

INTERLINK INSIGHT

Perspectives for business performance

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The pharmaceutical industry is sure to undergo tremendous change in the challenges and forces influencing the growth level, even as we say good-bye to 2012. Numerous changes are expected with many patent expirations and steady growth of generics. Through this article, you can get a deeper look at the challenges along with the ways to overcome them for better sustainability in the New Year 2013!

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With the competitiveness in today's market, making a brand standout is certainly an achievement. Incase of intense rivalry among products, prices become the basis for comparison. The challenges in the pharmaceutical industry in India are creating good enough brand awareness, loyalty and communicating compelling quality among the different generic environments. This article offers an in depth analysis of the various factors and pressures pharmaceutical companies face today. It also offers valuable insights on how to build strong brands.



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The pharmaceutical industry is believed to be a stable industry by many analysts. However, the reality is far from it. You can gain stimulating perspective on how you can get the much sought after growth the right way by tackling all challenges at the grass root level of the pharma field force. This article highlights the key issues challenging the industry today and also provides solutions to the tussle every CEO faces for delivering the desired growth numbers.

18 Functional Beverages – a Promising Health Opening

- Mala Raj

Along with a great increase in the buying power, Indians today have become more health conscious. So, an increasing number of people are turning to functional beverages as a solution to keep fit. India ranks 3rd in beverage consumption after USA and China. This article is an introduction to the Indian scenario with opportunities that lie ahead for nutritional beverages, challenges that the marketers are most likely to face as well as the marketing strategies they could adopt. The findings of an exclusive Interlink Primary Research Study on 'Nutritional Beverages' are also highlighted.



25 Calming a Stressed Corporate Executive

- Fabian Almeida

Stress is a part and parcel of the corporate lifestyle today with ever-crunching timelines, demanding work commitments and much more. Thus, ways to beat stress should be a priority for everyone. This article brings to you a ten point plan which will aid working professionals beat stress effectively. De-stressing is extremely crucial to lead a healthy and peaceful life as stress affects the personal as well as professional space.



FROM THE PUBLISHER'S DESK

'Growing beyond challenges'

It is time for pharma industry to create a more balanced business. A business that grows beyond challenges has to be capable of addressing marketing challenges, delivering sustainable financial performance and providing new value to prescribers, to middlemen and patients!

Every company has its own strategic priorities and intentions to generate growth, reduce risk and improve company's short term and long term financial performance. The leader in every organization has to size up capabilities of his company in the current economic environment as well as market dynamics. To become successful in actually growing beyond these challenges, he has to assess growth markets, drivers and devise methods and means of delivering value through existing and old products; at the same time he has to ensure sustainable flow of business and yet grow the company!

This issue of Interlink Insight is addressing a few challenges such as market, regulatory and other industry forces, delivering growth numbers and building brands in such a demanding environment. These thoughts are visible in NexGen Pharma, ...Achieving Growth Numbers and Diminishing Differentiation Building Brands. Obviously, when we aim to transcend beyond these threats, we need to look at new opportunities such as nutrition and wellness. When someone works in today's era of cut-throat competition and determines to grow beyond the threats, stress is inevitable. Are there ways to combat it? Peaceful mind provides alternatives to get those numbers and sustainable growth. A way to understand stress while living the daily corporate life and still staying calm is also one of the features of this Interlink Insight.

Hope this issue provides fresh thinking on existing challenges and helps you to look at the present as well the future with a positive outlook.

Good reading!

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Nexgen Pharma – a New Ray of Hope

- Dr. R. B. Smarta



The pharmaceutical industry is sure to undergo tremendous change in the challenges and forces influencing the growth level, even as we say good-bye to 2012. Numerous changes are expected with many patent expirations and steady growth of generics. Through this article, you can get a deeper look at the challenges along with the ways to overcome them for better sustainability in the New Year 2013!

2012 looked like a year which may be the end of the world for the pharmaceutical industry!

No longer would there be a continuation of the patent raj, as many block buster brands have gone off patent and the expiration of these product patents has depressed sales for their marketers.

The Pharma industry seems to be undergoing tremendous transformation with respect to the challenges and forces influencing the growth. With numerous patent expirations, the sheer dependence on the conventional 'Blockbuster Model' for a business to sustain is being questioned upon by the stakeholders.

Another crucial situation that pharma players today are facing is that of holding a competitive advantage over the other players in these times of great competitive levels in generics. Even then the need for growth from the domestic markets appears to be an important challenge.

Also, these product patent expirations have given rise to the growth of generics in the pharma industry. Generic substitutes of patent expired blockbuster brands will attribute to the growth with an increase in the volume; making them conveniently available to the patients. Previously, patients looked down upon the generic versions as compared to the more popular brands. There was uncertainty in the minds of the people over the effectiveness of these generic versions.

But, with increasing awareness, there came about a shift in the demand from popular brands moving towards the generic substitutes as they are priced much cheaper while maintaining the quality of the product. When a generic equivalent of a branded drug is available in the market, there is a decrease in the price of the branded drug. Therefore,

even as the industry will experience an increase in the volumes, it will adversely affect the margins. This will result in low profitability. However, many are seeing brighter times ahead with more product approvals and envisage global rebound effect due to only one remarkable fact - manifold increase in spending on medicines.

Spending pattern

Annual global spending on medicines according to IMS Institute's Global Use of Medicines: Outlook Through 2016 report, is expected to rise from \$956 billion in 2011 to nearly \$1.2 trillion in 2016, representing a compound annual growth rate of 3% - 6%. In other words by 2016, the global growth will double and the value will not come from developed markets but from pharmerging (pharma emerging) markets, as there will be a huge increase in spending in these markets.

This year the developed markets are expected to see their lowest annual growth at less than 1% or \$3 billion. But they will also pick up and rebound to about \$18 billion to \$20 billion by 2014-2016.

The reason for this massive increase is the augmented income levels today. It has been estimated that the middle income and upper income groups are expected to grow significantly. McKinsey Global Institute's 'The 'Bird of Gold' report states that by 2015, India's middle class will be over 250 million. The middle class could rise close to 600 million by 2025 which would be more than the total U.S. population of 350 million by then. Thus, accessibility and affordability would be the key drivers which fuel business growth.

The silver lining here would be the fact that the expenditure on medicines has almost tripled in India as their consumption has also increased.

Challenges

This growth will accentuate the following six major challenges that the pharma industry faces:

1. Access and affordability

Access and affordability of those who consume and pay for healthcare around the world will be an important challenge. Until now, the pharmaceutical industry had experienced and believed in more of a 'patient centric' approach so as to reach the customers. A patient centric approach gives importance to what is best for the patient's health along with the patient being more responsible and accountable for the treatment. The data received through this approach enabled pharma companies to clearly see where exactly the opportunities exist.

Obviously, patients would prefer affordable prices and would need immense availability and accessibility. The greatest example in India about 'Access Economy' is virtually witnessed with 'cell phones'. The same evolution could be emulated in pharma too and the industry will really serve the 'bottom of the pyramid' in India. Being 'generics', the comparatively low prices and having recent NPPA order, has already put the affordability move in process. In fact to provide fillip to this, 384 drugs have been brought under DPCO this year in NPPA from 76 drugs.

In fact, prices of drugs are 'cheapest' in India and promoters must highlight this fact to the common man.

2. Adaptability and flexibility in changing operations of Business

There needs to be a shift in the mind

set of focusing on developing and marketing medicines at higher prices with higher margins for smaller subsets of patients having significant diseases. To take advantage of the market evolution, solutions have to be developed to adapt to the change of bigger sets of patients with all types of diseases while keeping lower margins.

