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Execution to Impact in BioPharma
7 methods to optimize Omnichannel Analytics in EMEA

Customer Experience initiatives are rising to the next level in the biopharmaceutical industry, now that recent evolutions in data technology unlock unprecedented engagement opportunities. As an immediate consequence, communications from all directions flourish, engaging both patients and clinical as well as non-clinical stakeholders. It enables healthcare professionals to keep up with medical evolutions like next-gen therapies, non-linear treatment pathways, and increasing levels of patient control.

However, as new digital channels flourish, the demand for better orchestrated information provisioning by pharmaceutical manufacturers and their partners is bigger than ever before. There are important regional differences in terms of regulation, technology and data availability. In Europe, data about individuals' preferences and behaviour is relatively hard to obtain, store and use, even if it benefits their experience.

Before addressing seven methods to optimize Omnichannel Analytics, we will highlight the key drivers for the changing commercial operating model.

Key drivers change the commercial operating model

An increasing number of external and internal forces in the Life Sciences industry have impacted methods to deliver innovative medicines and solutions to customers. Manufacturers need to dramatically change the way they think, innovate, and operate.

A rapidly changing environment is prompting manufacturers to rethink their strategy to deliver health & economic outcomes. We have witnessed the evolution of healthcare systems with greater emphasis on market access, patient outcomes, treatment affordability and cost efficiency. This results in new pricing models and a shift from blockbusters to precision therapy. It is key to secure competitive advantage over industry peers. BioPharma now needs to activate new marketing channels in order to clearly demonstrate drug value via a wide array of multimodal and often disconnected brand communications. These factors are putting constant pressure on the daily operating model.

Evolving Healthcare System	**Changing Therapeutic Landscape**	**HCP and Patient in Control**	**Exponential Growth of Data**	**AI & Tech Transformation**
Drugs are evaluated based on the achievement of health and economic outcomes which means more cost efficiency, proven patient outcomes, and greater contribution to the overall health care experience throughout the value chain.	*The era of blockbusters is fading, the industry's shift to specialty medicines has implications on the importance of informative promotion with focus on product quality and demonstrating the drug value given their high cost to payers and patients.*	*Mobile, social media and other self-service engagement platforms are becoming predominant, driving the need for a novel engagement approach. Companies need to drive behavioral change and deliver more engaging experiences via multiple channels.*	*New data on digital, medical, behavioral, and socioeconomic profiles allows us to gain greater insights on customer preferences, behavior and understand the unmet needs. This provides a unique opportunity to tailor the customer engagement & experience.*	*Evolving technologies and advancement in AI throughout the ecosystem has enabled new and innovative solutions within the Life Sciences market. Generative AI creates new expectations and shortens the time to value for new customer and patient engagement & experience.*

To overcome external and internal drivers of change, organizations are on the journey of building capabilities to drive organizational differentiation in the future. Deloitte is working with multiple clients to factor in market level nuances on their omnichannel journey. Gaining greater visibility into the needs and behaviors of customers, drives higher quality, mutually beneficial interactions. These "precision insights" leads to an enhanced customer experience.

Omnichannel activation to leverage the waves of change

While several pioneers voice early success in the United States with respect to omnichannel activation, there are important hurdles on European territory that prevent organizations from applying a copy-paste model. Important differences in context, scale, mindset, data and GDPR legislation exist and these require careful consideration by executives and go-to-market teams.

To provide healthcare professionals and patients with a "superior customer experience", the BioPharma industry needs to focus on enhancing their experience management capabilities, including advanced analytics to profile individuals according to their behavioral preferences, mastering the velocity it takes to create and approve content at the speed of need and adapting business processes to allow for a more agile go-to-market approach. Timely feedback loops are needed, to track performance and to reiterate tactics based on an appreciative understanding of individual customers and their preferences. It takes a major digital transformation with associated resources, time and budget to move the needle in the day-to-day. To trim payback times, volume is king. While EU4+UK markets might be able to keep up the pace with the US, Japan & China, it is key to consider the specifics of mid-sized markets and prevent they're left behind.

