

White Paper

Time to Take Omnichannel Action:

Delivering an Optimal Customer Experience Through the Harmony of People-Based and Digital Channels

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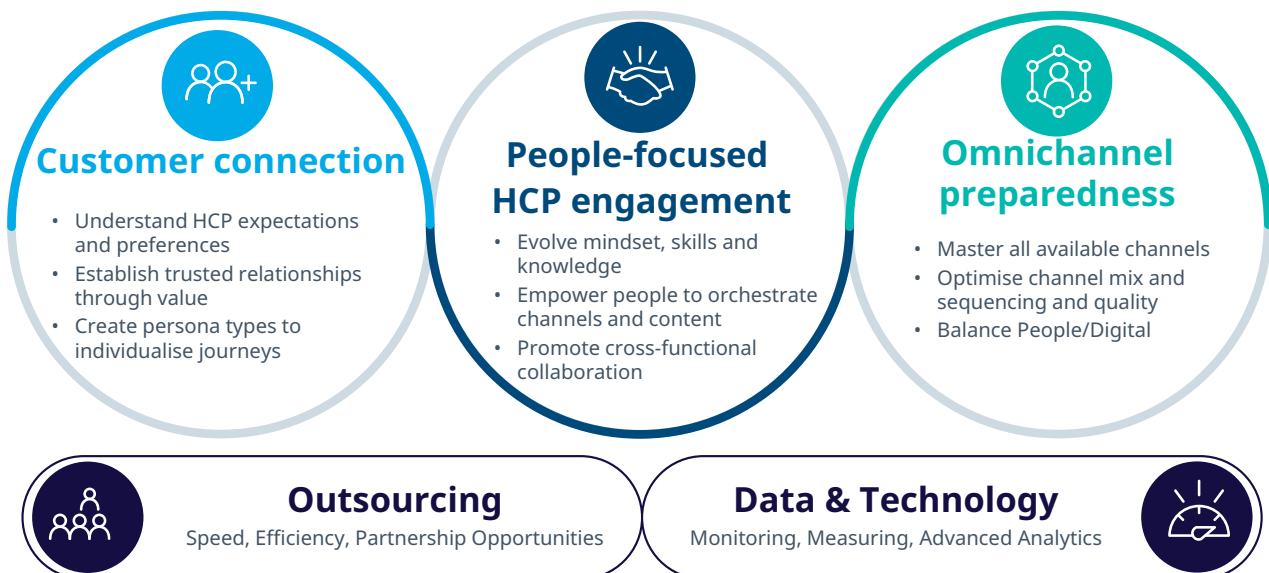
Introduction

For life sciences organisations, navigating the ever-evolving landscape of Healthcare Professional (HCP) engagement remains an ongoing challenge. Building robust, enduring relationships with customers at scale and in a cost-efficient manner is not only difficult, but also pivotal to the successful integration of medicines into clinical practice.

While most companies aspire to streamline their operations and foster mutually beneficial relationships with their customers, few are adequately equipped to meet the shifting expectations of today's HCPs through the effective implementation of a comprehensive omnichannel strategy.¹ This is why the spotlight is now on envisioning and evolving an omnichannel future, and the need for companies to bring together data and technology with human capabilities to stay competitive and deliver an impactful and meaningful customer experience.

This white paper aims to enhance the understanding of advancing omnichannel capabilities and the infrastructure required to support the long-term success of HCP engagement. It will explore the key facilitators for achieving an omnichannel approach, including outsourcing opportunities that allow companies to leverage resources and expertise at scale and speed, providing a fast track to omnichannel proficiency.

Figure 1: Building blocks of omnichannel excellence



Personalisation is changing the game for HCP Engagement



For decades, the ‘pharma sales rep’ has been at the core of pharma’s promotional model, providing information on drug innovation and collecting feedback and customer insights. This ‘noise-driven’ HCP engagement has always recognised the importance of people and skills,² coupled with product knowledge and advancements in local technology.

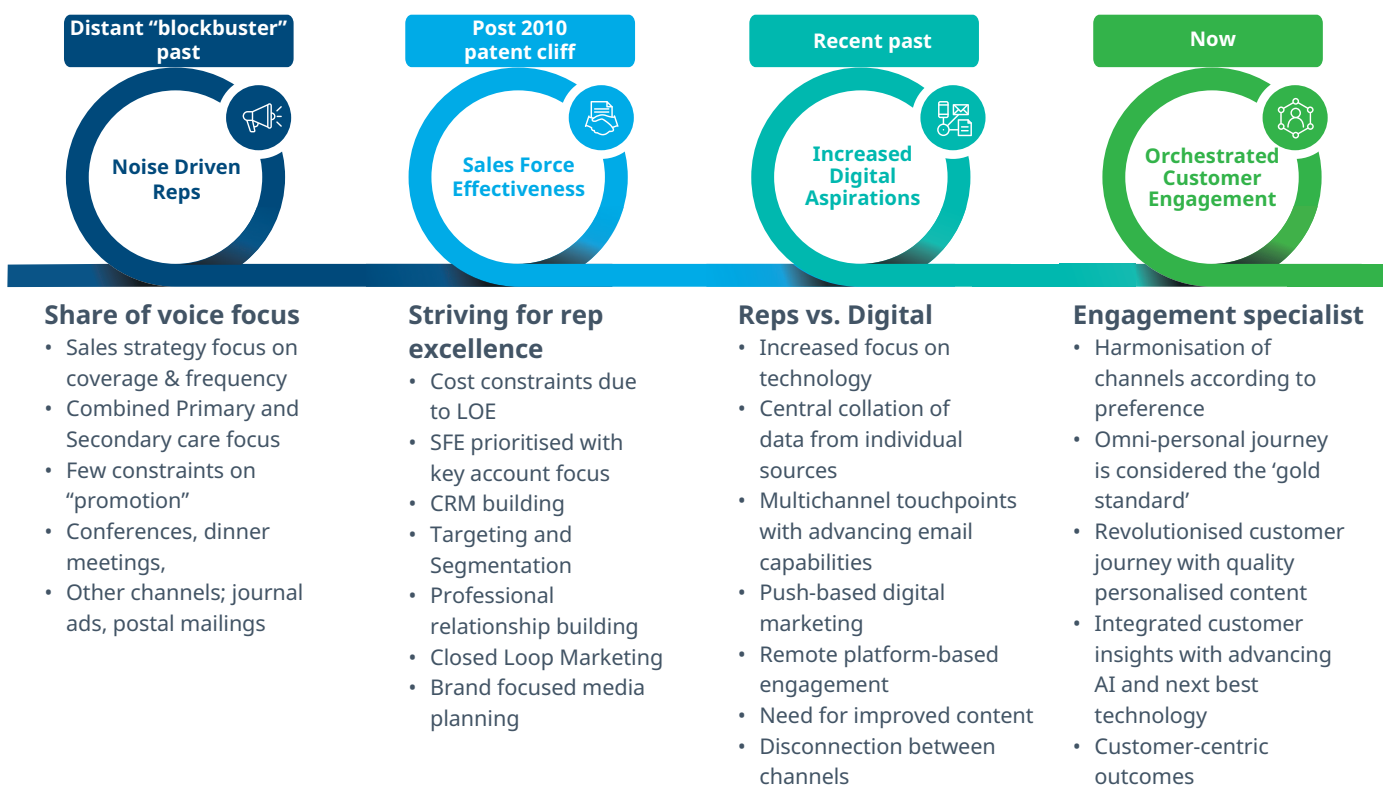
However, the commercial operating landscape continues to evolve at a rapid pace.

