The Omnichannel Reality in the Pharmaceutical Industry

The role of voice of the customer research and analytics in driving omnichannel success

By Svetlana Gogolina, Neil Martin
& Xierong Liu – Healthcare

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During the pandemic, much effort was devoted to understanding and monitoring how customer behaviours and preferences evolved. Today, we no longer need to generate further evidence to support the unique value of in-person interactions or the need to "go omni".

Instead of simply assessing usage and proclivity across individual channels, the nature of omnichannel engagement demands a more sophisticated understanding of the intricate interactions: channels, channel combinations, content, occasions and touchpoints.

In order to drive omnichannel success, this article discusses the importance of embracing the omnichannel reality, examines how an HCP-centric framework can uncover a deep understanding of the customer journey and how meaningful measures bring clarity to omnichannel strategy and tactics.

1 Embracing the omnichannel reality

Customers are increasingly looking for **flexibility, simplicity and consistency** in pharmaceutical product and service information, **regardless of the channel they use.**

Accordingly, companies are investing in bringing together all channels into one easy-to-use communication platform – integrating voice, email, webchat, and other tools into one omnichannel contact centre software linked to CRM databases.

Technologies and platforms that provide tailored and individualised omnichannel approaches are developing fast. These systems can now collect and analyse large quantities of data. Marketing strategies can be adjusted and finessed based on real-time behavioural data on channel usage. Powerful algorithms have been developed that allow tech platforms to test and adjust the channel mix or communication at an individual level.

2 A framework for omnichannel success

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Successful **omnichannel strategies** will hinge upon a comprehensive understanding of customers – their **unmet needs, emotions, experiences**, **and drivers of behaviour**.

Despite the advances with technologies and ability to personalise content, marketing can still fall short of expectations if these are not addressing customers' unmet needs. Successful omnichannel strategies will hinge upon a comprehensive understanding of customers – their unmet needs, emotions, experiences, and drivers of behaviour.

A framework that appreciates context, demonstrates empathy, and shapes expectations is critical in nurturing customer interactions through omnichannel communications.

Ipsos market research framework for informing omnichannel strategies

Where is the customer in their engagement journey?

Which competitors are they already interacting with?

Understanding context

Shaping expectations

Acting with empathy
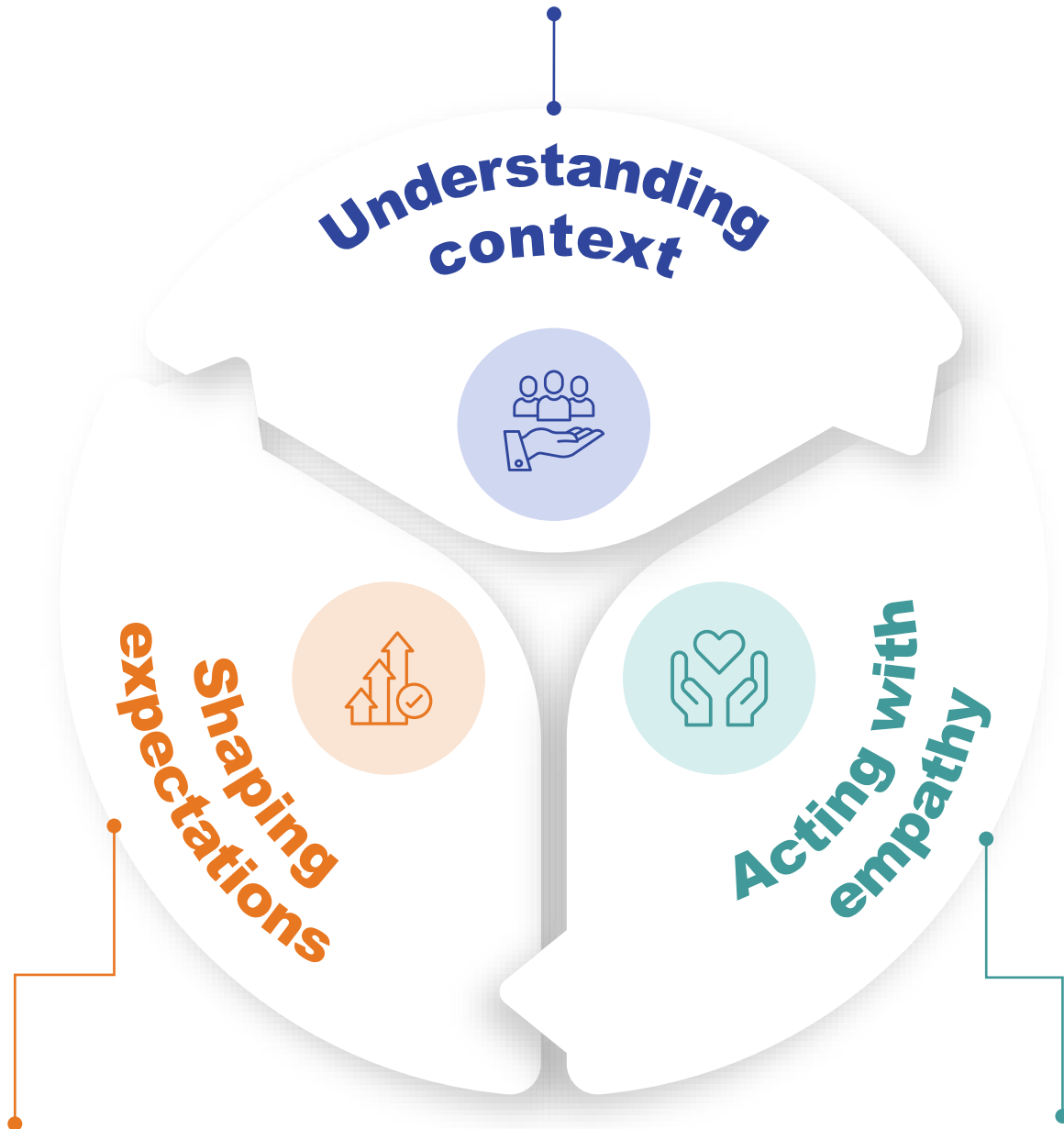
What are needs and expectations now, and how can these be shifted with differentiation and innovation?

