



Transforming Omnichannel Customer Experience Using AI and Digital

Pharma leaders offer insights on the value of customer orchestration



Progressive commercial organizations in the pharmaceutical industry not only embrace a customer-centric mindset but also take bold steps to advance their capabilities in support of that philosophy. We have already started seeing a paradigm shift in pharma, where customer orchestrations are starting to become more individualized as compared to a broad-brush, segment-level approach. This includes personalizing the experience using customer affinities toward channels and content. While personalization remains a key tenet of driving a stronger customer experience, the industry is also quickly shifting to an environment where the scope of optimization is expanding beyond the field to a more holistic and harmonized omnichannel strategy. However, personalization of content and harmonization of omnichannel touch points will not be sufficient to achieve full-scale customer orchestration. Using AI to adapt customer journeys and switch channel and content combinations based on the latest customer engagements will need to be one of the linchpins in today's sophisticated promotional models. Lastly, reps will continue to play a key role in driving successful orchestration and, therefore, any AI-driven customer engagement recommendations will need to be humanized to ensure adequate buy-in and adoption from the field. According to ZS's implementation experience across the pharma industry, true omnichannel customer orchestration has resulted in a more than 20% increase in engagement rates and an uplift in impactable sales that can reach up to 30%.

At the 2019 Veeva Commercial & Medical Summit, ZS sat down with two industry leaders who play key roles in their respective organization's customer-centric transformations: Alden Karr, senior director of customer and market insights at Biogen; and Sage Wodarz, director of customer experience at AbbVie. ZS Principal Saby Mitra moderated a wide-ranging discussion that touched on topics such as optimizing the customer experience, the business case for next best action programs, the operating strategy needed to deliver these programs and organizational changes related to marketing operations and field adoption.

Q: In your opinion, what are the most compelling reasons a company should consider developing a next best action program right now?

SAGE WODARZ: We need to realize that every touch point with [our] customers is an invitation to engage with them, and make it work as hard for us as it possibly can. We know what our field

force is doing with these end customers, so how do we complement that with non-personal promotion? That's new for the industry: Digital-savvy consumers are using different retail and e-commerce models. We may need to start thinking through that lens and not just devise strategies because doctors are very busy professionals.

Q: What are the characteristics of a good next best action program that you believe will drive the greatest business impact?

ALDEN KARR: We've learned a lot about some of the challenges and characteristics of a good next best action program. It's more than just sales and the personal promotion channel. It needs to be an organizational philosophy because it's not just one group that's impacted. As we thought about implementing a next best action program, one of the challenges was that everybody said, "We've got to start with sales," and "Sales is the most important." Sales is obviously a huge lever for us, but we also spent a lot of time educating the organization about how we contextualize this program to make sure we're truly coordinating our customer experience. There's a change management component that initially we weren't as attentive to, and it became apparent that it was more important than the cool stuff we were doing with data and information. If we're not setting the system up to create content in a new

way—to make sure that we're tagging content, thinking about metadata and capturing messages we've delivered—the whole thing won't make sense. And lastly, it's more than just data. A knee-jerk reaction that organizations may have is to buy all the data they can, but it's much more than that in

terms of getting all the different functions across the organization in line. As we started to have those conversations, we contextualized that this is a journey over time: Here is where we start, and this is the vision for where we end. Starting off having common ground on what we were trying to achieve—more than just buying data, more than just talking with the sales force in a new way—was important in getting us off the ground on the right foot.

"We need to realize that every touch point with [our] customers is an invitation to engage with them."

-SAGE WODARZ

Q: How would you describe the optimal operating structure to deliver a next best actions program, and specifically what role the customer engagement team should play?

SW: In my experience, establishing a formal customer experience group that is responsible for experience design and operational support, working very closely with the technology team, is an effective model. Additionally, if you have a group that is embedded with the brand teams and is much closer to the brand's strategy, it helps focus on creating a deliberate experience for the customer. Connecting across these two teams becomes important. In a larger-matrix organization, we need to make sure we're getting the resources and sharing the brand's strategic priorities with the technology teams. With data operations teams—the CE or CX team—the role they play is quarterback. The teams should work very closely with the marketing teams and with the agencies. One thing we've learned is the importance of partnering with agencies that can play nicely in your sandbox when you're operating this new type of model. Agencies need to understand how content will be served through channels and how segmentation and targeting might be handled differently than we've done before. Bringing in more people from outside of pharma who know how to orchestrate across channels, who have worked in hospitality, financial services, consumer packaged goods and different loyalty programs, can also help elevate the digital talent. Balancing that with pharma expertise is a refreshing way to move more quickly in this space.