According to Jeremy Levin, Teva's new CEO, the true differentiator between pharma companies is how well companies adapt to change. "Over the last five years, Teva has faced significant changes in the differences in the markets it serves," he says. "These changes necessitate changes in the way we operate. Other large companies focus on developing and marketing medicines at higher prices with higher margins for smaller subsets of patients with significant diseases. Teva has a nearly unique circumstance in that our patients are in 120 countries, our portfolio consists of over 1300 medicines, and our cultural diversity is unparalleled. This sets the stage for us to develop solutions to take advantage of the market evolution adapted to our particular circumstances."

Proactive leadership initiatives will be the need of this year rather than to the reactive problem solving leadership style of the past..

3. Shift to patient centricity

With changing times, today, organizations have to be very well equipped with strategies for the 'Patient Pull' approach.

There will be a shift from R&D and product centricity to patient centricity for its higher consumption.

4. Innovations in R&D

Innovations have been brought in by AstraZeneca by creating “virtual” micro science innovative medicines units! Pfizer has started the initiative in 2010 towards making R&D effective in such a way that it will reflect a precision medicine R&D!!

Revamping R&D with different models like consortiums: 10 pharma companies have joined together and pooled in resources as a consortium and committed to the partial resources to concentrate on getting standardization around all processes and create a basket of products to share. It will reduce individual investment and collect the produce along with pooled and shared insights.

“We haven’t seen one quite like this before where 10 pharmaceutical companies paired up of sort of their own volition in a way”, says Glen Giovannetti, Ernst & Young Global Biotechnology leader. “They join other consortia. This seems to be more of a real commitment of their resources and their effort. I think it’s great. They’re going to concentrate on getting some standardization around the clinical trial process.

“Holistic open learning networks” where academia, non profit groups and industry will allow pooling of resources and sharing of information is also on the anvil!!!

5. Innovations in Marketing

In this changing context, factors which could be considered by Pharma companies for Commercialisation & New Business Model are as follows:

- Developing novel effective ideas: Innovation in making ideas / strategies / concepts effective in the market

- a. Proposing ‘Market to Molecule’ innovative products / procedures/ services
- b. Innovation in Marketing practices / tactics
- c. Responsible and ethical field force strategic management

- Corporate Branding: Branding could play major role in a generic domain. Branding could be of corporate related, discipline related, service related or related to any differentiated consistent cycle of care
- Segment Management: Key segments management in Field Force strategy
- Competence Building: Capability building of managerial hierarchy- specially in the sales force
- Pricing: Introducing Pharmacoeconomics and Pricing innovation in 3rd phase of clinical trials to create evidence based pricing for a generic product on outcome basis
- Rx to OTC: Creating image/ market by switching ageing prescription products to OTC products
- Social Media: Innovation in promotion is possible with the help of social media. There are many ways industry can approach customer segments via many new media such as :
 - ❖ Mobile technologies
 - ❖ Social media
 - ❖ Search engine optimization
 - ❖ Video conference
 - ❖ Webcasts
 - ❖ Specialty oriented media
 - ❖ Product / Disease websites
 - ❖ e-Detailing

6. From disease solutions to cycle of care

As the demographics are changing and educational level is going up, awareness of health is becoming more evident in the younger generation as well as middle class of India. Considering this change, majority would like to take care of their health than to fall sick and find out solutions to their diseases. Additionally, the disease patterns are also changing with a greater prevalence of lifestyle diseases. These diseases are not exactly diseases but they are more of disorders and syndromes.

As a result, more focus will be needed for cycle of care than merely looking at solutions to diseases. There could be more challenges available to mitigate new diseases through vaccines or other drugs but majority of the new avenues would really fall in the area of nutrition, medicines, dietary supplements, exercises etc.

Many life style diseases also require lot of focus on family and family education such as Alzheimer's, Cancer, parkinsonism etc. so that, the cycle of care will encompass taking care of the affected person as well as entire family right from diagnosis to treatment to staying healthy.

Losers and Winners

In this process, there may be many winners who would cope with this situation and live with a flexible and adaptable mind set for future. While few could be losers; especially those who look at the environment as totally transformed and they do not have the capabilities to cope with the environment in tomorrow's context.

Coping Ways

While dealing with these challenges, it's possible that generic companies need to further evolve as under:

- Differentiate themselves from other companies like Teva
- Working on other alternatives like biotech and biologicals to expand the basket of products
- Integration with food and healthcare:

From the business growth point of view, the growth of the pharma industry has been affected. The industry growth in the US has come down by -1%. It can be thus observed that the industry is facing a challenge of generics as well as reduced margins. There is a need for the amalgamation of technically sufficient and evidence based products through nutrition and food to boost their existing growth.

The fast moving health goods FMHG products have a totally different business model. The FMHG industry is going to attract healthy people; while in pharmaceuticals, the industry is attracting sick population. It would be a better balance to attract both sick and healthy people in this newly formed patient centric industry.

Is this the 3rd Era?

Historically, this is perhaps the third era which will dominate from now on for almost 20 years. The First era was dominated by block buster products and competitive advantage through patents, second era was dominated by branding and marketing practices along with geographical expansion and further consolidation of industry as well as out sourcing to create value chain partners. The third era will now be dominated

not by these inside options but it will be dependent on the spending pattern of patients. Due to demographic changes especially in pharmerging markets, inclusive of developed markets, medicine spending is almost tripling and the consumption pattern will drive the growth of industry.

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Dr. R.B. Smarta, Founder and Managing Director of Interlink Marketing Consultancy, has more than 40 years of experience in the industry including over 28 years in management and business consulting. Being a thought leader, he has helped number of organizations set up and grow through strategy consulting, sales and marketing effectiveness, organizational development interventions, successful mergers acquisitions and innovative video based training packages for Indian pharmaceutical industry.

Diminishing Differentiation, Building Brands – a Challenge!

- Kapeel Kapoor



With the competitiveness in today's market, making a brand standout is certainly an achievement. In case of intense rivalry among products, prices become the basis for comparison. The challenges in the pharmaceutical industry in India are creating good enough brand awareness, loyalty and communicating compelling quality among the different generic environments. This article offers an in depth analysis of the various factors and pressures pharmaceutical companies face today. It also offers valuable insights on how to build strong brands.

Changing Indian Scenario

For the majority of products, differentiation is a very difficult achievement. The ubiquity of technology, skilled workforces, raw materials and capital, sooner or later levels the competitive playing field. In such circumstances the role that the brand plays becomes pivotal. Economics of the big pharmaceutical companies today is locked into product lifecycles of limited duration. Growing patient power threatens to change forever the traditional drug company/doctor/patient paradigm. Despite the ever increasing marketing spends to create differentiation among competing products, almost all segments of pharmaceutical industry are witnessing increasing commoditization. Price becomes the main basis of comparison in the cases of a state of intense competitive rivalry, excess number of players in the market, excess plan capacity underutilized, competitive attack to gain higher market share and lack of unique product features. Commoditization is born of products maturation, market saturation, and industry dynamics. In an industry that is constantly challenged by severe price competition and government price control, in order to sustain competitive advantage, pharmaceutical companies have to develop and build brands that meet real needs and are differentiated in the minds of customers. For the pharmaceutical industry in India, creating good enough brand awareness, loyalty and communicating compelling quality for good perceptions amongst numerous generic environments is a key challenge to increase brand equity.