The digital bar has risen, and a new baseline equilibrium between remote and in-person engagements has emerged,³ with investment in digital channels remaining at more than double pre-pandemic levels. The expectations of HCPs in receiving a more personalised service continue to grow, facilitated through the evolution of Artificial Intelligence (AI) and advancing technologies.

As a result, life sciences companies need to develop a commercial model that is scalable, can change in line with launching a dynamic pipeline, and can adapt in line with the evolving technology and demographic environment.

The days of deploying large sales teams to pursue big, broad markets are gone. Today’s HCP engagement requires an optimised field force pursuing a precision-targeting, customer-centric strategy. Customer-facing roles continue to evolve towards an orchestrated channel solution, firmly placed in the hands of the people who remain closest to HCPs. These individuals can ensure the delivery of customer-centric outcomes and a trusted HCP customer experience.

Figure 2: The evolution towards orchestrated omnichannel customer engagement



As HCP expectations continue to shift, together with the engagement landscape in which life sciences are operating, the cornerstone of any go-to-market strategy remains in creating and cultivating a profound understanding of the customer.⁴ The key determinants that shape HCP engagement decisions include:

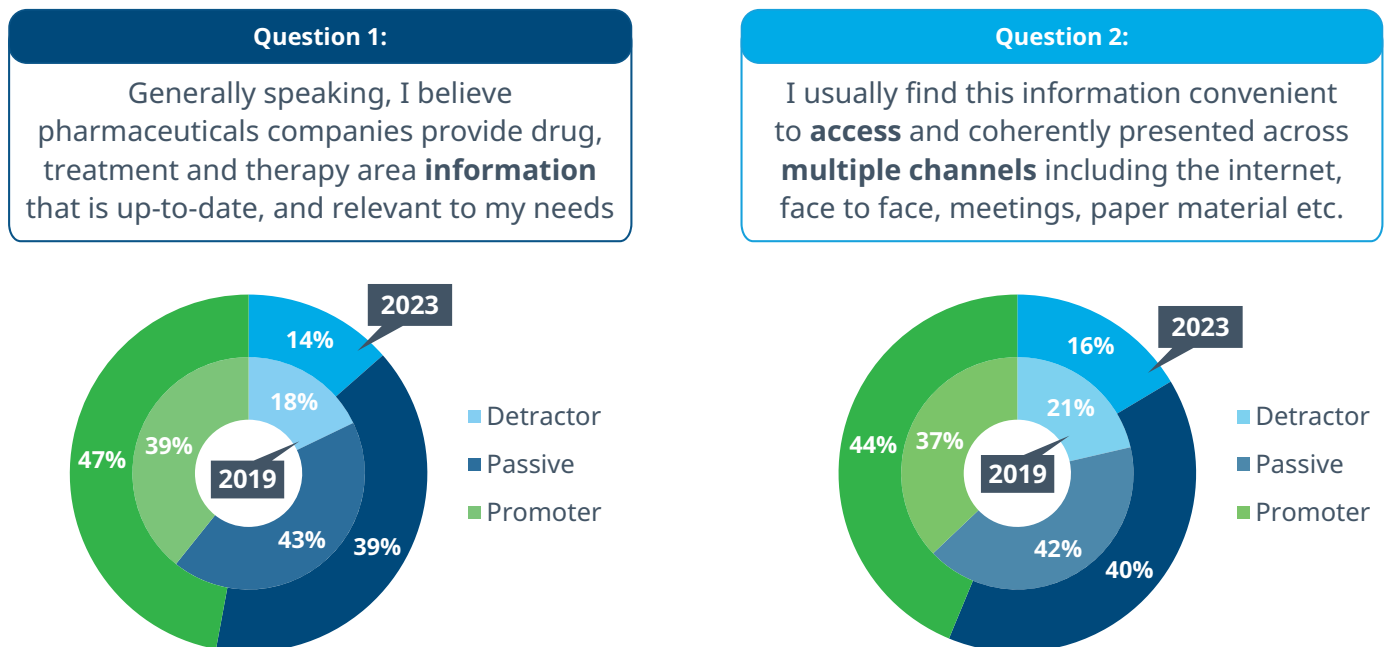
- **Geographical/Cultural Context:** Where are the HCPs located and what are the expected engagement practices?
- **Specialisation:** Which medical fields are of paramount interest to specific HCPs?
- **Behavioural Patterns:** Do these HCPs have an affinity for traditional news sources or are they more inclined towards social media?
- **Priorities:** Are there healthcare system constraints? How are HCPs balancing cost efficiencies with patient-centric outcomes?