Installing omnichannel excellence in their local operating model requires a flexible framework for precision insights and go-to-market activation in each geography. It should adapt for the local MLR context, languages, culture, brand strategy, IT infrastructure, and still show a positive return on smaller audience sizes. In this paper, we will identify seven techniques to help you advance your EMEA omnichannel capabilities, through advanced analytics and technology.

Why a different approach for EMEA is needed

The EMEA landscape is specific in kind

Several factors impact omnichannel operations in EMEA compared to the US:

- ➤ **Digital maturity:** Omnichannel detailing assumes consent, being the currency of personalization. In many countries, the amount of e-consents is still limited, reducing the channels in many cases to face-to-face, rep-triggered emails and remote calls – compared to many digital channels & non-personal promotion in the US.

- ➤ **Economies of scale:** Smaller geographies with local MLR context, languages and cultural differences lead to a more decentralized data & technology infrastructure which in turn increases cost, while smaller HCP audiences and salesforce sizes reduce the financial return of novel go-to-market paths.

- ➤ **Data quality:** Overall, data quality levels are lower in EMEA and inconsistent between countries, which increases the need for human intervention, leveraging their domain knowledge.

- ➤ **HCP-level data:** Since sales and script data is aggregated to brick, hospital or pharmacy level, advanced interpolation techniques are needed to descend to individual HCP-level. Moreover, it is hard to link patient outcome data to individual HCPs.

- ➤ **ROI management:** Given the constraints on HCP-level data, it is harder to calculate the return on investment of personalized outreach. Subsequently, ROI is often made on cost savings and/or coverage increase – which is less aligned to product launch scenarios where KPIs are set on revenue or script level.

Integrated Data & Analytics capabilities can help organizations to deal with these specific market nuances in EMEA. **Deloitte has elaborated a framework for Precision Insights that supports medical and commercial Go-to-Market leaders in EMEA to realize their full potential.** It leverages seven data-driven techniques to challenge the status quo over an iterative process.

Integrated Data, Analytics & Technology capabilities as a key enablers to unlock BioPharma's Omnichannel in EMEA
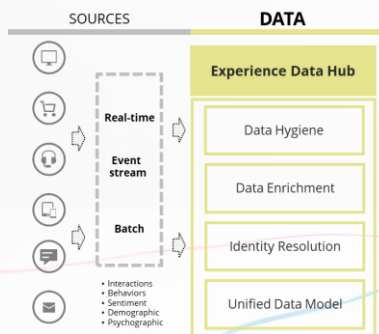
Seven data-driven methods can be applied at several points in the omnichannel transformation journey to **reduce cost** and **time-to-value** and to **increase leadership acceptance, field & marketing teams' adoption** and **HCP relevance**. These are prerequisites to unlock sales lift.

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7 methods to optimize Omnichannel Analytics in EMEA

Golden record — 01

SOURCES   DATA

Experience Data Hub
- Data Hygiene
- Data Enrichment
- Identity Resolution
- Unified Data Model

Real-time / Event stream / Batch
- Interactions
- Behaviors
- Sentiment
- Demographic
- Psychographic

With multi-cloud solutions you can unite data on individual HCP level across different data sources, leveraging technology such as Snowflake, Databricks & CDPs like Salesforce Data Cloud.

Impact? Single 360° HCP view

02 — Content Tagging & Creation

MLR-compliant content

Geo- & therapy-specific foundation models

Automate high-quality content tagging & fast creation of locally relevant content, by applying Generative AI models.

Impact? Robust models & time savings

You can train your custom foundation models on massive amounts of geo- & therapy-specific medical data & language; one in each country's context.

Impact? Create local content easier

03 — Scalable & Adaptive Intelligence

Channel Optimization How to reach

Interaction effects

Content Optimization What to say

Predictive Next-Best-Action algorithms cater to more personalized experience. When scaling your MLOps models, it is key to adapt them for local context at the same time, so commercial tools are fed with more relevant local insights to advance HCP journeys.

