

The status quo and beyond: A new launch personalization paradigm



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EXECUTIVE SUMMARY



The impact of personalizing customer experience has long been established in the industry, but personalization typically takes place once products have been on the market for 6 to 12 months or more. Yet launch uptake in the first 12-18 months is critical for the long-term success of a brand, with limited ability to meaningfully change trajectory later.

How can we enhance the practice of, and confidence in, personalization at launch to yield stronger outcomes? Research by Reuters Events Pharma and ZS shows personalization of strategy, key message and channel at launch is possible and can drive meaningful success. With voices from marketing and technology, we explore what personalization at launch can mean, the remaining challenges and the capabilities needed to launch a powerful personalized omnichannel strategy that will keep improving over time.

LAUNCH PERSONALIZATION

When it comes to how pharma messages around its products, the personalization revolution has long been underway. But one area has been conspicuously left behind. While it is common to see personalization further down the pharma lifecycle, historically launch has been preserved as a time for single messaging, ensuring baselines are established on an even level, and with the least number of complexities. However, in an age of increased algorithmic personalization across almost every digital interaction people have, can pharma afford to leave launch behind? If launch is the most important time for a product, then why is its personalization still waiting?

Breaking the launch status quo means injecting personalization into early interactions, leaning on enhanced data, insights and preferences to build out a sophisticated communications ecosystem. And the status quo needs shaking up – analog analyses by management consulting and technology firm ZS show that around half of the drugs launched in the last 15 years have underperformed analyst estimates by more than 20%.¹

“Personalization at launch, to me, means, how are you launching information about your new medicine or new indication in the most relevant way, in a way your target audience wants to receive information,” says Erica Taylor, Vice President, Chief Marketing Officer at biotech Genentech. This must be flexible not only based on your audience, whether that’s providers, payers or patients, but also due to the channel in question. “So it’s not just the content that you’re putting out, but it’s how you’re delivering it that also warrants a degree of personalization.”

“IT’S NOT JUST THE CONTENT THAT YOU’RE PUTTING OUT, BUT IT’S HOW YOU’RE DELIVERING IT THAT ALSO WARRANTS A DEGREE OF PERSONALIZATION”

Erica Taylor
Vice President, Chief Marketing Officer at biotech Genentech



A CRITICAL MOMENT

"We've defined personalization as content and channel customization based on a customer's individual preferences," says Emily Mandell, Principal and Leader of Global Pipeline and Launch Strategy Practice at ZS. "I think that everyone agrees that launch is the most critical time, and the objective of launch is very rarely just to save money – the objective is almost always to get the launch right."

ZS analog analyses have found that brands do not see significant upwards inflection points beyond 12 to 18 months post launch, without a significant external event, such as a supply shortage or a competitor getting off the market.² "It's very, very difficult, almost impossible actually, to recover the shape of your uptake curve after 18 months," says Mandell. "So everybody agrees launch is really important."

BOLD AMBITIONS

The opportunities which enhanced launch personalization offers are clear to those working across pharma, as seen in research conducted by Reuters Events Pharma and ZS. Respondents working across large, mid-size and small pharma across marketing, insights, market access and omnichannel excellence and analytics spoke about a product launch they had worked on in the past 18 months. Over half were working solely in the US market, with a third working in the US as part of global function,

covering therapeutic areas from oncology and neuroscience to immunology, ophthalmology and cardiovascular.³

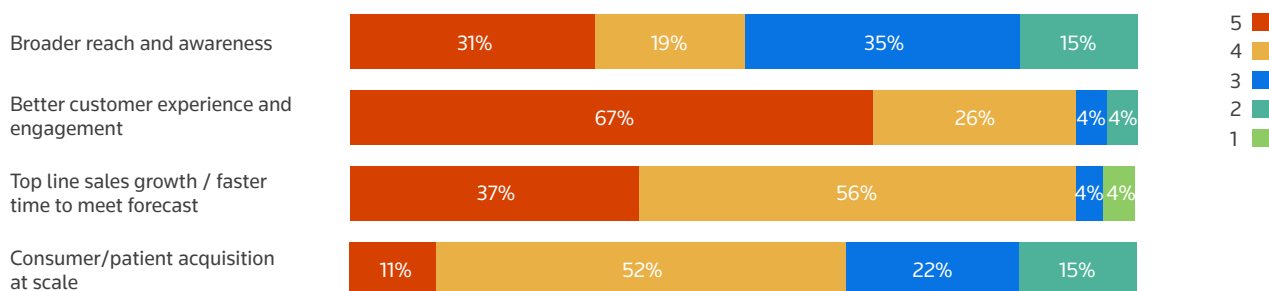
When it came to their chosen launch, launching with an omnichannel approach was the top goal, chosen by two thirds of respondents, followed by over half selecting engaging multiple customer types, from HCPs to consumers, and integrating commercial medical at launch. Over a third also valued driving efficiency in launch support, and reducing time to peak sales and leveraging AI for launch were also considered.⁴

There are bold ambitions among pharma companies for personalized marketing approaches at launch, with better customer experience and engagement seen as the most important goal, followed by topline sales growth and faster time to meet forecast.⁵ Consumer / patient acquisition at scale and broader reach and awareness were also seen as important factors.⁶

Notably 57% of respondents reported having personalization capabilities implemented for other products that are not in the launch phase, reflecting the trend for personalization to come after the critical window of launch. Rather than launching with one message for six months and then starting to see what can be changed and customized, personalizing from the outset allows for this most impactful period to be maximized. "If you think about the critical window as first 12 months, in order for it to really count, you have to have been personalizing within that," says Mandell.

Q13 – What goals did you have in mind for personalizing your marketing approach at Launch?

