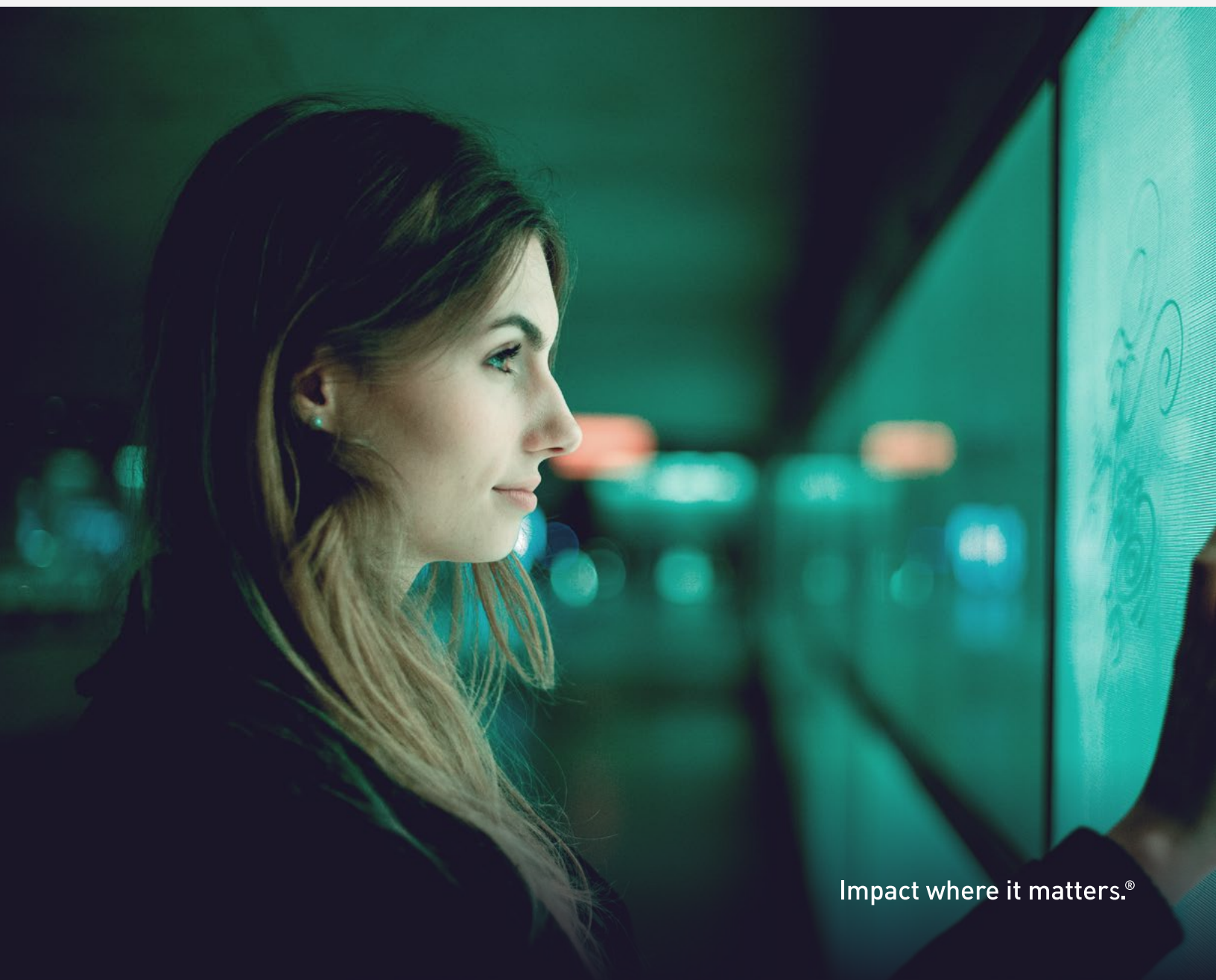




# B2B marketing—A missing key to advanced KAM in pharma and medtech

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Many pharma and medtech executives believe that advanced KAM strategies and capabilities are critical to their company's future success. And for good reason: Healthcare system trends in the United States include increased consolidation, increased administrator control and influence, continued constraints on sales rep access, increased administrator interest in partnering with manufacturers and higher net-promoter scores for manufacturers that successfully partner.<sup>1</sup> Medical group consolidation and payer business model evolution are also contributing to this corporatization of healthcare. Collectively, these trends continue to elevate the criticality of KAM in life sciences and underscore the need for increasingly impactful KAM strategies and capabilities.

KAM is still a relatively new B2B strategy in life sciences. Pharma and medtech companies have made important strides in KAM over the last five years, resulting in improved key account relationships and product access. Looking forward, the industry is now focused on pursuing advanced levels of KAM that address broader quadruple aim needs of large and complex health systems and medical groups. Case in point, the ability to develop and deliver advanced and tailored "solutions" is now the number one KAM-related investment priority for a majority of pharma and medtech executives.<sup>2</sup>

At present, few life sciences companies are able to design and deliver tailored solutions to key accounts at scale. Most have needed to walk before they run. Health systems have also been in a state of change including ever-increasing interest by administrators in partnering with life sciences companies. The evolution to advanced and tailored solutions promises new levels of customer impact and strategic relationships. However, it's critical to recognize that this next phase of KAM in life sciences is a big step and one that will require transformational change.

New B2B marketing capabilities will be at the forefront of this necessary transformation. B2B marketing is nascent in life sciences and is central to the development of solutions, value propositions and enablers required for advanced KAM. While many life sciences companies have roles like "institutional marketers" or "systems marketing," the fact remains these are usually one or two individuals with traditional brand marketing backgrounds and limited budgets tied to brands or product lines. B2B marketing for national and regional payers is farther along but is well short of the capabilities required for tailored solutions at scale. In fact, B2B marketing is a missing key necessary for unlocking the advanced KAM solutions and strategic partnerships that life sciences has long envisioned.

