# Omnichannel Solution

*: Do we provide Differentiated and Competitive Omnichannel activity in the market?*

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**Prepared by Ipsos Healthcare**

GAME CHANGERS | Ipsos

# Expanding HCP's communication via Omnichannel in global (1-1)

## Embracing Omnichannel brand reality

Following large scale digitalisation of pharma communications during the pandemic, Omnichannel has become a buzzword in the industry.

**Omnichannel** is an approach to marketing and communication that is **designed to provide customers with seamless and unified brand experience across multiple channels**.

Customers are increasingly looking for flexibility, simplicity and consistency of pharma product and service information, regardless of channel they use. **Companies are investing in bringing together all communication channels into one easy to use communication platform, integrating voice, email, webchat and other communication means into one Omnichannel contact centre software, that is linked to CRM databases**.

Technologies and platforms that provide tailored and individualised omnichannel approaches are developing fast. These tools can now collect and analyse large quantities of data. Marketing strategies can be adjusted and finessed based on real time behavioural data on channel usage. Powerful algorithms have been developed that allow tech platforms to test and adjust the channel mix/communication at an individual level.

# Expanding HCP's communication via Omnichannel in global (1-2)

After COVID-19, Healthcare companies continue to increase communicate with customers via much more various On & Offline channels these days.

## F2F Channel

- Symposium/congress/ conference
- F2F meeting with a sales rep
- An event organised by a Healthcare company
- International symposium/ congress/conference
- F2F/phone discussions with colleagues/peers/KOLs/HCPs
- Feedback from/ discussion with a patient

## Offline Channel

- Patient support materials (printed)
- Printed promotional materials from Healthcare company
- Healthcare company call centre for medical info
- Advertising in printed professional/medical journals
- Telephone interaction with a sales rep
- An article in a printed medical journal

## Digital Channel

- Online interaction with a sales rep
- Advertising in online professional/medical journals
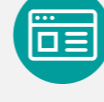- Disease awareness campaign/ activities (pharma initiated)
- PubMed, Medscape, UpToDate
- Medical/therapy area website
- Content for HCPs on broadcast social media platforms
- An article in an online medical journal
- Communications received online by a Healthcare company

- Healthcare company corporate website
- Pharma-developed mobile App for HCPs
- Online social networks for professionals and HCPs
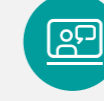- Messaging social media platforms
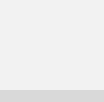- Online patient support services/ materials/advocacy org./ apps
- Banner/pop-up/video display advertisement online
- Virtual rep detail or 'e-detailing'
- Virtual online symposium/congress/conference
- Healthcare company webcast/webinar/e-learning

# A rapid acceleration in changes to programs of Customer Engagement

## Customer needs

- Rising expectations for instant access to knowledge, flexibility and simplicity

- Expectation of relevant, personalised approaches

- Consistency of content and brand experience regardless of the channel used

## Industry response

- Investing in bringing together different communications channels into an Omnichannel platform that is linked to CRM database

- Collecting real time usage data and applying sophisticated algorithms to optimise and tailor communications and channel mix

## Key business challenges

- Nuanced understanding of the customer and market context is often lacking

- There is a need to identify customer typologies to tailor communication

- Finding a meaningful way of measuring performance is crucial

- Creating an effective tool for strategy corrections

# HCP Segmentation according to the Needs and Utilization of Omnichannel (1-1)

## Why now?

Post- COVID-19 crisis, many pharma companies are re-evaluating the ways in which they detail/communicate with doctors

- Face-to-face (F2F) detailing is expensive, e-detailing is twice cheaper

- Doctors are getting used to e-detailing, it is becoming a new norm

- Doctors are using digital channels more

- A sizable proportion of doctors still like F2F detailing, but is it necessary for ALL doctors?

- As doctors' universe is not homogeneous in terms of channel usage and preference, could subgroups of doctors be targeted through a cheaper mix of channels?

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 channels for specific tasks? What channels they would ideally like to use in the future?