Rate on a scale of 1-5, where 1 is not at all important and 5 is very important



THE STATE OF PLAY

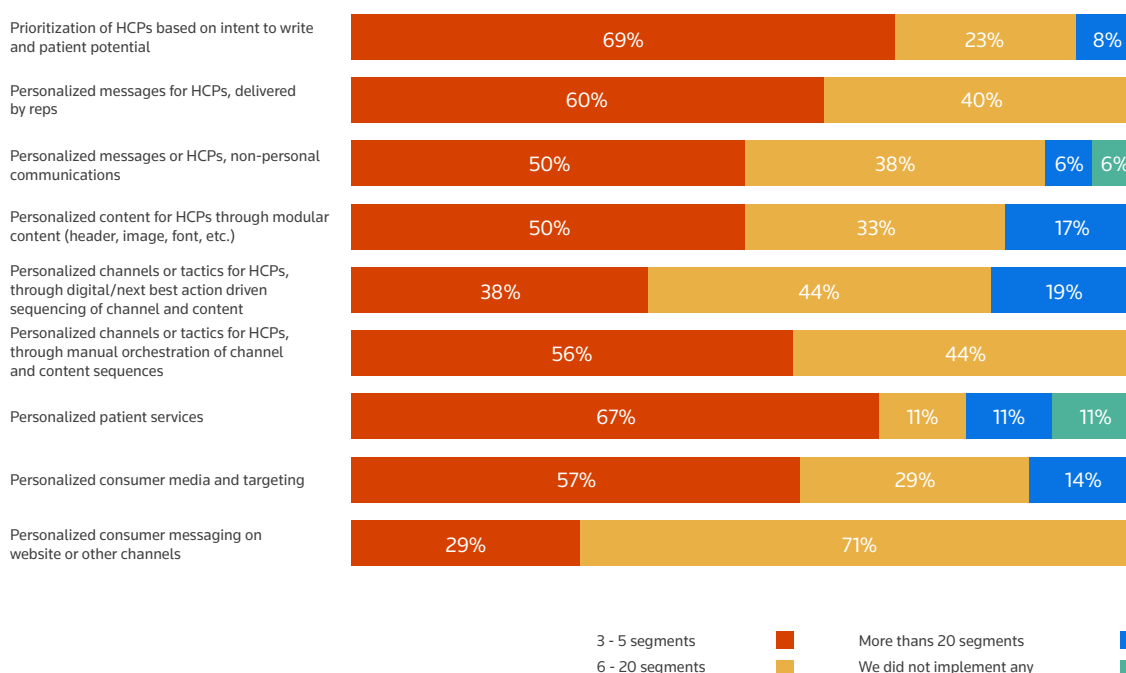
If everyone agrees in the importance of launch, there is “disagreement on the idea of risk”, says Mandell. “Even companies that have a very high degree of personalization with products that are on the market, meaning they have very advanced engines that customize that channel – the cadence, the contents, the colors, everything in their promotions – they will do that for on-market brands, and they still won’t do really any of that at launch. There’s a question around if the juice is worth the squeeze. ‘Is it worth changing all of this, when we never did it before?’”

The need for personalization across pharma lifecycles is clear. However, implementing it at launch, particularly at an individual customer level, remains challenging. Reuters and ZS research found that only 10% to 15% of launch insights are at an individual customer level, while 40% to 50% of launch insights are at a segment or at a sub-national geographic level. That leaves 40% to 50% of launch insights lacking any meaningful personalization.⁷

Developing personalized launch insights comes with a range of challenges, as does implementing or expanding personalization at launch, with organizational silos and difficulties in measuring impact being highlighted by survey respondents. Concerns around the complexities of bringing in differentiated data during the critical window are also holding changemakers back.

Q14 – What types of personalization did you ultimately implement for this launch?

Please select one per row



PERSONALIZATION AS A COMPLICATION

Launch is the critical performance driver for new releases and moving away from the typical approach feels inherently risky. This conceptualization of personalization at launch as a risk can be seen as a major barrier to progress. “There is a perspective that there’s so much to do at launch, that many companies feel it’s risky to complicate,” says Mandell. “They see personalization as complication.”

Personalization at launch represents a break from tradition, in which companies typically launch with one message, one suite of content and then after six to 12 months, start to personalize further. “There’s a playbook that companies have around how they approach launch,” says Mandell. “They feel there is risk in changing it. I would argue there’s risk in not changing it, because we know there is so much difference in customer preference.

“We know that people are absolutely demanding personalization in all their interactions with every company, personally and professionally, and we see the impact of personalizing. A lot of it comes from being confident in the data and insights that you have prior to launch. The approaches we have to get these data and insights are very new and very innovative. And it takes time to feel confident in something that is new.”

MISSING CAPABILITIES

It also may not always be possible to have confidence in data and insights at the outset. Lacking the right starting materials was the greatest challenge when it came to personalizing at launch, with a lack of differentiated insights on customer needs and preferences reported as a challenge for 57% of those surveyed.

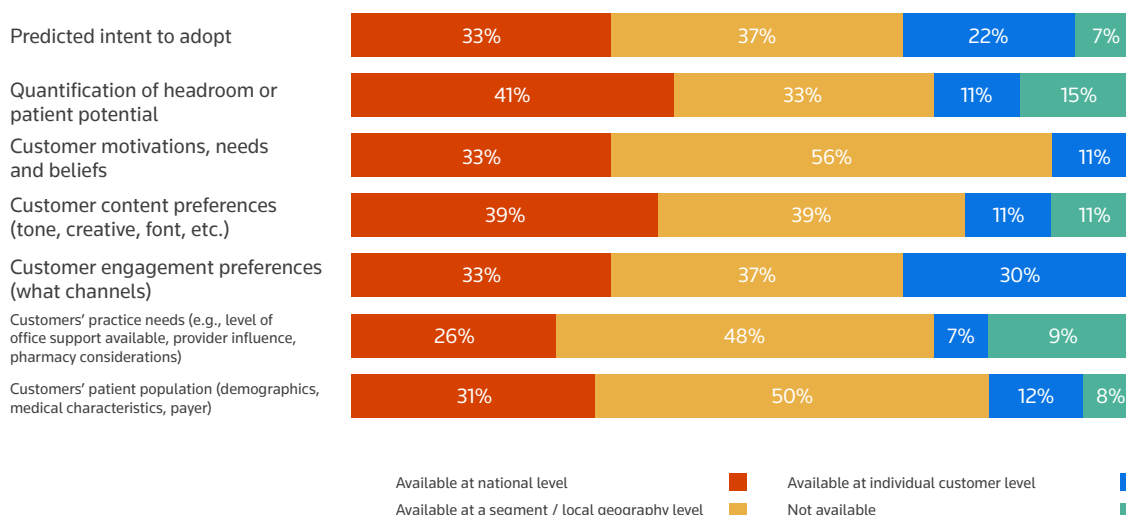
“You have different needs across the product life cycle, so there’s a lot that we’re exploring across those,” says Taylor. “Most of that, though, hinges upon having great information about who you’re targeting, what they like, what’s relevant to them, and how you might get that information to them on the relevant channel. So we’re somewhat limited by the data – that really can constrain what’s possible.”

For Anton Yarovoy, Group Product Director, Precision Medicine at Johnson & Johnson Innovative Medicine, launches have generally been deeply segmented. “There is a lot of segmentation, based on various stakeholders in the field. We separate out who those stakeholders are, and how we’re going to approach them based on their sphere of influence. So it does cut across as a result of that, from a digital perspective, and the non-personal promotion aspects.”