In this article, we focus on the critical role B2B marketing must play in order for life sciences to achieve the next frontier of KAM effectiveness and impact. In doing so, we provide a comprehensive B2B marketing framework and share insights on organization design, cross-functional operating model and evolution.

# Moving from basic KAM to advanced solutions requires transformational change

Leading life sciences companies are seeking to evolve rapidly from KAM focused on basic offerings and “tailored messaging” to KAM focused on “tailored solutions.” Consider the four fundamental account management models in life sciences (as depicted in Figure 1).

FIGURE 1:

## 4 fundamental account management models in life sciences

Advanced KAMo	<b>Customized Solutions</b> Type 4	<ul style="list-style-type: none"> <li>• Bespoke “one-off” solutions</li> <li>• Significant co-creation and innovation</li> <li>• C-and D-level contact points</li> <li>• Account segmentation, selection &amp; tiering)</li> </ul>
	<b>Tailored Solutions</b> Type 3	<ul style="list-style-type: none"> <li>• Tailored solutions via menu provided by B2B marketing</li> <li>• Quarterbacking to improve experience and pull-through</li> <li>• D-level contact with some C-level</li> </ul>
Entry KAM	<b>Tailored Messaging</b> Type 2	<ul style="list-style-type: none"> <li>• Basic offerings (and/or contracts) and tailored messaging to stakeholder types</li> <li>• Quarterbacking to improve experience and pull-through</li> </ul>
Account Mgt	<b>Basic Account-Based Selling</b> Type 1	<ul style="list-style-type: none"> <li>• Account-based selling for subset of assigned accounts (e.g., “full office calls” or some hospital or specialist reps)</li> <li>• Some degree of coordination required</li> </ul>

Current

Future

As indicated above, life sciences is currently seeking to evolve from a predominantly Type 2 KAM model to a Type 3 KAM model with some Type 4 for very select accounts. Recent ZS research provides compelling proof for this direction.<sup>2</sup> No life sciences executives rated their organization as highly effective at solutions and value propositions for key accounts, while 66% of life sciences executives indicated that advanced solutions and associated value propositions is their top investment priority for the future. Furthermore, 83% state that “programs to improve clinical, financial and/or experience outcomes” is one of their key objectives for KAM. In other words, the goal for many leaders is type 3 KAM with selective Type 4 KAM for special accounts.