Factors influencing challenges for branding

- Performance evaluation of brand managers is based more on the quantitative data (market share, rupee sales growth) which more readily respond to the sales promotion and lower pricing with little emphasis on qualitative aspects like strength of positive brand associations that need

careful nurturing over the long term. More emphasis needs to be given on qualitative aspects than just pricing of any brand; for it to become a grand success over a lasting period. Especially considering the fact that affordable pricing is the key characteristic of generics, brands need to be evaluated on other parameters too.

- With frequent lateral shifts in their careers and thus decreasing length of association with a brand and / or organization, brand managers too tend to focus on short term results (often achieved through sales promotion and price cuts) rather than on brand building measures. Short term association of brand managers with a particular organisation makes them focus on short range gains.
- Decreasing ability of healthcare industry to attract, nurture and retain marketing talent relative to other more fancied industries.
- Lack of a common definition of brand identity, confusion over the role brand plays in the organization's overall strategy, and lack of understanding of the far reaching implications of a new brand strategy.
- Lack of efforts at aligning the organization's value system with the values that are at the foundation of the branding strategy.
- Decision-making authority is shifting from physicians to consumers, and branded medications will increasingly lose out to generics. Cost-conscious consumers are already asking the chemists about equivalent generics!

Multiple competitive pressures exist in the domestic market

- MNCs are becoming more aggressive. Their focus on emerging markets is increasing as they are experiencing limited growth opportunities in developed markets.

- Domestic companies leveraging on their expanded field force.
- Increasing partnering by MNCs in the domestic market (marketing and distribution footprint of Indian companies and product portfolio of MNCs is being leveraged upon).
- Intense competition, especially in the acute segments and spill over of pricing pressure even to the chronic segments.
- Smaller industry players offering huge discounts/incentives to the distribution network and doctors.
- Highly fragmented market with top ten pharmaceutical companies accounting for only ~35-40% of the market.
- Shrinking pipeline molecules with the introduction of product patent regime.
- Expansion into new therapeutic areas with combination and controlled release products by many companies.
- A spate of me too products in every category in an industry starved of research products, with multiple branded generic competition leading to severe price erosion.
- Increasing tendency of new entrants to cut prices (eg. In the antibiotics segment) in a bid to secure volumes.
- Global healthcare reforms aimed at reducing healthcare spending and covering a larger proportion of population under public healthcare.
- Excessive spare production capacity with many contract manufacturers in the Indian market, thereby lowering entry barriers even in specialized dosage forms for new players.
- Switchover to OTC category by some marketers (e.g. antacids, anti-pyretics, anti-cold segments).
- FMCG marketers leveraging the health platform to compete in some segments (e.g in oral hygiene and

dental care products) whereby growth of Pharma brands may get restricted.

- Increased bargaining power of large distributors, retailers, institutions and insurance companies.
- Concept of the Pharmacy store becoming the profit centre of private healthcare institutions leading to favoring of competitors offering low cost or high margins.

Building strong brands

- Companies build strong brands by consistently delivering quality products, nurturing customer relationships and delivering consistent meaningful messages. Brands need to be revitalized, repositioned, and always kept relevant to the market. Analyzing the customers, competitors and your own company, with emphasis on cost structures and strategic positioning should be the starting point. Customer analyses can reveal what, besides prices, motivates your customers to buy your products. Competitor analyses help to estimate their pricing limitations and objectives. Market segmentation work must be informed by behavioural and/or attitudinal assessments, as well as any traditional demographic (speciality/ age/ type or area of practice) research. Achieving a market-focused, sustainable, and profitable product or category requires a complete immersion in a branding strategy. Brand Strategy involves giving the brand a very clear power of attraction, a set of relevant, unquestionable meanings which achieve a space not just in the head but also in the heart of the customers. Pharma companies try to build positive brand associations (e.g. superior efficacy, longer clinical experience, safety, satisfaction of using an evidence based treatment, trust and other emotional associations like a better quality of life or improved survival for the patients),

to achieve differentiation and loyalty in an intensely competitive market. Companies can adjust existing strategies or find new ones that allow them to sidestep the march of their products toward commoditization.

- A well-honed brand positioning statement defends the brand against commoditization and provides a roadmap for growth. Brands must deliver differentiated, well-conceived experiences that are authentic to core brand values to resist commoditization. Developing a powerful and distinctive brand positioning involves:
 - a) Understanding the product and its area of competence (effectiveness)
 - b) Understanding the needs of the different segments of the market
 - c) Identifying the most attractive segment
 - d) Developing the brand so that it can, with justification, claim to own a benefit that is relevant to the needs of the target audience
 - e) Evaluating the uniqueness and value of the benefit(s) to the target market
 - f) Depending on the fit between the intended and perceived positioning (blend of benefits), refining the brand according to customer response. Positioning of pharmaceutical brands must perforce be based on effectiveness or they would not be credible. Relief from illness, pain or discomfort is a far higher needs' state than the needs served by FMCG products. Trust in pharmaceutical brands, therefore, is a more vital and hard-won commodity. But once gained it can be leveraged most successfully in the brand-building process.
- Plan your goals with a realistic look at your market, your product, your brand, your customer, your sales force and your marketing budget. Uptake for new treatment approaches, or products may be slow and more selective as physicians struggle to figure out where it fits in their treatment options, and reps are often unprepared to help them. Find your brand's "moments of truth" in the treatment protocol /algorithm used by physicians. At what point can you influence that prescription? A physician may see limited value in a product unless you create a compelling need (with education, peer influence etc.). The endpoints emphasized in medical data must be meaningful and reflect clinical practice. Make physicians feel that whatever they're using now isn't effective, fast or easy enough—so a switch to your brand makes sense. Brand positioning and claims must be credible. Your sales rep should not end up all alone in front of the doctor, unable to answer the tough questions. Demand a common-sense reason for every promotional idea, or you will end up with a bunch of tactics searching for a strategy. Maximizing impact takes a plan that's focused on meeting specific objectives, strategies, and tactics that are prioritized.
- Companies may be able to postpone commoditization by capitalizing on existing markets, targeting underserved markets, developing new markets and niches, or finding new points of differentiation through branding, alliances, or other means.
- Companies can sustain competitive advantage through product differentiation based on unique features and benefits which are valued by customers. Product innovation, along with "quickest to market" can differentiate a brand and set one apart from others. While unique product attributes are rare

and rapidly copied or improved on by competitors, sustained emotional positioning offers the distinct and important advantage that cannot be copied successfully by competitors without further reinforcing the original brand's standing in the consumer's mind.

