



**ONEMSL**

THE GLOBAL STANDARD OF MSL EXCELLENCE

# **GLOBAL SURVEY 2023 FINDINGS REPORT**

## **MSL FINDINGS**

**Dear Colleague,**

Welcome to the key MSL findings from the One MSL 2023 global survey, which was designed to gather data from across the international Medical Affairs community about their in-role experience.

At One MSL, we are truly passionate about enabling organisations and individuals to build best-in-class MSL functions. The survey findings are important to inform both the individual MSL and the wider team, and inform our activities for this year and beyond.

This survey is repeated annually to enable further evidence of the global MSL and MSL manager experience.

Thank you for your continued support and interest.



**Helen Kane**  
CEO, One MSL

## Survey Navigation

Please use the below buttons to navigate through the survey findings.

 *Previous page*

 *Contents*

 *Next page*

<b>Background and role</b>	<b>MSL role experiences</b>	<b>Onboarding</b>
<b>External engagement</b>	<b>MSL skills and training needs</b>	<b>In-role challenges</b>
<b>Development and career progression</b>	<b>MSL value demonstration</b>	<b>Summary</b>

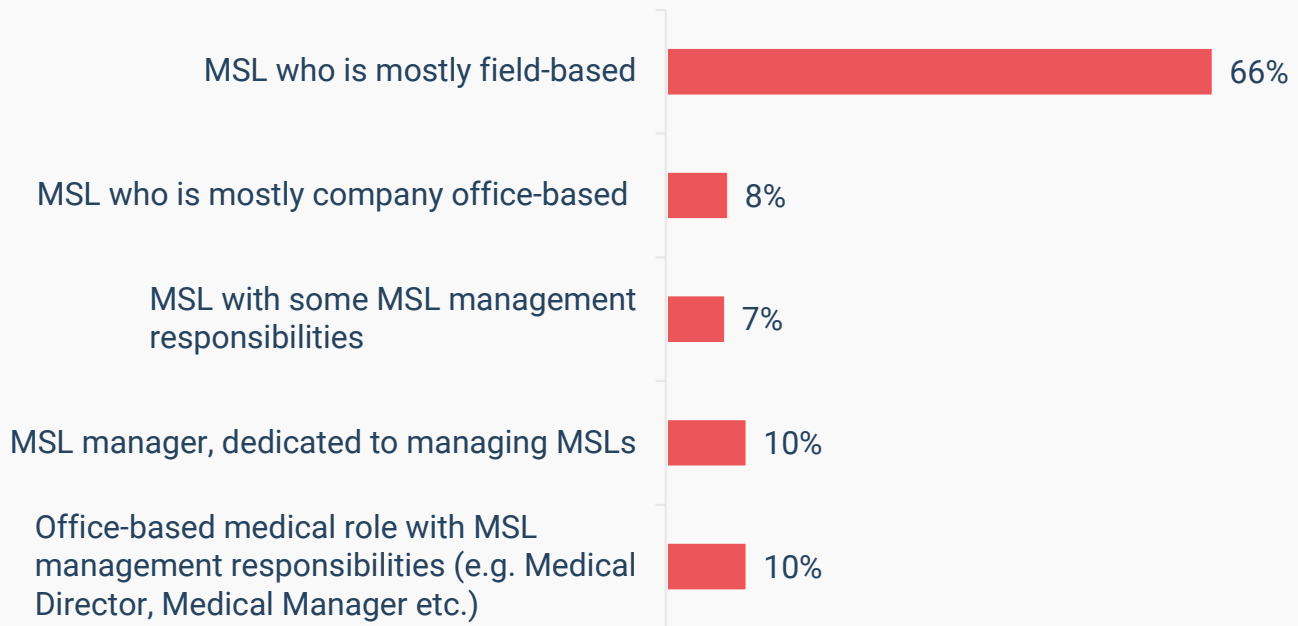
## Survey background

- Open from 9 January to 24 March 2023
- Open to MSLs, managers of MSLs and MSL leaders
- Respondents from over 59 countries, from Albania to Vietnam
- Data presented from up to 582 respondents
- 70 questions were asked, covering:
  - Background and role, including MSL journey to current role
  - MSL & MSL manager role experiences
  - Onboarding experience and opinions
  - External engagement measures and channels
  - MSL & MSL manager skills and training needs
  - MSL & MSL manager in-role challenges
  - MSL value demonstration
  - Development and career progression