For the right accounts, Type 3 KAM focused on tailored solutions drives deeper strategic partnerships, superior customer experience and greater mutual impact. In addition, Type 3 first movers can increase competitive barriers to entry. Customers may not need overlapping solutions, and established strategic partners have the advantage of deeper customer insight and trust.

While the rationale for Type 3 KAM is compelling, evolving from Type 2 to Type 3 KAM is a big step. Doing so means going from simpler “tailored messaging” and basic contracting to more complex account-specific insight, consultative engagement, tailored solution development, tailored value proposition messaging, compelling proof points and cross-functional execution. Key points of customer contact shift toward senior executives who, in many cases, are not current points of contact and are stakeholders many key account managers are uncomfortable engaging. Gaining and sustaining access to these harder-to-see executives will require both a clear understanding of their business priorities and delivery of real value during the interactions themselves. The customer engagement process must significantly evolve to include greater focus on up-front needs assessment and solutioning and downstream focus on implementation, pull-through and value maximization. New skills and competencies will be essential, many of which require new training but also substantial apprenticeship. Metrics and motivation systems will need to evolve along with many other aspects of internal support and cross-functional collaboration and support.

In conjunction, the B2B marketing function will be one of the most important areas for investment. Advanced and tailored solutions are the defining characteristic of Type 3 and Type 4 KAM. For Type 3 KAM, B2B marketing plays the central role in building segment-level advanced solutions and cross-functional agreement to those solutions. They then provide the enablers that key account managers need in order to tailor those solutions to the needs of individual accounts. For Type 4 KAM, where solutions are truly bespoke and co-created with a single customer, B2B marketing plays a central role as a member of the cross-functional SWAT team supporting the co-creation process. Given today’s lack of KAM-focused B2B marketing in most life sciences companies, it should be no surprise that the industry has seen limited success to date in Type 3 and Type 4 KAM. In the next section we’ll go deeper into the roles of B2B marketing.

## **B2B marketing**

The core B2B marketing functions required for Type 3 KAM are depicted in Figure 2 and fall into four categories: B2B strategic marketing, account-based marketing, customer insights and organizational alignment.

FIGURE 2:

## B2B marketing functions critical to advanced KAM (Types 3 and 4)

1 B2B Strategic Marketing	2 Account-Based Marketing (1:1, 1:Few)	3 Customer Insights	4 Organizational Alignment
<p><b>Establish segmentation, value strategy, ABM model and resources</b></p> <ul style="list-style-type: none"> <li>Account segmentation, selection and tiering</li> <li>Baseline value strategies                             <ul style="list-style-type: none"> <li>Solutions and optionality</li> <li>Value propositions</li> <li>Shared metrics</li> <li>Enablers</li> </ul> </li> <li>Interlock with corporate, BU and brand strategy</li> <li>Digital strategy for KAM</li> <li>Resourcing and budgeting (budgets, ABM tiering and FTEs)</li> </ul>	<p><b>Support tailored solutions in partnership with KAMs</b></p> <ul style="list-style-type: none"> <li>Account plan and customer engagement process (CEP) inputs and support</li> <li>Tailored solutions/value propositions guidance and customized collateral</li> <li>Omnichannel marketing plans and campaigns                             <ul style="list-style-type: none"> <li>DMU awareness and engagement</li> <li>Solutions pull-through and impact</li> </ul> </li> <li>Top-to-tops support</li> </ul>	<p><b>Lead primary + secondary research and insights</b></p> <ul style="list-style-type: none"> <li>Customer needs, priorities and objectives</li> <li>Decision-making units, journeys and moments of truth (DMUs, CDJs, MOTs)</li> <li>Competitive intelligence</li> <li>Voice-of-customer and experience (VoC, CX)</li> <li>AI / analytics</li> </ul>	<p><b>Support organization-wide commitment and collaboration</b></p> <ul style="list-style-type: none"> <li>KAM executives board member</li> <li>KAM program office / CoE member</li> <li>Executive sponsor (account-specific team member)</li> <li>Cross-functional leadership alignment</li> </ul>