The insights generally available to organizations at launch on an individual customer level remains low. In Reuters and ZS research, it was highest for customer engagement preferences, such as which channels they wanted to use, at 30%, but customer motivations, needs and beliefs, customers’ patient populations, and quantification of headroom or patient potential all sat at just above 10%.⁸

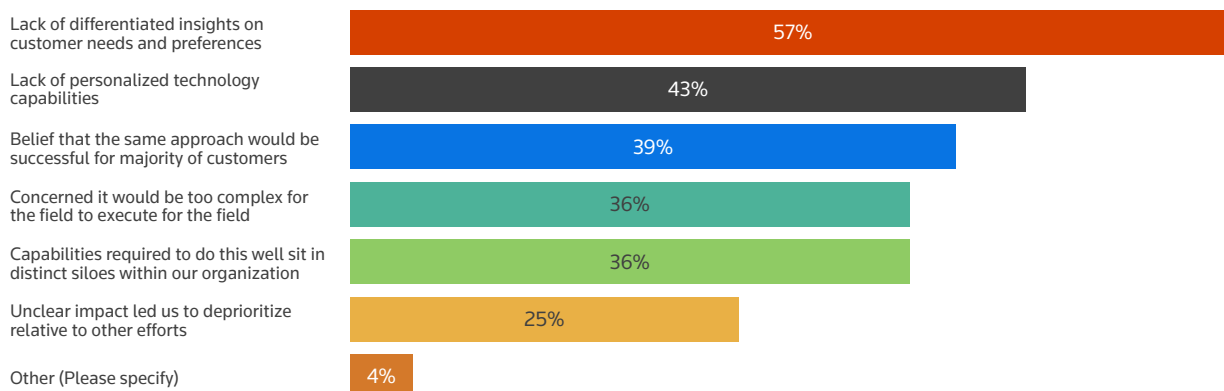
Q18 – How granular are the data and insights you have for the following?

Please select one per row



Technical limitations also factor in highly. A lack of personalized technology capabilities was highlighted by 43% of respondents, while efforts were also hampered for over a third of people by the capabilities required to personalize well sitting in distinct silos within organizations.⁹ “Are the right groups, who have the information, even involved early enough?” says Mandell. “These functions that have so much to do – digital, analytics, labs – don’t get pulled in until a couple of months before, because they’re not the ones designing the strategy.”

Q15 – What challenges did you run into when attempting to implement your personalization plan at launch? Please select all that apply



WINNING HEARTS AND MINDS

There’s a further question mark around organizational change. “Say we solve content, and say we solve data,” poses Taylor. “Many in this industry are leveraging a first party data strategy in a way that actually allows for deeper insights into the ways in which customers want to receive information and what’s relevant to them. Now, you’ve got to change all the people, processes and mindsets.”

Limiting beliefs and a reluctance to change were highlighted in the research data, with over a third reporting challenges with implementing personalization due to beliefs that the same approach would be successful for the majority of customers, and that personalization would be too complex for the field to execute.¹⁰ Forty percent of respondents believed clear ownership and sponsorship within the organization would impact personalization efforts.¹¹

Changing mindsets can be challenging, because there’s a chicken and egg element to this step-change. Bringing new tools into people’s workdays, and changes into launch, will naturally bring knock-on changes down the pipeline, all of which requires the buy-in of senior leadership. Do you create a new process first, and bring the people and mindset shifts along after, or do you start with the mindset?

“If I had to think of the three-legged stool of ultimate hyper personalization, you’ve got to get all three of those things to work harmoniously to make that happen,” says Taylor, where the three legs are people, processes and mindsets. “I’ve yet to see someone in the industry do all three of those things really well. You get two out of three, and in certain specialized circumstances, you can really excel there. But I think that’s the future that we’re all striving for.”

Additional challenges to implementing personalization at launch, cited in the research, are that capabilities are in distinct silos within the organization, and lack of understanding of impact.

THE IMPACT OF PERSONALIZATION

Personalization has been shown to create commercial impact. “We know that there’s somewhere between four and six per cent lift impact by personalizing something that’s steady state,” says Mandell. High-degrees of personalization have driven three to six per cent top-line lift, while any amount of personalization has driven one to three per cent lift.¹² Determining the precise impact of launch personalization, however, can be more challenging.

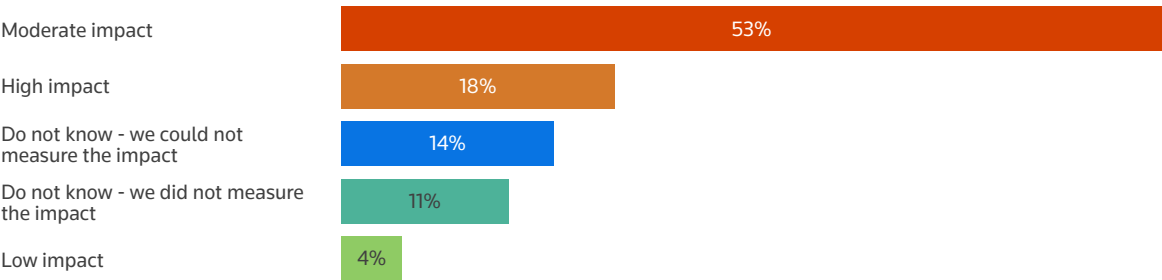


“Launch is such an opportunity,” says Taylor. “But the question is really, is personalization driving the impact that you need to see?” asks Taylor. “For that, you have to have a really strong measurement culture, and a way to let the data dictate things, saying, ‘I personalized this, I don’t think it got me much more. Why don’t I go back to something that I have done pre-personalization, and continue to drive impact?’”

As part of Reuters research, 70% of respondents saw medium or high levels of impact from the personalization completed. This consists of over 50% who saw moderate impact, and close to 20% who determined high impact from their personalization at launch.¹³ High impact from personalizing at launch was seen in specialisms including gastroenterology, oncology, ophthalmology and cardiovascular.

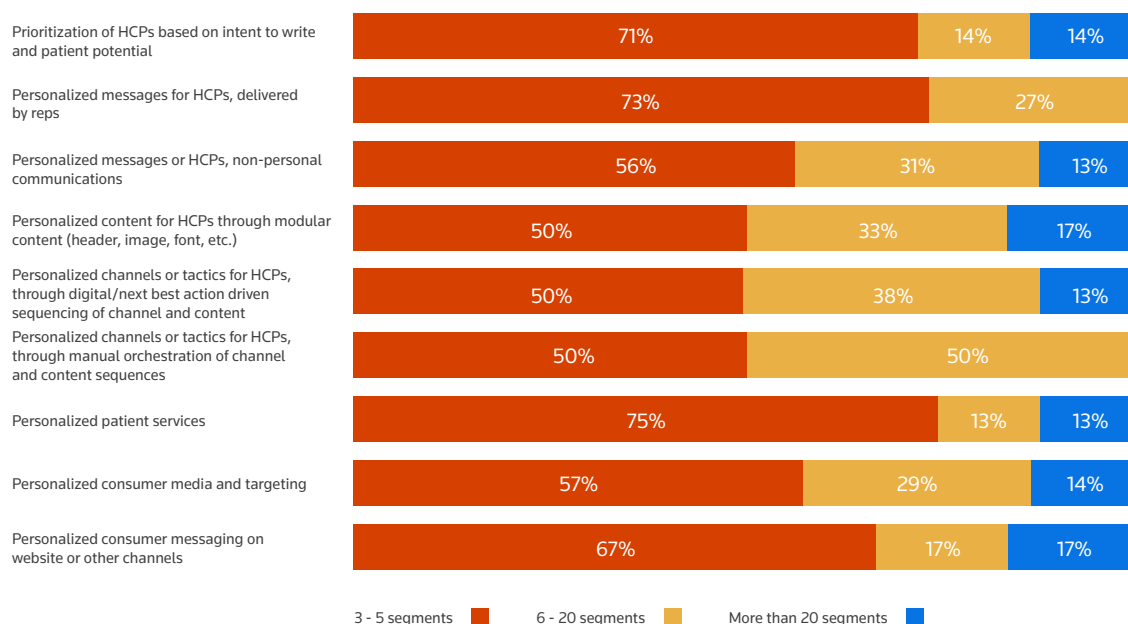
Within that critical window of launch, getting on-brand messaging on-customer can ensure a winning strategy from here throughout the life of the interactions you’ll have. For HCPs, personalizing channels through next best action driven sequencing or manual orchestration of channel and content sequences, personalizing their messaging through non-personal communications and rep interactions and prioritizing interactions based on intent to write and patient potential can create impact from the outset. Patient services can be similarly personalized at launch, including orchestrated consumer experiences.