## Survey participants were based in the following regions:

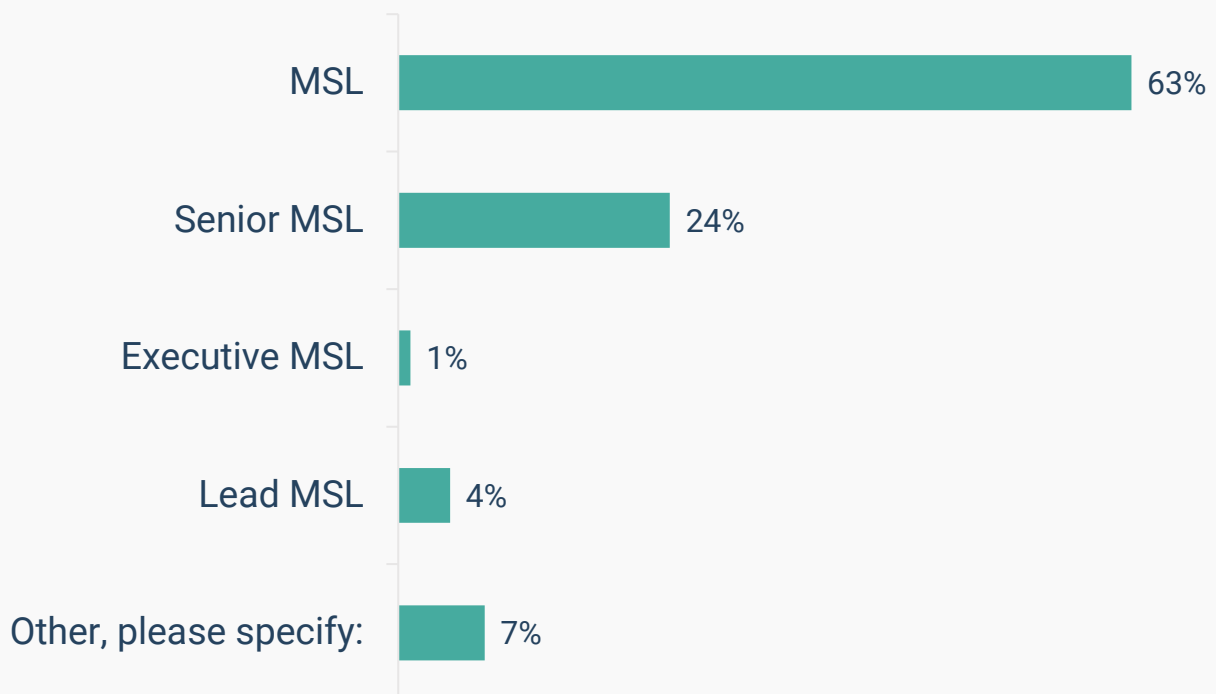


## Which of the following best describes your role?



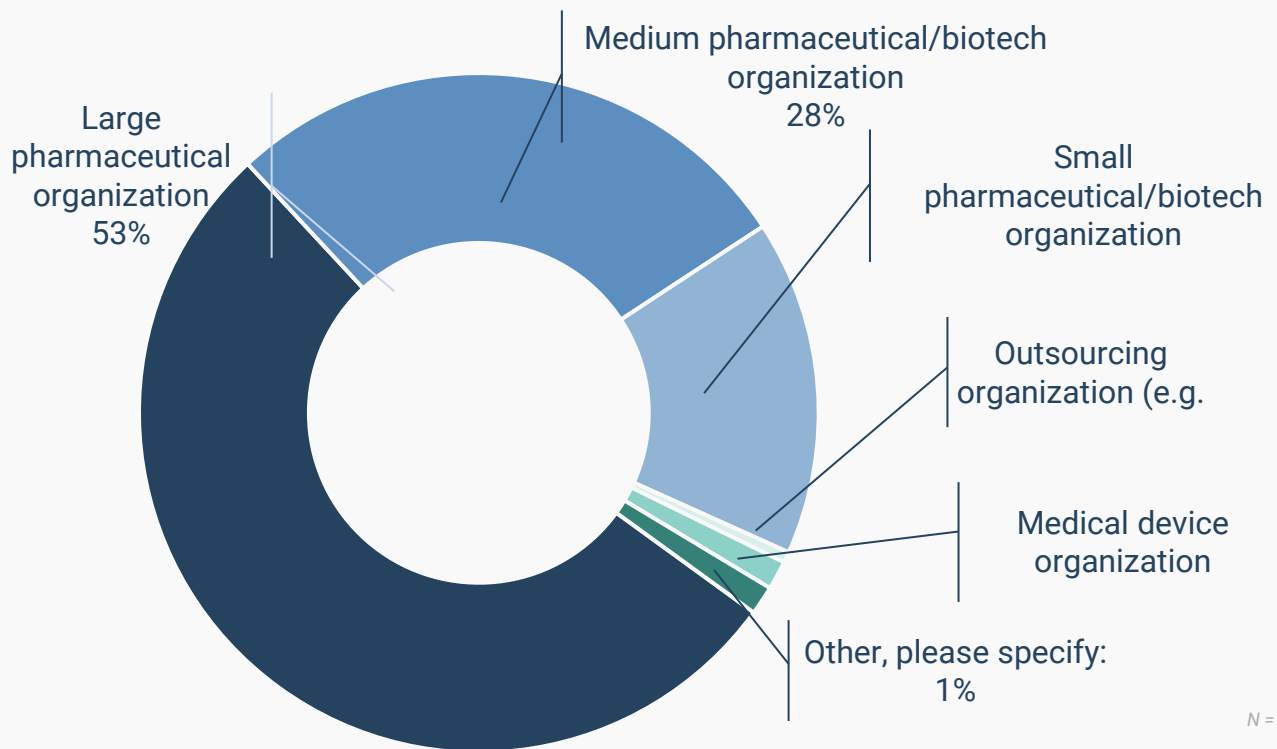
N = 582

## MSLs: Please select your role title



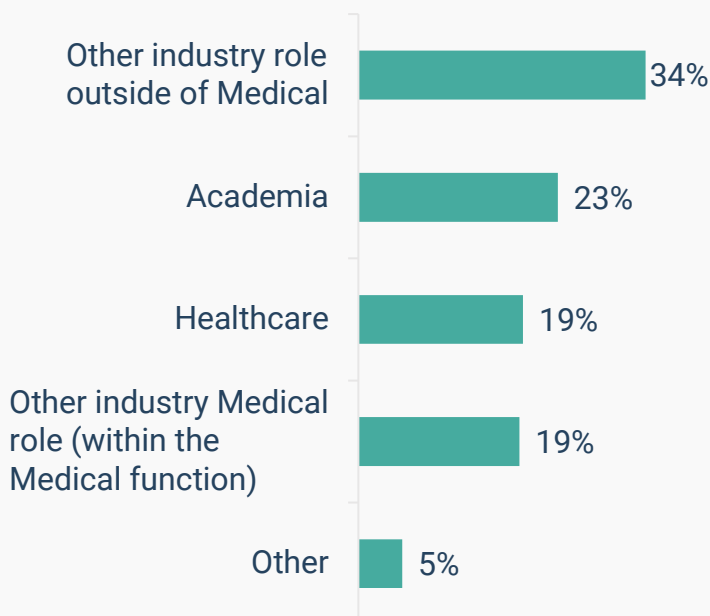
N = 468

## Which of the following best describes your organization?

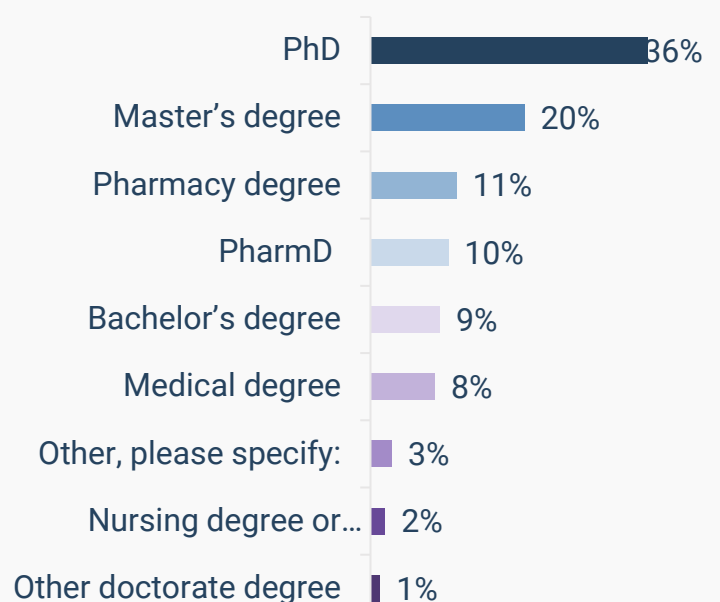


## MSL prior role and academic qualifications

### What was your role before you became a MSL?

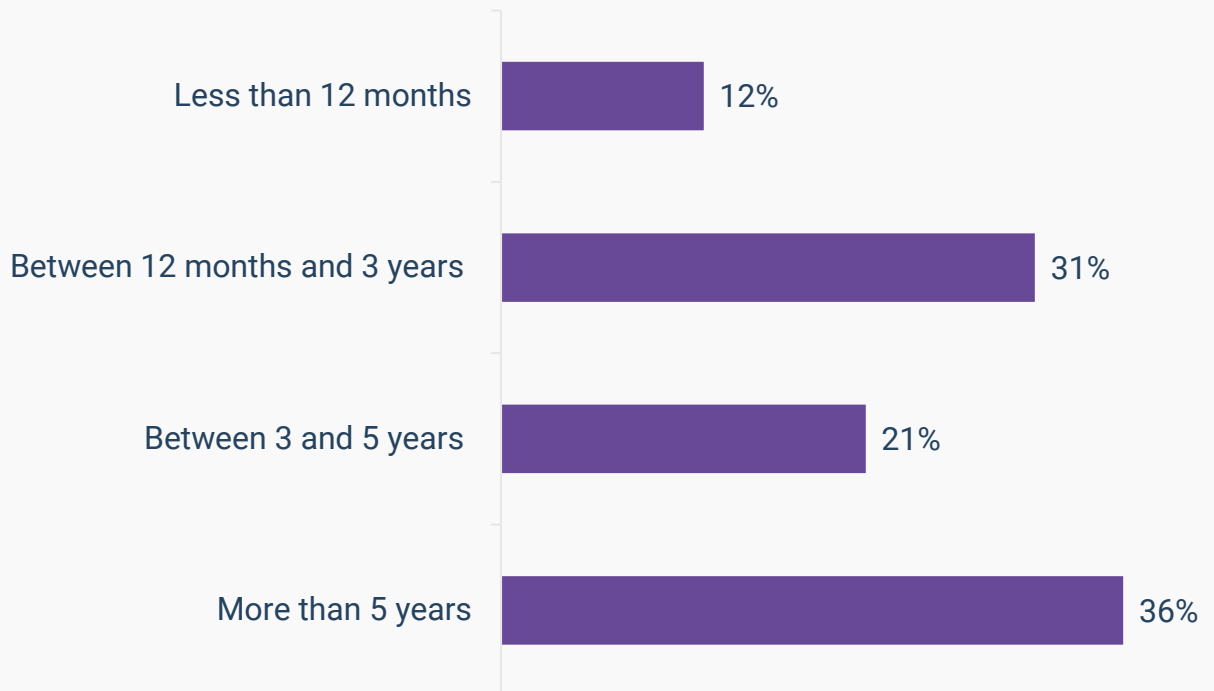


### What is your highest academic qualification?



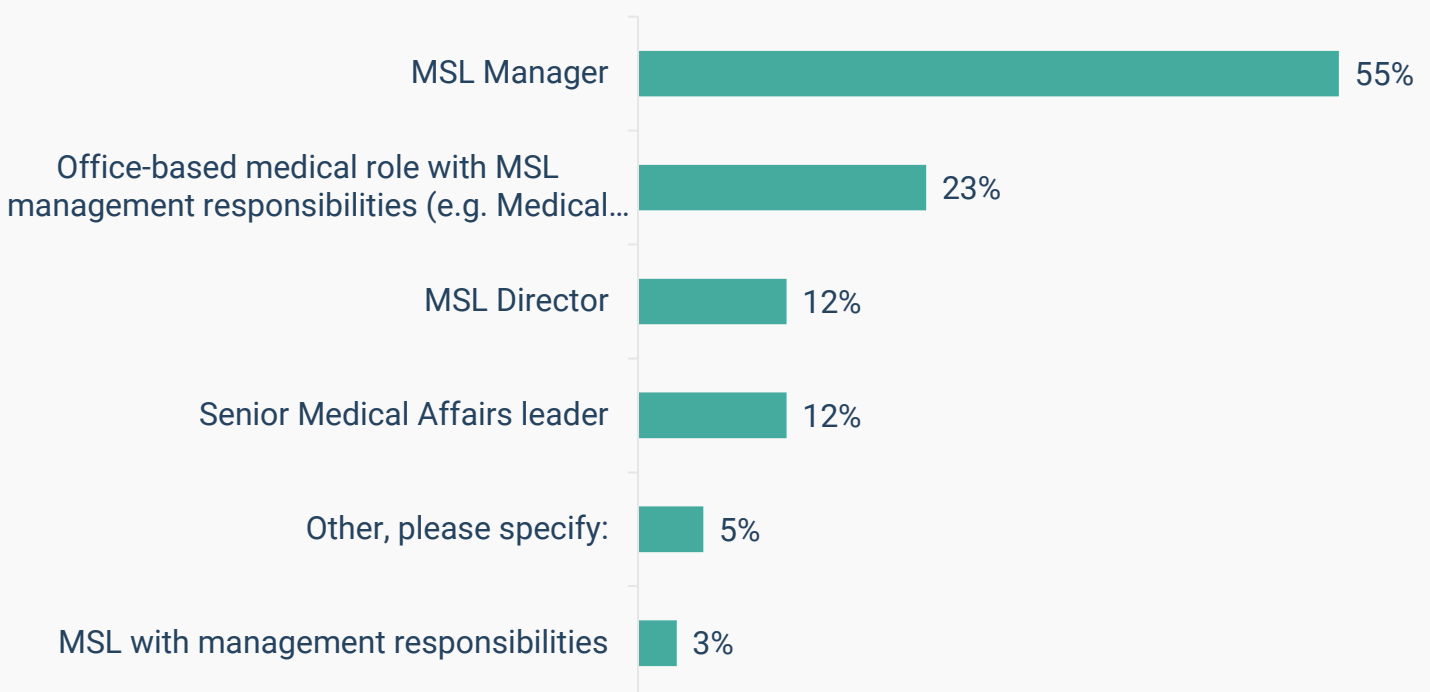
Left: N = 468 | Right: N = 468

## MSLs: Please select your total MSL experience (including your current role):



N = 468

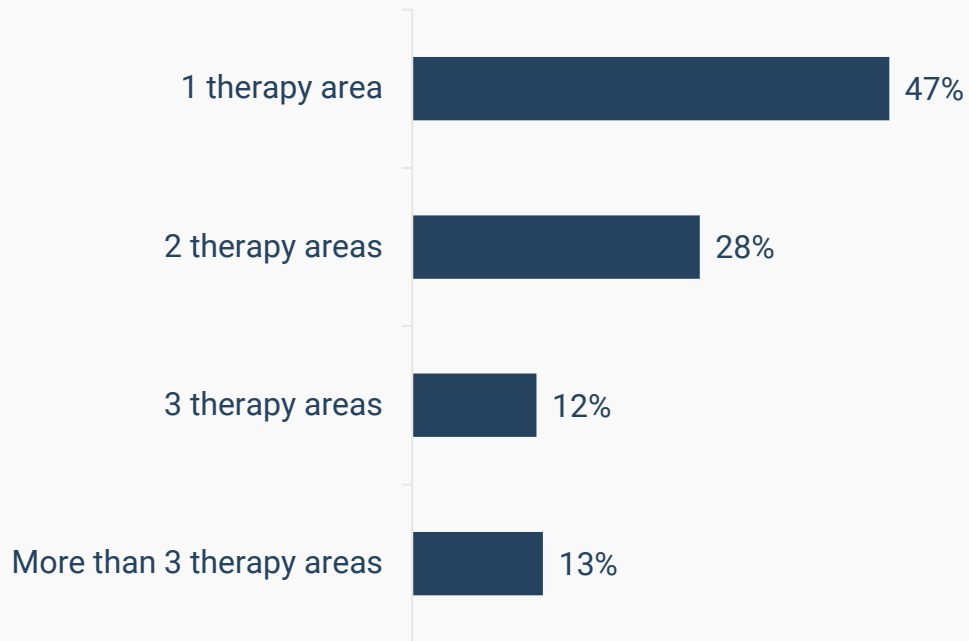
## MSLs: Who is your direct line manager?