In addition to the aforementioned factors, it is important to recognise that HCPs’ engagement expectations are continually shaped by the constraints of the healthcare systems in which they operate.⁵ It is crucial to acknowledge that HCPs, while often sharing common traits, are unique individuals with diverse preferences.

To capture changes over time and gain insight into these preferences, HCPs across the world are asked two questions as part of the ChannelDynamics™ Channel Perception Survey. These questions pertain to the perceived relevance, accessibility, and diversity of information across various channels:

Life sciences companies have made steady progress, as evidenced by the additional 8% in promoters in Question 1 (39% to 47%) and the additional 7% in Question 2 (37% to 44%). Nevertheless, there remains significant potential for additional progress, considering that around 40% of HCPs are passive and a considerable proportion remain detractors.

Figure 3: HCP perception of information quality and accessibility from pharmaceutical companies (2019-2023)



Source: ChannelDynamics™ Channel Perception Survey results 2019 and 2023

Mastering the delivery of all channels

Demand from HCPs for a broader array of communication channels has risen, particularly as an increasing number opt to complement in-person activities with digital channels, which offer the advantage of allowing online materials to be reviewed independently. As the landscape of engagement evolves, life science organisations often continue to struggle with striking the right balance between personal and non-personal channels.

Personal channels, such as direct face-to-face interactions, meetings, and events, remain invaluable. These direct encounters facilitate the development of strong relationships by fostering a personal connection. Such relationships are conducive to active listening, inquiry, and the creation of significant impact, especially for newly launched products.⁶



The chart below illustrates that face-to-face interactions are picking up but are not expected to return to pre-pandemic levels. Despite their rise in 2020, remote and digital interactions have seen a decline in 2022 and 2023, indicating a shift towards a new norm where face-to-face engagement remains the predominant channel.

Figure 4: Understanding omnichannel harmony through personal and non-personal channels

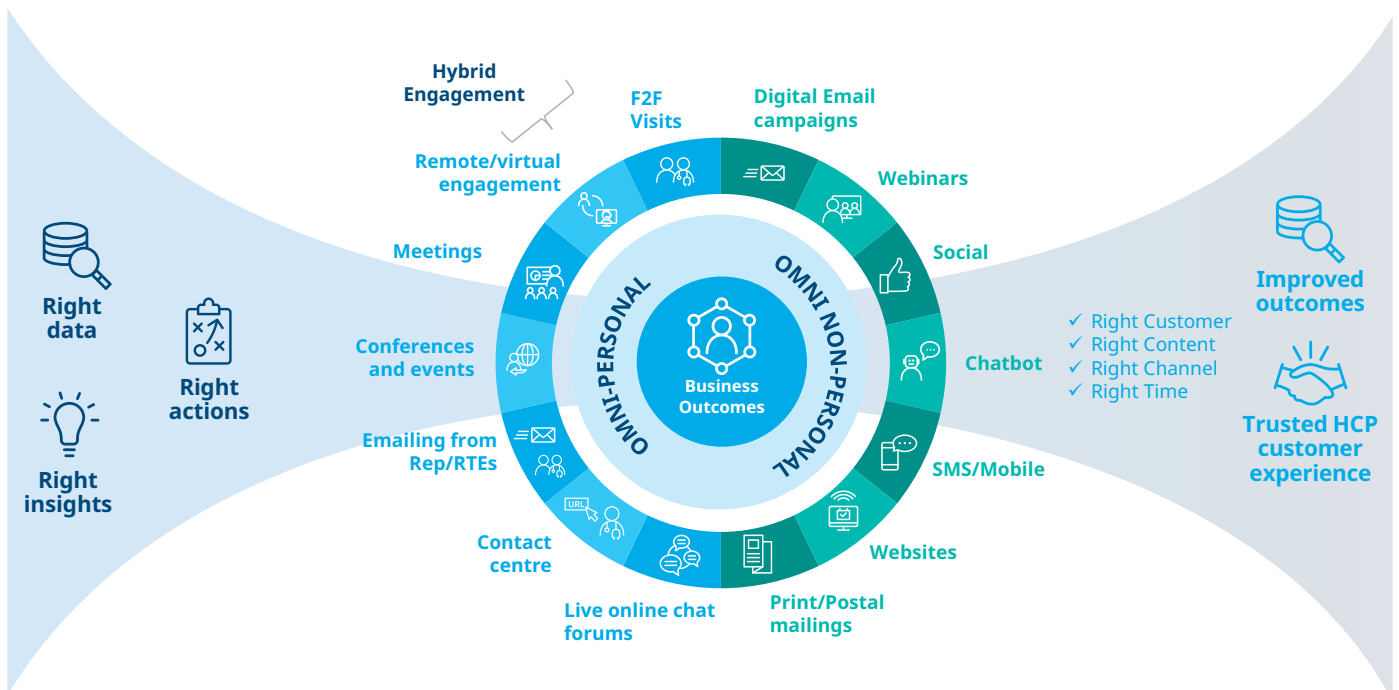
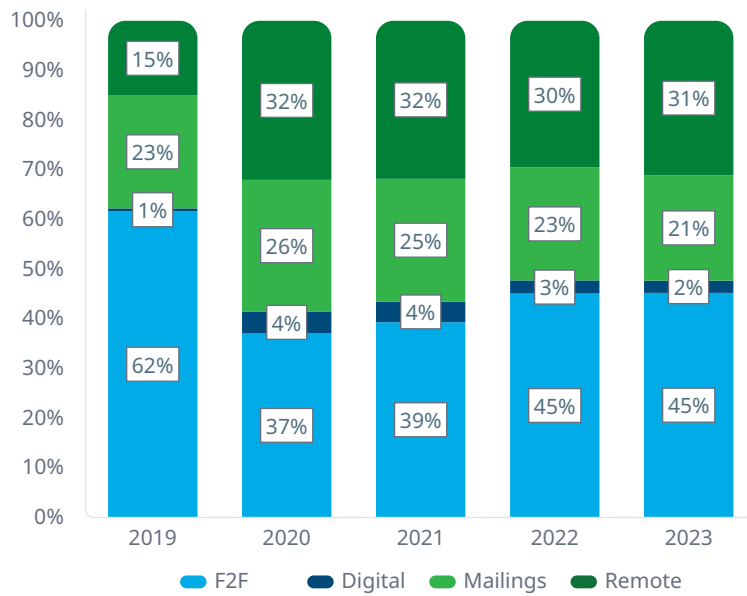