**(VIA WHAT COMBINATION OF CHANNELS?)**

# HCP Segmentation according to the Needs and Utilization of Omnichannel (1-2)

## What for?

Looking at likeminded groups of HCPs in terms of channel usage, preference and needs is important in order to:

- Guide process of channel optimization

- Size the need for F2F channel as well as rep empowered digital communication

- Identify ideal combination of channels for each subgroup

- Potentially tag the CRM data base with physician's likely channel mix preferences

- Allows creation tailored personalized messages and channel mix for individual HCPs

- Allocation of resources for greater impact

# Ipsos approach for an optimized Omnichannel strategy (1-1)

**Ipsos market research framework
for informing clients' Omnichannel strategies**

## Understanding Context

Where is the customer in their engagement journey?
Which competitors they are already interacting with?

▼

## Acting with Empathy

What are competing demands on their time and attention?
What support is needed? What really matters to customers?

▼

## Shaping Expectations?

What are needs and expectations now and how these can be
shifted with differentiation and innovation?

It is important to have a nuanced understanding of the context at each touch point in the customer journey because customers' behaviours vary, and they may not have the same needs when performing different tasks in their professional life.

It goes without saying that, while delivering communications to customers, pharma companies must be respectful, supportive, and not compete for the doctors' time to the detriment of the job they do for their patients.

Additionally, customers are bombarded by communications from many different market players, healthcare providers and regulators regarding research, treatment, or hospital management, etc.

How can Healthcare companies help customers to do their job more effectively, and not start an omnichannel arms race for increased exposure? There is no simple answer to this challenge. Understanding the marketplace, competitive activities, customer expectations and what is truly important to customers would be a good first step.

# Ipsos approach for an optimized Omnichannel strategy (1-2)

### Market and Competition

### Specific Touch Points for different 'Occasion'

### Empathy

### Expectation

| Key to understand omnichannel activities of key competitors | Deep understand key touch points or occasions in customer journey: | Understand what is important to customers | Understand & shape customer expectations |
|---|---|---|---|
| <ul><li>Which channels are used for what occasions</li><li>How often</li><li>How well key competitors perform in terms of Communication equity</li></ul> | <ul><li>Relative importance of 'occasions', the task the channel is being used to support</li><li>Channels used to successfully complete these tasks</li><li>General channel preferences</li></ul> | <ul><li>What are the most important channels?<ul><li>– Stated: Respondents tell us what is important to them</li><li>– Derived: Structural modelling of interactions between channels and impact on overall quality of communication</li></ul></li><li>What are the most important occasions?<ul><li>– Use ratings or trade-off methods to find relative importance of tasks supported by channels</li></ul></li></ul> | <ul><li>Which channels are most appropriate or preferred on each occasion?</li><li>Allowing for occasion importance and channel preferences, what is the optimal omnichannel combination to meet customer needs?<ul><li>– Weighted TURF analysis</li></ul></li></ul> |