- As a general physician or specialist considers a treatment protocol or algorithm in approaching their patient's issues, a marketer should find where in that protocol lies their brand's "moments of truth." At what point (patient flow mapping) can you influence that prescription?
- Differentiating by factors other than price can reduce the effectiveness of price competition. Introducing new features or emphasizing non-price features to physicians can reduce their price sensitivity. The enhanced or differentiated attributes must be compelling enough to make physicians feel they "have to prescribe it." This means a series of characteristics and benefits that come together to make the branding strategy and product positioning a success.
- All successful branding strategies start with the commitment and involvement of the executive team. Inconsistency is the biggest enemy of all branding efforts. Therefore it is so important to gain consensus among key stakeholders of the brand. Commitment, not compliance is the key to successful implementation. Start with a solid branding strategy and involve everyone in the organization to reinforce the "promise" behind the brand. Do workshop(s) to create a common language and vision about the organization's strategy and vision for the brand.
- Nurture brand management expertise - translating the discipline of branding to the challenges of the health care environment requires some experience and flexibility.
- Caution should be used before any changes are made to existing, valuable brand identities, that may have built a loyalty both internally and with consumers.
- Understand your competitors' brands today and their future direction when creating the new brand's positioning strategy.
- To develop the emotion around your organisation's brand, give it a personality and call out its values. Each brand should have a brand character statement that is the basis of its market position. Furthermore the brand character needs to be backed with a brand promise statement that sends a concise message to the organization's culture.
- From a product-centric approach Pharmaceutical companies need to adopt a promise-centric approach in order to optimize brand communication.
- Service is another point of differentiation (e.g. Delivering value-added information or clinical insights that make disease management easier or better; reminders for vaccination schedules to registered patients; replacing faulty reagents or helping in stabilisation of complex diagnostic machines; expert support in interpretation of results of sensitive diagnostic kits). Service, depending on the product and the therapeutic category, can be achieved at key patient/ physician "touch points." The interactions must be valued by the customers (physicians/patients/retailers/lab personnel) and not seen as intrusive.
- Patient education/ CMEs, can help pharma companies improve case detection and compliance; reduce dropouts, treatment failures; and move from product-focused marketing to better disease management or treatment outcomes (true customer needs). Such initiatives improve a rep's interaction with physicians and

demonstrate commitment to a given therapeutic area, thus building brand preference and loyalty.

- Company image, reputation or trust can be a key differentiator in product categories where relative differences amongst competing brands are minor or don't score high on relevance.
- Successful healthcare brands are built on consistency. Consistency though predictable, preys on our collective need for familiarity, creating a simple set of symbols for complex associations. By keeping your brand identity consistent, you are removing an important barrier between you and your market. Repetitive exposure to the same symbols allows your customers to quickly and easily recognize your core message. Hence all your communications; whether an ad campaign, a website, or the waiting room posters; must be visually consistent to create a familiar presence. Familiarity builds trust. Your customers should be able to follow a clear path between your collateral, your advertising and your physical spaces.

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Is In-clinic Productivity a corner stone for Achieving Growth Numbers?

- Ruth D'Souza



The pharmaceutical industry is believed to be a stable industry by many analysts. However, the reality is far from it. You can gain stimulating perspective on how you can get the much sought after growth the right way by tackling all challenges at the grass root level of the pharma field force. This article highlights the key issues challenging the industry today and also provides solutions to the tussle every CEO faces for delivering the desired growth numbers.

Most analysts perceive the pharmaceutical industry as one of the most stable industries, certain to give consistent returns and growth even in a turbulent environment. The reality however is different, resulting in sleepless nights for many CEO's faced with the struggle to deliver growth numbers quarter on quarter and year on year! The slowing industry growth is compounded by the pressures of intense competition, the bargaining power of customers, the talent crunch and the trust deficit with society. In such a situation, it is often a temptation to get into profit protection mode with a focus on survival. However, this may be the very time when CEO's need to examine their options to grow the business, tackle competition and improve profits. Improving profits can be driven either by a cost saving exercise or a focus on increasing revenue. While costs can be reduced, though only up to a point, revenue generation should be the mainstay of growth.

The "In Clinic" transaction

Over the years, any industry observer would accept that there has been a decline in the quality of the "In Clinic transaction". The exposure of products to customers has to be done now in merely a minute with the MR having to complete the task of launching new products, promoting key brands and ensuring major products prescribed by the doctor do not lose emphasis. There are many factors which have contributed to this decline.

Free choice or forced choice?

Foremost among which is the lament about how this industry is not an industry of choice, but most end up out of NO choice! Unlike the FMCG, IT or even Call Centers, this industry ranks way below others in its capacity to attract talent at the entry level. The MR's job involves long hours, carrying heavy bags laden with samples, making calls on doctors who are difficult to meet and who often have scant respect for the MR, combined with a

remuneration that is lower than other entry levels in other industries. The talent crunch has resulted in companies compromising on education standards at entry level with many organisations who used to consider only B.Pharm or MSc graduates earlier, now settling for BA's or even undergraduates. For these recruits, understanding pharmaceuticals and science is in itself a huge challenge with the resultant dropping of the quality of communication and interaction in the doctor's chamber.

Induction or orientation?

Recently while launching its new training package "INTERACT™" in order to get a better insight, Interlink conducted a detailed research among both MRs and Training managers. The findings were interesting:

1. In the survey of the Training managers, it emerged that the induction training has undergone a major change in the last 20 years. Induction training used to be conducted for a period of 21 days to 45 days depending on the company. A minimum of 3 weeks time used to give the MR a strong foundation of knowledge on the anatomy, physiology, therapies, market information, understanding of competition, product features and benefits along with various skills like detailing, territory management, selling, handling objections, probing and closing. Equipped with this solid foundation the MR could enter the doctor's chamber confidently and discuss the therapy and product promoted intelligently, earning the doctors respect and confidence.
2. What is the status today? On an average the induction training has been reduced to 7-10 days due to pressure of filling vacancies and the 30% attrition challenge. In these 7- 10 days, the entire focus is on equipping the MR with product knowledge and basic soft skills like communication and listening but with low focus on 'selling'. Obviously constraints of time lead

to compromises and so training managers are forced to deliver the minimum for enabling an MR to work in the field. The focus here is on “urgent” aspects leaving more important issues aside for sheer lack of time. Our survey reports that with the added problem of compromise in entry level recruits, it is indeed a challenge for training managers to get MR’s to even understand basic terminologies in anatomy and physiology. Hence most of the induction time is spent on getting them to pronounce some key words essential to present themselves in the doctor’s clinic.

- Another challenge is dealing with the profile in the customer of the pharmaceutical industry... Doctors are highly educated, professional, knowledgeable, with large practice and increasing demands on his/her time. If the MR is placed in this context, sometimes he/she cannot even pronounce medical terms effectively, let alone carry on an animated discussion on therapy or brand treatment options or patient issues with the doctor! Even if the MR can manage the basic “detailing”, he/ she is not equipped to deal with the doctor on an equal basis and the call ends up being a mere reminder. Not difficult to conclude why growth is an issue!

Attrition versus retention

Pharmaceutical selling is a relationship based selling and definitely affected by attrition. Since it takes a while for a new replacement to establish a relationship with the doctor, valuable knowledge of the market, therapy and customer behaviour is lost. Current attrition levels vary from 20% to 70% with an average being 30% for the industry. Many factors lead to attrition including a sense of increasing frustration and loss of meaning in the job. MR’s who no longer take ‘pride’ in their profession, often have to cope with managers who emerge from the same talent pool with the similar issues of competence in managerial and leadership skills.

Does selling have a chance?

Perhaps in the context of the branded generics competition, one has seen an increasing trend of CRM as a mainstay of pharma promotion. While this is a short term measure to increase revenues, the implications of such dependence need to be examined. First and foremost, the MR’s call ends up as a “service call” with the MR concentrating on checking with the doctor as to what “Service” does the doctor need. The call therefore becomes only a commercial transaction with most of the 1 minute available to the MR taken up by CRM leaving no time to focus on scientific promotion.

We have interacted with field forces who believe that without CRM there will be a drop of 30% in the topline and there is an increasing pressure on managements to increase spending on KOL’s. The implication therefore is a belief system that what works is “CRM” and there is no need for any other scientific promotion or selling or In Clinic performance. What gives results is the quantum and innovativeness of the CRM offered to doctors. CRM is not a cost that can be reduced overnight without affecting sales nor can one measure the return on such an investment made on a doctor. In fact, the competitive environment often sees companies offering greater “service” which means customer loyalty cannot be factored into stable business. In a system where competitive forces are fierce and reflected by frequent drop in prices, the increasing spending on CRM together with the new DPCO which has shaved off the top lines of “cash cows” of many large organizations. There is already a pressure on bottom line.

