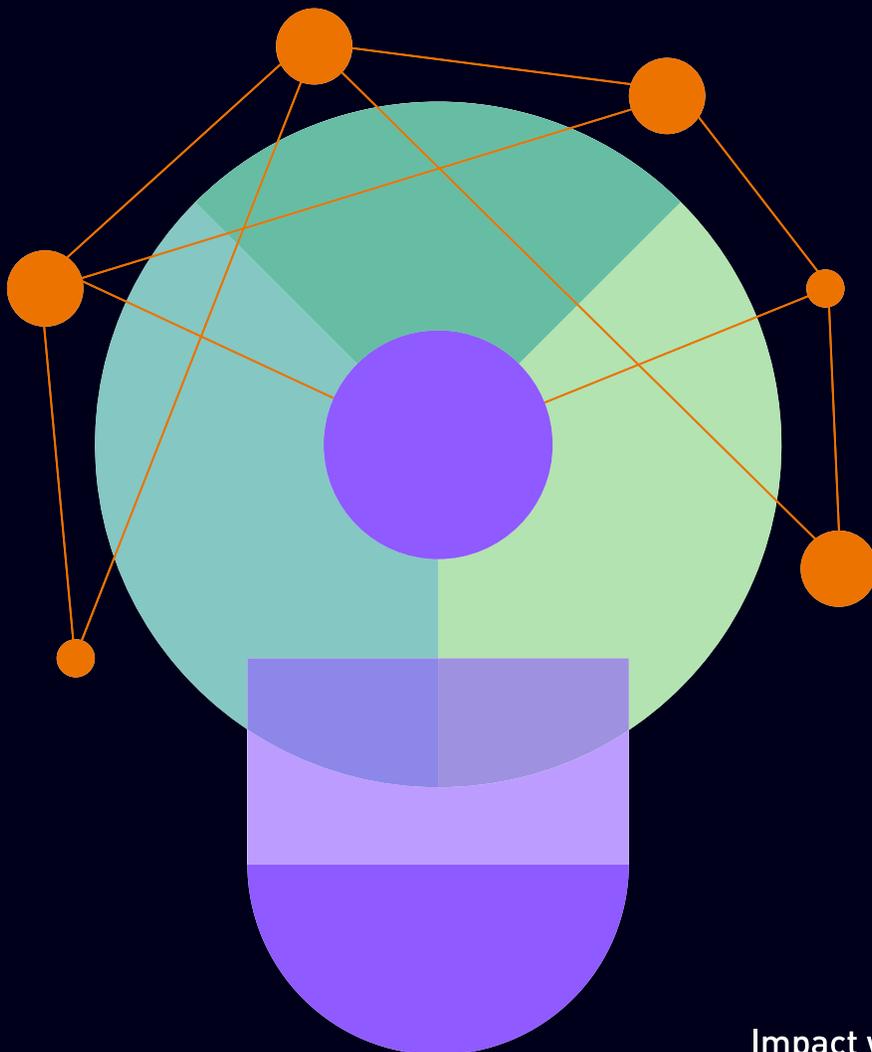


What will it mean for pharma marketing when customers are in the driver's seat?

By Katie Krasnikova, Carolyn Morrow and Greg Shapiro



As a pharmaceutical marketing leader, you may wonder how to take your organization to the next level. How can you see where the future is headed and make realistic changes within your organization to realize future gains?

To understand where the future of marketing is going, you need to look at where marketing has been. We are emerging from an era centered around building customer relationships and prioritizing engagement, retention and loyalty. Pharmaceutical marketing strategies were poised to be slightly more personalized and digital-focused than predecessors, but we still find ourselves in a sales-dominant model.

As we look ahead, the evolution of marketing in the pharmaceutical industry will be driven by changing customer needs in tandem with advancements in technology.

What this shift means for the 2025 horizon is a change in focus away from relationship-driven marketing toward a customer service model where the customer is in the driver's seat.

In this white paper, we will dive into the trends that are causing disruptions across pharmaceutical marketing organizations, and we will explore some practical changes you can make to be prepared.