Figure 5: Proportion of reported contacts over time across major channels in the EU4+UK:

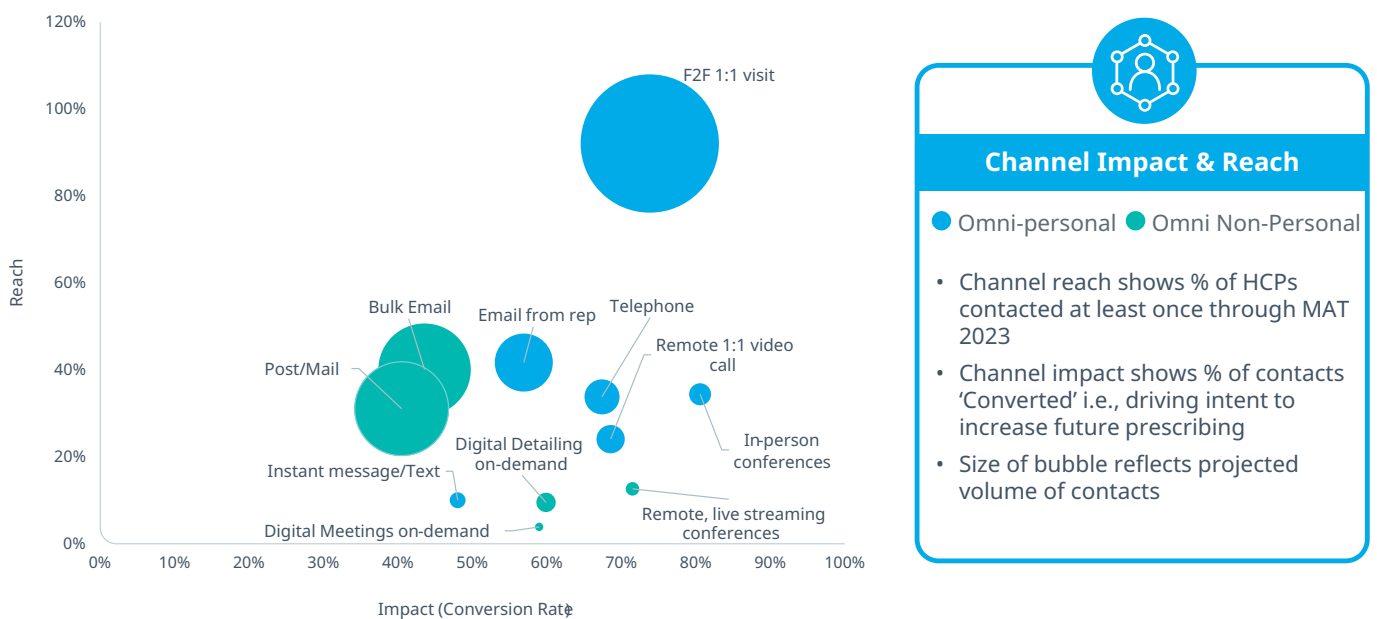


Source: IQVIA ChannelDynamics™; F2F: Traditional 1:1 face-to-face detailing, Digital: virtual 1:1 video calls, automated meetings, digital meetings (live), Remote: Telephone calls, Mailings: Postal mail

Commercial organisations are looking to balance personal interactions with non-personal approaches in an increasingly complex digital environment. There is a growing need to build an intelligence-backed ecosystem

that continuously learns from each data point to create smarter interactions, where individual customers can be precisely targeted to cut through digital ‘noise’ and deliver more agile, successful engagements.

Figure 6: Channel impact and reach (EU4+UK)

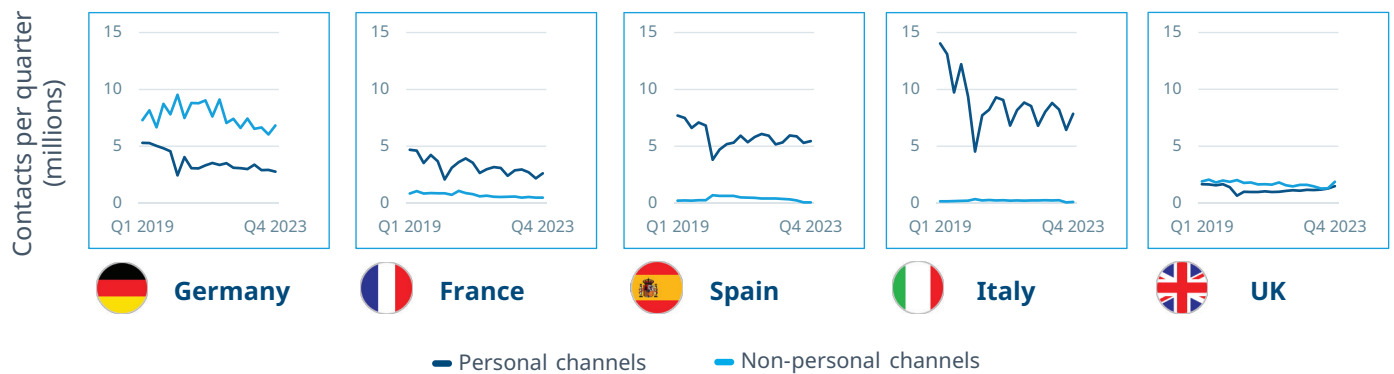


Source: ChannelDynamics™

Generally, trends in personal engagement are similar across the EU4+UK, with volume dropping sharply at the start of the pandemic, recovering partially, and then plateauing or gradually declining. This reflects the challenging economic environment and squeeze on health systems' capacity, resulting in HCPs lacking time to engage with the industry. In particular, the UK stands out due to its consistently low personal contact volume, while Italy has the highest.

