
- **Privacy of HCP Information:** Remember that while HCPs are professionals (not protected by HIPAA like patients are), there are still privacy expectations. The data you have on HCPs (like their prescribing volume) is often considered sensitive business information. Handle it confidentially for example, don't publish a list of "top prescribers" publicly. Also be aware of any HCPs who may have opted out of data sharing programs (the AMA used to have a Physician Data Restriction Program, though its status has evolved after legal cases). In short, use HCP data for internal strategy, but be discreet. If an HCP asks, be transparent about using prescription data: it's legal in the US, but some may be unaware their prescribing is tracked. Train reps on how to answer such questions honestly and diplomatically. Additionally, **email outreach compliance**: if marketing uses HCP emails obtained through mapping, ensure compliance with CAN-SPAM (for promotional emails, provide opt-outs, etc.) and with any HCP communication preferences.
- Non-Discrimination and Ethical Engagement: Ensure that mapping insights are used ethically. For example, just because a doctor is low-volume, don't completely ignore them if they have patients in need there may still be an opportunity for education (maybe via non-personal channels).
   Conversely, don't focus all attention on those who might give the most prescriptions to the detriment of patient care considerations. Compliance also means following the PhRMA Code on interactions with HCPs e.g., when providing meals during a program, keep it modest and in a conducive setting for education, not as lavish perks. When involving KOLs in research or consulting, have clear content-of-interest disclosure practices (so if they speak to peers, they disclose they consult for your company, maintaining transparency).
- **Documentation:** Keep records of how your mapping was done and how targets were selected. If ever audited (by internal compliance or external regulators), it helps to show that HCP targeting was based on legitimate criteria (patient need, scientific leadership) and not on inducements. Document the rationale for KOL engagements (e.g., "Dr. Y was engaged for consultancy because of her expertise in XYZ as evidenced by... and she provided advice on...."). Good documentation of processes can protect against any perception of impropriety.

In summary, **compliance should be woven into the mapping and engagement process from the start**. By using de-identified data, you respect patient privacy (HIPAA). By being transparent and fair in HCP engagements, you adhere to Sunshine Act and ethical norms. And by training



your teams, you ensure the powerful insights from mapping are applied in a compliant manner. With these safeguards, HCP and KOL mapping can be pursued confidently, enabling your commercial strategy to benefit from rich insights while upholding the trust of the healthcare community and regulators.

**Conclusion:** HCP and KOL mapping is a cornerstone of modern pharma commercialization strategy in the U.S. It blends data science with the art of stakeholder engagement. By clearly defining your HCPs and KOLs, understanding their importance, using robust methodologies and tools to map them, and then thoughtfully integrating those insights into your field and marketing plans (all while remaining compliant), your team can drive more effective campaigns and better patient outcomes. Armed with this guide, pharmaceutical sales and marketing professionals can approach HCP/KOL mapping in a structured, informed, and ethical way – turning raw data into actionable strategy and ultimately forging stronger connections with the healthcare professionals who shape patient care.

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