

MAXIMIZING OMNICHANNEL CUSTOMER ENGAGEMENT

AN IPSOS POINT OF VIEW

JULY 2020

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GAME CHANGERS





TODAY'S WORLD: OUR POINT OF VIEW

- Context
- Challenges
- Our approach
- Channel landscape
- Channel mix
- Channel segmentation
- Channel measurement
- Summary
- About Ipsos



The application of technology has proven transformative in some areas of the pharmaceutical sector, yet the digitalisation of customer engagement has largely stayed in the emergent phase. Whilst digital communication channels regularly feature in pharma brand commercialisation strategies, there has still remained a heavy reliance on field-based salesforces and medical liaison teams to deliver face-to-face engagement with customers.

The COVID-19 pandemic in the first half of 2020 triggered a rapid acceleration of interest in virtual channels as opportunities for in-person dialogue between pharma personnel and customers disappeared almost overnight. Even so, whilst COVID-19 has been a catalyst to the industry embracing more divergent, omnichannel approaches to engagement, customers were already seeking to engage in new and different ways, looking for on-demand personalised

information, delivered through their preferred channels at their preferred time.

Simultaneously, a number of other industry trends also support the move towards **an omnichannel approach to customer engagement in healthcare**, away from the traditional field-based models.



Price pressures from governments and payers, including outcome-based pricing, will only continue. This will necessitate more **cost-effective** and efficient engagement approaches, which can operate at scale without needing to upscale resources.



Enhancing the customer experience is no longer a by-line in pharmaceuticals. Truly understanding and meeting provider, patient and payer needs requires a deep understanding of customers and a shift from a product-centric to **customer-centric** way of thinking, operating and delivering.



Drug approvals in precision medicine continue to rise and are often for rare diseases. Finding, reaching and engaging with small numbers of geographically-dispersed treating physicians and their patients necessitates a **virtual and agile** engagement approach.



TODAY'S RAPID ACCELERATION IN THE USE OF VIRTUAL CHANNELS MEANS OMNICHANNEL ENGAGEMENT STRATEGIES ARE NEEDED, AND QUICKLY

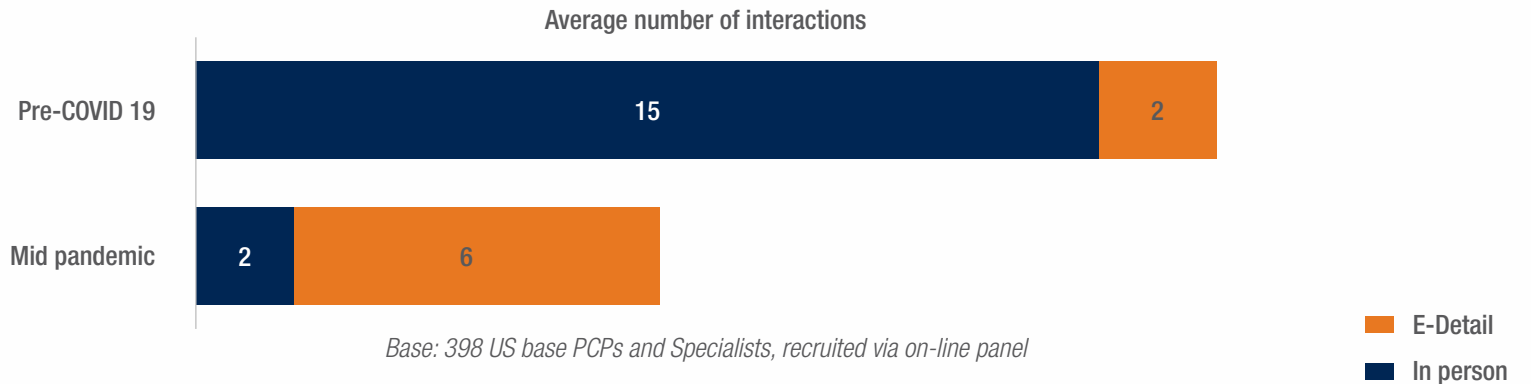
Your customers are now consuming and communicating information in innumerable new ways. Recent seismic shifts in healthcare and society have forced change through the disruption of current behaviours and acceleration of new ones.

