



Global marketing excellence: Getting personalization right

Tailoring content globally and locally to clearly segment customers

By Jennifer Curtis, Jay Lichtenstein, Jeff Moore and Bianca Lawson



Impact where it matters.®

Clarify responsibilities as marketing evolves

With omnichannel strategies now a necessity for any pharma organization, marketing is becoming more customer centric and data driven. This raises questions about how global marketing should evolve, how we should define marketing responsibilities, and what marketing excellence looks like in the future.

Global marketers already face questions as they move further down the path of omnichannel engagement and digitalization, namely: Who is responsible for developing an omnichannel touchpoint journey? How do we develop a globally and locally relevant approach to content personalization? Who should own the customer segmentation, and will customer segmentation get us closer to delivering the personalized experience expected in today's age of digital and AI-driven engagement?

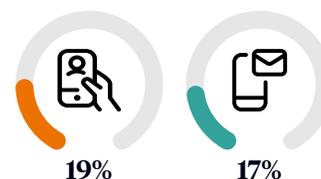
Data is critical to personalized strategy

At ZS, we define marketing as an integrated set of strategic choices that tell a distinctive, agile and future focused story over defined periods of time. These stories connect customer facts and insights to actionable tactics, which create value by driving change to meet customer needs.

The way pharma approaches strategic marketing is moving toward a dynamic, data-driven future of customer engagement. With offices and doors closed to reps, and congresses going online, COVID-19 accelerated the digitization of customer experiences.

Most healthcare professionals (HCPs) expect to use online resources as much as or more than they did during the pandemic, according to ZS research. About half of HCPs believe their frequency of rep interactions will remain as they are now rather than increase.

Despite the gravitation towards digital, recent ZS research shows that only 19% of HCPs in France, Germany, Italy, Spain and the United Kingdom are satisfied with the virtual details they receive and only 17% with emails.





Content relevance to the customer’s interest, not the brand, is a key driver of customer satisfaction. Generic content may have been sufficient when personalization was driven through face-to-face rep interactions, but in the future, digital and AI-driven engagement will require content personalization to engage customers.

Getting personalization right requires using data in a meaningful, decision-driven way to tailor to digital and content preferences. Data is abundant but the ability to interpret it to understand what customers do and why—and how to translate that into actionable marketing insights—will become the new normal. We are closer than ever to realizing this vision of marketing excellence.

But first, there are several fundamental questions pharma organizations must answer, including, who is responsible for:

- Defining the marketing strategy and campaigns
- Customer touchpoint mapping, or the interactions and touchpoints that guide the customer experience and the engagement plan
- Managing the interactions that connect the actual customer experience to the desired one
- Translating data into actionable insights that deliver an enhanced customer experience

These are the questions that global pharma organizations try to answer as they face increased budget pressures and reduced headcount while trying to generate engagement.

As our research demonstrates, the answers vary depending on organizational structure, specifically the level of centralization versus decentralization in decision-making.

Considerations for today's global and local marketing landscape

To better understand the current role of global versus local marketing in global pharma brand management, including omnichannel strategy and execution, ZS looked at marketing organizational structures across mid-to-large companies.

As expected, lifecycle management and pre-launch brand strategy were consistently within the remit of the global marketing organization due to the need for a centralized global strategy for resource efficiency. However, there was more variability across global marketer remit and responsibility post-launch versus local. Regional marketing functions varied across organizations; mid-to-large sized companies tended to have a centralized regional role and smaller companies did not.

Three predominant structures emerged post-launch, based on levels of centralization or decentralization. Each structure offers varying advantages, provided there is proper management, clear accountability and anticipation of potential challenges. Regional marketing functions are determined by organizational size and scope.

There was more variability in role definition of global versus local marketing functions, whereas the role of regional marketers was more consistently defined as an enabler of global strategy collaborating with local country marketing teams to support campaign implementation.