N = 468

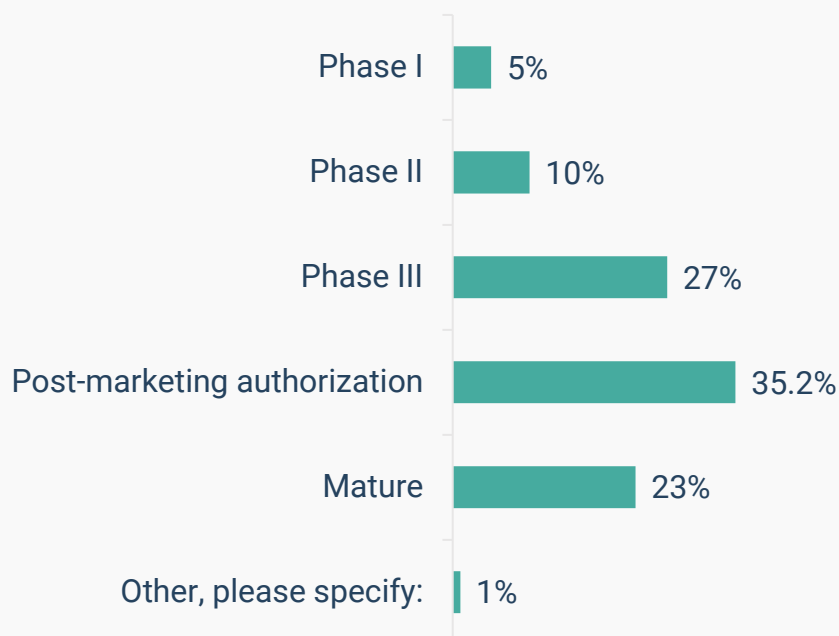
## In what areas and phases are MSLs operating?

### How many therapy areas do you cover?



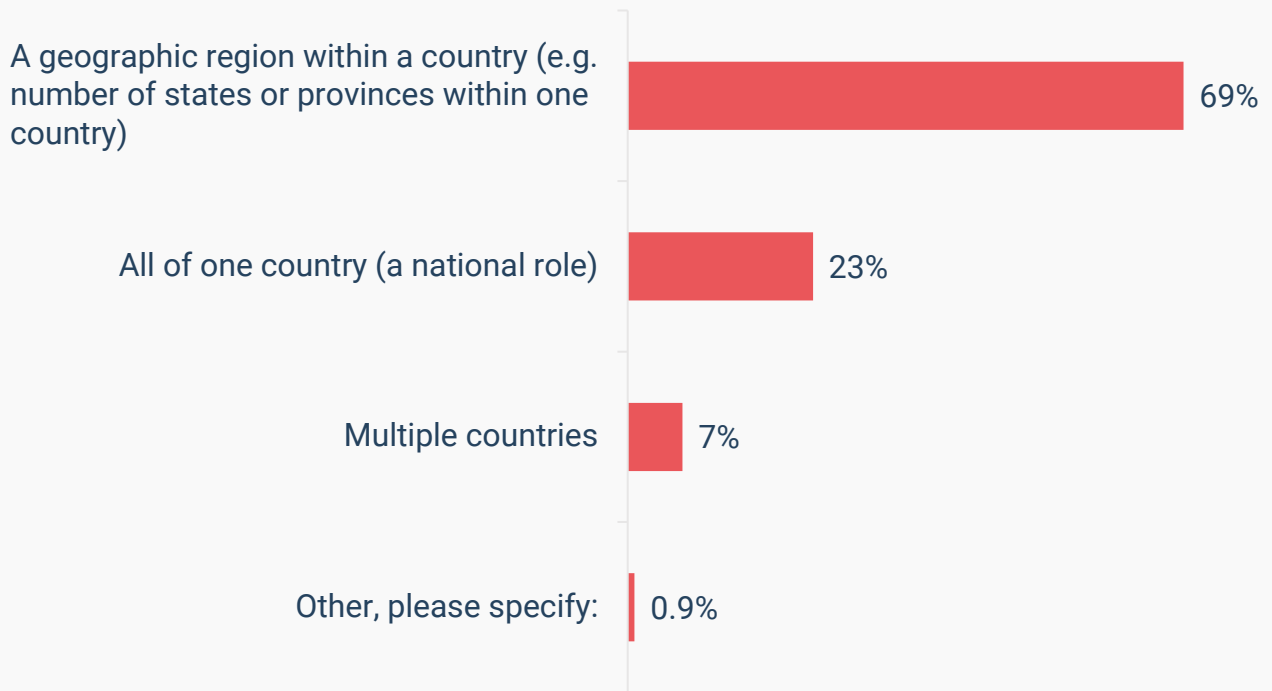
N = 468

### Where is your drug in the drug life cycle? (select all that apply)



N = 468

## MSL territory: Which of these does your role cover?



N = 468

## MSLs: What was the reason for leaving your last role?

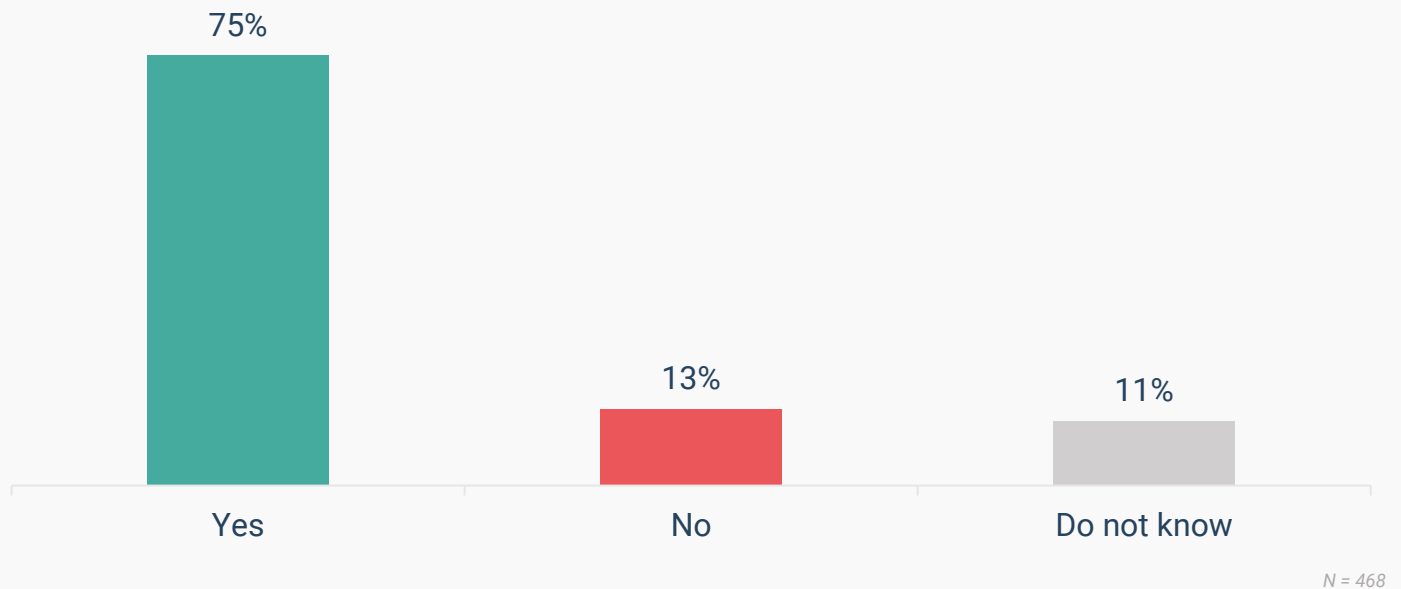


N = 452



## MSL competencies

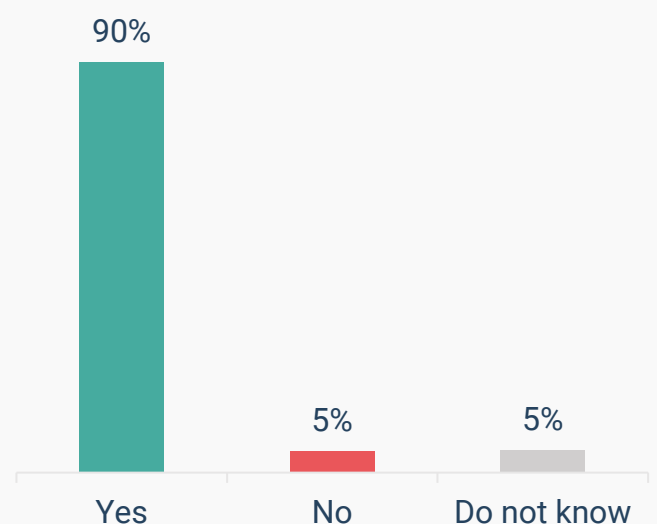
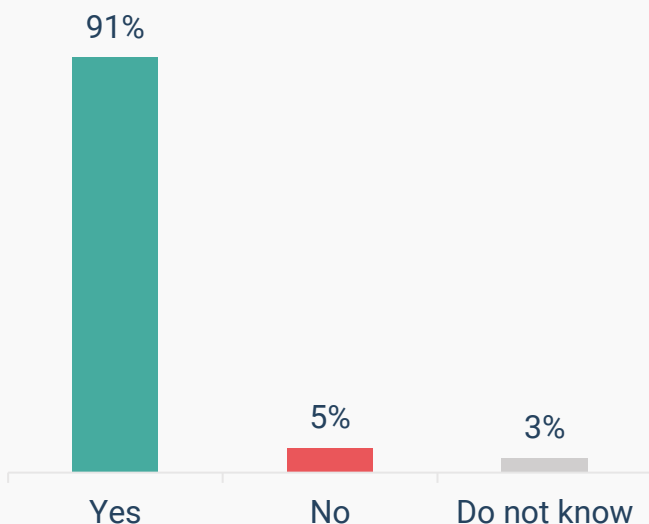
Is there a competency framework for the MSL at your organization?



## MSL value proposition

MSLs: Are you confident to communicate your MSL value proposition to internal colleagues?