The growth challenge

Government has now come up with ethical guidelines for marketing which are very stringent against providing gratification to doctors. The field force that is dependent on CRM will have to unlearn its beliefs and relearn new ways of scientific selling and communication. What then is the way out? Are there options to regain or

to improve the quality of in-clinic performance, increase the motivation of sales force and increase productivity? While all issues are linked, one has to begin somewhere. The solution lies in a gradual shift to ethical selling, a serious re-examination of the quality of the in-clinic transaction, a deep assessment of the effectiveness of induction training process followed by corrective measures. Only then will there be a change in the interaction from transaction based to science based. It is vital that minimum 3-4 days be spent in increasing the MR's pride in the profession and equipping them to interact with specialists/super-speciality doctors along with thinking on their feet which can only be achieved through a revamping of the induction training process. Restoring "Pride" to the profession, building the MR's competency to promote products WITHOUT CRM combined with a change in the promotion process and plans will not only reduce attrition and increase growth but also add to the topline.

Interlink's INTERACT™

Based on its consultancy, research and training findings, Interlink has launched "INTERACT™" – A new Learning tool to build capabilities of Medical Representatives. INTERACT™ is a comprehensive creative, fun, customizable, interactive and experiential video based training package aimed to facilitate in-company trainers to upgrade the

skills of Medical Representatives. The objective of INTERACT™ is to transform each medical sales professional from a mere promoter of products to a Brand Ambassador of company's values and equity! Given today's challenges pharma companies face, INTERACT™ is ideally suited for transformation of the mind sets of field forces, build pride in the profession and move them from transactional to science based selling, thus improving their In-clinic performance and contributing significantly to the top line of the organization.

Conclusion

In conclusion, the Indian Pharma industry is facing multiple challenges of poor resource pool of talent, curtailed induction training, high attrition rates, over-dependence on CRM activities for generating sales, fear of abolishment of CRM activities for Pharma promotion by the government and low profit margins. In wake of this grave scenario, it is time that the industry evaluate the probable solutions such as investing more time, effort and other resources in the induction training of new recruits with a view to equip them with knowledge and skills to enable them rise and shine in an ethical scientific promotion based marketing that appears to be around the corner.

References:

Interlink Knowledge Cell

Ms. Ruth D'Souza, Executive Director of Interlink Marketing Consultancy, is a renowned management consultant and a motivational speaker. With the expertise and experience of over 3 decades in pharma, animal health, diagnostics, nutra & wellness space, she has spearheaded number of strategy consulting and competency development interventions at many NCs and MNCs to improve business performance of client organizations. She is also a regular writer on management.

Functional Beverages – a Promising Health Opening

- Mala Raj



Along with a great increase in the buying power, Indians today have become more health conscious. So, an increasing number of people are turning to functional beverages as a solution to keep fit. India ranks 3rd in beverage consumption after USA and China. This article is an introduction to the Indian scenario with opportunities that lie ahead for nutritional beverages, challenges that the marketers are most likely to face as well as the marketing strategies they could adopt. The findings of an exclusive Interlink Primary Research Study on 'Nutritional Beverages' are also highlighted.

A slow and steady shift in the eating and drinking habits of Indians is becoming apparent, particularly among the educated city dwellers. Consumers are reading the labels of the foods that they purchase, consumers are seeking out information & discussing in various forums- on how to remain healthy and productive, consumers are shifting distinctly towards a more nutritious and healthy diet that will enable them stay away from diseases. This trend presents a huge opportunity for the 'Nutraceuticals' market in India.

Nutraceuticals refers to those products which provide health and medicinal benefits such as the prevention and

treatment of diseases in addition to the basic nutritional value that they offer. Nutraceuticals are further classified as 'Dietary Supplements' and 'Functional foods and Beverages'. As per BCC Research, the global nutraceuticals market was estimated at about \$151 billion in 2011. By 2016, it is estimated to reach nearly \$207 billion, a projected compound annual growth rate (CAGR) of 6.5% between 2011 and 2016. Functional beverages market is expected to experience the highest growth, at a compound annual growth rate (CAGR) of 8.8% during the 5-year period from 2011 to 2016. This sector was estimated to be worth \$57 billion in 2011 and nearly \$87 billion in 2016. (See Figure 1)

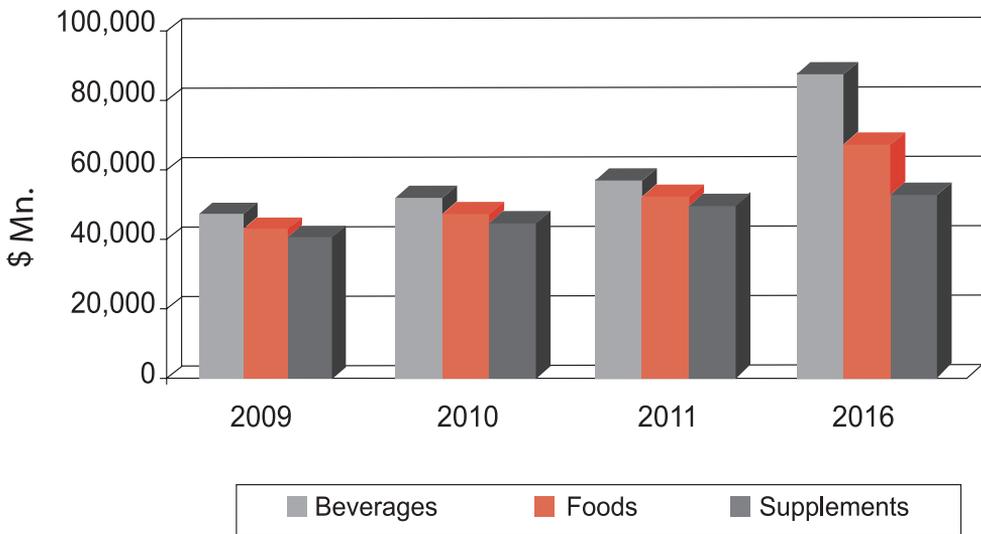


Figure 1: Global Nutraceutical Market - Beverages, Foods and Supplements, 2009-2016

The Indian Nutraceutical Market was valued at \$ 1480 Million in 2011 and is expected to grow to \$2731 Million in 2016 (Frost & Sullivan Report, 2011) with a segment-wise break-up as shown below. (See Figure 2)

The Functional Beverage Market:

A beverage is a drink specifically prepared for human consumption.

They include a variety of non-alcoholic beverages and alcoholic beverages. Our area of interest is in a special category of non-alcoholic beverage, viz., the functional beverage.

A functional beverage can be defined as a drink product that is non-alcoholic, ready to drink and includes in its formulation non-traditional ingredients.