Centralized



Blended



Decentralized

Role of global marketing	Drives global strategy and planning and guides implementation with local country teams	Drives global strategy and partners with prioritized countries to localize and implement it	Drives global brand strategy and collaborates with local country teams to implement it
<i>Role of regional marketing – variable where it exists</i>	<i>Regional marketing function usually exists in mid-to-large global organizations in a coordinator role to support local country implementation of global strategy. Support with execution when there is need to scale capability or activity across countries.</i>		
Role of local country marketing	Supports local implementation of globally driven marketing campaigns	Role varies – Large-revenue countries partner with global teams. Countries with smaller revenue drive local implementation	Drives translation of global strategy into locally relevant marketing campaign
Relevant context/situations	Limited in-country resources and desire for efficient coordination	Varying resource levels across geographies	Greater resources in countries and lower need for cross-country coordination
	Concentrated expertise	Significant differences in capability across regions	Strong disease and market expertise locally
	Significant pipeline and lifecycle opportunities	Can vary in pipeline strength and lifecycle mix	Often mature portfolios and brands or more limited pipelines
	Helpful in highly “globalized and specialized” therapy areas	May result from compromises rather than intentional design	May result from historically autonomous cultures

Organizational archetypes defined

	Centralized	Blended	Decentralized
	<p>In highly centralized models, global teams' leaders of strategy development are critical in supporting regions and local efforts. The benefits of this model are clear: greater global strategic consistency, economies of scale and more streamlined collection and communication of learnings and best practices.</p>	<p>Between the continuum of highly centralized and decentralized pharma models are a spectrum of blended models. These models vary significantly but often result as companies seek to balance the benefits and challenges of decentralization.</p>	<p>Decentralized models bring the advantage of local customization, which is critical to healthcare personalization. In highly decentralized models, local teams take the lead, allowing for larger investments in specific customer experience programs and approaches. The challenge for decentralized organizations in the digital era will be the cost and complexity to shift to a seamlessly digital model.</p>
Benefits	<ul style="list-style-type: none"> • Greater strategic consistency worldwide • Economies of scale • Streamlined collection and communication of best practices • High degree of strategic consistency across markets 	<ul style="list-style-type: none"> • Balances need for global coordination with desire for local autonomy • Enables strategic consistency in most important markets 	<ul style="list-style-type: none"> • High level of localization • Fosters culture of local team empowerment • Decision-making lies with those closest to the customer
Challenges	<ul style="list-style-type: none"> • Requires discipline around close global-to-local collaboration • Can create challenges when local situations diverge resulting in disconnected local and global priorities 	<ul style="list-style-type: none"> • Multiple layers between global teams and non-priority countries create communication and strategy consistency challenges 	<ul style="list-style-type: none"> • Requires high levels of affiliate resourcing • Can make it challenging to implement a consistent brand strategy worldwide

DEFINITION SIDEBAR

Centralized | In highly centralized models, global teams' leaders of strategy development are critical in supporting regions and local efforts. The benefits of this model are clear: greater global strategic consistency, economies of scale and more streamlined collection and communication of learnings and best-practices.

Blended | Between the continuum of highly centralized and decentralized pharma models are a spectrum of blended models. These models vary significantly but often result as companies seek to balance the benefits and challenges of decentralization.

Decentralized | Decentralized models bring the advantage of local customization, which is critical to healthcare personalization. In highly decentralized models, local teams take the lead, allowing for larger investments in specific customer experience programs and approaches. The challenge for decentralized organizations in the digital era will be the cost and complexity to shift to a seamlessly digital model.



POSITIONING CENTRALIZED PHARMA ORGANIZATIONS

While centralized models appeal to worldwide pharma organizations, particularly for companies with specialized, globally driven therapeutic focuses, healthcare is locally oriented. Its shift toward both marketing personalization and systems engagement present challenges. Pharma will need to be able to deliver locally relevant and highly personalized customer experiences.

Localization challenges are often exacerbated by a global team's location. For example, U.S.-based global teams tend to focus on U.S. strategy. This can leave EU teams to feel that a global strategy is less globally suitable, and vice versa for EU-based global teams. Both U.S. and EU-based global teams tend to build strategies that are less applicable for Japan and China and may either push a potentially less applicable strategy or open some flexibility for local deviation.

Despite localization challenges, data-driven digital engagement brings significant infrastructure requirements. Centralized pharma organizations will be better positioned to reap the benefits of economies of scale in this department, which is critical to organizational integration and agility.