**An overview of each of these 4 categories is provided below:**

### 1. B2B strategic marketing

B2B strategic marketing is responsible for KAM strategy at the segment-level including account segmentation strategy and segment-level value strategy—both in accordance with broader corporate strategy and business unit (BU) strategies. B2B strategic marketing also defines KAM related account-based marketing and digital strategies while operating as the key interface with brand marketing and other marketing functions that touch key accounts.

B2B strategic marketing’s leadership of key account segmentation strategy ensures that the right accounts are being engaged through KAM with mutually impactful value strategies and associated engagement models. The leading practice within life sciences is multilevel

segmentation strategies, with the first level being by role in the healthcare system (such as provider, payer, GPO and so on) and the second level based on account characteristics (such as addressable potential, degree of control, partnering receptiveness and so on).<sup>3</sup>

“Sub-segments” of accounts are often defined within the second level based on variations in characteristics. Assignment of accounts to segments and sub-segments is an important aspect of the strategy and is managed as an annual business process to objectively select, deselect and prioritize key accounts.

In organizations with both enterprise and BU-level KAM functions, B2B strategic marketing is responsible for the harmonization of the enterprise-level KAM segmentation strategy with the BU-level KAM segmentation strategies. Harmonization does not necessarily mean the same segmentation strategies but does imply a segmentation approach that allows effective and efficient coordination between enterprise and BU key account strategy where there is overlap.

Value strategy for key accounts is focused on three key factors for each account segment: Advanced solutions, optionality and value propositions.<sup>4</sup> Advanced solutions are built around programs, services, systems and informatics that go beyond basic offerings and that align to areas of mutual interest between key accounts and the manufacturer. Optionality refers to the elements of the solution that the key account team can vary in order to best tailor the solution to individual accounts. Value proposition is the messaging and proof points for the expected benefits and impact of the proposed solution. In Type 3 KAM, B2B strategic marketing’s role is to develop baseline solutions, optionality and value propositions at the segment or sub-segment-level. In the process, B2B strategic marketing collaborates with cross-functional stakeholders and establishes organization-wide commitment. Doing so helps ensure the account-specific tailored solutions developed by key account managers will be mutually beneficial and cross-functionally supported during implementation.

A third role of B2B strategic marketing is to manage the “interlock” with brand teams and other marketing functions (such as disease, patient, region or other marketing functions that might exist). Relative to other marketing functions within life sciences, B2B strategic marketing is uniquely focused on customer-centric strategies specific to administrator quadruple aim needs and priorities. Conversely, brand (or disease) teams develop solutions and plans specific to their own respective area. As B2B strategic marketing develops customer-centric strategies, they both take input from and inform brand and disease marketing teams.

The goals are to align key account solutions and value propositions with brand priorities and messaging where appropriate, provide clear and customer-centric direction to key account managers (versus multiple and potentially conflicting direction from a multitude of marketing

teams), facilitate synchronized contact with administrative decision-makers that are being targeted by multiple marketing teams and better align and rationalize marketing resource allocations.