The four forces driving pharma marketing's next evolution

Customers are looking for more of a say in their experience and are pushing for on-demand data and experiences. To deliver, pharma marketing needs to shift to be more agile, connected and service-oriented.

Four fundamental forces are beginning to drive the shift toward this customer-driven model:

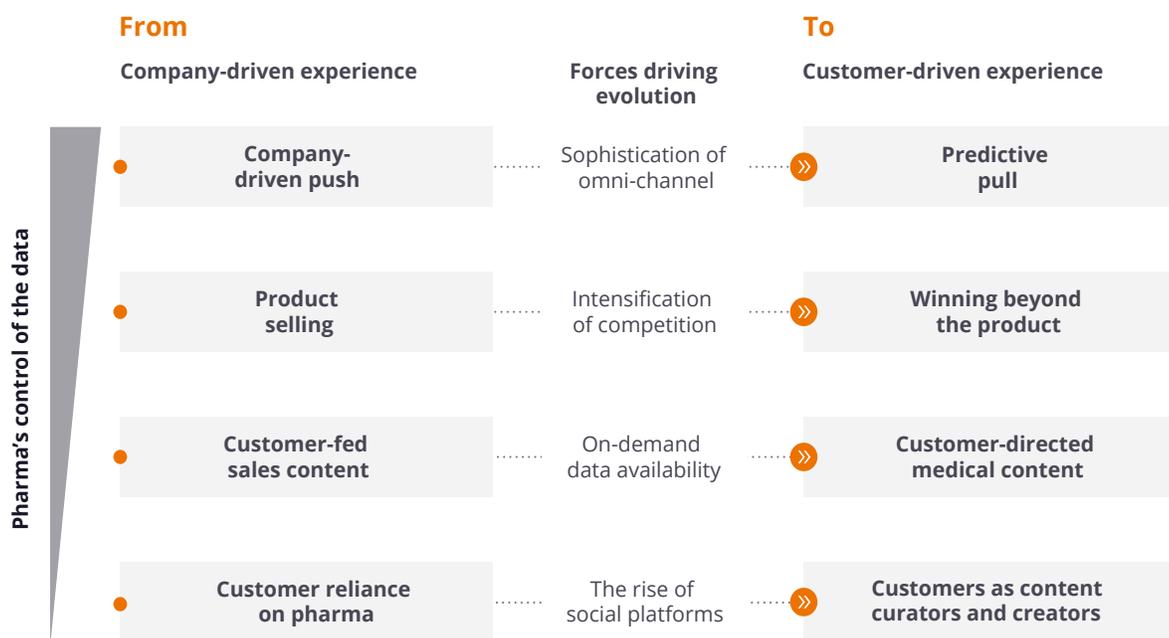
1. **sophistication of omnichannel delivery**, which is leading to shifts toward seamless customer engagement expectations
2. **beyond-the-product value narratives** amidst an intensifying competitive landscape
3. customers' wish for **on-demand medical content**
4. **social platforms leading to novel information** or content curation, creation and influence

As marketing shifts toward this customer-driven orientation, the pharmaceutical industry will need to consider how these forces work together to reshape a range of activities (see figure 1). These include:

- how your organization operates, including how you collaborate internally to design and deliver customer experiences in ways that provide the most value
- how your company seeks or takes control and ownership over the data and information related to customer activity
- your company’s ability to address issues of data privacy and compliance

FIGURE 1

Understand the forces behind pharma’s customer-driven marketing evolution



Source: ZS



Most importantly, we believe that those who understand how data can be used and deployed during the industry's transition to a customer-driven model will emerge as leaders. Here's a view on what pharma marketing leaders can focus on now and what to watch as the market begins to shift:

Predictive pull

What it is: To date, the technology has not been in place across pharma organizations to meet customers where they are, but that's changing. In the future, we can expect to see more sophistication in the industry's ability to deliver on true omnichannel engagement. And when customers are in the driver's seat, they will increasingly influence what information they receive and through which channels.