What are the competing demands on their time and attention?

What support is needed?

What really matters to customers?

Understanding context

It is important to have a nuanced understanding of the context at each touchpoint in the customer journey. Customers' behaviours vary, and they may not have the same needs when performing different tasks in their professional life. A doctor may rely on one set of resources when collecting information on clinical trials for a new molecule in development but use an entirely different approach when looking for information to support decision-making for a specific patient's case.

Acting with empathy and shaping expectations

It goes without saying that, while delivering communications to customers, pharmaceutical companies must be respectful, supportive, and not compete for the doctors' time to the detriment of the job they do for their patients.

Additionally, customers are bombarded with communications from many different market players, healthcare providers and regulators. Increasingly, these organisations are developing their own omnichannel solutions.

How can pharmaceutical companies help customers to do their job more effectively and not start an omnichannel arms race for increased exposure? There is no simple answer to this challenge. Understanding the marketplace, competitive activities, customer expectations and what is truly important to customers would be a good first step.

In short, a well-designed omnichannel market research programme should be able to help with the following:

- Understanding context using customer journey mapping

- Providing guidance on how to act with empathy through a deep exploration of the customer experience that appreciates the diversity of needs among physicians. **More on this – on the following page.***

- Shaping expectations by co-creating with customers through creative facilitation techniques

Adding to the complexity, physicians are not a homogeneous group when it comes to omnichannel communication needs

A nuanced view of the target customers is often needed to develop an optimal omnichannel experience, as well as relevant targeting – to provide the right content through the right combination of channels, drive tailored customer engagement, and accelerate product uptake.

Traditionally, prior to launch, pharmaceutical companies have conducted market research to segment potential customers and identify target physicians, help decide which groups to prioritise with marketing and identify the type of communications best suited to them. In many cases, a company would also have its whole CRM database tagged with customer segment details. This has been a way to help sales reps tailor their conversations with HCPs.

In the new reality of omnichannel communications and even 'omnichannel reps', it is more important to conduct segmentations that accommodate channel-specific needs and attitudes as well as individual customer touchpoint journeys. The traditional approach needs reinvention to help in identifying customer segments that react in a similar way to certain content pushed through an omnichannel environment. When tagged to client databases, this would allow true precision targeting.

We are now seeing an increase in interest in channel segmentation across different therapy areas, brands, and specialities.

Find out more about our perspective on healthcare segmentation in our recent article, 'The Future of Healthcare Segmentation'.

3 Identifying meaningful measures for success

Constant monitoring and evaluation of the omnichannel customer experience presents a challenge for pharmaceutical marketers.