Digital strategy for KAM is a rapidly expanding focus for B2B strategic marketing. Digital in the context of KAM continues to evolve and includes digital channels, digital enablement and digital customer solutions. Some examples include:

- Digital channels: Unique website portals and functionality for key accounts, ability to track and report key account user website activity, e-commerce solutions for key accounts.
- Digital enablement: KAM-specific CRM and account planning tools, knowledge management technology for solution and value proposition collateral management and customization, virtual meeting rooms, automated coaching tools, social media and news scanning for key accounts.
- Digital offerings: Customer solutions that incorporate digital elements such as IoT, patient wearables and others.

Finally, for a B2B strategic marketing function to be successful, it must also drive allocation of a sufficient level of marketing budget to achieve these goals. This has traditionally been a challenge in life sciences companies where the marketing budget is often allocated at the brand level. To shift to a true “above the brand” segment-level engagement, shifting similarly to “above the brand” segment-level budgeting is a necessary requirement.

## **2. Account-based marketing**

Whereas B2B strategic marketing is focused on designing baseline solutions and value propositions at the segment-level, account-based marketing (ABM) is focused on supporting key account team execution at the account-level. The power of ABM is its tailored personalization. ABM for KAM is quite different than the large-universe “1-to-many” ABM that many marketers are familiar with (for example, ABM focused on thousands of customers). ABM for KAM is “1-to-1” or “1-to-few,” where few is a small cluster of “like” accounts (for example five to ten similar accounts). With ABM for KAM at full maturity, marketers provide consultation to individual key account managers at each stage of the customer engagement process along with customized collateral, account-specific marketing campaigns and top-to-top executive meetings support. The scope of the ABM function and level of resources can vary widely based on the organization’s key accounts value strategy and state of KAM maturity. The more advanced the tailored solutions and optionality, the greater the need for ABM.

For advanced ABM functions, account-based marketers provide consultation and customized collateral to individual account teams at each stage in the customer engagement process. In this regard, ABM entails a close, tandem partnership with individual key account managers at every stage in the customer engagement process (as depicted in Figure 3).

FIGURE 3:

### Account-based marketers as tandem partners to key account managers

CEP Stage	KAM Role (Type 3 or 4)	ABM Role
<b>Account Planning</b>	<ul style="list-style-type: none"> <li>• Develops intimate knowledge of account needs, issues and decision influencers based on direct personal engagement</li> <li>• Orchestrates and leads account planning and strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Provides insight on needs, CDJ, DMU and personas based on secondary data analysis and primary marketing research</li> <li>• Advises on overall account plans and owns marketing-specific component</li> <li>• Develops marketing campaigns to drive engagement with key decision influencers in accordance with the account plan and strategy</li> </ul>
<b>Needs and Priorities</b>	<ul style="list-style-type: none"> <li>• Engages key decision influencers to more deeply understand needs and priorities and to gain agreement to co-develop potential solutions</li> </ul>	<ul style="list-style-type: none"> <li>• Advises on potential needs, “mutual interests” and solutions</li> <li>• Supports KAM with development of account-specific collateral</li> <li>• Joins KAM during key customer interactions (e.g., dual listening, thought partner)</li> </ul>
<b>Solutions and Tailoring</b>	<ul style="list-style-type: none"> <li>• Select solutions and optionality and associated value propositions (in partnership with customer and supported by ABM)</li> </ul>	<ul style="list-style-type: none"> <li>• Advises on solution tailoring and value propositions</li> <li>• Drives development of account-specific materials</li> <li>• Joins KAM during key customer interactions (e.g., complimentary skills)</li> </ul>
<b>Mutual Commitments</b>	<ul style="list-style-type: none"> <li>• Leads the development of and agreement to commitments required from both sides to move forward</li> </ul>	<ul style="list-style-type: none"> <li>• Provides leverage to KAM by facilitating internal cross-functional alignment to agreed commitments and associated expectations</li> </ul>
<b>Implementation</b>	<ul style="list-style-type: none"> <li>• Develops, tracks and manages overall implementation plan</li> </ul>	<ul style="list-style-type: none"> <li>• Develops and executes campaigns to drive HCP, patient and other stakeholder pull-through required to maximize impact</li> <li>• Addresses internal implementation issues as they arise</li> </ul>
<b>Impact Maximization</b>	<ul style="list-style-type: none"> <li>• Leads business reviews with customer to quantify impact-to-date and identify opportunities and plans to increase impact</li> </ul>	<ul style="list-style-type: none"> <li>• Leads VOC, tracks “shared metrics” attainment and advises associated actions</li> <li>• Supports development of account-specific collateral for business reviews and participates in customer readouts</li> </ul>