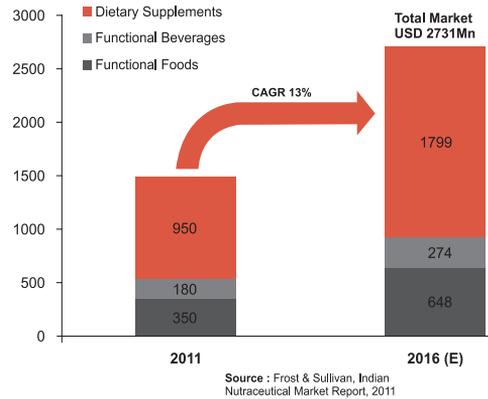
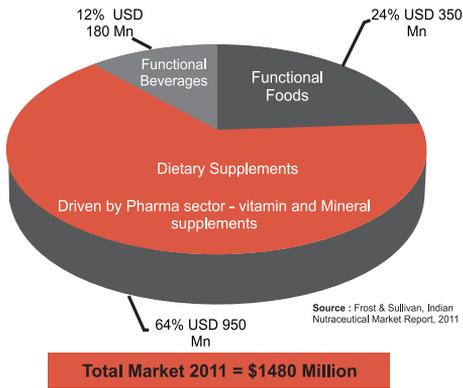


Figure 2: Indian Nutraceutical Market

This includes herbs, vitamins, minerals, amino acids or additional raw fruit or vegetable ingredients, so as to provide specific health benefits that go beyond general nutrition.

Functional Beverages: Functional Milk, Yoghurt & Dairy Drinks, Energy Drinks, Sports & Performance Drinks, Enhanced Water, Ready to Drink Teas, Enhanced Fruit Drinks & Juices, Soy Beverages.

Market Segments of Functional Beverages: Hydration Products, Energy / Rejuvenation Products, Health & Wellness Products and Weight Management.

Health Benefits Claimed by Functional Beverages: A variety of health benefits are claimed depending on the ingredients used in the functional beverages, including, helping boost the immune system, improving mental alertness or energy, lower cholesterol, or help maintain gut, bone health, heart health, vision and eye-health benefits.

Commonly Used Functional Beverage Products:

The Prebiotic and Probiotic yoghurt drinks are among the more popularly known functional beverage products

in the market. Functional milk is also gaining popularity with many new nutritionally fortified milks being marketed, including those fortified with extra calcium, Omega-3 FA, Vitamins and even lactose-free milk for specific target audience. Juices have always been a popular choice in western countries with many new variants being launched with inclusion of not just additional vitamins, minerals, omega-3 FA, but also with the inclusion of cholesterol lowering ingredients! The humble thirst quencher, water is also now fortified with vitamins and minerals, with health benefits around weight management, improved digestion and mental alertness. The 3 countries, the US, Japan and Germany, account for around 80% of global functional bottled water market, according to Euromonitor. Energy drinks with brands like Red Bull and Sports drinks with brands like Gatorade have always found good support from the youth world over and have been one of the fastest growing segments among the functional beverages.

Newer Beverage Products:

Packaged refrigerated teas is among the more popular newer products which have gained good acceptance in India.

The popular Indian road-side drink, ‘Nariyal Pani’, viz., Coconut water is becoming a super hit in many countries as a strong iso-tonic, hypo allergenic and all-natural health provider with even major players like Coca-cola and PepsiCo claiming a stake in this segment. For its applications in satiety and heart health, oat-based beverages are also an emerging new avenue. Other exotic ingredients favoured include lychee, pomegranate, aloe vera juice, mixed fruit and vegetable juices. Other recent entrant is the chia beverage and the Kombucha tea. In Mexico, chia seeds are often stirred into fruity drinks where they turn gelatinous and add a nice texture to the beverage. Chia was a prized “superfood” for the Aztecs who took advantage of the seed which contains protein, fiber and omega-3 fatty acids including high amounts of alpha-linolenic acid. Chia beverages are expected to gain more popularity as supplies of chia seeds improve. Kombucha is a fermented variety of a sweet tea, which is actually a symbiotic colony of a bacteria and yeast, said to have detoxifying properties. Lastly, to help stressed-out people unwind and loosen up, a variety of ‘relaxation beverages’ are also attracting attention. These ‘relaxation beverages’ make use of a variety of ingredients known for their relaxation benefits, including kava, melatonin, L-theanine and gamma aminobutyric acid, or GABA.

Besides varying the ingredients and composition, the functional beverage players have also found good success with manipulation of the total volume to be consumed. Unlike the typical bottles or cans, a new 50 ml variant –

called as ‘Shots’ has become a roaring hit in many western countries. Vitamin based energy shots contain numerous additional vitamins and supplements for sustenance, sustainment, and overall health, while energy shots contain caffeine, vitamins, and herbs such as guarana, ginseng or ginkgo biloba, taurine, maltodextrin, inositol, carnitine, creatine or glucuronolactone. Such is the popularity of ‘Shots’ that many respondents in a survey expressed the desire to have their entire days’ requirements of vitamins and minerals in a single shot!

Functional Beverages in India:

With increasing health awareness and with the pressure to remain fit and perform superlatively at all times, the Indian health-conscious youth are also opening up to experimenting with functional beverages. The changing lifestyles with poor dietary habits, the hurried life with lesser time to cook at home has spurred the demand for complete and convenient nutrition that can help prevent ailments and keep oneself physically & mentally fit. Needless to state, the growing affluence in the country has also enabled the purchase and usage of these new products.

Though India ranks 3rd largest in beverage consumption after the USA and China with 10% of the Global beverage consumption, the functional beverage market is still small in comparison (\$ 180 mio). But the growth rates are very impressive at almost 20%. Some of the leading players include Groupe Danone, Dabur, PepsiCo, Coca-Cola, Amul, Britannia, Tata Global Beverages, Nestle India and Rasna who are tempting the Indian consumer with a variety of product choices.

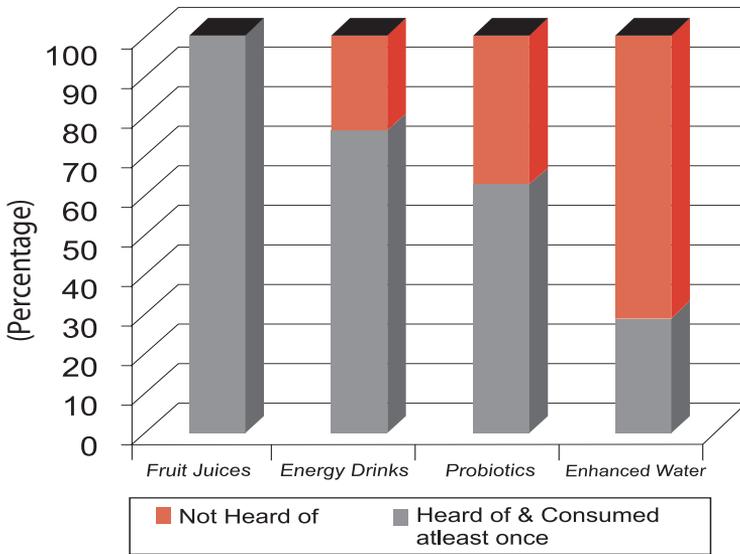
Nutritional Beverage Market Survey Findings:

A brief primary research survey of 25 respondents (all adults) was conducted in Mumbai city during the month of Dec 2012, salient findings of which are elucidated below.

- Excellent awareness of ‘Fruit Juices’ among all the functional beverages with 100% awareness.
- Awareness of ‘Energy drinks’ and

‘Probiotics’ is also high, while that of ‘Enhanced water’ is low at 29%. Most respondents are aware of only mineral water (particularly Bisleri).