Q16 – What do you believe was the impact of these personalization efforts on the success of the launch? Please select one



Q12 – For the personalization above, how granular were the customer groups you sought to personalize?

Please select one per row

**THE QUESTION OF MEASURING IMPACT**

Despite the positivity around personalization at launch, among research respondents, a quarter were still unable to determine the impact of their personalization efforts at all. This was split between those who could not measure the impact, and those who did not measure it.¹⁴ Among those who faced challenges in implementing personalization at launch, a lack of clear understanding around impact was a factor. Unclear impact led a quarter of those surveyed to deprioritize personalization at launch relative to other efforts.¹⁵ “When we talk about some of the tools and capabilities, I think there’s also minimization on the measurement and impact front,” says Taylor.

As personalization capabilities expand at launch, so does the importance of a clear measurement plan. “Measurement at launch is challenging for many of the same reasons personalization is challenging – outcomes and impact come in rapidly just after launch and without a clear plan it can be easy to wait for data to stabilize 6-12 months post launch,” says Niladri Mukherjee, Principal and a Leader of the Digital Customer Experience Practice at ZS. “A clear plan is needed in advance of launch. Alignment on approach – for example, taking different approaches with different HCPs, pre-identifying test-control groups or more simply identifying leading indicators, all help create signals that personalization at launch is working.”

Measurement also typically goes hand-in-hand with continuous refinement. “Continuous tracking of leading indicators and signals in order to pivot and course-correct with agility is key to the success of personalization at launch,” says Mukherjee. “It is more than just measurement of ROI and sales lift. Understanding, for example, what is driving adoption or whether we are overcoming the barriers our customers have through the right adjustments to the personalization plan is critical for revenue acceleration.”

There has been a historical hesitancy here for the industry, due to complexities like purchasing patterns and lagged data. “I’ve been particularly keen on two things within our organization, which is how we focus on leading indicators of impact, so that we don’t have to wait for that final claim script,” says Taylor. How do we really add some sophistication into our marketing mix modeling and in the analytics around attribution?”

INITIAL SUCCESS STORIES

As the industry does make progress, more specific examples of personalization techniques are being measured to understand impact. As part of a recent exercise, ZS examined a launch brand that personalized much of their customer engagement and content at an n=1 level. Results were positive, with sales trends showing ~25% higher sales uptake for personalized customers versus non-personalized customers over the first 12 months post launch. In addition, personalized HCPs showed double the initial conversion in, on average, half the time.

“These initial deep dives fuel our optimism in this space,” says Mukherjee. “When organizations have embraced personalization, they have seen positive outcomes.”

OMNICHANNEL PERSONALIZED

When it comes to realizing the value from personalization at launch and building a truly personalized omnichannel strategy, there are some fundamentals required. From richer data and deeper customer insights to create the context for personalization, through to AI to bring this all together and develop personalized customer-level engagement plans, there is a new playbook developing for launch. A focus on content to bring a personalized message to a customer is crucial, as is the technical ability to implement individual customer level engagement plans.

Solutions such as ZS' Digital Forward Launch¹⁶ are at the cutting edge of personalized omnichannel at launch, with a strong focus on revenue acceleration. Utilizing next-generation AI techniques and a connected, intelligent ecosystem, this tool helps clients answer four critical omnichannel questions at launch: Who to target? How to win based on an HCP's specific barriers to adoption? How to personalize with the right content? How to monitor, sense, and pivot with agility?

"I'M A SCIENTIST BY TRAINING, SO I WANT ALL DATA, ALL THE TIME... UNLESS YOU'RE A MARKETER, IT'S REALLY HARD TO GET A PERSON TO TELL YOU WHAT KIND OF CONTENT THEY LIKE AND WHY THEY LIKE IT."

Erica Taylor

Vice President, Chief Marketing Officer at biotech Genentech



RICHER DATA AND DEEPER INSIGHTS

At the heart of personalization is the data that enables it. Without a knowledge of customer preferences and motivations, launches can't be personalized to a meaningful degree. Richer insights about individual customer motivations, needs and beliefs was overwhelmingly cited as the data and strategy element likely to be the most impactful in the first 12 months of launch.

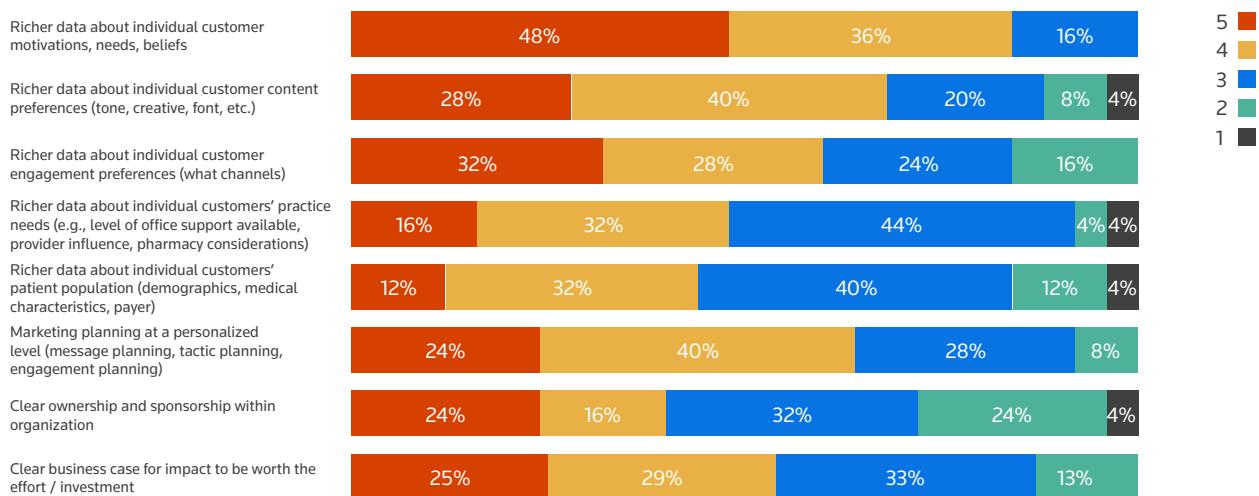
One enabler of this level of insight is ZAIDYN Customer 360 by ZS, which unifies data across channels, vendors and touchpoints into a single customer view. Embedded analytics and automation empower teams to personalize engagement, optimize decision-making and confidently accelerate commercial impact.¹⁷

"I'm a scientist by training, so I want all data, all the time," says Taylor. "Unless you're a marketer, it's really hard to get a person to tell you what kind of content they like and why they like it. What you like in a moment is so contextual. Motivations and beliefs are really important because they tend to travel with that individual no matter what kind of decision they are making."