There is a need to sift through partial and often biased insights from various sources, such as omnichannel platforms, salesforce feedback and market performance data. There are currently several ways of monitoring performance:

Omnichannel platforms integrated with CRM systems, capturing channel usage behaviour

Feedback from the salesforce

Market sales performance data

Direct feedback from customers (voice of the customer data)

1

Omnichannel platforms linked to CRM systems are well-equipped to measure the real-time breadth and depth of engagement on specific channels via behavioural channel usage data. The volume and immediacy of this data mean they are a key source of information for marketers. However, CRM alone offers a partial view of the impact of the omnichannel activity. It provides us with behavioural data or channels used and frequency of usage, but not with an understanding of what drives the behaviour and what customer expectations look like.

2

Representatives from a company's salesforce may be able to glean some additional insight from meetings with HCPs. Still, this insight might not offer all the answers as reps are unlikely to have a full understanding of competitive activities and might lack objectivity. Sales reps' experience alone is not enough to guide the optimisation of engagement plans across channels.

3

Market performance data sources with prescription volumes could offer competitive context and measures of behavioural impact, but this too has known limitations as it is often not granular enough. Also, in a highly regulated market, the level of prescribing is not necessarily a direct reflection of customer engagement with omnichannel communications.

4

Direct feedback from customers (voice of the customer data) helps to measure softer KPIs, taking into account the context in which channels are used. This is crucial for evaluating the performance of the omnichannel strategy, and specifically:

- The role each channel plays as a source of information in HCPs' day-to-day activities and how this varies for different customer segments

- The impact of specific channels on the overall perception of interactions with a company

- How the omnichannel penetration and effectiveness compare to that of key competitors

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All data sources bring value and ideally should be used in combination with the direct voice of the customer data being the central data source. Additionally, companies must be careful to avoid the common pitfalls of voice of the customer research: these can often be over-engineered and far too expansive, creating huge amounts of data with very little insight.

To avoid this, companies must:

Ensure the design of the research is based on a deep understanding of the customer journey – this keeps the programme focussed on what is important to physicians and what will drive better engagement

Get the most from the data by leveraging advanced analytics – through analysing the dynamics between behaviour, preferences and impact on customer engagement, companies can more clearly pinpoint the perfect combination of channels and occasions needed

Choosing meaningful KPIs to monitor omnichannel effectiveness

The last step in ensuring success is about uncovering the KPIs which work for the organisation and brand. In the past, the industry typically relied on a set of simple measures like channel reach and channel importance as the basis for strategic decision-making. In a shift that accelerated during and after the pandemic, marketers have begun to move away from these simple measures of channel usage towards a holistic view to monitor performance and measure success.

Ultimately, the aim of pharmaceutical marketing and communications is to boost prescribing. This doesn't necessarily mean that share or volume of prescriptions is the best measure of omnichannel effectiveness. It is unlikely that exposure to communication, even with compelling content on relevant occasions, is the most important direct driver of sales volumes.

Omnichannel communication is an important tool for driving awareness, trust and loyalty in a company that markets brands to customers. Improving on these metrics, in turn, will support and augment sales. It makes sense that monitoring the success of marketing should focus on KPIs that most closely reflect the immediate objectives of the omnichannel strategy – rather than the final goal, which is further removed from marketing investments. In the shift towards being holistic, the focus is increasingly on engagement (instead of reach) with KPIs developed to measure and monitor the overall customer-company relationship and touchpoint experience (which goes beyond reach and frequency).

Finally, the omnichannel KPIs selected must be bespoke: they should be meaningful within the organisation, intuitive and easy to act upon. They must consider the competitive and market context – pharmaceutical companies that are launching into a new indication can capture these benchmark KPIs for existing players to understand what is expected in order to compete and areas where there is potential to differentiate.

Conclusion

To maintain an edge in this omnichannel reality, there are five essential steps to success:

- Start with a deep understanding of customer needs (context, empathy, expectations)

- Ensure the customer journey mapping considers the diverse needs and experiences of physicians

- Develop a programme to monitor direct customer feedback (i.e. voice of the customer research) to stay close to what's working and what's not

- Leverage advanced analytics to transform data into insight that ultimately informs the delivery of better customer engagement

- Exercise care with selecting your omnichannel engagement KPIs – these must be bespoke and meaningful across the organisation

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Contact Us

Svetlana.Gogolina@ipsos.com

Chief Research Officer, Healthcare

Neil.Martin@ipsos.com

Director of Data Science and Advanced Analytics, Healthcare

Xierong.Liu@ipsos.com

Senior Director, Healthcare (UK)

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