POSITIONING DECENTRALIZED PHARMA ORGANIZATIONS

Decentralized models require high resourcing in affiliates and can lead to inefficiencies as they are left to their own resources to manage major market variations, such as shifts to digital and personalization. Under these circumstances, affiliates will be looking for more guidance from global teams, challenging their local autonomy. While this will likely create some challenges, decentralized pharma organizations can react more nimbly to market shifts, and more quickly integrate feedback and insights to shape the customer experience closer to real-time.



THE BLENDED ORGANIZATIONAL ARCHETYPE

Blended archetypes enable global teams to ensure strategic consistency, at least in the most important markets. Under a blended model, global pharma organizations can balance the need for global coordination with local autonomy to deliver on particular healthcare needs. Key strategic issues such as positioning, evidence strategy and lifecycle management are globally driven, while others, including segmentation and communications, are locally executed.

Blended archetypes typically hinge on moderately resourced region headquarters to provide support to non-priority markets. Priority markets are often highly resourced at the affiliate level and work closely with support from global leadership.



Future predictions for global and local marketing

Within the next five years, pharmaceutical marketing will shift to personalized, relevant and meaningful campaigns that engage customers. Personalizing these campaigns will require pharma companies to focus on the customer and to deeply understand their learning styles, unmet needs, communication preferences and levels of digital savviness.

Global pharma companies will need to map the customer experience across touchpoints with a much higher degree of customization than they've been used to. For each touchpoint, campaigns must deliver content tailored to customer preferences. Rapid and integrated insight-driven feedback loops will also challenge the relatively static nature of global strategy. Immediate actions resulting in these feedback loops will likely be more tactical, but more frequent and consistent feedback signals will create the desire for more agile shifts in strategy.

These changes have significant implications for both global and local marketers that require a clear understanding of who is owning strategy and campaign content development, and who handles refinement and feedback loops to inform strategy and campaign decisions. It will also require significant investment in infrastructure, resources and upskilling marketers.

The future of marketing requires a blended organization archetype

Back to the description of the organizational archetypes: Organizational decision-making will need to better incorporate the blended archetype strategy, which maximizes efficiencies and centralized-model infrastructure. It also hinges on those closest to the customer driving campaigns, as seen in decentralized models.

For centralized organizations, inconsistencies in data regulation and the desire to provide local markets with greater autonomy will drive decentralization. Decentralized organizations will need to ensure consistency in global brand positioning and core campaign content while maximizing efficiencies of scale in data and technology. This will help leaders to derive meaningful insights to inform their marketing strategies.

In this model, global teams will continue to own the strategy and develop campaigns. They will develop feedback loop infrastructure while regional and local marketers execute campaigns. Global leadership will likely remain the owner for setting the overall strategy, initial launch campaigns, core messaging concepts and infrastructure to support feedback integration and activation.

Global leaders must also become more involved in content creation. Personalizing content for different customer segments at varied stages in the adoption journey will drive greater demand for content, but, from a capacity perspective, such content will be challenging for local teams to manage. Leaders must leverage economies of scale as global teams develop content libraries for local teams.

Post-launch, campaign execution and management ownership will shift to the local affiliates who are closer to the customer and better positioned to personalize the customer experience. Affiliate roles will become increasingly important as the main decision-making tool in how to adapt and customise campaigns, reducing duplication seen at the global and regional levels.

The role of regional marketer will evolve from coordinator and facilitator of global strategy to become problem solvers. They will activate the network to learn and foster innovation. Regional marketers may disappear at mid-size and small organizations. Global teams may absorb them as strategy and campaign development is centralized and refinement is owned locally.

Why personalized campaigns matter

While delivering personalized marketing campaigns will become a competitive necessity in the future, not all organizations will be able to undergo the required digital transformation. Some will take longer to deliver a more customer-centric and engaging experience, but they inevitably will.

Regardless of how quickly an organization develops marketing strategies and campaigns, they will benefit from investing in a customer-centric future.

Global branding should be strategic

Global brand teams must strategically integrate their marketing strategies into their omnichannel execution approaches and they must decide where global or local teams will deliver them. This is a shift from today, where many consider digital to be a channel within a wider marketing strategy.

Defining how to execute brand campaigns versus customer-oriented campaigns and deciding how to drive marketing efforts with their resulting data will directly impact customer engagement. Leaders at the global level should decide this and reinforce approaches for local strategies.