As tandem partners with the key account manager, account-based marketers bring a unique competency to the team including the following: A deep understanding of the relevant customer decision journeys, decision-making units and personas; a deep expertise in the company’s advanced solutions, optionality and value propositions; a deep understanding of existing collateral and enablers along with expertise in customized collateral development; and a strong ability to engage internal cross-functional stakeholders as necessary at each stage in the engagement process.

Account-based marketers also develop and execute customized campaigns targeted to individual decision influencers and accounts or clusters. The goal of such campaigns is to drive engagement and pull-through for defined account objectives and solutions. Account-based marketers have a range of tools and tactics to draw upon including content, channels and granularity (as summarized in Figure 4).

FIGURE 4:

### Account-based marketer tools and tactics for key account personalized campaigns

Content	Channels	Granularity	ABM Role (Tailored Campaigns)
<ul style="list-style-type: none"> <li>Articles, blogs, papers, books</li> <li>Brochures, newsletters</li> <li>Research reports, infographics</li> <li>Case studies, testimonials</li> <li>Webinars, podcasts, videos</li> </ul>	<ul style="list-style-type: none"> <li>Website</li> <li>Email</li> <li>Direct mail</li> <li>Social media</li> <li>Advertising, PR</li> <li>Conferences</li> <li>Field force, partners</li> </ul>	<ul style="list-style-type: none"> <li>Specific individual</li> <li>Specific account</li> <li>Type of decision-maker</li> <li>Type of account</li> <li>Need, solution or desired action</li> <li>Generic</li> </ul>	<ul style="list-style-type: none"> <li>Account or cluster-specific marketing plans:                             <ul style="list-style-type: none"> <li>– Audience awareness and engagement</li> <li>– Internal awareness and engagement</li> <li>– Solution pull-through and execution (impact maximization)</li> </ul> </li> <li>Orchestration</li> </ul>

Effective ABM for key accounts is a force-multiplier for the entire commercial team and leads to greater engagement from key decision influencers, more effective solutions and value propositions, stronger customer commitments, greater pull-through and value maximization, and deeper partnerships. Some critical success factors for the design of the ABM function include the following:

a. Specificity on which accounts will receive 1:1 ABM versus more generalized 1:few ABM

- 1:1 ABM is a side-by-side partner with the key account manager at every stage in the customer engagement process.
- 1:few ABM provides more generalized support with higher reliance on key account manager “self-help” enablers and technology.

- b. Access to segment-level advanced solutions, optionality and baseline value propositions as provided by strategic marketing (as opposed to ABMs themselves having to innovate solutions from scratch).
- c. Clarity regarding the interlocks between B2B strategic marketing, ABM and brand planning processes.
- d. Availability of resources and realistic time horizons resulting from executive recognition that ABM is critical to KAM and is a longer-term “strategic” initiative—and not a short-term “tactical” initiative.
- e. Definition of the ABM function’s roadmap that typically starts smaller and scales over time (start with a small number of ABMs and Early Experience Teams (EETs™) and scale over time).

A type of 1:1 ABM model already exists on a small scale in some life sciences companies for engagement with very “special” entities like Kaiser Permanente. Enabling B2B marketing for the entire KAM strategy will entail upgrading and scaling this approach by changing it from a “one-off” to an organizational capability supported by the right tools and processes.