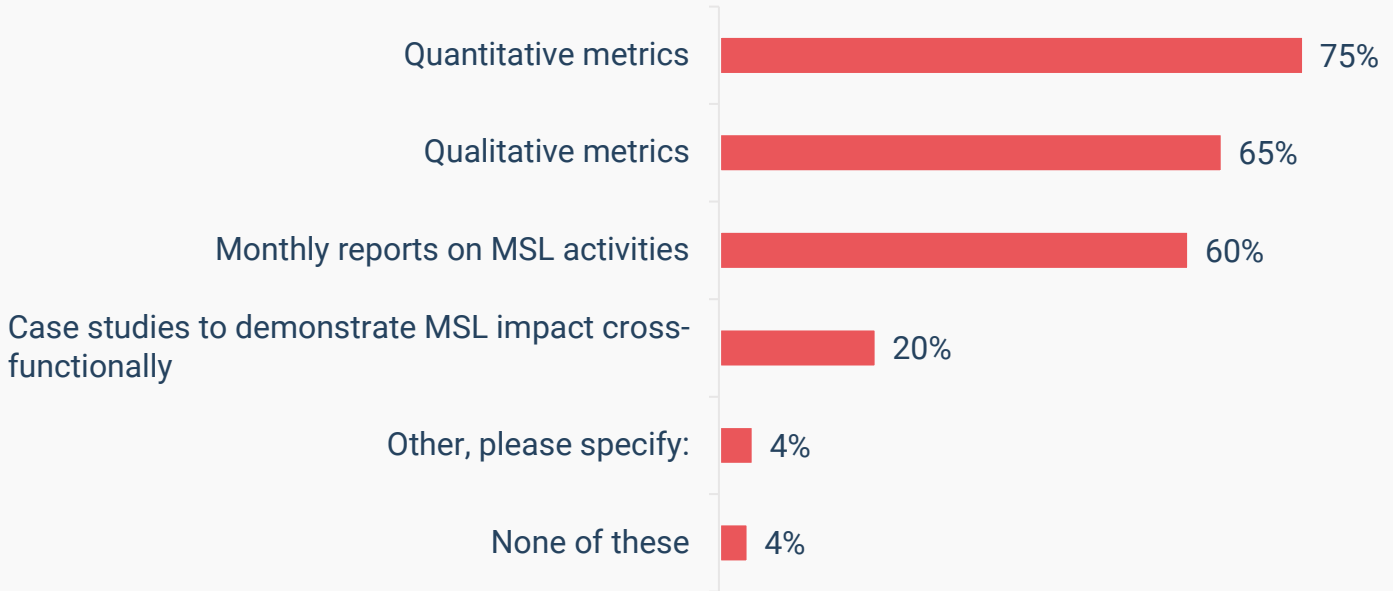
MSLs: Are you confident to communicate your MSL value proposition to external colleagues?



Left: N = 468 | Right: N = 568

MSL ROLE EXPERIENCES

# How is the value and impact of the MSL role measured within your organization? (select all that apply)

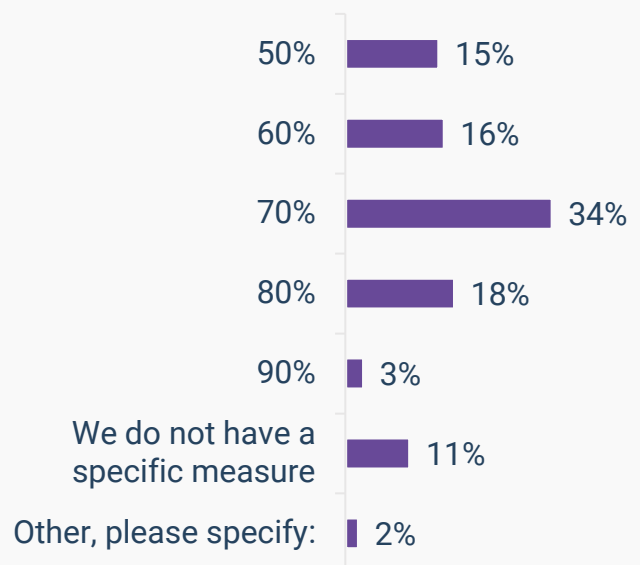
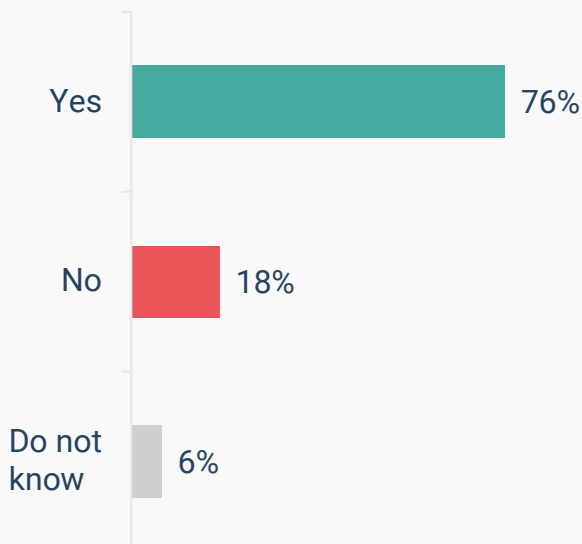


N = 582

## MSL external engagement expectations

Do you feel clear on the amount of time you are expected to be externally engaging as a MSL?

Please select the measure closest to the amount of time you are expected to engage externally:

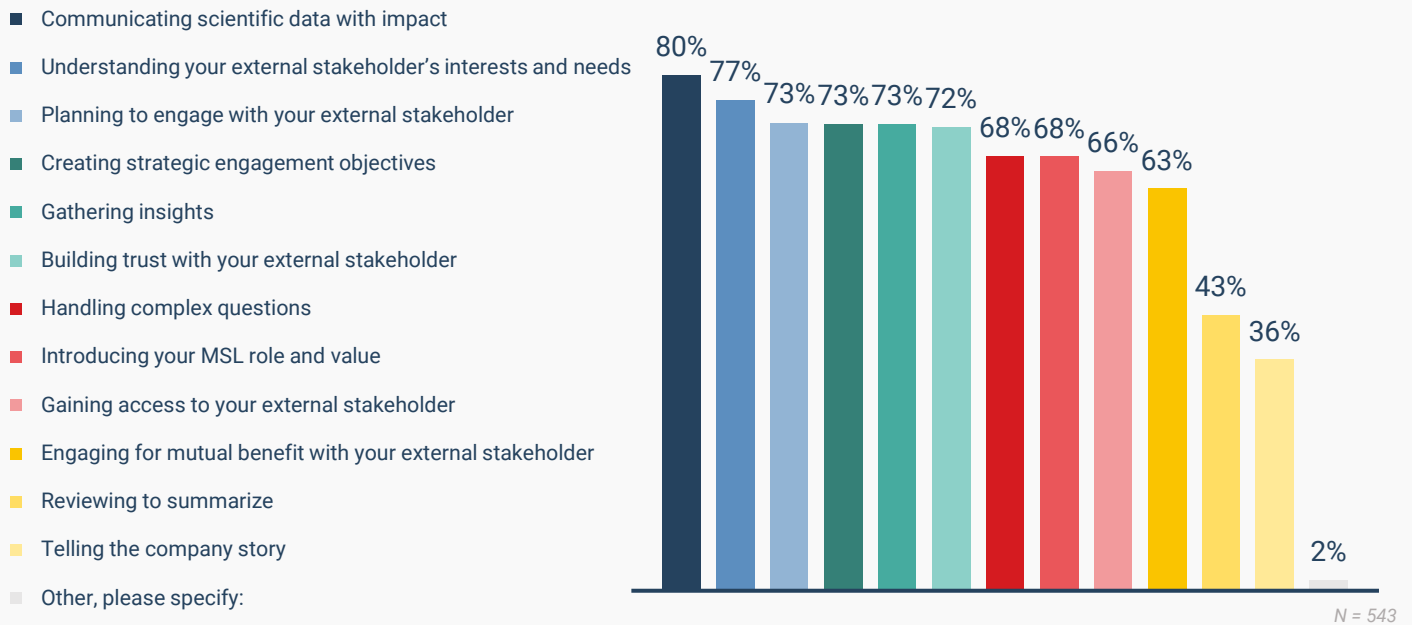


Left: N = 468 | Right: N = 355

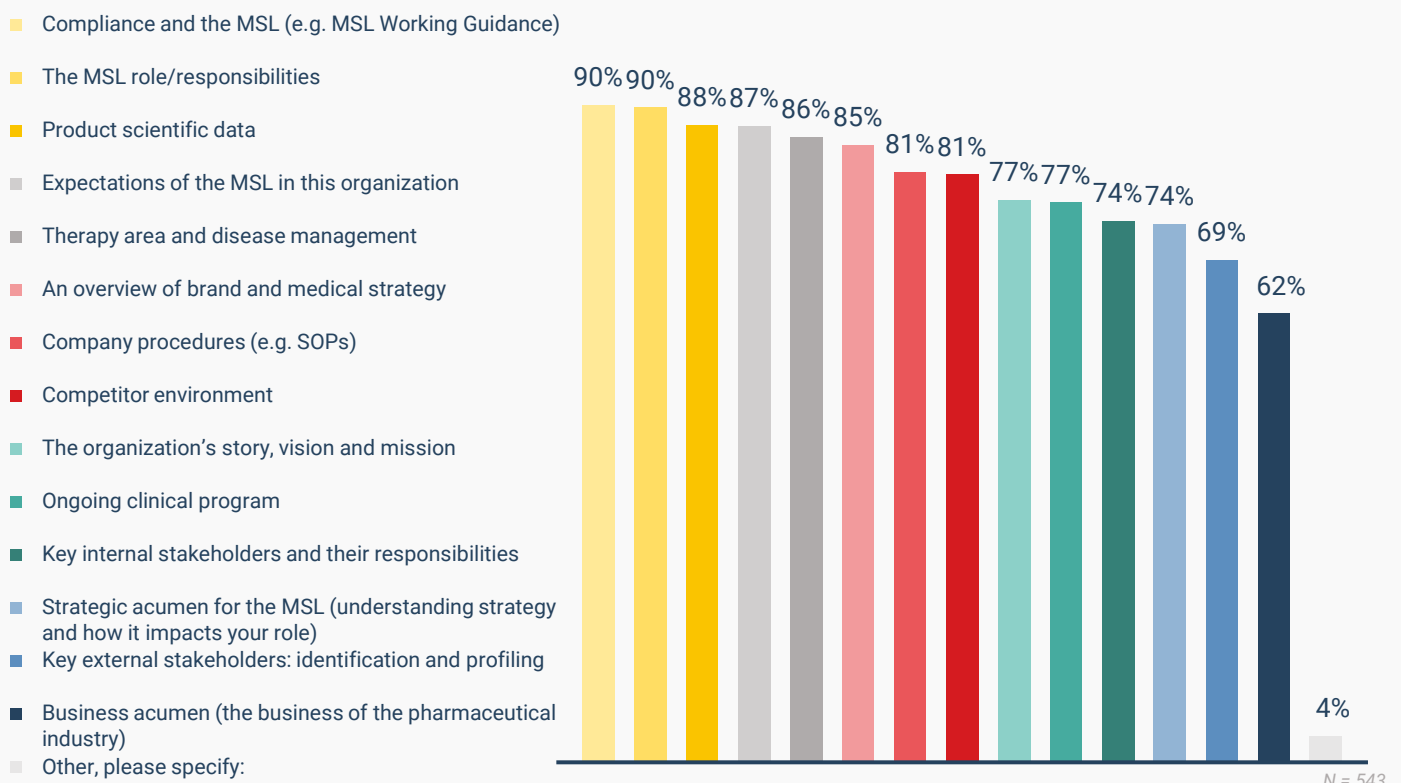


# MSL onboarding skills topics

Which of the following skills topics do you believe should be included as part of MSL onboarding?