Where it's going: To drive value, marketing leaders will need to understand the unique needs of their customers, including patients, healthcare providers (HCPs) and healthcare systems. Without a deep understanding of customer needs, deployed content will fall flat, or customers will choose not to engage. To better understand and learn about your customers, you can employ AI feedback loops that learn from customer engagement and predict how customers will engage with content. These efforts can bring a more connected and hyper-personalized experience to your customers through continuous learning.

What to watch: As you build capabilities, the risk is over-indexing on content sophistication rather than channel understanding or vice versa. Focus on upskilling teams in both areas in parallel to avoid a situation where, for example, sophisticated and personalized modular content is deployed solely via traditional channels such as email. Avoid narrowly defining roles or hiring candidates who lack expertise in content or emerging channels. Instead, look for strategic thinkers who can collaborate across functions and have an eye for operational coordination and efficiency.

Winning beyond the product

What it is: The pharmaceutical industry has always sold based on the product, but clinical differentiation across products can be limited in many therapeutic areas, making it harder to win on product alone. As a result, marketing leaders have an interest in competing on value beyond a product's functional benefits.

Where it's going: We anticipate that value beyond the product will be the new battleground for building a strong customer experience, resulting in an explosion of innovation. Many companies will anchor on removing friction and creating seamless experiences—all of which requires a shift to a strong service mindset and innovation in the delivery. Others will shift toward more holistic and immersive experiences with adjunctive offerings and value adds, leveraging the latest technologies such as the metaverse or virtual reality to create moments of delight for customers and value beyond the product itself.

To win the customer, you'll need truly customer-centric value propositions, with a profound sense of purpose. Any perceived value-added offering that isn't connected to real customer needs creates a risk of endangering the experience you're trying to deliver.

What to watch: The risk pharma faces as it positions itself to serve the customer is assuming that today's sales talent can deliver on service. But the skills that made sales organizations successful in the past will not be the same skills that drive customer value tomorrow. Different disciplines such as human-centered design and behavioral science will be important for creating improved customer experiences for a wide range of external stakeholders.

Customer-directed medical content

What it is: Today's HCPs expect on-demand information, services and support for their medical questions. They require speed and objectivity to drive decisions. Looking ahead, HCPs will lean more on medical information channels inside and outside pharma. We expect HCPs' reliance on traditional sales teams to drop and their reliance on field medical personnel to rise. As a result, medical affairs teams will get more sophisticated and nuanced in their content to cater to needs that go beyond what is available in today's self-serve realm.

Where it's going: Marketing leaders will need to collaborate closely with medical affairs and clinical teams to elevate how they communicate the value of medical information to the customer. Customer needs will need to be fed into the organization to inform engagement approaches and product development.

This shift will require that you source hybrid medical-business skills from medical talent or differentiated hiring profiles that match with your company's ambition for omnichannel strategy and deployment.

What to watch: The biggest risk to pharma succeeding in this new model is the mindset of existing medical talent. You will need to help teams change their mindsets from being special to being integrated with the broader organization. This collaboration is necessary to support early input into business planning processes and a partnership with the marketing organization.

Customers as content curators and creators

What it is: In the near term, we anticipate that customers will start to take a more active role in curating their own experiences and data. They will rely on social networks and a multitude of sources for on-demand information, increasingly rationalized through more personalized AI. Consumer influencers, including HCPs, patients, politicians and academics will become more trusted sources for data and experience. Pharma will no longer have the control over the narrative they once had; data validity and overall trust will remain a concern.

Where it's going: Marketing and technology leaders will need to develop the partnerships and capabilities supported by AI to sift through customer noise to identify the right moments for intervention. These moments can range from an influencer podcast on the topic of practice economics or a patient TikTok video sharing their experience with a brand's product.

What to watch: The significant risk for pharma will not be that misinformation is being spread (that can be relatively easily refuted), but rather that the data the public is curating, sharing, emphasizing and leaning into is accurate but off strategy. We anticipate that marketing leaders will need to increase collaboration between marketing and communications to develop a more sophisticated way of communicating with and through a customer-led voice. You can start planning for this today by finding the opportunities for synergy across teams.