Non-personal channels, including non-interactive digital engagement and postal mailing, are generally utilised less, with volume approaching zero in some countries. This suggests that life sciences companies are choosing to invest in personal channels, despite their higher cost, as non-personal channels have relatively low impact. The main exception is Germany, where non-personal contact volume is ten-fold greater than elsewhere, and also far exceeds personal contact volume.

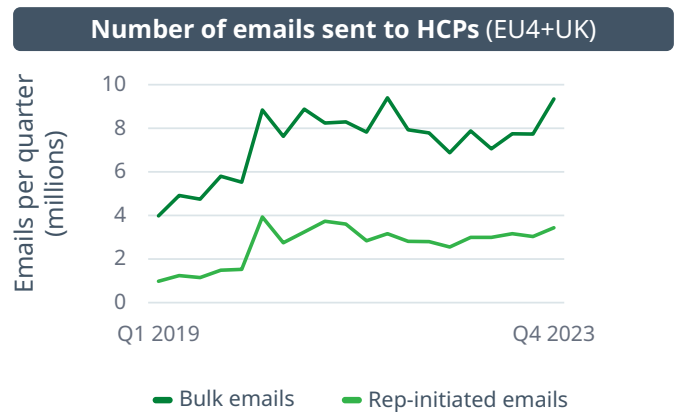
Figure 7: Number of contacts with HCPs (Q1 2019 to Q4 2023, excluding emails)



Email has remained a constant channel of communication, especially since the pandemic, with the volume of both personal and non-personal emails remaining steady in the EU4+UK. In Europe, an HCP's permission must be sought before sending them emails to ensure compliance with data privacy regulations.

Emails can be an important means of building on personalised engagement with HCPs, and this is more likely to be achieved through rep-initiated emails that strengthen an established relationship than through centrally distributed marketing emails. As rep-initiated emails currently represent the minority of total email volume, attention should be placed on closing this gap, with a focus on personal emails that align with HCP preferences and priorities.

Figure 8: Number of emails sent to HCPs (EU4+UK)



Case study: Medthority (by EPG Health, an IQVIA business)

Medthority⁷ is online platform that helps to provide treatment decision support for HCPs

Omnichannel engagement encompasses both medical and commercial touchpoints. A notable example of this in the medical realm is Medthority, an online platform that offers disease awareness information tailored specifically to HCPs. Additionally, it provides accredited learning activities, enabling HCPs to navigate materials aligned with their interests at their own pace.

Analysing usage statistics of the Medthority site for HCPs who have viewed more than five pages reveals the diversity of HCP user journeys:

- Only 10% have followed the same path as others, with 90% embarking on completely unique routes to obtain information.
- On average, these HCPs have engaged in 4.1 learning activity sessions.
- They have also visited an average of 2.3 different disease areas and/or specialty hubs.

The platform is designed to track these intricate HCP user journeys, focusing on functionality, educational design, and communication strategy. Its primary objective is to measure knowledge gain and the intention to adapt clinical practice accordingly. A key benefit to HCPs is that they can orchestrate their own learning journey over time, with the system being ready to support them as they aim to broaden their knowledge or progress through different specialities.

Figure 9: Factors contributing to challenges of omnichannel implementation



Challenges in the pursuit of omnichannel excellence

The life sciences industry faces a significant challenge in realising omnichannel orchestration. This is primarily due to the complexity of integrating multiple channels of communication and engagement, including digital platforms, face-to-face interactions, and traditional marketing methods.

The goal is to harmonise personal and non-personal channels to provide a seamless and consistent experience for HCPs. However, achieving this requires a deep understanding of each channel's unique characteristics and how they can complement each other. The adoption of an omnichannel strategy is not a one-size-fits-all process, but rather a journey that varies from company to company.

The journey towards omnichannel excellence can be visualised as an adoption ladder, which highlights the importance of a phased and strategic approach. The omnichannel adoption ladder helps life science companies to navigate the complexities

of omnichannel implementation by identifying their current position and setting realistic goals for their journey towards omnichannel maturity. However, it is important to note that companies are at different points on this ladder. Some are just beginning their omnichannel journey, while others have already made significant strides.

The importance of trust in developing strong, long-lasting customer relationships

At the centre of delivering an optimal omnichannel customer experience lies the goal of building trust with customers.⁸ This is contingent upon establishing a reputation of integrity, which also involves unwavering and absolute adherence to compliance (e.g., consent management, GDPR). In turn, this fosters a loyalty-based relationship, transforming HCPs into advocates for the company's medicines.