Where digital was once a bolt-on to traditional commercial models, it now has a dominant, business-critical role to play. And expectations are that it is here to stay, with healthcare professionals already telling us they expect more virtual interactions in the future, pandemic or no-pandemic.

- Context
- Challenges**
- Our approach
- Channel landscape
- Channel mix
- Channel segmentation
- Channel measurement
- Summary
- About Ipsos



COVID-19 has triggered an expected decline in sales rep face-to-face interactions in the United States.



And **1/3** of all HCPs interviewed stated that they would expect half or more of the interactions with pharma companies to be virtual in the post-COVID world.

Source: Ipsos Health COVID-19 Surveillance Research, May 2020



SUCCESSFUL OMNICHANNEL CUSTOMER ENGAGEMENT WILL DEPEND ON DEFINING, OPTIMISING AND MEASURING YOUR OMNICHANNEL STRATEGY

We believe it's not about all-digital or all off-line but an intelligent and carefully curated mix of channels that delivers an omnichannel engagement experience to customers and patients in a personalized and value-added way.

We also recognise that within this, there are differing levels of digital IQ amongst customers and digital maturity of individual markets, which heavily influence channel mix and selection.

Context

Challenges

Our approach

Channel landscape

Channel mix

Channel segmentation

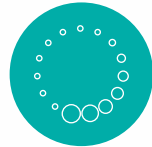
Channel measurement

Summary

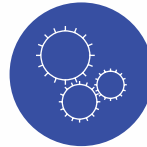
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Winning with your omnichannel engagement will depend on having an in-depth understanding of:



The current channel landscape: What works and doesn't work, the channels customers use and prefer



The optimal channel mix to ensure the right messages are available and delivered via the right combination of channels



How to customize the channel offering to meet the needs of key customer segments so that they receive the information they want, when and how they want it



With the right measurement in place to track performance

We can help you clarify what your brands need to start, stop or accelerate, in order to deliver the best omnichannel customer engagement experience



UNDERSTANDING TODAY'S CHANNEL LANDSCAPE

Channel-specific questions can be readily and rapidly added to your current research programs, including brand trackers, quantitative and qualitative studies. This can help provide a baseline understanding of current customer behaviours, perceptions and expectations around channels and engagement.

Ipsos' syndicated services can also give you instant access to physician behaviour, channel usage and preferences in a number of markets.

Our European and US syndicated research focused on e-detailing and e-health uptake, has recently launched. The European study is being conducted across France, Spain, Germany, Italy and the UK.

Context

Challenges

Our approach

Channel landscape

Channel mix

Channel segmentation

Channel measurement

Summary

About Ipsos



E-detailing & E-health uptake in Europe

A syndicated study assessing the impact of COVID-19 on the treatment of patients and changing interactions between healthcare stakeholders and industry

Prepared by Ipsos

May 2020

Introduction

Welcome to our proposal. We understand that this is a challenging and increasingly dynamic time where adaptability is key in terms of communicating with HCPs via more limited channels... Ultimately, this survey will provide a detailed and robust view adapted to the rapidly-evolving industry-wide business questions posed by our clients today...

- 1** "What makes for an effective e-detailing campaign – how do we break through the masses?"
- 2** "What are the key HCP needs during this time – how can we support the transition to telemedicine?"
- 3** "What does the future landscape look like for HCP interactions in a post COVID-19 world?"

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IDENTIFYING THE OPTIMAL CHANNEL MIX

Our channel mix solution blends four key elements that we see as essential to identifying the optimal combination of channels. What we do is robust and scientific; what we deliver is simple and actionable.

