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Success Factors for Deploying a Next Best Suggestion Program

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Next best action systems, often decision tree- or rules-based, have been available to life sciences sales organizations for some time. Today, forces have come together—massive amounts of data, AI and machine learning, and integration technology—that enable us to deliver a much more sophisticated solution with the potential to improve decision making across most facets of commercial operations.

In working with clients, we have identified critical success factors for companies deploying a next best action program. These fall into four pillars, only one of which is related to technology.

1. Plan to achieve business objectives

The process begins with defining your business objectives, including your brand strategy. Also, what is your product strategy? Are you trying to launch a new product? Do you want to increase engagement in your digital channels? Are you trying to shift your strategy from account based-selling to prescriber-based selling? The answers will be unique to your organization, and they have to drive your program, not the technology.

A key success factor is having the right data to support a next best action solution.

Another consideration in this pillar is end user preferences for receiving and acting on insights. Are they looking for near real time alerts on their mobile phones? Or are they making data-driven decisions on their laptops? How do you want to inform your organization about changes, such as your product's adoption by a plan, and what actions do you want sellers and marketers to take?

Meeting business objectives also requires that the messages you send to users are consistent with your brand strategy. For example, do you want to communicate a brand's efficacy, or safety, or a new indication? To succeed, the suggestion to reach out to a specific medical practice, for example, must include the message you want to convey.

2. Select the right technology solution

Before you can select a technology solution, you need to understand your organization's level of readiness. For example, if your company is heavily data and technology driven, you might already have an architecture for data management and a data scientist in place for AI/ML. If not, you might find a business-friendly, ready-to-use SaaS platform to be a better fit. Another factor is whether or not you have the right data to support a next best action solution. There is a lot of third-party data you can acquire to complement your own data if your platform of choice can accommodate it.

Also consider scalability, which requires a vision of where you want your platform to be in six months, 12 months, 2 years. You might want to start with one country and one brand, with a plan for scaling up to include other brands and countries. Will your platform scale easily? Do you want your rollout managed by the business, or by IT? How difficult is the system to configure as your needs change, and can you do it yourself? Are the AI/ML algorithms transparent, so that you can trust the results that are being delivered and edit the algorithms as needed to improve performance?

3. Start with the right organizational setup

Getting the people factors right is crucial, and it's where many customers struggle. That's what this pillar and the next one are about. Making your initiative a strategic imperative with strong, highly visible sponsorship from the top may be your single most important success factor. Your implementation can't be seen as coming only from IT, nor can it be pigeon-holed as just another analytics project.

Make your initiative a strategic imperative with strong, highly visible sponsorship from the top.

Why? If you are implementing a system with closed-loop feedback like IQVIA's, you need committed end users who respond to alerts and suggestions. Their actions feed the self-learning algorithms so they become smarter over time. Top-down strategic sponsorship is important to making this adoption happen. Also important is the right organizational structure. We recommend a program

that is centrally driven and locally executed, with planning and implementation involvement from both your individual brands and locations. You will need flexibility to meet their requirements. You'll ensure conformance with local laws and practices, plus local relevance helps encourage adoption by users.

4. Manage change and measure effectiveness

According to our clients, effective change management is critical to adoption — and adoption is critical to the success of your program. Let's take sales, for example. Sellers are busy, and their job is to engage with customers, not with alerts. Even with a well-designed system like ours, which surfaces recommendations at the appropriate point within the user's workflow, users must respond to those alerts and suggestions for the program to deliver results. Change management — setting expectations, training, motivating, and communicating — all go into making your program relevant to users and, in turn, increasing adoption.

A final thought is to plan how you will measure value and return on investment. A next best action program is not about how many end users you have on the system, or how many alerts you send out, or how many times people clicked on those alerts. Instead, you need to define the business value you will measure. Did you uplift the number of successful digital sales calls? Progress more HCPs through the marketing funnel? Reduce compliance issues with HCP engagements? See an increase in prescriptions? Define in advance what measures are important to you.

So, how do you get started? The approach we are seeing from most customers is what we call crawl, walk, run. Start with one brand and one country. Roll it out, see what you're your adoption metrics are, and adjust from that learning. Then you're ready to roll out your program broadly and measure your success.

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