Respondents also highly valued richer data about individual customer content preferences, such as tone, creative and format, and individual customer engagement preferences, including which channels they preferred.¹⁸ By pooling customer-level company insights, cross-industry insights and projecting 1st party data through AI, it can be easier to gather this necessary data today.

Q20 – Which of the following data and strategy elements do you believe will have the most impact on personalization within the first 12 months of launch?

Please rate each from 1 to 5, where 1 is very little impact and 5 is significant impact



Having the right context for meaningful personalization doesn't always mean getting to the individual level, though. "My belief is that it just needs to feel like it's n=1 to your receiver – it doesn't have to actually be," says Taylor. "This is particularly relevant in our industry, because we're speaking to so many different audiences. For a patient, you probably do want to get pretty close to n=1 if you can. For the providers, depending on therapeutic area, it may be a little less important."

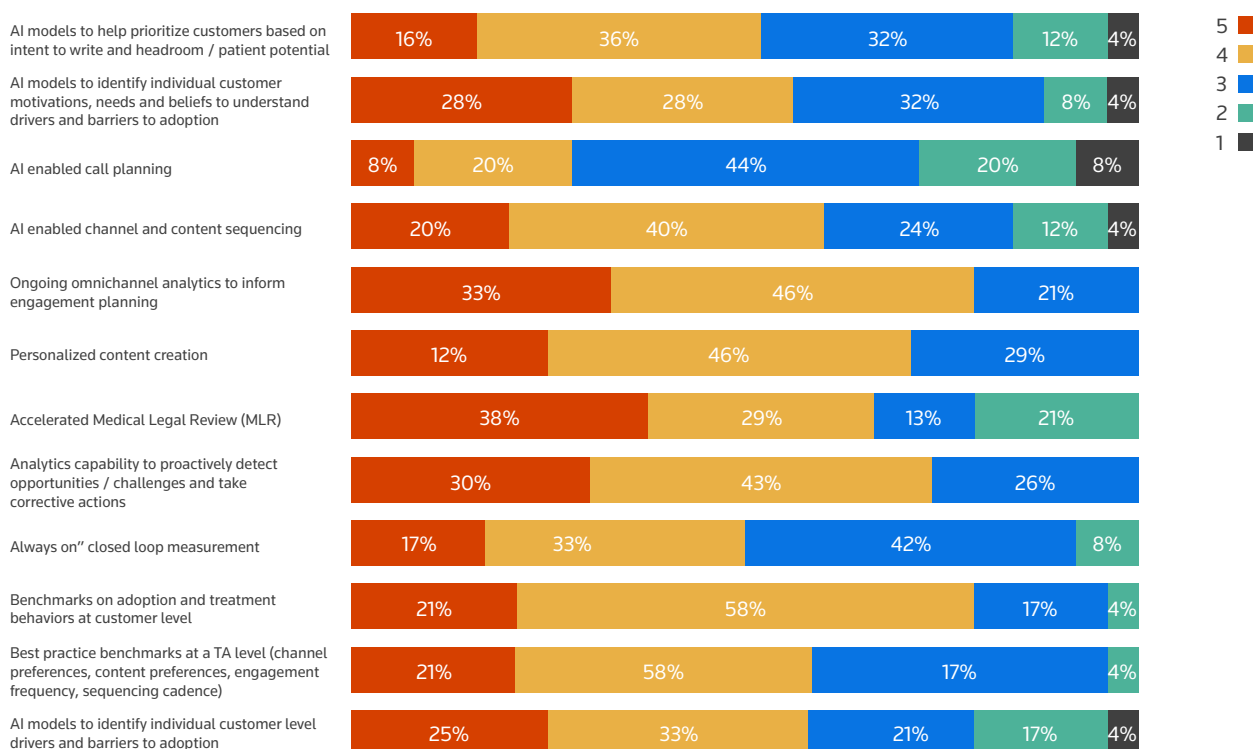
"The goal that I push within our organization is it should just feel that way. The work, the insights, the analytics sophistication, is in knowing when you need to drive really close to n=1, or when n=1000 is sufficient, because you're only talking to a couple of different flavors of an audience."

BRINGING IN AI AS A PERSONALIZATION PARTNER

AI emerges as a frontrunner among capabilities believed to have the most impact on personalization in launch, with Reuters and ZS research finding that over half of respondents favored numerous AI capabilities. AI-enabled channel and content sequencing was seen as the most potentially impactful, followed by AI models to identify individual customer motivations, needs and beliefs to understand drivers and barriers to adoption, AI models to help prioritize customers based on intent to write and headroom / patient potential and AI models to identify individual customer level drivers and barriers to adoption.¹⁹

Q21 – Which of the following capabilities do you believe will have the most impact on personalization within the first 12 months of launch?

Please rate each from 1 to 5, where 1 is very little impact and 5 is a significant impact



ZS's ZAIDYN Omnichannel NBA exemplifies this AI-driven potential by using industry-specific machine learning models to ensure each customer receives the right message through the right channel at the right time – maximizing engagement and outcomes. Powering this is ZAIDYN OmniBERT, a proprietary AI architecture that enables precision in next-best-action recommendations, amplifying both growth and ROI.²⁰

"What many people are calling AI is really what we've always traditionally called an omnichannel," says Yarovsky. "It's the omnichannel approach – the right channel at the right time. AI applications moving forward can help us do that, but in some ways it is no different than setting up rules into your customer cadence journey. AI can help us build out the rules and the analytics journeys." The true omnichannel vision here ties to the concept of behavior-changing personalized customer engagement at scale.²¹

"ZS has developed advanced AI models that not only identify individual customer motivations and needs, but also prioritize customers based on their potential impact," says Mandell.

Generative AI is expected to produce \$60 to \$110 billion in annual value across the pharmaceutical value chain, from drug discovery through to their marketing.²² Much of the data that is used to drive tech capabilities within marketing comes from in-market engagement data, whether that's tracking emails opened, programs attended, or behaviors which followed specific touchpoints. "The data pre-launch is the biggest piece of that, and AI is one of the things that we use to project and scale and predict small, deep data sets to be complete among a large group," says Mandell. "There's an interplay – AI is an approach that's used to take customer insight that you have for 400 people and scale what it might be for 5000 people."

Leveraging predictive insights can enable AI-driven predictive target identification to highlight things like early adopter likelihood and patient potential prediction to maximize opportunities.

Elements offered by ZS like ZAIDYN Dynamic Targeting support this by refining segmentation with real-time data and AI to identify and prioritize HCPs. This enables marketers to deliver precise, timely interventions based on deeper behavioral signals – enhancing reach and efficiency during the crucial launch phase.