Figure 10: IQVIA omnichannel adoption ladder

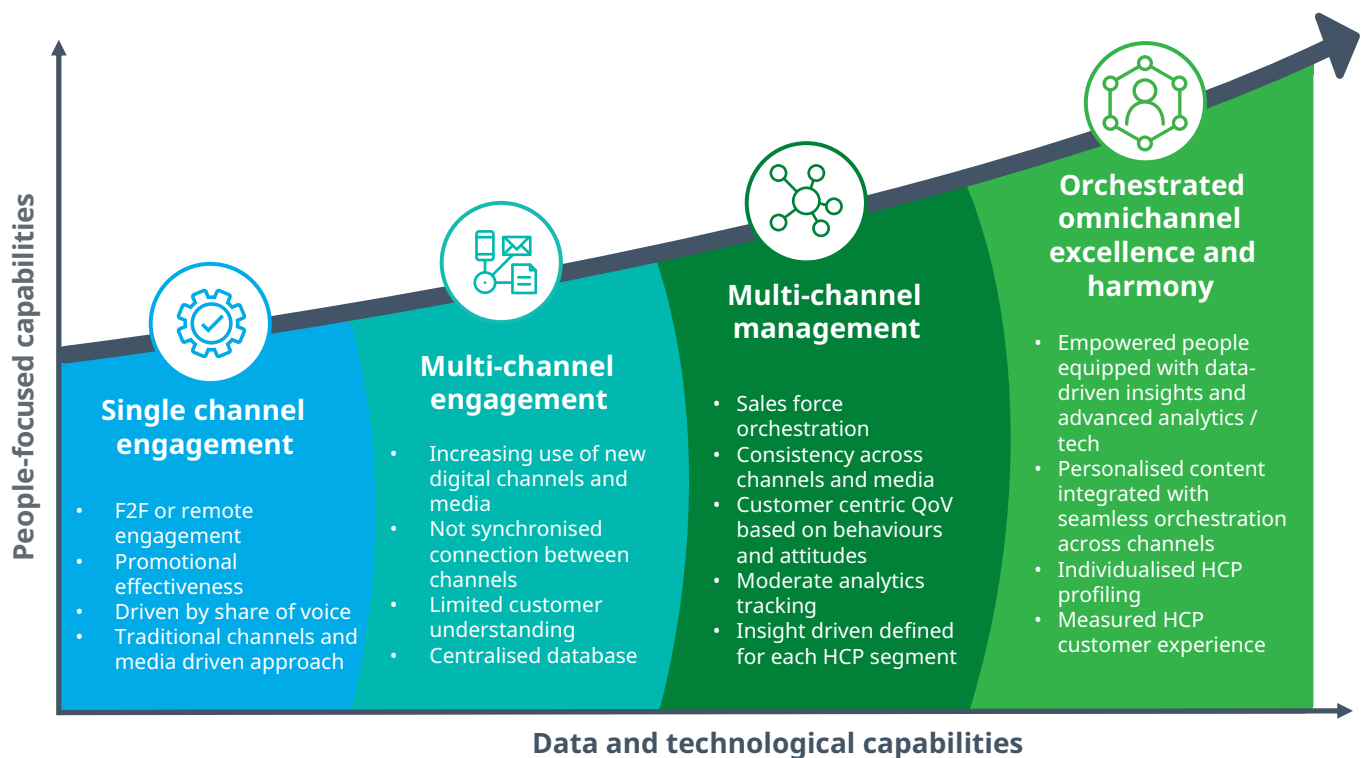
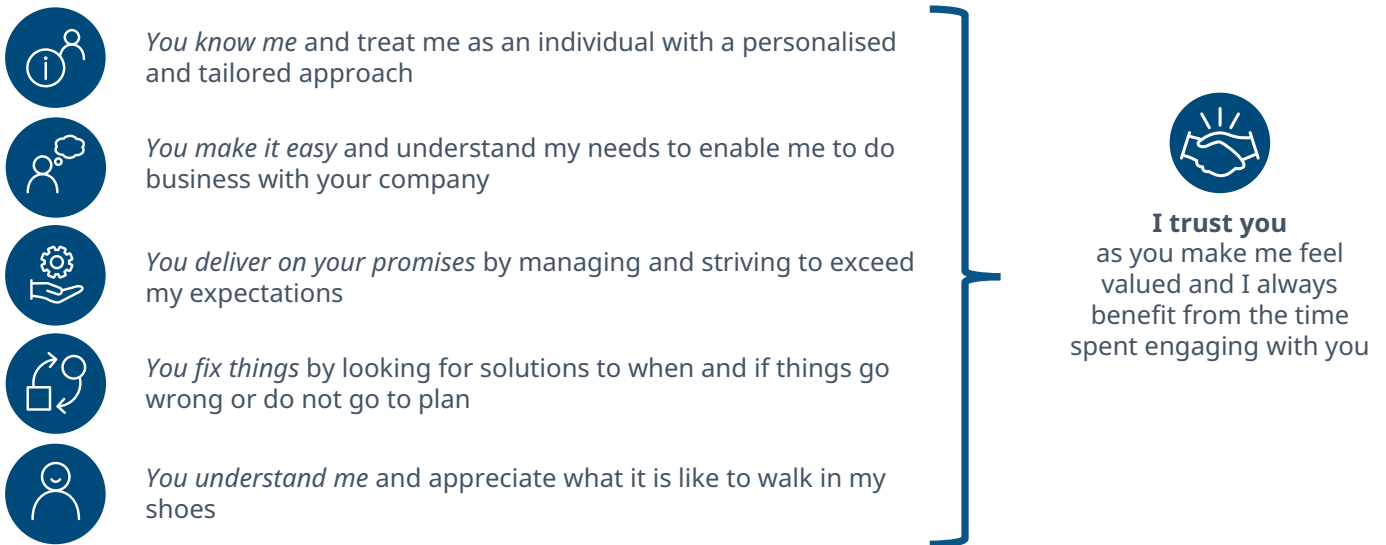


Figure 11: Five key components of trusted customer experience



The role of people-based engagement within omnichannel

As commercial operations continue to evolve, it is essential to conduct continuous evaluations and assessments to ensure optimal delivery. Typically, a significant portion of expenditure in this domain is allocated to the deployment of customer-facing personnel for HCP engagement.⁹ However, this approach has come under increased scrutiny due to the emergence of cost-effective digital channels and the decline in face-to-face interactions following the pandemic.¹⁰

Nevertheless, people-centric engagement remains relevant, and it is imperative to ensure that individuals possess the right mindset, knowledge, and skills. The development of business-ready attributes in customer-facing roles should extend across both medical and commercial functions, empowering all individuals to make informed decisions about content sharing and channel orchestration.

People-centric channels are not only effective in building robust relationships but also the most favoured method of engagement from an HCP perspective.



The importance of customer-facing teams in excellent HCP engagement

Looking to the future, life sciences organisations must focus on developing an ecosystem that is centred around HCPs. People are essential to this approach, ensuring optimal orchestration by embedding customer-centric thinking into the organisation.