Use feedback to personalize campaigns

When tailoring personalized content to customer interests, as opposed to pushing generic, brand-focused messages, marketers must develop campaigns and make strategic decisions at a segment level. They should continually use actual customer feedback to refine their campaigns and strategies.



To provide customers with the information they need, when they need it, marketers may need certain technology, content and touchpoint orchestration.

Global marketing teams should own the development of market structures, macro-level customer segments and segment-engagement journeys. Local affiliates can apply this macro-segment understanding to their campaign development and project that understanding onto customer targets. Over time, they can adapt these macro-level segments locally at the country level by evolving integrated feedback loops into meaningful micro-segment campaigns.

Create integrated feedback loops

The market is dynamic and so is the customer experience. Marketers who learn and adapt nimbly to new customer insights will have a competitive advantage.

Internal stakeholders use real-time, quarterly and annual feedback loops to inform strategy and campaign decisions.

- Real-time loops immediately capture customer feedback on campaigns. Marketers use this feedback to refine live campaigns by tweaking messaging, channel mix and content. Affiliates use this approach.
- Quarterly loops capture data from already deployed campaigns to shape and refine future campaigns. Affiliates, global teams and sometimes regional teams use this approach.
- Annual loops use feedback to identify macro trends and themes across geographies to adapt and refine brand and personalization strategies. Global teams use this approach.

Together, all approaches contribute to a personalized customer experience.

Build marketing excellence capabilities

Marketers must develop new skills to properly increase personalization through feedback loops and real-time customer insights. They must become more data-driven, iterative and integrated in how they make strategic decisions and design campaigns.

These skills should evolve rapidly as we move further down the path of personalization. Marketing educators should emphasize the importance of digital skills, including working with diverse data set. This helps marketers to continuously adapt campaigns and support customer-facing teams as they seek to personalize customer experiences.

Conclusion

In the future, personalized marketing campaigns will be foundational to effective omnichannel customer engagement. Organizations that provide these tailored services will continue to engage customers.

To deliver this, global and local marketers must work in a more interconnected, iterative and data driven way, across all levels of their organizations. By developing globally and locally relevant approaches to content personalization and clearly defining customer segmentation roles and objectives, pharma organizations can provide the personalized experience that has come to define marketing excellence.

About the authors



Jennifer Curtis has worked in healthcare for over 15 years, focused on the U.S. and European markets and leading the European pipeline and launch strategy practice. A leader in ZS's European marketing practice, Jennifer brings broad strategy and marketing expertise with large and emerging pharmaceutical and biotech companies across the U.S., Europe and Asia. Jennifer holds a MSc in organizational behavior and social psychology from the London School of Economics. She also has a bachelor's degree in economics from the University of New Hampshire.



Jay Lichtenstein is a seasoned strategy consultant and marketing professional with almost 20 years of experience growing businesses across categories. Throughout his career Jay has developed and implemented marketing strategies for numerous brands and has created road maps for growth and trained companies on improved marketing processes. Jay holds a MBA with honors from the University of Chicago and a BBA with distinction from the University of Michigan Ross School of Business.



Jeff Moore focuses on marketing strategy and execution with an emphasis on market research, segmentation, strategic and brand planning and workshop design and facilitation. His experience with marketing and insights history spans disease areas including oncology, neurology, immunology, endocrinology and rare diseases, as well as geographies including EU, U.S., China, Japan, Latin America and the Middle East. Jeff holds a bachelor's degree in economics from the University of Michigan.



Bianca Lawson is a consultant in the ZS London office with over eight years of experience spanning marketing and sales within the healthcare and pharmaceutical industries. Bianca works closely with ZS clients to help shape strategic marketing thinking, brand strategy and marketing-related aspects of digital transformation. Prior to working with ZS Bianca worked as a product specialist for Roche, a medical representative for AstraZeneca and in business development in the nuclear medicine sector.



About ZS

ZS is a professional services firm that works side by side with companies to help develop and deliver products that drive customer value and company results. We leverage our deep industry expertise, leading-edge analytics, technology and strategy to create solutions that work in the real world. With more than 35 years of experience and 9,000-plus ZSers in more than 25 offices worldwide, we are passionately committed to helping companies and their customers thrive.

Learn more: zs.com/solutions/marketing

