



Think you're best in class? What HCPs really say about the pharma customer experience

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Pharma has been investing in customer experience (CX) for many years now, fully aware that a better CX leads to better engagement and better outcomes. But the results of ZS's 2025 survey of more than 700 U.S. healthcare providers (HCPs) suggest there is plenty of room for improvement, with pharma companies overall averaging a -10% Net Promoter Score® (NPS).

While top pharma companies have advanced their NPS by double-digit points (top big pharma scores at 26%), they're not yet at the level of brands like Apple (35%) and Amazon (34%) with the same audiences. The industry lags much more on average, with many companies delivering more negative experiences than positive ones. What do HCPs really say about pharma CX? How can CX be improved, and what are the best companies doing to pull away from the pack?

We're in a context where AI is changing the game at work, at home and everywhere else. Environmental uncertainties in the evolving U.S. regulatory landscape such as tariffs and policy shifts are forcing manufacturers to chart new courses. Moreover, in recent years, pharma launches have struggled, making it imperative to help new products achieve their best returns.

In this research, part of a larger global initiative, what we learned aligns with previously discussed fundamentals of CX: relentlessly anticipating and solving customer barriers, creating a seamless digital experience and remembering the importance of "human" connections with HCPs and patients. In an era where personalization at scale is reshaping behavior, only companies that can deliver digitally

harmonized experiences, demonstrate authentic patient focus and build trust across the ecosystem will be positioned as “best in class.”

A pharma CX reality check

With 53 pharmaceutical companies represented in the U.S. version of the survey across eight therapeutic areas, the results revealed a wide performance range, from a high of 26% to a low of -57% in NPS. Interestingly, when compared to nonpharma CX leaders, even the top-performing pharma companies are still trailing, though some larger companies are beginning to close the gap.

While larger pharma companies more consistently deliver better experiences, size doesn't guarantee success. Our study reveals that nimble emerging players can rival the average experience of big pharma, and HCPs are open to working with companies regardless of their size. Over a quarter of HCPs said they would select emerging pharma players as a top-three preferred partner, rising to nearly half of HCPs in competitive therapy areas like oncology. By excelling at the basics like clinical relevance, communication, customization and credibility, emerging pharma companies are proving that size doesn't limit impact. Their customer-centric focus is creating experiences that resonate deeply with providers, delivering both practical support and clinical value in equal measures.

A solid digital experience strategy wins

The best companies deliver a harmonized digital experience, integrating people, support and patients with technology. HCPs know this: Nearly 70% of HCPs show a high affinity for digital, with half preferring digital interactions over in-person. Of course, even those who prefer digital want in-person interaction in the right context.

We found that every therapeutic area market leader delivers a positive digital experience.

The best companies deliver experiences that are purposeful, relevant, coherent and human. They focus relentlessly on removing customer barriers. They create customer journeys that are dynamic and personalized. And they create touch points that feel human and helpful. These factors contribute to a positive digital NPS and help leaders outperform the rest of pharma in every other dimension along with overall experience.

- Relationships and patient focus matter.** Companies with more effective rep engagement receive significantly higher ratings (+22% NPS). HCPs value reps who build trust and prioritize patient and practice needs over product promotion. The best reps understand the patient-provider context, use data-driven insights to support their customers and act as true partners—forward-thinking, problem-solving and honest about product limitations. As one HCP told ZS, “Every product has shortcomings. If they reveal that, it means they trust you. Once we feel their vulnerability, I feel that this person can be trusted.”
- Personalization matters.** Companies that treat their apps, social channels and customer engagement platforms as one interconnected ecosystem can stay focused on connecting to their customers. In the future, more companies will be developing personalized messaging and channels tailored to the needs, preferences and context of customers.
- Being personal (not just personalized) matters, too.** Respondents noted how digital tools, from electronic benefit verification to digital co-pay cards, simplify processes. But what sets companies apart is how these services are paired with human support, like direct contacts for urgent issues or technical help during insurance appeals. For example, companies are investing in ways to reduce the turnaround time for patient support requests by using technology to make the process more seamless, though still human-led.

All of this requires companies to invest in technology that helps them connect the data they collect to build a complete picture of each customer. This level of insight, along with well-timed actions to support customers, can become a differentiator in creating meaningful CX.

A patient focus can be a pharma differentiator

Patient-focused pharmaceutical companies are raising the bar by delivering holistic, timely and empathetic support. In our research, providers highlighted companies that are doing more than providing medications. Instead, they're enabling better outcomes through proactive access support, meaningful education and community-driven digital experiences. Respondents who perceive a company as genuinely patient-focused said they were up to 80% more likely to recommend, prescribe and engage with that company.