Figure 12: The unique blend of skills and capabilities required to achieve omnichannel excellence



Spotlight on The IQVIA Engagement Specialist:

People empowered with data and technology through IQVIA Connected Intelligence™



IQVIA ENGAGEMENT SPECIALISTS CAN DELIVER A MORE TAILORED, HCP-DRIVEN EXPERIENCE

IQVIA Engagement Specialists possess a range of core skills and competencies for today's HCP engagement. Equipped with advanced next-best technology and integrated insights through IQVIA Connected Intelligence, our people ensure the orchestration of the right content and channels in line with HCP preferences. This approach delivers tangible outcomes to build a trusted customer experience.

Figure 13: The IQVIA Engagement Specialist



Expertise & mindset: possess the skills, knowledge, commercial acumen, and next-best mindset that is open and responsive to evolving customer and market environments.

Performance management: undergo continued professional development, coaching, and performance management to deliver dynamic outcomes flexibly through F2F, remote, or a hybrid way of working. They demonstrate improved business performance by adhering to call plans, marketing engagement, and sales priorities in response to business operating models and challenges.

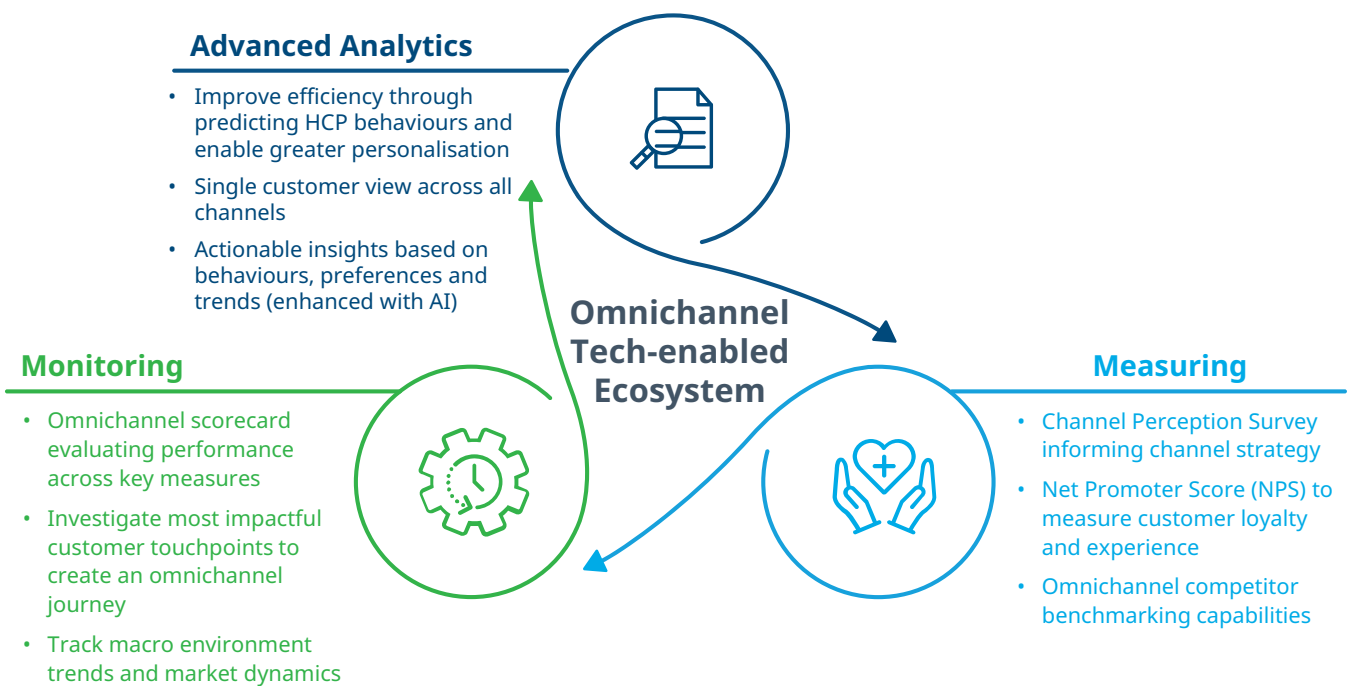
Digitally enabled with an insight-driven approach: empowered through next-generation intelligence, utilising AI and next-best technology with connected, actionable HCP insights. This approach facilitates faster real-time decision-making and dynamic targeting.

Omnichannel harmony & content intelligence: skilled in orchestrating an omnichannel experience that makes interactions with HCPs more agile and meaningful. They make the best use of content and channels according to the communication preferences of their customers, improving reach and delivering a more personalised journey.

Leveraging data and technology to enable omnichannel engagement

Designing a future-proof omnichannel ecosystem requires a strategic approach that leverages advanced technologies and relevant data, along with robust monitoring and measuring tools. This digitally enabled ecosystem integrated technology with customer management systems to enable the best digital and personalised experience to customers across multiple touchpoints, while also providing 360 insights to drive future business outcomes.