Which of the following knowledge topics do you believe should be included as part of MSL onboarding?



## MSL onboarding period

How long was your onboarding period before you were live in-field?

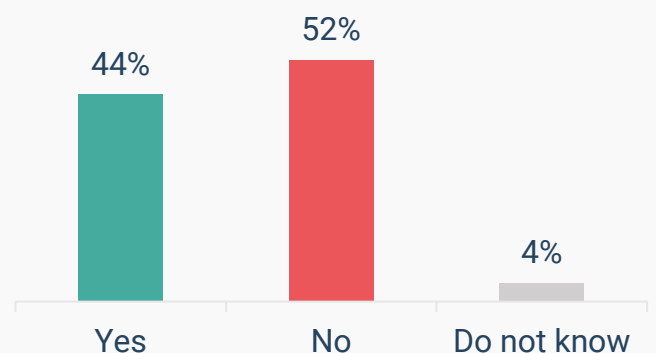
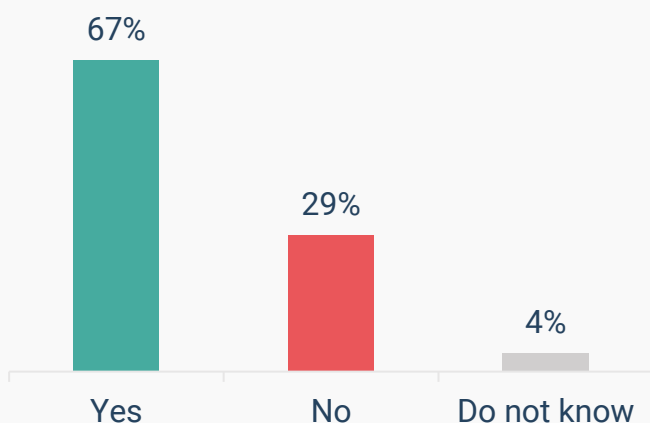


N = 433

## MSL post-onboarding review/assessment

Did you have a scientific knowledge review on completion of onboarding, before going live in-field?

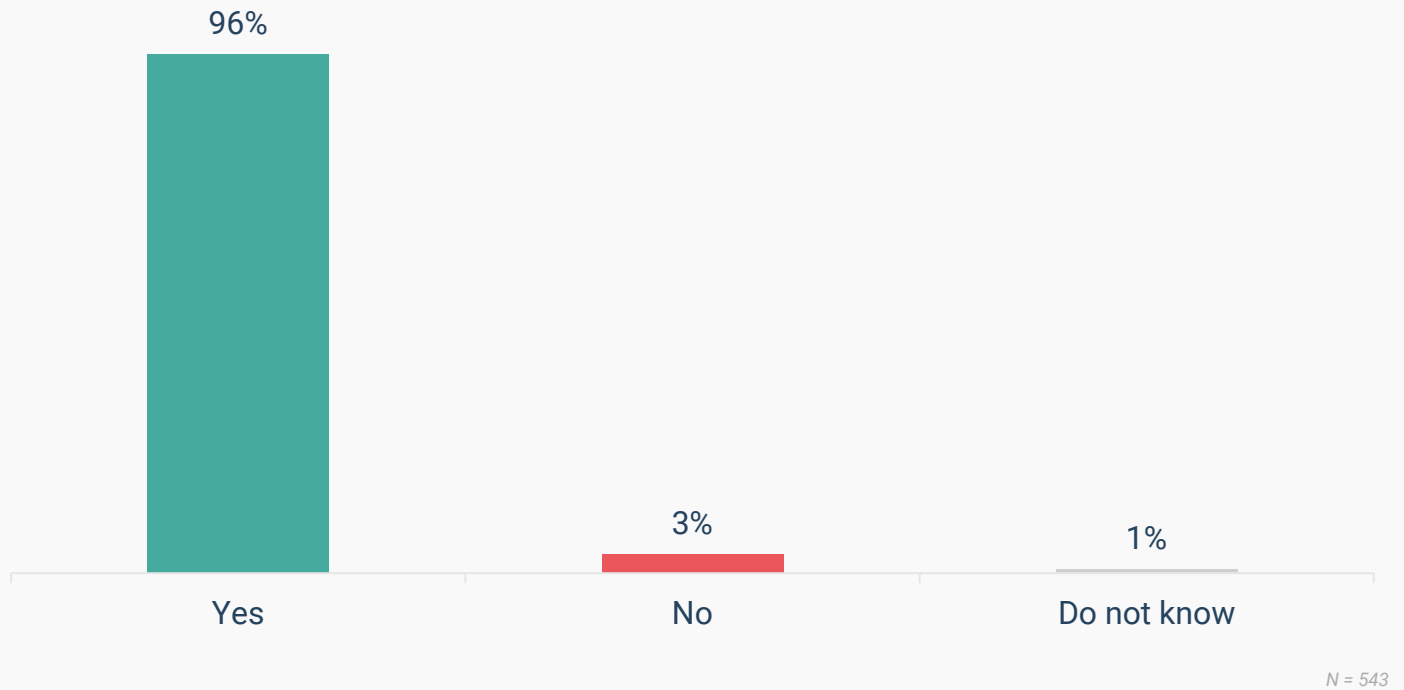
Did you have an engagement skills assessment on completion of onboarding, before going live in-field?



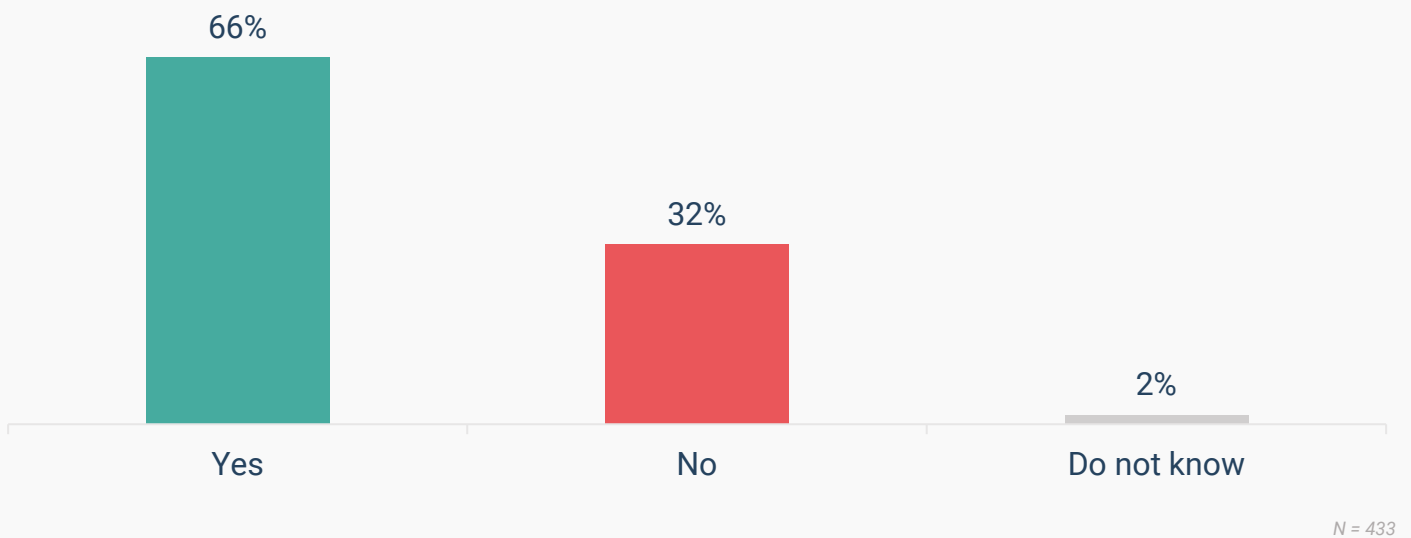
Left: N = 433 | Right: N = 433

## Onboarding support from mentor

Do you believe that MSL onboarding should be supported by a mentor/experienced colleague?

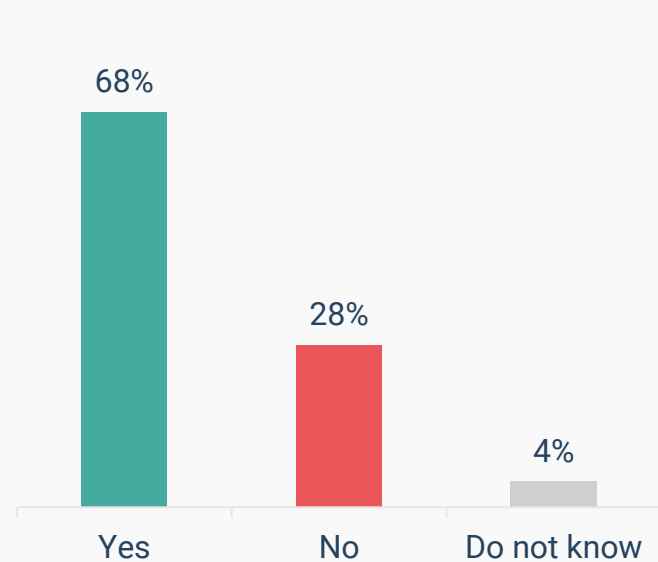


Did your onboarding include the support of a mentor/experienced colleague?



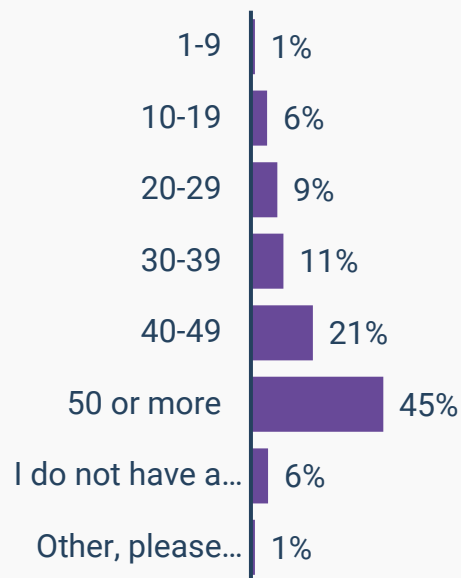
## MSL external engagement

Do you have a defined number of external stakeholders that you are expected to engage with in the conduct of your role?



What is the target number of external stakeholders you are expected to engage with in a 12-month period?