It's clear that organizations have an opportunity to use patient services as a competitive differentiator. Some pharma companies have launched direct-to-patient platforms, empowering patients directly and supporting faster pathways to select treatments. As pharma designs more personalized and empowering experiences, putting patients at the center is increasingly a way for companies to win in the market and may open up an opportunity for patients to shape pharma's relationship with providers as well. With patients becoming more informed, proactive and digitally engaged in their care decisions, they're influencing treatment choices and driving demand for more transparent, coordinated and experience-driven interactions across the healthcare ecosystem.

Here are some things patient-focused companies are getting right:

- At the forefront is a commitment to accessibility. Providers say that robust patient access programs, including financial assistance, expedited online enrollment and tools like electronic prior authorization and benefit verification are dramatically reducing time to treatment.
- Patient-focused companies are equipping providers and patients alike with high-quality educational content. "Exceptional customer support and patient access programs ... allowed me to offer timely treatments to patients, especially those with financial constraints," said one provider. "Their educational resources, including clinical trial data, also supported my decision-making in complex cases."
- Beyond scalable programs, what sets some companies apart is their willingness to go the extra mile, even for just one patient. One provider recalled a moment when a patient was struggling to understand her prognosis and treatment path. On short notice, an educator from a pharmaceutical company stepped in to provide personalized materials and support, helping the patient gain clarity and confidence. "I was blown away that they were willing to meet me to help one patient," the provider recalled.
- Finally, these companies are investing in digital tools that create connection. Chatbots and patient portals not only offer streamlined self-service but also provide space for patients to engage with peer communities, reducing isolation and building a sense of belonging.

By meeting patients with empathy and empowerment, pharma companies are building a foundation for something even more powerful: trusted partnerships with the healthcare professionals who bring those treatments to life.

Building customer trust is still key for HCP engagement

Our research found that 75% of HCPs trust pharma's clinical data. But only 25% said they trust pharma as a partner for their institution. How can we broaden the trust in pharma to go beyond the clinical data?

Our research suggests that the most effective sales representatives stand out because they focus on people, not products. They also excel at listening, taking time to understand how each practice operates and empathizing with the unique challenges providers and patients face. In fact, they know the provider, their practice and their patients so well that they can equip them with the right information at the right time, removing barriers before they arise. They help HCPs feel heard, supported and better equipped to solve problems.

These top performers move beyond scripted messages, answering questions with credibility and confidence. Their ability to tailor responses to each provider's needs builds confidence and trust. They also recognize that, in today's complex healthcare landscape, it's not enough to explain why to buy a product—providers also need support navigating how to buy it. The best reps help ease access and logistical hurdles by sharing lessons learned and pointing to resources that streamline treatment initiation. Technology is a key enabler for the top performing reps and not only helps with productivity but also proactivity by applying solutions like next best action personalize interactions in a timely manner.

Ultimately, what sets the best reps apart is their mindset: they view themselves as partners to the entire practice. By building strong relationships with physicians and staff alike, they create a sense of partnership and shared purpose. Practices feel supported, valued and connected to a resource who makes their work easier and their patients' care better.

For example, emerging pharma companies were commended for their personalized support, providing meaningful solutions at the point of care. This level of customization signals a deep understanding of provider workflows and patient realities, which in turn builds stronger, trust-based relationships.

How pharma can boost CX

By amplifying patient focus, deploying digital and field resources contextually and doubling down on building trust, pharma companies can close the experience gap and ensure they remain competitive.

Here are some ways to begin:

- **Amplify patient focus:** Redesign metrics and incentives to embed patient focus into your processes. Recognize and celebrate patient-focused actions and evaluate patient outcomes beyond ROI. Empower the organization to act for the patient by embedding patient-first principles and processes centered on understanding and serving patients.
- **Build trust:** Understand the ecosystem around the HCP and build solutions that help solve problems and remove barriers they face. Share the burden of integrating products into practice. Contextually deploy digital and personnel but remember the value of the human touch.
- **Become fluent in customer context:** Know the context of the interaction and individual. Have the right content for the context, delivered via a channel they prefer for that context.
- **Be ready to act as a mainstay** rather than just a messenger, anticipating and addressing barriers to the customer's journey. This mindset helps companies become the central pillars of support and build trust, reliability and support for the customer.

HCPs have spoken, and they're looking for companies that combine clinical expertise and technology with human connection. Curious about where your company stands and how you can improve your CX? Contact us.

Note: The “Net Promoter Score” (NPS®) is based on the fundamental perspective that every company’s customers can be divided into three categories: promoters, passives and detractors. Net Promoter, NPS Prism and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc. and Fred Reichheld.

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