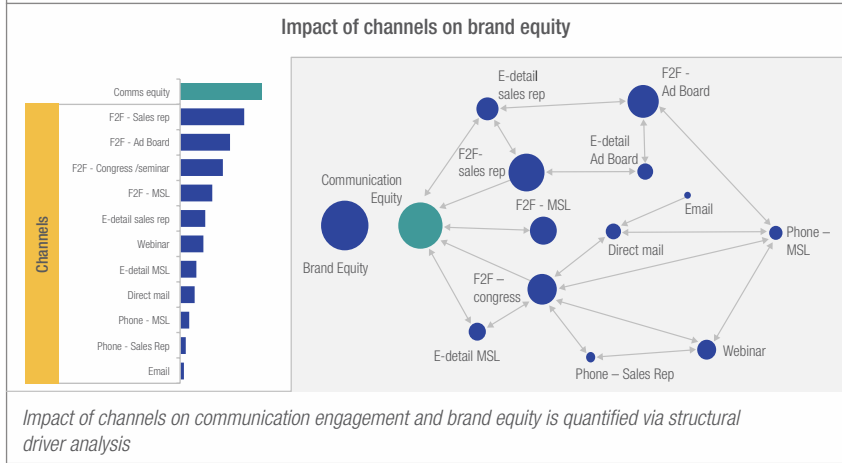
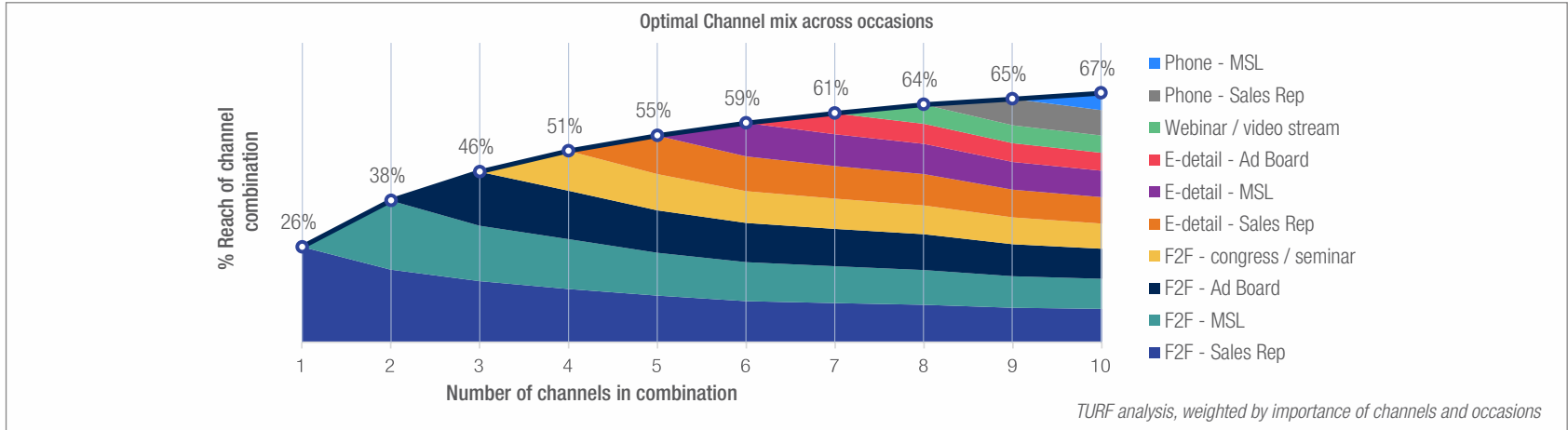
- Context
- Challenges
- Our approach
- Channel landscape
- Channel mix**
- Channel segmentation
- Channel measurement
- Summary
- About Ipsos