# Ipsos offerings for leveraging an Omnichannel strategy

*Omnichannel Solution will provide Analysis and Insights for below items.*

## Channel Experience

**01** Channel Experience

**02** Channel Landscape ~ Relationship between Channel & Occasion

**03** Channel Importance (stated importance)

**04** TURF (Total Unduplicated Reach and Frequency Analysis)

## Channel Impact

**05** Communication Equity

**06** Impact of channels on 'Communication Equity' (derived importance)

**07** Channel Map ~ Impact of Channels on Communication Equity

## Channel Performance

**08** Channel Performance ~ 'ConX' Score

**09** Channel Summary

**10** Overall Evaluation of Company Communication

**11** Other_ Channels to enhance
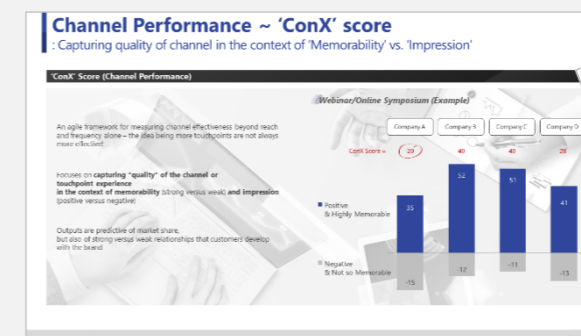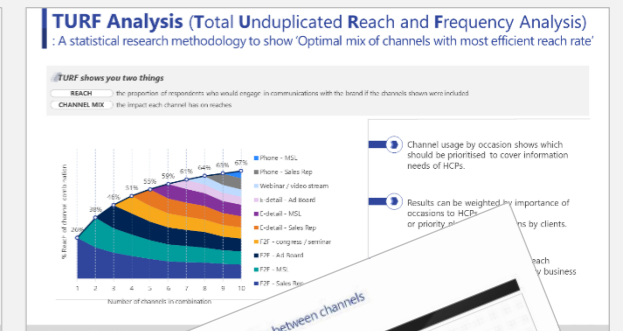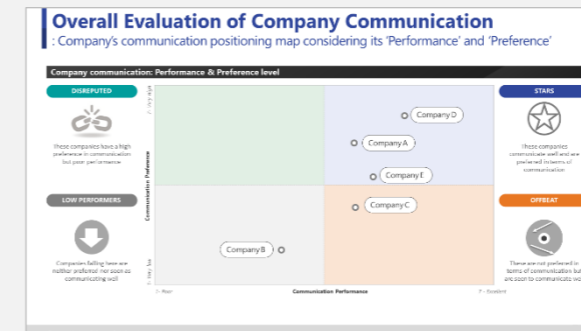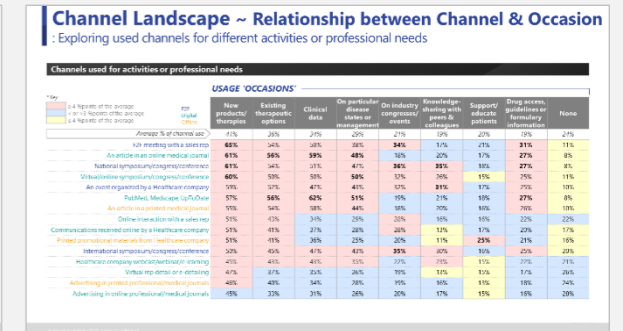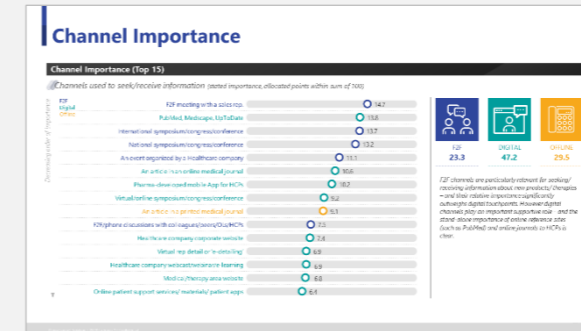
# How to Approach Omnichannel Solution

## Option 1

Omnichannel Solution
~ **Full** version

## Option 2

SFE or Brand ATU study
+ **Simple** version
   of Omnichannel solution

**+**

### Qualitative Exploration

**For the purpose of gaining a deeper understanding**
*within the allowed interview duration (approx. 30~35min.)*
*(Open-ended or Closed-ended questions)*

**Exploring the reasons why for evaluating score**

**Exploring expected/preferred channel activities or contents**

# Contact Us

**Jinkyung Kim**

Ipsos Healthcare
Country Service Line Leader, Korea HEC
Jinkyung.kim@ipsos.com
822 6464 5320

**Seon-Young Kang**

Ipsos Healthcare
Associate Director, Korea HEC
Seonyoung.kang@ipsos.com
822 6464 5321

*Director Advanced analytics*
**Neil Martin**

Ipsos Data Science &
Advanced Analytics
Director Advanced analytics
Neil.martin@ipsos.com

# THANK YOU

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