- Frequent / repeat consumption was reported high for fruit juices and energy drink.
- The most popular brands(& company of origin) for each category are as shown in Table 1:

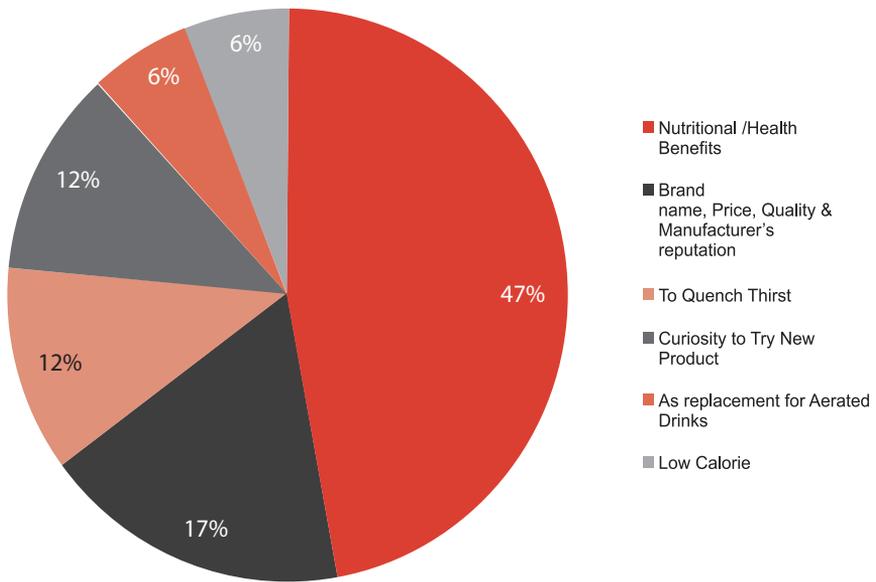


Awareness & consumption of Nutritional Beverages

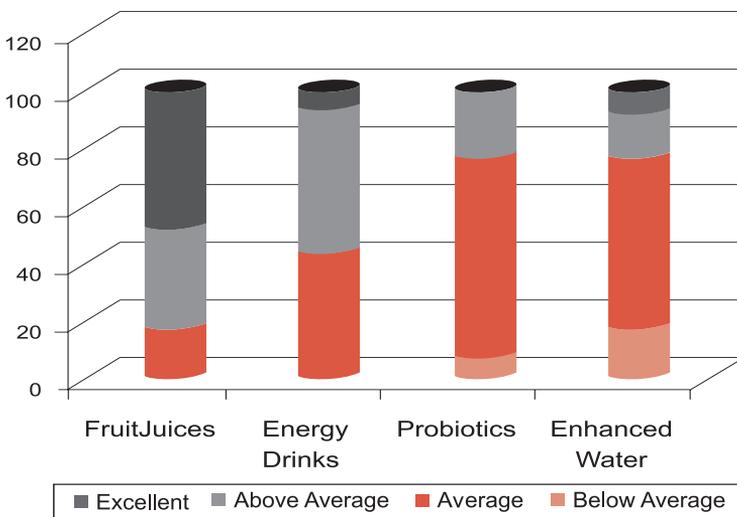
Probiotic Drinks:	Yakult (Yakult Danone India), Mother Dairy (Mother Dairy), Amul Probiotic Prolife Lasse & buttermilk (Gujarat Coop. Milk Marketing Fed.)
Energy Drinks:	Red Bull (Red bull GmbH), Cloud 9 (Goldwin Healthcare), Gatorade (PepsiCo), Burn (Coca-cola India), Tzinga (Hector Beverages)
Juices :	Real / Real Active Fruit Juices (Dabur), Tropicana (PepsiCo)
Enhanced Water Drinks:	Tata Water Plus (NourishCo), B'lue ,Qua Plus (Danone-Narang Beverages)

Table 1 : Populer Brands and Company of Origin

- Perceived health benefits is the major reason that attracts consumers to try out ‘Nutritional beverages’ (in almost 50% cases).
- The other important factor that influences consumption of these beverages is the brand name, name of the company, the price, quality & safety of the brand.



Reasons for Purchase of Nutritional Beverages



Experience / Feedback after Consuming Nutritional Beverages

- Highest level of satisfaction expressed with Fruit juices with 83% of respondents rating their experience as above average or excellent.
- Good level of satisfaction with Energy drinks.
- Nearly 77% of respondents rated both Probiotics & Enhanced Water as average or below average, indicating a great scope for improvement of these two beverages.

Marketing Strategies for Nutritional Beverages:

Some of the key obstacles faced by marketers of functional beverages in India include price factor, public concerns over safety and quality of these beverages, fear of high pesticide levels in the water-based products, lack of endorsement from the medical community for such products, ambiguity over regulations governing label claims of the same, resistance to change beverage consumption habits

and low awareness among non-metro consumers.

To overcome these obstacles, beverage marketers must adapt their marketing strategies to appease the Indian consumer and his requirements. What strategy works in other countries may not necessarily work in an identical manner in our country. For example, influenced by the heavy promotion of Yakult and other probiotics, many consumers purchased and tried these beverages; however the level of satisfaction after consumption was very low with probiotics, resulting in poor repeat purchase. So marketers have to bear in mind that adaptation of the original product to suit Indian consumers without altering the health benefits is an important focus area.

Creative launch strategies beginning right from the choice of ingredients, the formulation, brand name, packaging, pricing, choice of distribution channels, brand communication and other brand related decisions, is vital for creating

brands that add value to the taste and health requirements of the quintessential Indian consumer. The growing middle-class in India is willing to try newer options that can keep them healthy and fit; Indians today want variety in all that they consume; Indians today have the additional spending power ... So, nutritional beverage marketers, if you can satisfy their requirements, your thirst for success will be quenched.

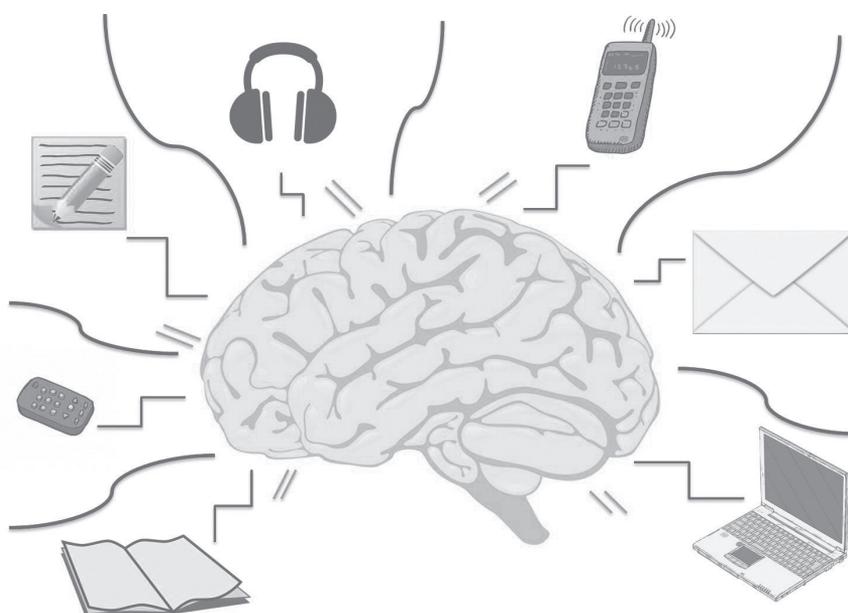
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Mrs. Mala Raj, is a senior consultant at Interlink. She is a brand management expert and is well versed with the intricacies of Pharma Marketing in the country. She is an excellent trainer for marketing strategies and selling skills for Marketing and Sales Personnel.