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| <p>Holistic impact of channels on customer engagement and brand equity – Firstly, understanding each of the channels, how they are used, what works and doesn't work and their impact on engagement, is imperative. Our work goes further and ensures we explore synergies between channels and how this may impact, directly or indirectly, customer engagement and brand equity.</p> | <p>1</p> | <p>The relationship between channels and information occasions – Not all channels suit all information occasions. For an effective omnichannel strategy, knowing how the type of content influences the channel preference contributes to identifying the optimal mix. We want to recognize and reflect the relative complexity of HCP's information needs, rather than oversimplify our solution.</p> |
| <p>Changing priorities of occasions and information needs – Our channel optimization model is based on a multi-faceted measure of reach. We look at channel impact from three perspectives: Communication equity, holistic customer experience KPIs, as well as complexity of occasions.</p> | <p>4</p> | <p>Competitor channel activity by occasion and overall engagement – It's as important to look at HCP engagement with competitor channels as with your own. Competitor wins and losses, when it comes to communication and engagement, help illuminate gaps and opportunities for your brand.</p> |

IDENTIFYING THE OPTIMAL CHANNEL MIX: ANALYTICS

- Context
- Challenges
- Our approach
- Channel landscape
- Channel mix**
- Channel segmentation
- Channel measurement
- Summary
- About Ipsos



Competitive channel performance by occasion

| % of channels used by occasion | Company 1C | Company 2 | Company 3C | Company 4 | Company 5 |
|--------------------------------------|------------|-----------|------------|-----------|-----------|
| Info about existing treatments | Large | Medium | Small | Large | Medium |
| Learning about clinical trials | Medium | Medium | Small | Large | Medium |
| Keeping up to date on disease states | Small | Medium | Small | Large | Small |
| Industry congresses/ events | Large | Small | Medium | Medium | Medium |
| Support patients and/or caregivers | Medium | Medium | Medium | Small | Medium |



CHANNEL SEGMENTATION: CUSTOMISING THE OFFERING

Our channel mix research solution will help identify the optimal channel mix for your customer base, whilst our expertise in segmentation means we can provide a more targeted solution for different segments of customers. Integration with your CRM system could lead to full personalisation of the customer engagement experience for individual HCPs.

The top three ways segmentation can help optimize your channel strategy include:

- Identifying the ideal combination of channels for each segment
- Sizing the need for a F2F channel
- Identifying physicians on your target list for whom F2F detailing needs to be offered and those for whom e-detailing, or other virtual channels, are preferred.

There is also a significant opportunity to link the channel segmentation to your CRM database, which will allow you to customize the channel mix for individual HCPs and deliver a personalized customer engagement experience.

Context

Challenges

Our approach

Channel landscape

Channel mix

Channel segmentation

Channel measurement

Summary

About Ipsos



Who are the subgroup(s)
that are most likely to prescribe our drug?
(WHO TO TARGET)



What are they motivated by?
What type of content do these people look for via
different communication channels?
(WITH WHAT CONTENT)



What communication channels
are they most likely to use and to trust with what
kind of information? What drives them to use
specific tasks? What channels they would ideally
like to use in the future?
(VIA WHAT COMBINATION OF CHANNELS)