AK: Thinking more broadly about next best action operating structure, what's helped us is quickly having clarity on the evolution of driver/passenger as we're thinking about different initiatives. There can be one team shepherding this whole group that is accountable for customer experience, but there are many different cross-functional components. Field excellence teams think about messaging to the field in the most effective way and driving true behavioral change in the field force. A multichannel team is accountable for evolving the entire digital marketing approach including production of new content and activation of new channels. Separately, as companies

advance to more agile operating models of their commercial organizations, there is a need to change the way that we think about fundamental building-block processes such as promotional review committees or medical legal reviews as we're aspiring to create and improve more flexible content, or at least reduce the cycle time to create new things as we face real-time, evolving customer needs.

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-ALDEN KARR

Q: In what ways does implementing an omnichannel next best action program change the marketing operations process?

SW: I anticipate certain areas of the marketing operations process will evolve significantly. The process of customer engagement and campaign design will be more AI and analytically driven. There’s more that can be done in terms of contractual agreements with third-party

partners, and in working with your regulatory leads. Bringing them in early and showing them the tools you’re going to create for them when they review is going to help you get there more quickly. And if we’re talking about dynamic content, the management process changes as well. Improved speed of content production, more volume of content and better tagging become part of the new operating strategy.

AK: One of the pieces we as an organization haven’t figured out yet is how we think about the evolution of marketing strategy and the tactical plan, and how those interrelate with each other. What are the expectations of a marketing organization from a planning cycle perspective? It’s a hanging question in my mind of how we evolve the organization on that front.

Q: What engagement tactics do you recommend to drive stronger adoption of next best actions among sales teams?

AK: This one is critical because if the field’s not working, it’s not going to work. Our approach was to have heavy field engagement early on from an educational perspective. We had them sitting in as we were evaluating different vendor partners to make sure there was foundational understanding of trade-offs—the “why” behind what we were doing, the investments we were making and how the whole system needed to fit together. Building field ambassadors and expanding that group of ambassadors as broadly and as quickly as possible is a critical imperative. Embedding the ambassadors as part of that core team significantly helps with buy-in and making trade-off decisions. At the outset of the program, “super users” from the field can test proof of concept for a few weeks on the operational capabilities, and then that group can expand as programs start to deploy more advanced suggestions to the field, so that there’s at least one person who has been deeply embedded in the process in each region. Relying on that peer-to-peer influence and leveraging peers to train each other on the process often becomes a successful strategy. If this didn’t feel like a grassroots effort at the peer level, then we weren’t going to be as successful as we needed to be. It all comes back to them. Measuring behavior is very important with the team in setting goals and providing information, as well as transparency on how sales teams are adopting the next best actions.

SW: Showing the field how quickly you can make a change is also helpful for buy-in. When they say, “What if we did this instead?” and we show a very short turnaround to make that change, partnership comes a lot more quickly.

About the Experts



Alden Karr leads Biogen's customer and market insights group including data analytics, market research, competitive intelligence, forecasting and marketing sciences. He has 10 years in strategic and operational experience across the biopharma value chain. He has focused on deepening his cross-functional skill set across commercial disciplines including commercial operations, marketing, and market access and reimbursement. Alden works to drive a data-driven decision-making culture by delivering actionable insights across stakeholders.



Sage Wodarz leads the U.S. AbbVie Immunology customer experience team's digital transformation with a focus on evolving current capabilities to leverage new marketing technologies and create a fully connected and data-driven customer experience. Prior to AbbVie, Sage was associate director of content and social marketing at Kraft Heinz. Sage's experience includes more than 15 years in CRM and digital marketing leadership roles across a variety of industries ranging from travel, financial services, consumer packaged goods and life sciences.



Saby Mitra is a principal in ZS's Evanston, Ill., office and leads ZS's global customer-centric marketing technology practice. He has more than 18 years of experience in advising and helping clients and their commercial organizations through customer-centric marketing and Digital solutions globally. Saby's expertise includes designing and implementing transformation programs in several customer-centric topics in the pharmaceutical industry and other verticals, including global digital transformation programs using AI and advanced analytics, digital platforms and technologies, and organizational science.

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