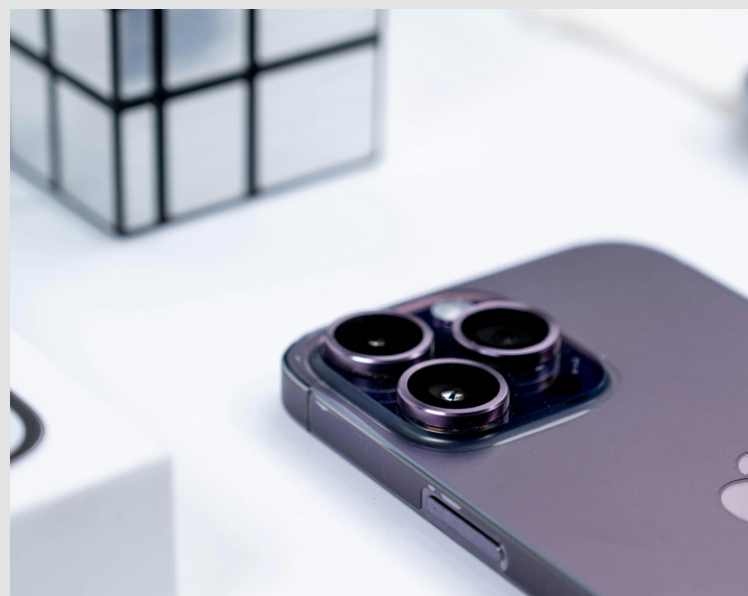
Field teams can be further empowered through ZAIDYN Smart Assist, a conversational AI assistant that delivers real-time insights on demand. Seamlessly integrated with tools like ZAIDYN Field Insights and Field Incentive Reports, it boosts productivity by making relevant, contextual information instantly accessible in the field.²³

THE CONTENT CONTINGENT

“Understanding stakeholders is really critical and having a very concrete strategy around what content is going out,” says Yarovoy. “Then it is around what content is sticky. What value is it giving it to them, so that they want to file it away and reference it later?” Personalized content creation is seen as a significantly impactful capability on personalization at launch, with 70% of research respondents valuing content to bring a personalized message to a customer highly.²⁴

And it’s more important than ever to get it right. “Digital has become absolutely overwhelming,” says Yarovoy. “HCPs aren’t paying attention unless it’s something of value. For brand teams, once you roll out a couple of messages, you’re basically stuck recycling that message.”

“Content is probably one of the biggest levels of promise in terms of actual personalization,” says Taylor. Content production and distribution is labor intense, and a limiting factor, so how content needs to be produced at scale “begs a solution” like generative AI, she says, both for written content and copy, but also potentially for imagery to be customized depending on where a banner ad was shown, with, for example, simple tweaks like seasonal or environmental backgrounds to match each chosen geography. “The kinds of things that you can now do on your iPhone for marketing content, is huge. To me, the question now is, what are the right tools? How do we keep pace with the speed at which the technology is enhancing?”



At the same time as adopting with speed, it is also true that if you are producing much more personalized content, with goals of more than 10 content assets across at least three key message categories, you will still have to get all this content through the approval process. “Anyone that is going to leverage gen AI for content creation must also contemplate, ‘How do we revamp the processes to ensure that we are able to move this content out into the world compliantly?’” says Taylor. “It begs innovation in that space as well.”

ZS’s Quill offers a generative AI-driven content transformation platform that streamlines creation, approval, and personalization to meet the rising content scale and compliance demands. Designed for regulated industries like life sciences, Quill automates and enhances the content lifecycle, accelerating delivery without compromising on quality.²⁵



TECHNICAL ABILITIES

The nuts-and-bolts technical abilities to make personalization changes at launch and implement customer-level engagement plans is still an issue for a number of pharma companies, particularly those on the smaller side of size. “Technical capabilities are starting for mature brands that have lots of engagement data, and they hopefully will move to launch brands, whereas small companies who have not yet launched at emerging pharma, for example, they’re not going to have those capabilities,” says Mandell. “A lack of personalized technology capabilities was seen as an issue by 40% within the research, indicated a way to go when it comes to system change.

Ongoing omnichannel analytics to inform engagement planning, benchmarks on adoption and treatment behaviors at a customer level and analytics capability to proactively detect opportunities were all favored by 70%-plus as gamechangers when it came to launch success. Bringing marketing planning in at a personalized level, through message, tactic and engagement planning, was also highlighted as a potentially impactful change.²⁶

Organizations were split on whether clear ownership and sponsorship in the organization would impact upon personalization at launch, indicating the divergent experiences within different organizations when it comes to prioritizing such personalization currently.²⁷ Working across seamless marketing technology platforms and enabling third-party vendors ensure cross-organizational cohesion in these moments.

Technical abilities also marry with the human touch, in the reps of the future being able to execute individual engagement plans in the field. “It’s trusting that our reps understand our customers and what they need, and are able to lightly customize the tone and the type of information based on that,” says Mandell. “Maybe you always talk about efficacy, but there are certain customers where you really get into the science, and much more, where you talk about the patient impact. That’s an example of customization that could make a big difference.”

Reps can bring in great value when working with hyper-personalization. “Having an excellent rep is always going to be number one,” says Yarovoy. “To hyper personalize content for their HCP, they have to understand their HCP’s core needs. Which conferences do they attend? Who do they know? What are they are interested in? Creating that value utility and doing hyper-personalization through that type of personal content, is very impactful.”

“THERE ARE CERTAIN CUSTOMERS WHERE YOU REALLY GET INTO THE SCIENCE, AND MUCH MORE, WHERE YOU TALK ABOUT THE PATIENT IMPACT.”

Emily Mandell

Principal and Leader of Global Pipeline and Launch Strategy Practice, ZS



BEYOND THE ALTAR

A launch versus commercialization is, to me, the difference between a wedding and a marriage,” says Taylor. “There’s something very exciting about that moment you are introducing your new product or indication to the world writ large – you get a chance to make that great first impression. And there’s something very important about that moment, which no amount of technology changes – what you can do is really enhance that moment at launch.”

Enhancing the momentum of launch to bring on a successful marriage leans on gaining true value from the personalization made possible by deeper data and insights, partnering with AI, developing rich content which meets the customer where they are and bringing in stronger technical muscles. Tying together this strengthened offering, harnessing everything known about a customer, enhanced with AI, allows organizations to hone in on the personalization which they believe make the biggest difference to their chosen audiences, de-risking launch.