(answered if answered yes to question on left)



Left: N = 428 | Right: N = 290

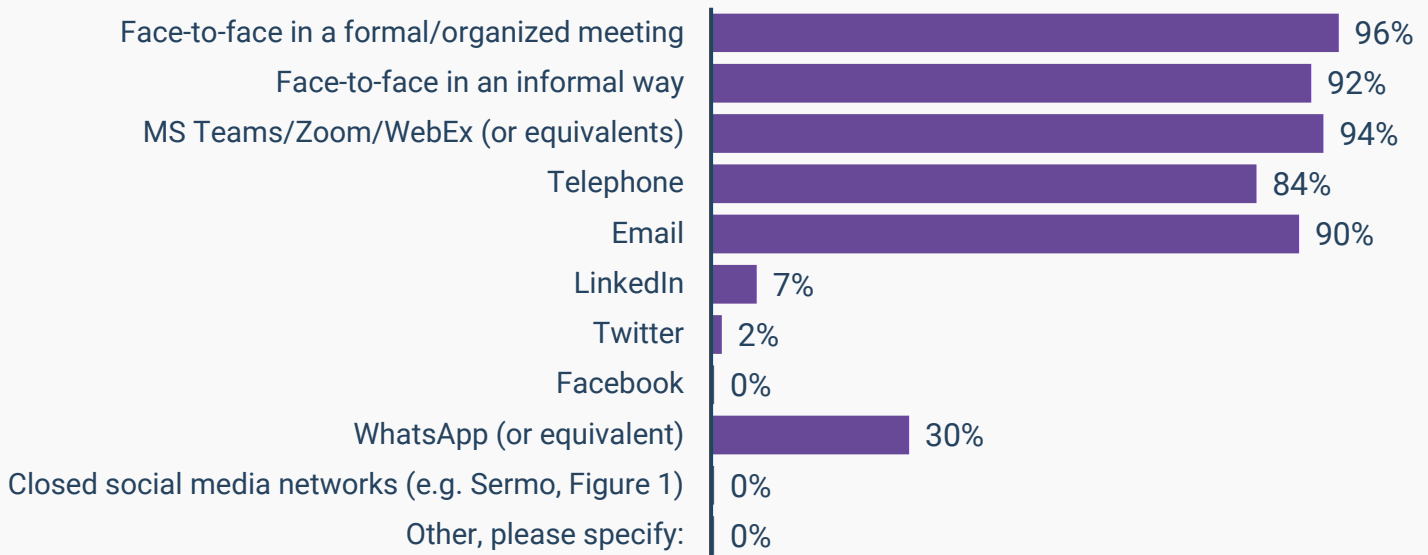
Which stakeholder groups do you engage with in your role? (select all that apply)



N= 418

## Channels of engagement

Over the last 12 months, which of the following channels have you used to engage with your key external stakeholders?



N = 428

## Channels of engagement by region

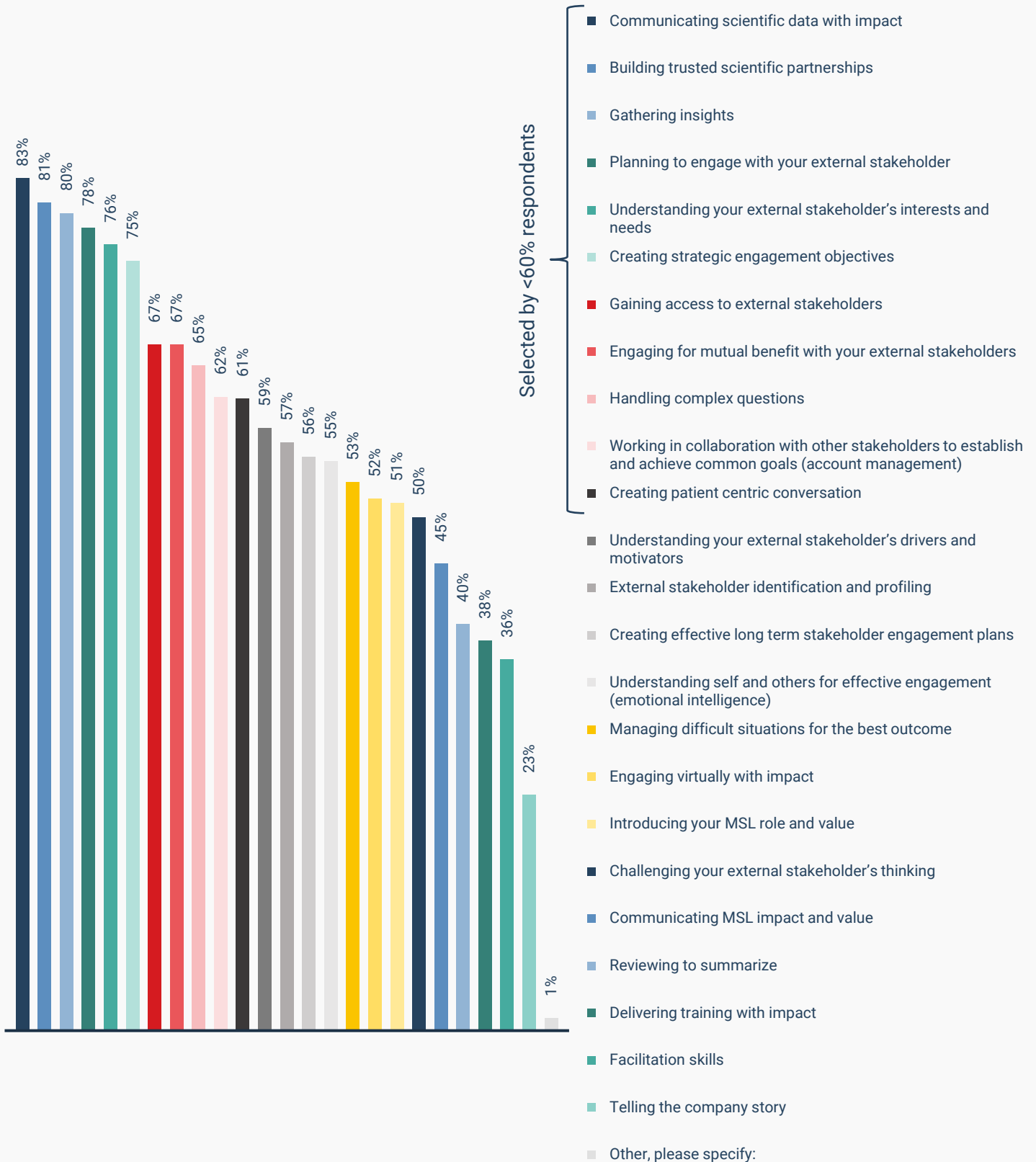
Channel	Asia & Oceania	Europe	LATAM	Middle East, Africa & Russia	USA & Canada
Face-to-face in a formal/organized meeting	91%	97%	100%	100%	96%
Face-to-face in an informal way (e.g. at conferences or congresses)	85%	94%	95%	83%	94%
MS Teams/Zoom/WebEx (or equivalents)	95%	96%	86%	75%	96%
Telephone	64%	90%	90%	88%	81%
Email	84%	94%	81%	79%	91%
LinkedIn	1%	7%	10%	8%	11%
Twitter	0%	2%	0%	4%	3%
Facebook	0%	1%	0%	0%	0%
WhatsApp (or equivalent)	11%	39%	71%	58%	1%
Closed social media networks (e.g. Sermo, Figure 1)	0%	0%	0%	0%	1%
Other, please specify:	1%	0.4%	0%	0%	0%

Asia & Oceania: N = 81 | Europe: N = 232 | LATAM: N = 21 | Middle East, Africa & Russia: N = 24 | US & Canada: N = 70



# MSL key skills

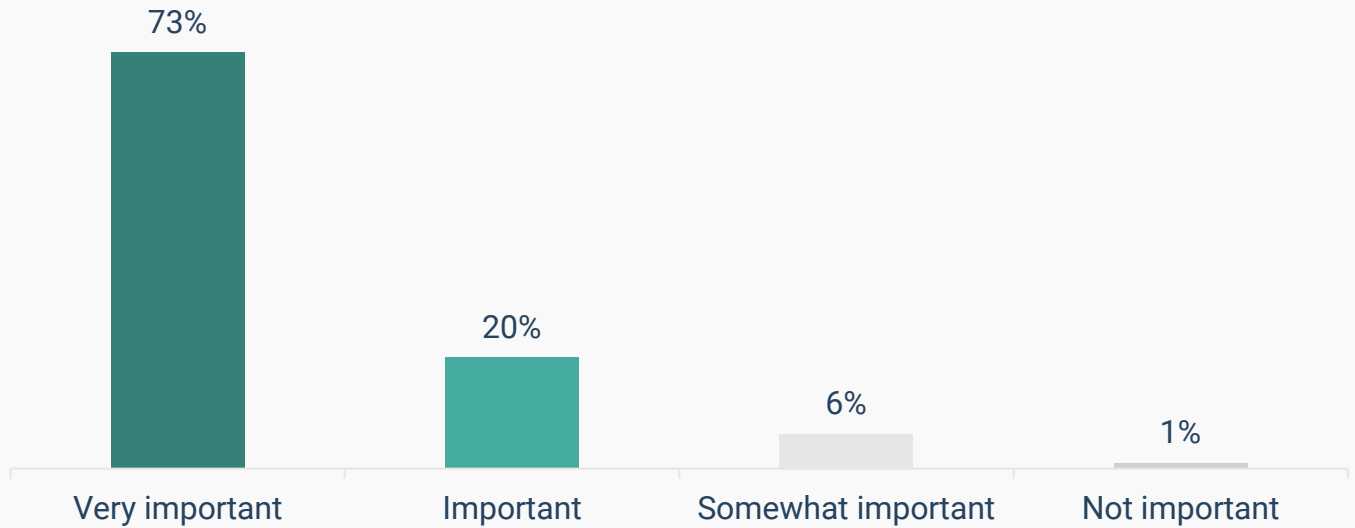
## Which skills do you believe are essential for the MSL?