### 3. Customer insights

A common saying in KAM is “if you’ve seen one key account you’ve seen one key account.” Key accounts are complex entities, each with their own unique needs and decision processes. As a result, key account managers play a central role in the collection and validation of detailed and intimate customer insight and rely somewhat less on primary marketing research outputs compared to HCP-focused sales roles. Still, this does not mean that the customer insights function is any less important for KAM. Quite the opposite.

The customer insights function provides essential inputs to B2B strategic marketing, account-based marketing, individual key account managers and executive leadership. Because of the complexity and importance of key accounts, input from the customer insight function is combined with the experiences of key account managers to drive effective decisions on an account-by-account basis.

#### **B2B customer insights responsibilities for supporting KAM strategy fall into four categories:**

- a. Conducting primary and secondary research to understand needs and priorities for key accounts, associated customer decision journeys (CDJ), key decision-makers (also known as decision-making units or DMUs), personas and key moments of truth (MOTs) during the customer decision journey.
- b. Collecting competitive intelligence to help shape differentiated solutions and to drive more effective engagement processes and coverage.
- c. Conducting voice-of-customer and customer experience (CX) tracking specific to KAM. The leading practice for KAM CX tracking is a closed-loop voice of customer platform that captures input from a cross-section of key decision-makers within each account and provides real-time feedback to account teams to address any risks and to maximize experience.



- d. Providing or guiding the delivery of analytics to support B2B strategic marketing, ABM and account teams directly. Examples may include analytics related to addressable potential, control or account behavior along with suggestion engines to provide timely advice to key account managers and teams.

#### **4. Organizational alignment**

A range of broader organizational alignment and support roles exist for B2B marketing leaders in addition to those outlined up to this point. These may include the following:

- a. Member of a cross-functional executive board that is tasked with collectively owning and overseeing the company's KAM program objectives, resource commitments and execution.<sup>5</sup>
- b. "Executive sponsor" who is an imbedded team member on one or more specific account teams and who shares accountability for account success along with the key account manager.<sup>5</sup>
- c. Member of a cross-functional KAM "Program Office" or Center-of-Excellence that is responsible for collectively supporting and continuously improving KAM excellence within the company.<sup>6</sup>
- d. Champion to continuously engage relevant cross-functional leaders to ensure ongoing commitment and support necessary to execute the advanced solutions called for by the broader KAM strategy.

## Organization evolution

B2B marketing is nascent within life sciences and is a precursor to Type 3 or Type 4 KAM. In general, a key success factor for organizations that are early on the B2B marketing journey is to start small and expand the capability over time based upon demonstrated impact and learnings.

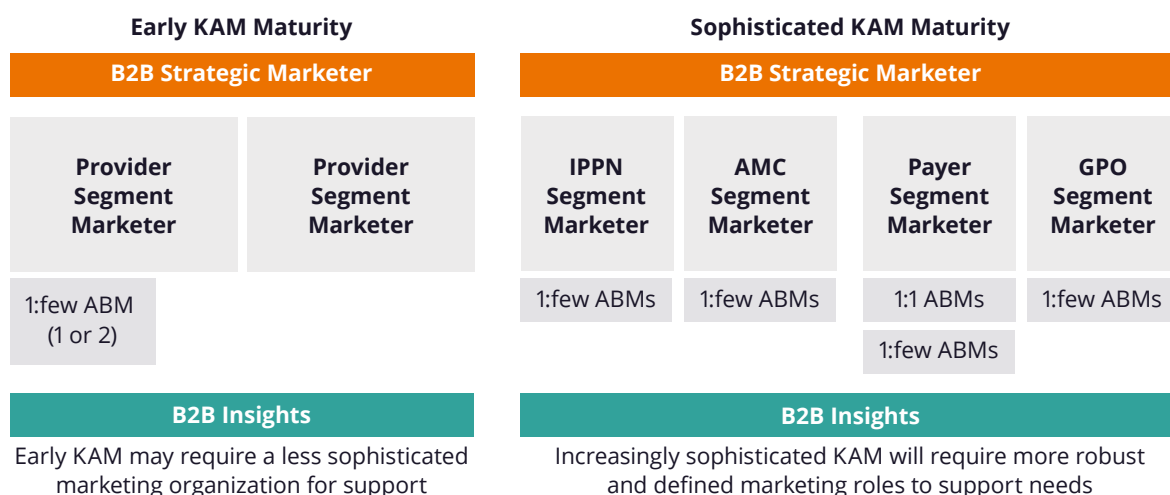
Four types of roles typically form the building blocks for the B2B marketing function including the following:

- Executive leadership: Responsible for B2B strategic marketing as a whole.
- Segment marketers: Responsible for B2B strategic marketing at the segment or sub-segment-level.
- Account-based marketers: Responsible for ABM at the account or account-cluster level.
- Customer insight leads: Responsible for customer insights focused on key accounts.

A range of specializations are possible within each of these roles. As depicted in Figure 5, early-stage B2B marketing functions will generally have fewer, less-specialized segment marketers focused on higher-level segment groupings and will employ ABM in a limited group of accounts (possibly just a few initially). Over time, as both the KAM strategy and B2B marketing capability evolve, the B2B marketing function will expand and become more specialized.

FIGURE 5:

### B2B marketing should start small and expand over time based on impact and business needs



A number of factors need to be considered by leaders who are defining the vision and design for the B2B marketing function. These include the following:

- How to ensure necessary capacity and expertise based on the speed at which the organization is seeking to move to Type 3 KAM (recognizing that initial solutions are typically simpler in nature and become more complex over time as capability evolves and customer relationships deepen).
- How and when to specialize segment marketing roles based on necessary expertise and associated opportunity by segment and sub-segment.
- How fast to grow ABM resources and capabilities, including which accounts to target with 1:1 ABM, 1:few ABM and self-service ABM (via technology solutions). Also, whether to leverage other roles such as regional marketing to provide ABM support (in cases where these roles already exist).
- How best to simultaneously support enterprise and BU KAM strategies and implementation in organizations that have both.
- How to establish business processes that achieve an interlock between B2B marketing and brand marketing or payer marketing (plus other marketing including disease, patient and other).
- Where to source talent that has expertise in KAM and B2B marketing strategy, ABM and customer insights.

There is no one-size-fits-all B2B marketing organization design and operating model. B2B marketing will invariably vary from one organization to the next based on the organization's KAM strategy and aspirations along with broader organization design, operating model and systems considerations.

## Concluding comments

Key trends related to large and complex health systems and medical groups will continue to increase the criticality of KAM in life sciences. KAM-related objectives and investment priorities indicate that a majority of life sciences leaders are committed to significantly increasing the sophistication and impact of their organization's KAM strategies and capabilities. As a result, the frontier for KAM in life sciences will rapidly move toward advanced solutions that address broader quadruple aim needs and priorities held by powerful administrative stakeholders.

Advanced solutions are the hallmark of Type 3 and Type 4 KAM and represent a significant opportunity to maximize impact for providers, payers, patients, communities and manufacturers alike. Success will require many aspects of KAM strategy and capabilities to evolve with B2B marketing capabilities at the forefront. The institutional and systems marketing models and brand or product-line focused budgets that exist in life sciences today will not achieve the advanced KAM impact that most life sciences companies have set as a strategic priority. In many ways, B2B marketing has been a missing link in life sciences KAM and will be key to realizing the strategic account partnerships and impact that life sciences has long envisioned.

## Endnotes

1. Provider Organization Partnership tracking survey, wave 4. ZS Associates. Data represents a quantitative survey of 92 US health system administrators in July 2022.
2. ZS and Strategic Account Management Association, "State of Key Account Management in Pharma" and "State of Key Account Management in Medtech," Q4 2020.
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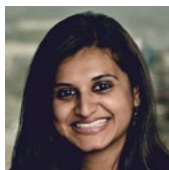
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