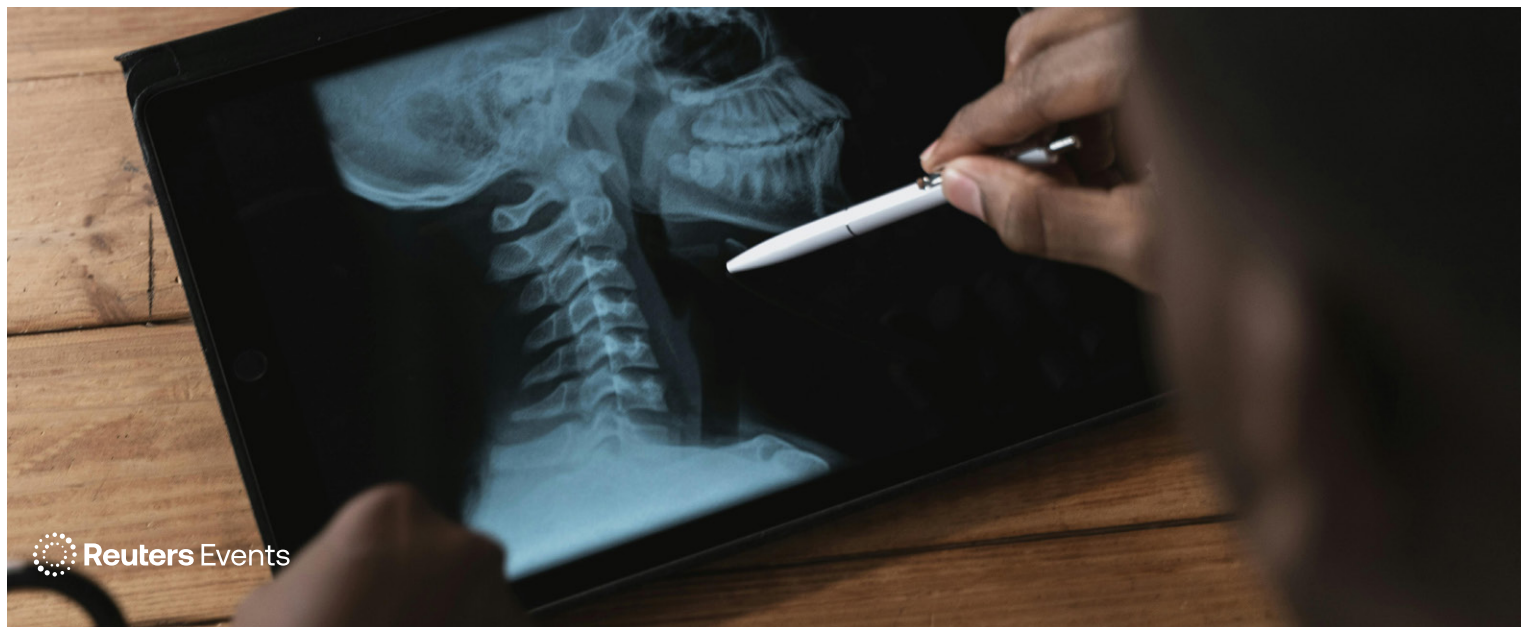
For research respondents, the most critical thing to personalize at launch was message, with over 90% choosing this as one of their priorities. More than half also prioritized channel, with timing and cadence, level of effort and the creative or asset coming next.²⁸

“For me, it’s the message, and making sure the message is relevant,” says Yarovoy. “There’s been a big challenge in our industry, where there’s a tendency for the creative to be overdone. And the message is completely lost in it, so it doesn’t land right. At the end of the day, doctors need to understand, why am I going to prescribe this drug? Is it going to extend the life of the patient, is it going to minimize adverse events versus another drug? And what is the efficacy?”

“THERE’S BEEN A BIG CHALLENGE IN OUR INDUSTRY, WHERE THERE’S A TENDENCY FOR THE CREATIVE TO BE OVERDONE. AND THE MESSAGE IS COMPLETELY LOST IN IT, SO IT DOESN’T LAND RIGHT.”

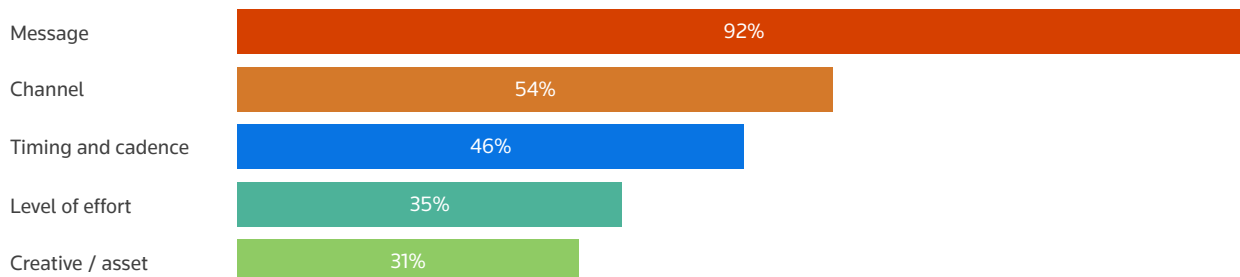
Anton Yarovoy

Group Product Director, Precision Medicine, Johnson & Johnson Innovative Medicine





Q19 – What do you believe is most critical to personalize within the first 12 months of launch? Please select all that apply



How the message is delivered is at the heart of it for Taylor too. “It’s almost hard to divorce message and channel in my mind, because the two work together to drive that particular impact,” she says, highlighting the different messages you will be able to deliver across differing channels, like email, social or banners.

“If I’m reading an email, I’m in a different frame of mind and ready to receive different kinds of information than if I’m walking through the metro station scrolling on my phone. We have to think about that context within which someone’s receiving the information. I’m not surprised to see that message is first and foremost, because it’s the one thing we can control. That’s a bit of a default, but we have to acknowledge there is a relationship between the message you’re putting out and the channel you’re delivering, because the two of them will get you context.”

After years of being sidelined, personalization at launch is finally having its day, as enhanced technical capabilities put the power to adapt messaging in our hands. If personalization has been adopted elsewhere in the lifecycle, it has been a major oversight for it to be overlooked at launch, says Mandell, even if that has been due to fears of adding complexity while establishing a value proposition from scratch. “Saying personalization at launch doesn’t matter goes against everything else that we’ve seen and believed as an industry. Why would it matter later and not matter now?”

Ultimately, says Taylor, the goal of launch personalization is to “create those experiences that drive decisions that improve patients’ lives, and that’s what everyone in this industry is trying to achieve. I’ve never been more excited about all the ways in which it’s now more possible than it was before. As an industry cohort, there’s just so many more patients who we get to help when we leverage this.”

RESEARCH METHODOLOGY AND DEMOGRAPHICS

Quantitative research was conducted by Reuters Events Pharma and ZS in 2024, with a 21-question survey sent to respondents working across pharma in roles within marketing, insights, market access and omnichannel excellence and analytics. They were asked about a product launch they had worked on within the past 18 months, discussing the level of personalization they hoped to achieve, and what they did achieve down the line, as well as details around segmentation.

Respondents identified their professional background and role in their launch as follows:

Current level

Senior director – 28%, Director, 25%, VP or above – 21%, Associate director – 11%, Manager – 11% and other – 4%.

Primary function

Marketing – 37%, Other – 21%, Insights and analytics – 18%, Market access – 13%, Omnichannel excellence and analytics – 11%.

Company

Large pharma – 39%, Mid-size pharma – 38%, Small / emerging pharma – 16%, Other 7%.

Market

US only – 52%, US as part of global function – 35%, not US – 13%.

Role in key decisions around a product launch in the past 18 months

Lead – 41%, Supporting team – 35%, Oversight – 16%, Minimal – 8%.