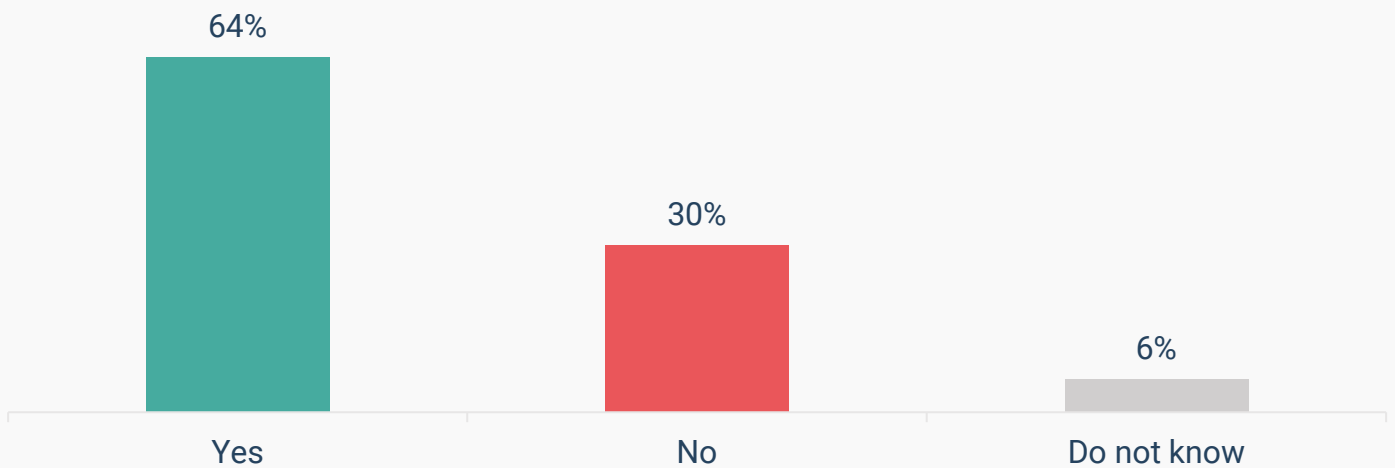
## Importance of and access to upskilling

How important is it to you that your organization invests in your professional development?



N = 389

Do you have access to MSL-specific training programs within your organization?



N = 389

## Top MSL in-role challenges

**MSLs: Are you currently facing any of the following challenges in your role?**

Challenge	Percentage
Lack of MSL career pathway	38%
Lack of MSL career opportunities	35%
The expectation to attend a high number of internal meetings	34%
Challenging relationships with cross-functional colleagues	33%
Gaining access to my relevant external stakeholders	31%
Time spent in online internal meetings	31%
Internal confusion between MSL and sales role	30%
Hard to prioritize a heavy workload	30%
Lack of opportunities for development	28%

N = 368

## Regional differences

(top three challenges selected by participants from each region)

### Asia & Oceania

Challenge	Percentage
Challenging relationships with cross-functional colleagues	30%
Lack of MSL career pathway	30%
Internal confusion between MSL and sales role	27%

### Europe

Challenge	Percentage
Lack of MSL career pathway	41%
The expectation to attend a high number of internal meetings	40%
Time spent in online internal meetings	40%

### LATAM

Challenge	Percentage
Lack of MSL career opportunities	56%
Lack of MSL career pathway	56%
Time away from home	56%

### Middle East, Africa & Russia

Challenge	Percentage
Internal confusion between MSL and sales role	43%
Challenging relationships with cross-functional colleagues	43%
Lack of MSL career opportunities	43%

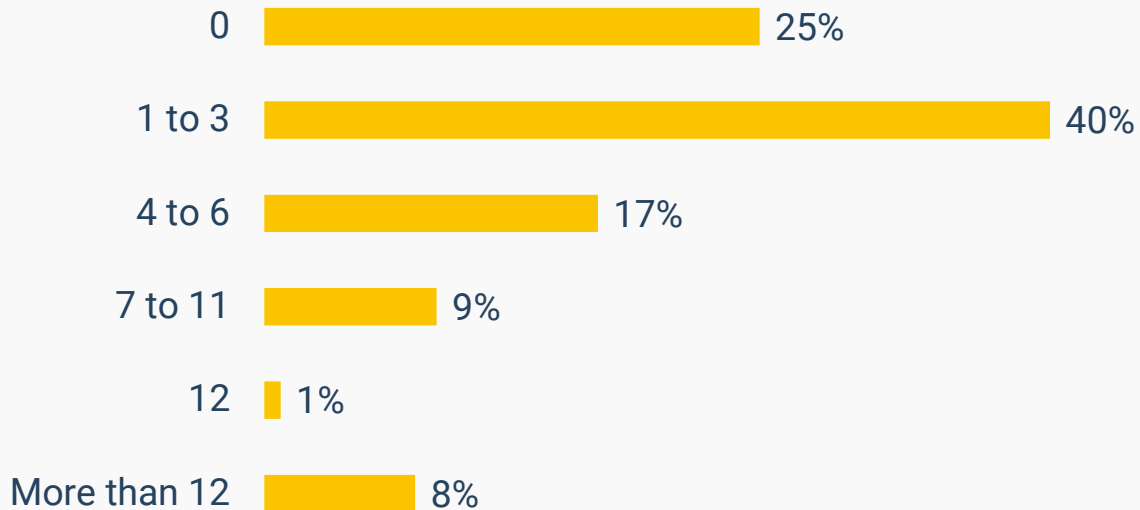
### USA & Canada

Challenge	Percentage
Gaining access to my relevant external stakeholders	44%
Lack of MSL career pathway	35%
Lack of MSL career opportunities	34%

Asia & Oceania: N = 71 | Europe: N = 196 | LATAM: N = 18  
| Middle East, Africa & Russia: N = 21 | US & Canada: N = 62

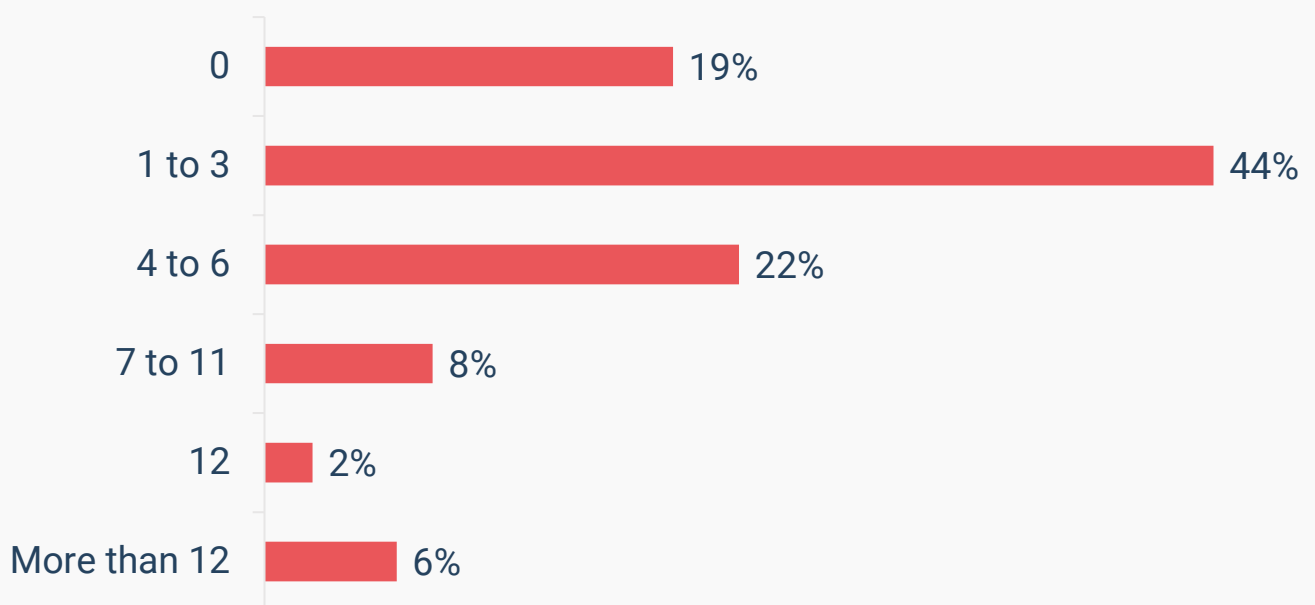
## In-role development

Please select the number of interactions you have had with external stakeholders that have been observed by your manager within the last 12 months (including virtual and face-to-face):



N = 363

Please select the number of coaching conversations you have had with your manager or a designated MSL coach within the last 12 months:

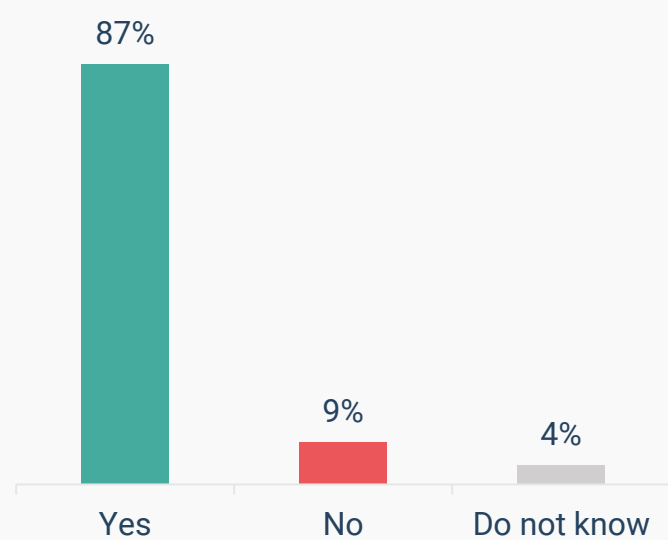


N = 363

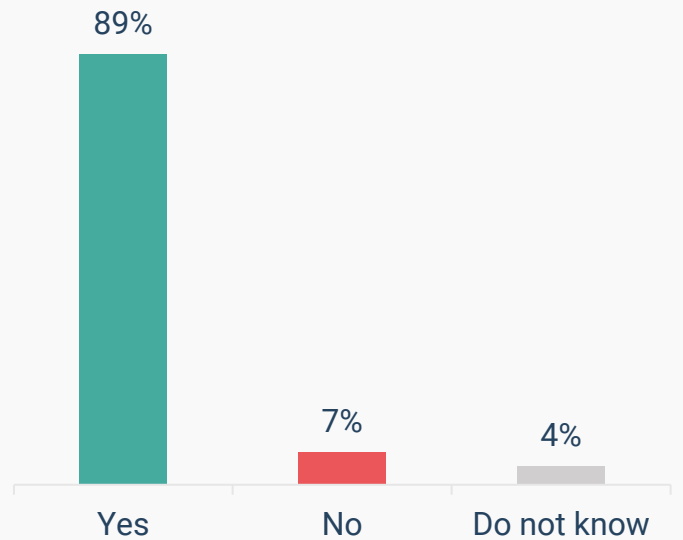
MSL DEVELOPMENT AND CAREER PROGRESSION

### Career pathway for MSLs

**MSLs: Is it important for you that there is a career pathway for the MSL at your organization?**

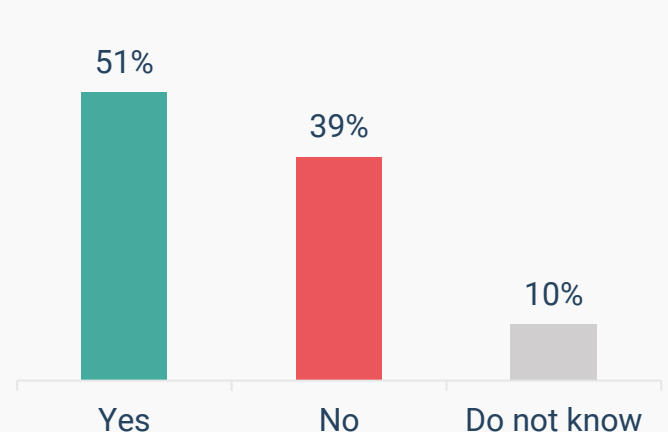


**MSLs: Is it important for you that there are opportunities for career progression outside of the MSL role within your organization?**