Understand the truths of this customer-driven model

Several truths will emerge when the customer is in the driver's seat. As a leader, you will need to decide which trends and which areas you will focus on and grow.

The macro trends will not change, but how they apply to your business may be nuanced. Ask yourself how the truths below will impact your market and company.

The new truths about understanding the customer

- The importance of the individual HCP as the core customer will decrease; leaders will need a broader customer lens.
- A more holistic view of the customer will increase cross-functional collaboration and blur the lines between functions.
- Investment will continue to grow in AI and predictive capabilities to understand customers better across all aspects of the business.

Ask yourself: What would need to change so that teams across marketing, sales, medical affairs, operations and technology groups can collaborate effectively? As a marketing leader, you'll need to lead the organization to become more collaborative and connected.

The new truths about what customers value

- The industry will need to specialize and upskill to drive customer value; several of these critical skills are nascent in pharma today, such as human-centric design, behavioral science, solutions development and digital channel excellence.
- Partnerships on solutions and services will be critical to move beyond a product's functional benefits.

Ask yourself: As you look across your team, what specific skill gaps do you need to bridge? Marketing teams often face specific skill gaps around human-centric design and behavioral science to help the organization build solutions and enhance their digital channel expertise. Building sophistication across these domains is critical to driving customer value in the future.

The new truths about how customers engage

- Engagement with medical information and new medical roles will rise while engagement with traditional sales teams will continue to decline.
- The customer engagement model will be redefined through channel proliferation, sophistication and personalization.
- More agile processes will come into play, especially with protocol-driven areas such as medical, compliance or regulatory functions.

Ask yourself: How will I know what is working and what needs to be adjusted? As more channels and agile processes become standard across your company, you'll need feedback loops to monitor how well the new model is working. Feedback loops require collecting information and analyzing data in new ways and creating new KPIs, measurements and triggers for success.

Your new service mindset

So, how should you evolve your team? With all these landscape shifts and choices, we can predict that pharma's future marketing organizations will need to orient around the customer and adopt design and service mindsets to be successful.

Getting there will mean evolving your team so they can understand and engage customers, decrease the time to product or service delivery through automation, and measure engagement—not through the success of sales or frequency of touchpoints, but through the quality and relevance of the experience.

Marketing leaders who collaborate around the customer, address talent gaps and create mechanisms to really listen and adapt to the customer all within their organizational structure are going to be the leaders who thrive.

About the authors



Katie Krasnikova is a manager in ZS's Advisory & Transformation space. She has experience working across the pharmaceutical industry, focusing on customer engagement and launch strategy. Katie focuses on supporting clients in making the right decisions through product development and launch, and on improving their decision-making capabilities and operations through agile methodologies. Katie holds an M.B.A from the UC Berkeley Haas School of Business, and a B.S. in Neuroscience from Carnegie Mellon University.



Carolyn Morrow is a Principal in ZS's Advisory & Transformation space focused on re-imagining the future of marketing in the pharmaceutical industry. Carolyn works with clients across strategic issues on global projects from organizational design, launch strategy, customer experience design, competitive planning, marketing strategy, capability development and more. She focuses on specialty markets and has a specific depth of knowledge in oncology and rare disease, helping to elevate the capabilities and ways of working for unique spaces and business models.



Greg Shapiro is a Principal at ZS with extensive experience in marketing strategy in the pharmaceutical and biotech industry. Throughout his career, Greg has focused on generating insights to inform and implement marketing initiatives, including opportunity assessment, patient and customer journey, customer segmentation, positioning and messaging. Greg holds an M.B.A. from the NYU Stern School of Business and a B.A. in Mathematical Methods in the Social Sciences from Northwestern University.



About ZS

ZS is a management consulting and technology firm focused on transforming global healthcare and beyond. We leverage our leading-edge analytics, plus the power of data, science and products, to help our clients make more intelligent decisions, deliver innovative solutions and improve outcomes for all. Founded in 1983, ZS has more than 12,000 employees in 35 offices worldwide.

Learn more: www.zs.com