Therapeutic area for launch

Oncology – 28%, Neuroscience – 13%, Immunology – 13%, Ophthalmology – 10%, Cardiovascular – 10%, Other rare – 10% (Vasculitis, Hematology, GI), Other non-rare – 10% (Vaccination, HIV, OTC, Nephrology), Respiratory – 5%.

Approximate US peak revenue forecast for the launch

\$1B+ – 17%, \$501M-1B – 31%, \$201-500M – 31%, \$,200M – 22%.

This was supplemented by qualitative interviews which included looking over the survey data.

ABOUT ZS

ZS is a management consulting and technology firm that partners with companies to improve life and how we live it. ZS transforms ideas into impact by bringing together data, science, technology and human ingenuity to deliver better outcomes for all. Founded in 1983, ZS has more than 13,000 employees in over 35 offices worldwide.

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3. For more information on demographics, see Research Methodology. Primary function: Marketing – 37%, Other – 21%, Insights and analytics – 18%, Market access – 13%, Omnichannel excellence and analytics – 11%. Company: Large pharma – 39%, Mid-size pharma – 38%, Small / emerging pharma – 16%, Other 7%. Market: US only – 52%, US as part of global function – 35%, not US – 13%. Therapeutic area for launch: Oncology – 28%, Neuroscience – 13%, Immunology – 13%, Ophthalmology – 10%, Cardiovascular – 10%, Other rare – 10%, Other non-rare – 10%, Respiratory – 5%.
4. Respondents were asked what goals they had for personalizing their marketing approach at launch. Launching with an omnichannel approach – 64%, engaging multiple customer types – 56%, integrating commercial medical at launch – 56%, driving efficiency in launch support – 38%, reducing time to peak sales – 36% and leveraging AI for launch – 31%.
5. Respondents were asked to rate the importance of goals on a scale of 1-5, where 1 is not at all important and 5 is very important. Better customer experience and engagement' was ranked 5, 'very important' by 67% of respondents, and 4, 'important' by 26%. 'Topline sales growth and faster time to meet forecast' was ranked 5, 'very important' by 37% and 4, 'important' by 56%.
6. Consumer / patient acquisition at scale' was ranked 5, 'very important' by 11% and 4, 'important' by 52% of respondents. 'Broader reach and awareness' was ranked 5, 'very important' by 31% and 4, 'important' by 19%.
7. Respondents were asked how granular the data and insights they had for launch were around seven factors including customer motivations, predicted intent to adopt and engagement preferences. These figures reflect averages of the launch insights as a whole.
8. Respondents were asked about the granularity of their data and insights. At an individual customer level, customer engagement preferences, was 30%, customer motivations, needs and beliefs, 11%, customers' patient populations, 12% and quantification of headroom or patient potential, 11%.
9. Respondents were asked about challenges when implementing personalization plans at launch, with 43% selecting a lack of personalized technology capabilities and 36% saying the capabilities required to personalize well sat in SILOs.
10. Respondents were asked about challenges when implementing personalization plans at launch, with 39% identifying a belief that the same approach would be successful for the majority of customers and 36% highlighting concerns it would be too complex for the field to execute.
11. Respondents were asked which data and strategy elements would have the most impact on personalization within the first 12 months of launch. When selecting clear ownership, 24% put 5, 'significant impact', 16% put 4, 'some impact'.
12. Pharmaceutical Executive, The Three Pillars of Pharma's New Commercial Model, <https://www.pharmexec.com/view/the-three-pillars-of-pharma-s-new-commercial-model>
13. Respondents were asked what they believed was the impact of personalization efforts on the success of the launch. Moderate impact – 53%, High impact 18%, (= 71%), Do not know – we could not measure the impact – 14%, Do not know – we did not measure the impact – 11%, Low impact = 4%
14. Respondents were asked what they believed was the impact of personalization efforts on the success of the launch. Do not know – we could not measure the impact – 14%, Do not know – we did not measure the impact – 11%.
15. Respondents were asked to select challenges they ran into when implementing personalization plans at launch, with 25% highlighting unclear impact.
16. ZS, Using sophisticated digital-forward solutions to drive launch excellence, <https://www.zs.com/insights/pharma-product-launch-excellence-digital-solutions>
17. ZS, Customer Engagement, Zaidyn by ZS, <https://www.zs.com/zaidyn-platform/commercial/customer-engagement>
18. Respondents were asked which data and strategy elements would have the most impact on personalization within the first 12 months of launch. Richer data about individual customer motivations, needs, beliefs – 48% ranked it 5, 'significant impact', 36% ranked it 4, 'impact' = together 84%. Richer data about individual customer content preferences (tone, creative, format) – 28% ranked it 5, 'significant impact', 40% ranked it 4 'impact' = together 68%. Richer data about individual customer engagement preferences (what channels) – 32% ranked it 5, 'significant impact', 28% ranked it 4, 'impact' = together 60%
19. Respondents were asked which data and strategy elements would have the most impact on personalization within the first 12 months of launch. AI enabled channel and content sequencing – 20% ranked it 5, 'significant impact', and 40% ranked it 4, 'impact' = 60%. AI models to identify individual customer motivations, needs and beliefs to understand drivers and barriers to adoption – 28% ranked it 5, 'significant impact', 28% ranked it 4, 'impact' = 56%. AI models to help prioritize customers based on intent to write and headroom / patient potential – 16% ranked it 5, 'significant impact', 36% ranked it 4, 'impact' = 52%. AI models to identify individual customer level drivers and barriers to adoption – 25% ranked it 5, 'significant impact', 33% ranked it 4, 'impact' = 58%
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24. ZS, Unleash Your Content's Potential with Quill, <https://www.zs.com/insights/unleash-your-contents-potential-with-quill>
25. Respondents were asked which data and strategy elements would have the most impact on personalization within the first 12 months of launch. Personalized content creation – 25% ranked it 5, 'significant impact', 46% ranked it 4, 'impact' = 71%
26. Respondents were asked which data and strategy elements would have the most impact on personalization within the first 12 months of launch. Ongoing omnichannel analytics to inform engagement planning – 33% ranked it 5, 'significant impact', 46% ranked it 4, 'impact' = 77% Benchmarks on adoption and treatment behaviors at a customer level – 21% ranked it 5, 'significant impact', 58% ranked it 4, 'impact' = 79% Analytics capability to proactively detect opportunities / challenges and take corrective actions – 30% ranked it 5, 'significant impact', 43% ranked it 4, 'impact' = 73% Marketing planning at a personalized level (message planning, tactic planning, engagement planning) 24% ranked it 5, 'significant impact', 40% ranked it 4, 'impact' = 65%
27. Respondents were asked which data and strategy elements would have the most impact on personalization within the first 12 months of launch. 24% put 5, 'significant impact', 16% put 4, 'some impact', 32% put 3, 'neutral', 24% put 2, 'little impact' and 4% put 1, 'very little impact'.
28. Respondents were asked what was most critical to personalize in the first 12 months of launch and could select all that applied. Message – 92%, Channel – 54%, Timing and cadence – 46%, Level of effort – 35%, Creative / asset – 31%.