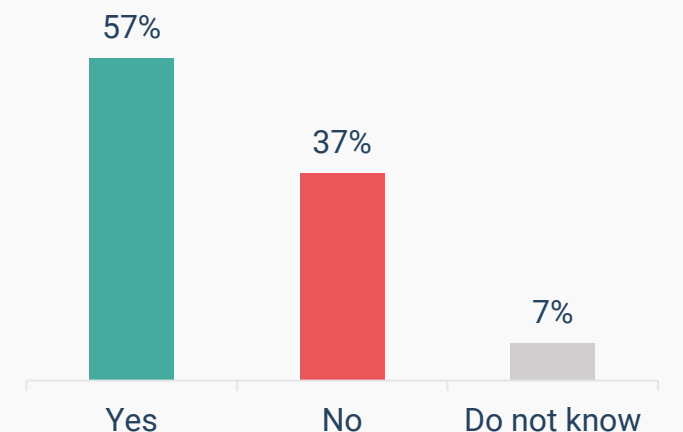


Left: N = 366 | Right: N = 366

**All: Is there a career pathway for the MSL at your organization?**



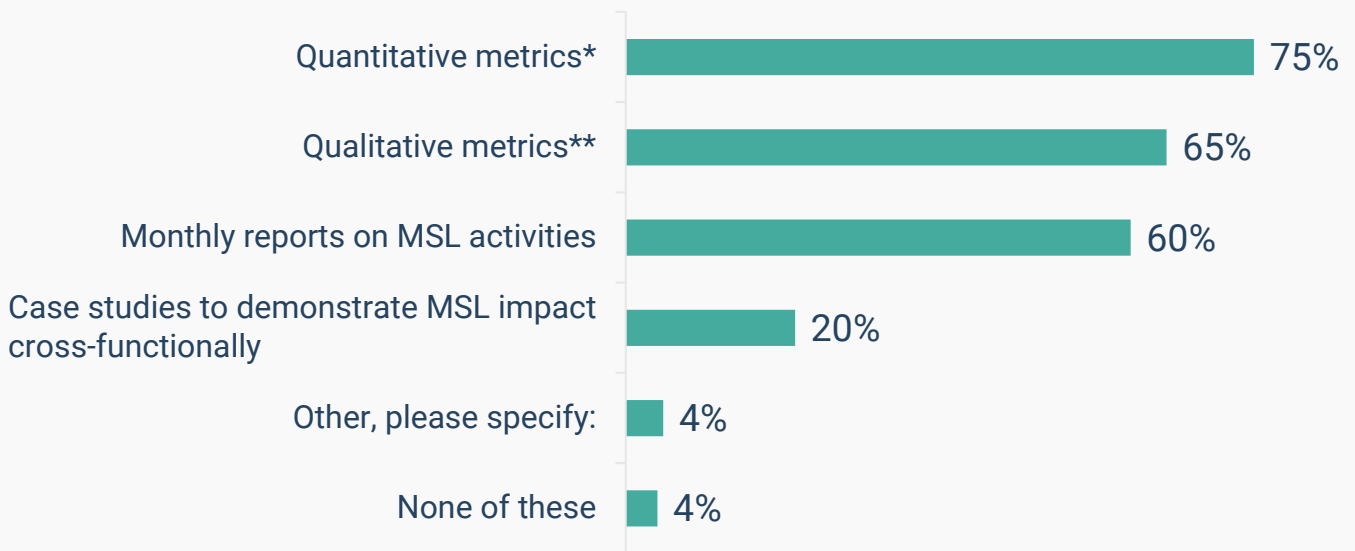
**MSLs: Are you aware of career opportunities for you in your current organization?**



Left: N = 457 | Right: N = 366

## MSL impact and value

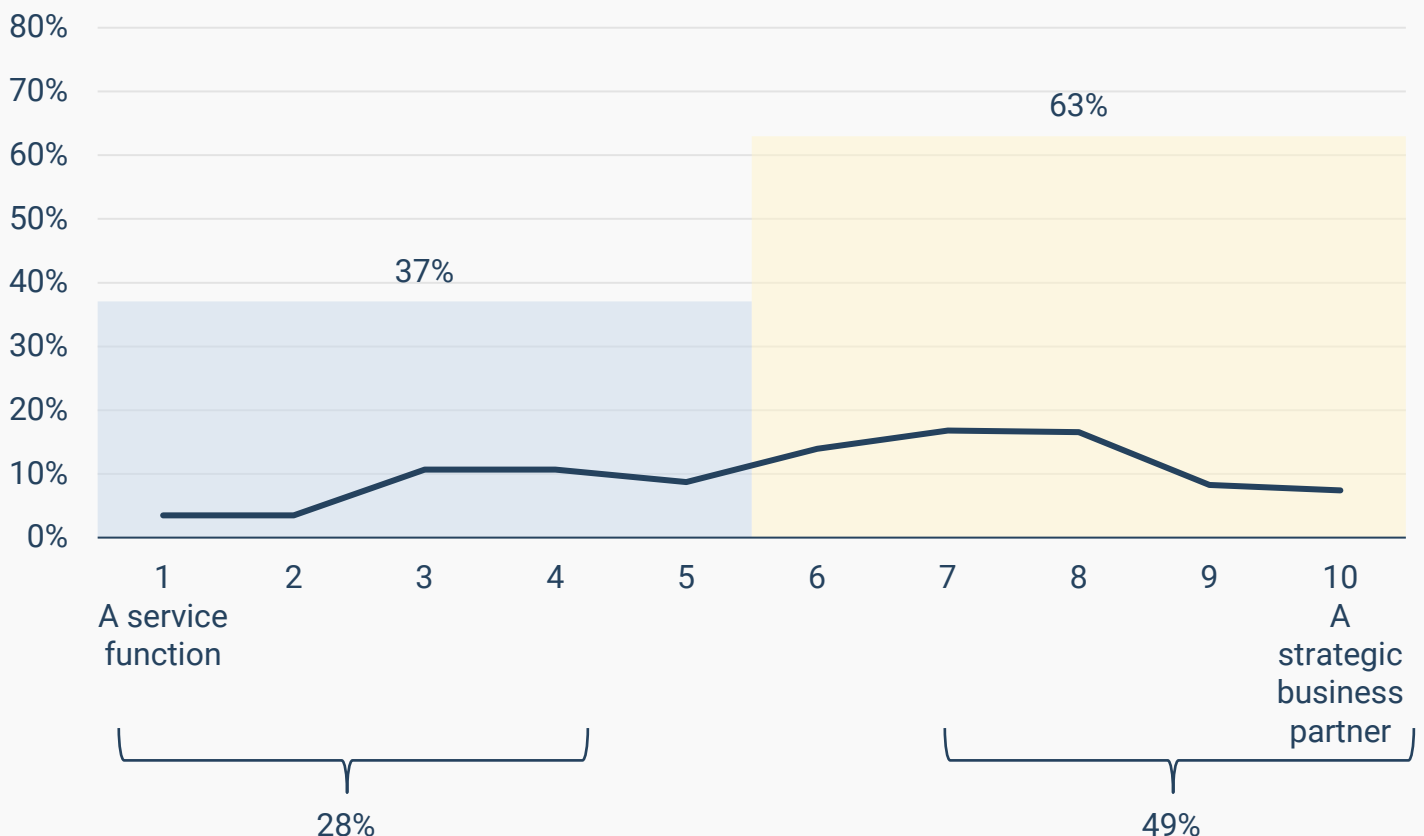
How is the value and impact of the MSL role measured within your organization?



\* (e.g. number of meetings, number of HCPs, length of meetings)  
 \*\* (e.g. HCP and colleague feedback)

N = 582

I believe that the MSL role in my organization is seen as:



N = 431



## Summary

These findings reflect the continuing evolution of the MSL role from a service function to a strategic business partner.

Our key takeaways from these findings include:

- More than half of MSLs surveyed are covering two or more therapeutic areas (page 7)
- MSLs are working earlier in the product life cycle than previous years' surveys have indicated (10% working at phase I versus less than 7% in previous years, page 7)
- MSLs were more likely to have a scientific knowledge review on completion of onboarding than an engagement skills assessment (page 12)
- Most respondents had a target number of external stakeholders they were expected to engage with in a 12-month period, and for over half this was 40+ stakeholders (page 14)
- Channels of engagement by region varied the most by use of WhatsApp (page 15)
- One of the most common challenges for MSLs is the lack of a career pathway and MSL career opportunities (particularly salient in the LATAM region, page 18), and an MSL career pathway was important for the majority of MSL respondents (page 20)
- Almost as many respondents reported that qualitative measures were used to demonstrate the value and impact of the MSL role, as those who reported that quantitative measures were used (page 21)

We are pleased to provide this findings report for free. If you have any questions about these data, please contact us.

**We hope these findings are of use to you.**



## About One MSL

Our annual survey findings enable us to better understand and address the needs of MSL and MSL Managers globally, both through our consultancy with our clients and our engagement with Medical Affairs professionals via the One MSL Community.

One MSL is proud to be recognised for our expertise, passion and authenticity.

Our team of selected industry experts have an in-depth understanding of the role of the MSL and MSL Manager, based upon our collective experience within Medical Affairs across global pharma and related industries.

We are passionate about upskilling MSLs and MSL Managers throughout their professional development journeys. For all of our team, our activities within Medical Affairs are in ultimate support of the patient.

If you are interested in finding out more about this year's survey or participating in our next annual survey, please contact us:

[contact@onemsl.com](mailto:contact@onemsl.com)



[www.onemsl.com](http://www.onemsl.com)



**Thank you for your  
interest in our survey  
findings!**



**ONEMSL**

THE GLOBAL STANDARD OF MSL EXCELLENCE

Email: [contact@onemsl.com](mailto:contact@onemsl.com)

Web: [www.onemsl.com](http://www.onemsl.com)