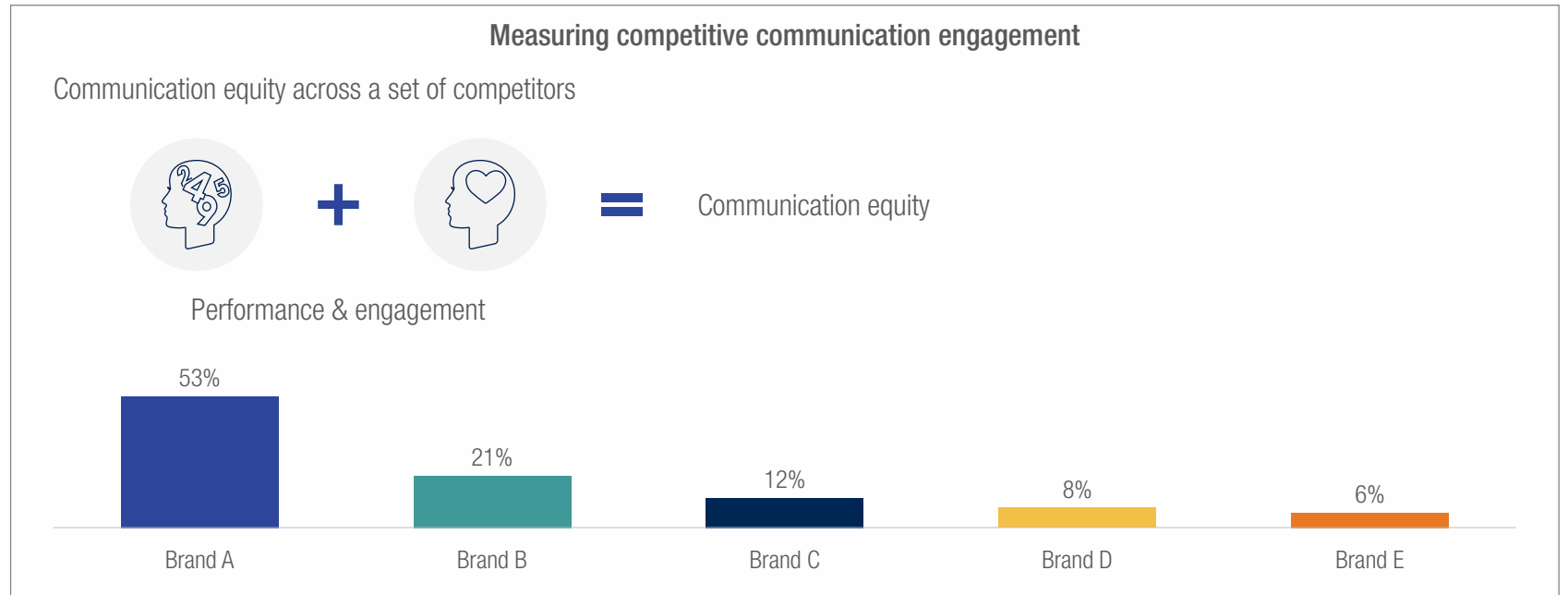
- Context
- Challenges
- Our approach
- Channel landscape
- Channel mix
- Channel segmentation
- Channel measurement**
- Summary
- About Ipsos



MEASURING OMNICHANNEL CUSTOMER ENGAGEMENT

Measuring the success of omnichannel engagement is a complex, yet critical question. We believe capturing holistic customer engagement relies on more than just share of voice within each channel and information occasion.

Our communication equity measure reflects share of preference, instead of just share of voice. It captures feedback on two fundamental questions that measure both functional ratings and emotional engagement with the experience.





- Context
- Challenges
- Our approach
- Channel landscape
- Channel mix
- Channel segmentation
- Channel measurement
- Summary**
- About Ipsos



Summary

As omnichannel customer engagement takes centre stage in the commercialisation of pharma brands, the right data and insights are essential to inform which activities to start, stop or accelerate for the optimal customer experience.

Ipsos believes there are four requirements for diagnosing, designing and delivering an omnichannel customer engagement strategy and we have robust and scientific research solutions to address each of them:



Understanding the current channel landscape



Identifying the optimal channel mix



Customizing the channel offering for key customer segments



Measuring success

Let's start a conversation!

Reach out to jo.appleton@ipsos.com or svetlana.gogolina@ipsos.com



Context

Challenges

Our approach

Channel landscape

Channel mix

Channel segmentation

Channel measurement

Summary

About Ipsos



About Ipsos

Ipsos' Healthcare Team partners with pharmaceutical, biotech and medical device manufacturers to inspire better healthcare. Operating in 50+ markets, our 1,000+ experts support key business decisions for our clients throughout the commercial lifecycle, from early-stage strategy, to launch, to performance optimization. We do this through a uniquely integrated combination of therapeutic and market expertise, gold standard real-world evidence and market-leading custom research approaches – all underpinned by a global footprint and unprecedented access to today's healthcare stakeholders.

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