Impact? Improved model maintenance

Explainable AI — 04

Interest type
Function
Engagements in 1st week
Nr of previous leads on account
Engagements in first 4 weeks
Nr of previous lead conversions on...
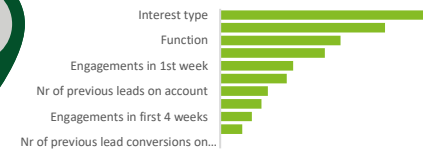
Users are always entitled to know why and how each algorithm has made a suggestion and which factors play a critical role. Otherwise, they will always be wary of adopting it. LIME (Local Interpretable Model-Agnostic Explanations) and FCM (Fuzzy Cognitive Mapping) are promising computational methods to explain AI-driven suggestions and may lead to more trustworthy AI. Successful applications have been made in medical decision-support systems.

Impact? Higher local adoption of centrally steered innovations

05 — Appreciative Journeys

HCP 1
HCP 2
...
HCP n

Sequence Optimization 1:1 approach over time

Cultures & individuals differ. Based on country- and HCP-specific constraints, recommend frequency caps, cadence, and days between recommendations.
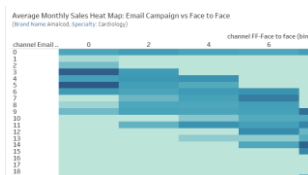
Determine optimal sequence of personalized communications for each HCP, consisting of channel & content type.

Impact? More relevant HCP journeys

Feedback Loops — 06

Average Monthly Sales Heat Map: Email Campaign vs Face to Face
(Brand Name [xmas]sd, Specialty: Cardiology)

Sophisticated analytical techniques can help you moving from hospital/brick-level to HCP-level sales- & script data.

Closed loop measurement on leading (evolving HCP engagement) and lagging (HCP sales/script lift) indicators is key to capture evolving dynamics, and to iteratively increase the accuracy of personalization algorithms and their attribution to value growth.

Impact? Quantify omnichannel return-on-investment

Business Case for Scaling — 07

In a landscape with many different leadership layers and diverging priorities, the business case for scaling must be calculated precisely:

- Cost savings or coverage increase are most convenient to measure but create a partial view on the potential gains.
- With many new launches upcoming in EMEA, it makes sense to track script / sales lift as well, considering e.g. the typical delay between interaction with physician & script lift, and switching patterns by pharmacists to get to sales.

Impact? A clear business case brings acceptance to scale up
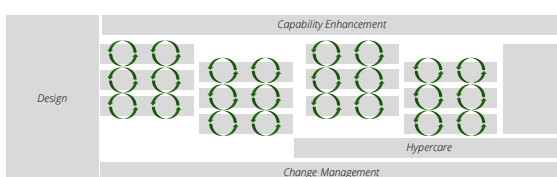
How to scale your Omnichannel program globally

Once you have unlocked the EMEA playfield, we recommend to define and execute a scaling plan that best suits your needs and priorities. This should be based on what is already existing, the use cases that are needed, the desired maturity level, the countries and brands that are prioritized, etc.

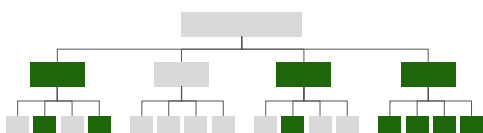There are different options to approach this transformation:

	+	**−**
Broad-scale transformational program	➢ Ability and speed of scale and roll-out ➢ Unique and consistent framework across the organization ➢ Higher impact across countries / regions / therapeutic areas (TAs) ➢ Higher control over budget spent	➢ Slower time to market and test ➢ Complex resource and budget planning ➢ High top-down change management efforts required
"Do attitude", start in one country followed by upscale	➢ Ability to scale / roll-out after having first proof-of-value ➢ Lean approach to "test" first ➢ Reduced time to market as the complexity is reduced ➢ Reduced effort to break resistance to change as the amount of people and leadership involved is lower	➢ Higher complexity to drive a consistent framework while scaling ➢ Need to re-adjust / adapt while scaling ➢ Architecture of first proof-of-value might need to be revised
Localized business problem solving (e.g. immediate product launch)	➢ Lower budget requirements ➢ Directs only to top priority areas ➢ Reduced or targeted scope ➢ Reduced effort to break resistance to change as the amount of people and leadership involved is lower	➢ Higher complexity to drive scope economies ➢ Isolated impact / revenue growth ➢ Leads to less alignment between countries, which might generate confusion for global brands

If you would like to share reflections individually, or join one of our roundtable discussions, please contact us

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