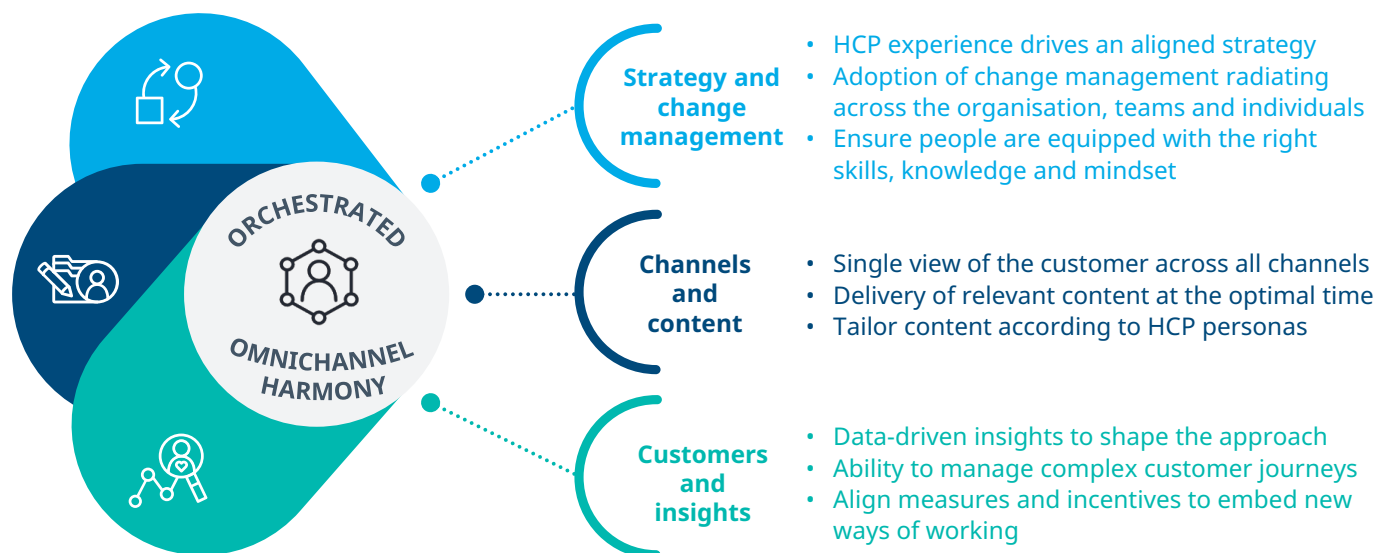
Figure 14: Integrated elements for tech-enabled omnichannel ecosystems



Advancing towards orchestrated omnichannel harmony

Life sciences organisations must reflect on their current operations, strategies, and capabilities, with a particular focus on customer engagement and communication channels.

Figure 15: How to orchestrate omnichannel harmony



Implementing omnichannel capabilities necessitates a significant shift in mindset and a willingness to embrace change.¹¹ This transformation is not merely about adopting new technologies or systems but fostering a culture that values seamless, integrated customer experiences across all touchpoints.

Employees at all levels must understand and appreciate the importance of omnichannel engagement, recognising its potential to enhance customer relationships and drive business success. Change management processes are crucial to this transition and involve ensuring employees are fully equipped with the skills and knowledge required to navigate new systems, as well as proactively addressing any potential resistance to change.

Successful implementation of omnichannel capabilities hinges on the organisation's ability to adapt and evolve in response to their changing business landscape. Focusing on these elements can help to create a more engaging and effective omnichannel strategy, leading to stronger relationships with HCPs and ultimately better patient outcomes.

Outsourcing: Fast-tracking omnichannel adoption

In today's rapidly evolving digital landscape, businesses are streamlining their operations, enhancing customer engagement, and fostering growth. Developing omnichannel capabilities is a crucial aspect of this process, but implementing these capabilities in-house can be complex and resource intensive. Therefore, outsourcing to a trusted partner is a valuable strategy for several reasons:

- **Access expert knowledge and skills:** Outsourcing partners are specialists in their field, with a deep understanding of the latest technologies and best practices. They can guide businesses by positioning people with the right skillset and mindset for HCP engagement today. Partners can also help to pair systems that are fit for purpose in meeting specific needs and objectives and can assist in seamlessly integrating enhanced ways of operating with existing processes.
- **Significantly reduce costs:** Implementing a system in-house can be expensive, considering the costs associated with training, software acquisition, infrastructure, and setup. Outsourcing provides an opportunity to convert fixed costs into variable costs, paying only for the relevant services. This not only reduces financial risk but also frees up resources that can be invested back into core business activities.

- **Speed up implementation:** Setting up a system can be time-consuming, particularly for businesses without prior experience. Outsourcing partners, with their expertise and resources, can expedite this process, ensuring a quicker transition to omnichannel capabilities.
- **Enhance scalability:** As businesses grow and evolve, their needs may change. Outsourcing partners can easily adapt to these changes, providing scalable solutions that can accommodate business growth and changing customer demands.
- **Improve system reliability and security:** These systems handle sensitive customer data, making them a potential target for cyber threats. Outsourcing partners have robust security measures in place to protect this data, providing businesses with peace of mind.

By leveraging the benefits of outsourcing, businesses can adeptly navigate the digital landscape, delivering a seamless customer experience that boosts customer satisfaction and fosters loyalty. Contract Sales Organisations offer an array of commercial solutions,¹² with the top providers offering cost-effective agility, enabling swift launch and scalability, as well as the flexibility to make necessary adjustments. Many providers also deliver experienced contract sales teams and are positioned to target HCPs with precision. Additionally, these customer-facing teams are equipped with data-driven insights and advanced technology, ensuring their interactions have maximum impact.

Conclusion

The evolving landscape of HCP engagement highlights the value of creating a personalised customer experience. This evolution presents challenges and opportunities, demanding an expansion of capabilities from both technology and human perspectives. Providing an optimal HCP experience must be shaped by the integration of data-driven strategies and the customer-centric mindset of individuals. The ultimate goal is to genuinely understand and address customer needs, for example through a heightened understanding of their personal engagement preferences.

The role of individuals as orchestrators of a personalised omnichannel experience, by integrating data and technology, is of paramount importance. As the industry continues to adapt to ongoing changes, life sciences companies must review their internal capabilities to deliver the necessary changes in their commercial approach. Consequently, the industry is likely to see an increasing trend towards outsourcing to ensure successful omnichannel implementation. Let's work together to build trusted customer experiences and shape the future of HCP engagement!

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Carrie works in the Global HCP Engagement Team within Commercial Engagement Services where she is a specialist in Customer Experience and HCP Engagement through the harmonisation of digital and people-based channels within an Omnichannel strategy across global markets.

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Christopher began working in health care in the 1980's driving ambulance in New York City. Since then, he has held a variety of international market research, business development and marketing roles in the life sciences industry. Christopher now leads ChannelDynamics - the global reference for tracking sales force and marketing channel performance.

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