Calming a Stressed Corporate Executive

- Dr. Fabian Almeida



Stress is a part and parcel of the corporate lifestyle today with ever-crunching timelines, demanding work commitments and much more. Thus, ways to beat stress should be a priority for everyone. This article brings to you a ten point plan which will aid working professionals beat stress effectively. De-stressing is extremely crucial to lead a healthy and peaceful life as stress affects the personal as well as professional space.

Know your enemy
 Stress, today, is an ugly word... we experience it everyday and in every way. Corporate stress refers to the levels of stress manifest in and around the corporate market, affecting everybody – managers, executives, trainees, freshers, etc. Eustress refers to the optimum levels of stress that can actually bring about positive results. Distress refers to the extreme levels of stress that triggers negative outcomes. The repercussions of a stressful life reduce the effectiveness of a professional performance and take its toll on our personal lives, also affecting the health of the mind and body.

Causes and consequences

Anything that causes stress is called a ‘stressor’. Stressors can be ‘internal’-from the body, or ‘external’ – from the environment. Physiological factors like illness, contribute towards increasing our stress levels. Psychological factors like depression, fear, anxiety and others are also related to increasing stress levels. Stress hormones such as cortisol and norepinephrine are released by the body in situations that are interpreted

as being potentially dangerous. Cortisol is believed to affect the metabolic system and norepinephrine is believed to play a role in case of depression and hypertension. Stress hormones increase heart rate, blood pressure and breathing rate, and also adversely affect digestion, reproduction, growth and immunity.

Constant stress causes continual release of various stress hormones which can cause weakness and early fatigue, increased risk for diabetes, hypertension, heart disease, ulcers, alopecia (hair loss & baldness), acne (pimples), irritable bowel syndrome, decreased immunity levels and much more ! Increasing levels of stress sometimes leads to maladaptive patterns of coping like addiction to alcohol, cigarettes, drugs, internet etc. Heightened stress is associated with increased risk for self-harm and suicide.

Fighting back....the 10 point plan

Knowing that stress is a part and parcel of our corporate culture, it makes sense to fight back when stress seems to be getting the better of you. Here is a 10 point plan in place, to help us find anchorage, and stay fit and fine, despite the stress and strain. Here goes,



1. **Self-awareness:** It is important to connect to our inner self, truly and deeply! A deeper understanding of our strengths, our weaknesses, and our fears will help us to improve ourselves for the better. This leads to an increased sense of self worth... and it is no secret that self-esteem increases self-confidence. This leads to increased psychological stability.
2. **Self-development:** Self development should centre around changing ones perspectives and attitudes related to problems and solutions. Isn't the statement 'if you are not part of the solution, you definitely are part of the problem!' true? Possibility thinking, visualizing and verbalizing your goals, new learning, benchmarking your progress...all of these exercises help to fortify oneself against the onslaught of stress and its dire consequences.
3. **Brain gym:** 'Train your brain' seems to be the catch phrase for improving and increasing the efficiency of our brains. Simple activities like Spot-the-difference, Sudoku, Chess, crossword puzzles etc can help in a big way to sharpen our cognitive skills. Tougher brains offer a tougher resistance to the detrimental effects of increasing stress.
4. **Body basics:** Attention needs to be paid to the body too, by means of advocating regular, basic exercises for the body. Simple deep breathing exercises, stretch exercises and strength enhancing measures can lead to fitter bodies. Care about our diet and nutrition, coupled with a holistic approach to good health, will ensure that harmful stress effects are kept at bay.
5. **Healthy hobbies:** Encouraging healthy hobbies like reading, listening to music, playing a sport, leisure travel, and others can help to re-vitalize the mind. Such activities also help to channelize our energies in the right direction. Pursuing one's passion during the in-between times available, directly or indirectly boosts up ones morale and professional productivity.
6. **Plan out your work (and work out your plan):** Proper planning and execution of our work agenda and responsibilities helps in reducing chaos and confusion. Better time management skills, use of assertive techniques for clear communication, utilizing hindsight and foresight for strategy mapping and other significant steps can help to reduce the levels of stress associated with corporate boardrooms and project deadlines.
7. **Balance Vs Burnout:** Isn't it easy to get carried away with our enthusiastic involvement in various proceedings, blinded by the anticipated access to fame and success.....right up to the extent of a breakdown and burnout? Intensified inputs over a longer period of time can prove to be faulty or fatal, for the mind and body. Striking a balance between work and play, especially our personal and professional lives, can provide a buffer against the negative effects of stress.
8. **Role-models:** Inspiration always helps to stabilize one's aspirations. Looking up to real life heroes who have been able to combat their stress, making appropriate life-style changes, and striking that much needed balance in their life, against all odds can serve as the perfect motivator for those keen on scaling new heights of success.

9. Support systems: Everybody needs praise, encouragement, love and support in large measures as they move ahead through life's journey. Family and true friends, mentors, colleagues, and others form a large part of our support systems. Whenever the going gets tough, it is this support system that secures our sanity and our sensitivities, and helps us to tide over our troubles... bouncing back with renewed vigour.

10. Spirituality: Last but not the least, a sense of spirituality provides meaning and moderation to our existence and growth. It also prevents us from getting grandiose and narcissistic.... and helps us to stay grounded. Having a realistic understanding of our abilities, can orient us to give off our best in everything we do. Trust, understanding and hope are the pillars of any lasting relationship, including that between man and God!

The way forward

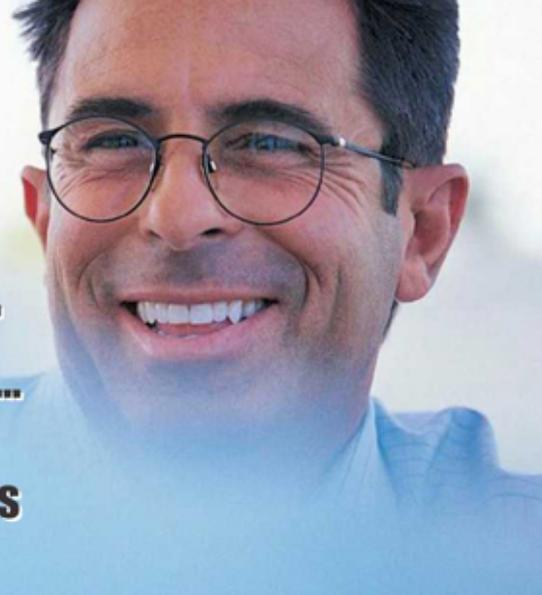
Stress, my friend is here to stay ...and so stress-busting mantras should become a part of our lives. Quality time with our loved ones; better, balanced work strategies and outputs; the much needed vacations whenever possible, to pamper oneself- all help de-stress ourselves well. However, in-house de-stressing therapies seem to be the need of the hour such as power naps, workplace workouts, in-house therapists, team yoga, wonder workshops, etc.

Eighty per cent of the blue-chip companies contacted by stressbusting.co.uk provide some form of in house stress therapy, ranging from office massages to 24-hour help-lines and office punch bags.

Summing it up in the words of a grateful employee- 'All of us work extremely hard, and this gives us a chance to stop for a moment, and focus on relaxation and peace. It works wonderfully for team spirit, and inspiration, and I think it also helps staff relax when they're at home!'

Dr. Fabian Almeida is a Consultant Psychiatrist, Counsellor and Motivator; with work experience in the U.K. He has been working in the field of mental health over the past 15 years and has conducted over 1000 seminars and workshops on mind and behaviour, all over India and abroad. He is the Director of Wellsprings Counselling Clinic and HopeSprings Psychosocial Activity Centre.

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