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Future of Customer Engagement in Pharma

Insights from the European region

Executive Summary | Existing engagement approaches lead to a gap between HCPs and corporate expectations, driven by strategy, content, and channels

WHAT WE DID?

RESEARCH

We commissioned an EU-wide research to **understand current engagement levels and scale of opportunity**

OUTCOME

The industry is **falling short of delivering** high quality customer experiences[1] and must consider some **key actions** as well as **re-evaluate its Customer Engagement model**

WHAT HAVE WE FOUND?

>80% of pharma execs are **satisfied** with current customer **engagement strategy**[2]

Resulting in a clear…

! CUSTOMER ENGAGEMENT PERCEPTION GAP

< 28% of HCPs feel customer-facing resources are **meeting their needs well**[4]

WHAT NEEDS TO CHANGE TODAY?

Pharma Cos of the future need to address their…

Foundational Pillars: CX Strategy, Content, Channels

…in combination with strategically enhancing their…

Enablers: Data & Analytics, Technology, Operating Framework

Ultimately, resulting in a change in their…

Customer Engagement Models

- THE INTEGRATOR
- THE CONCIERGE
- THE ALWAYS-ON AMPLIFIER
- THE DIGITAL DRIVER
- THE OUTSOURCER

See Outro for footnote details

Context and objectives | European HCPs & EU Executives Pharma Surveys

CONTEXT

- In today's rapidly **evolving pharmaceutical landscape**, understanding the **future of customer engagement** is crucial for meeting the needs and expectations of HCPs
- Deloitte conducted a **comprehensive survey** targeting the **preferences and expectations of HCPs** in Europe regarding their interactions with pharmaceutical companies
- A separate survey of pharma executives was conducted to explore the **industry's perspective on future customer engagement** and the **gaps between their perception and HCP needs**

OBJECTIVES

1. **Understand HCP Preferences:** Determine preferred methods and channels for HCPs to receive information from pharmaceutical companies.
2. **Assess Current Interactions:** Evaluate how effectively pharmaceutical companies are currently meeting the needs and expectations of HCPs in their interactions.
3. **Uncover Unmet Needs:** Identify any gaps or unmet needs in the current engagement strategies of pharmaceutical companies.
4. **Prioritise Enablers:** Focus on key enablers to unlock the full potential of pharma customer engagement pillars.
5. **Elevate Customer Engagement Capabilities:** Build new capabilities or strengthen existing ones to bridge the gap between pharma businesses and their customers.

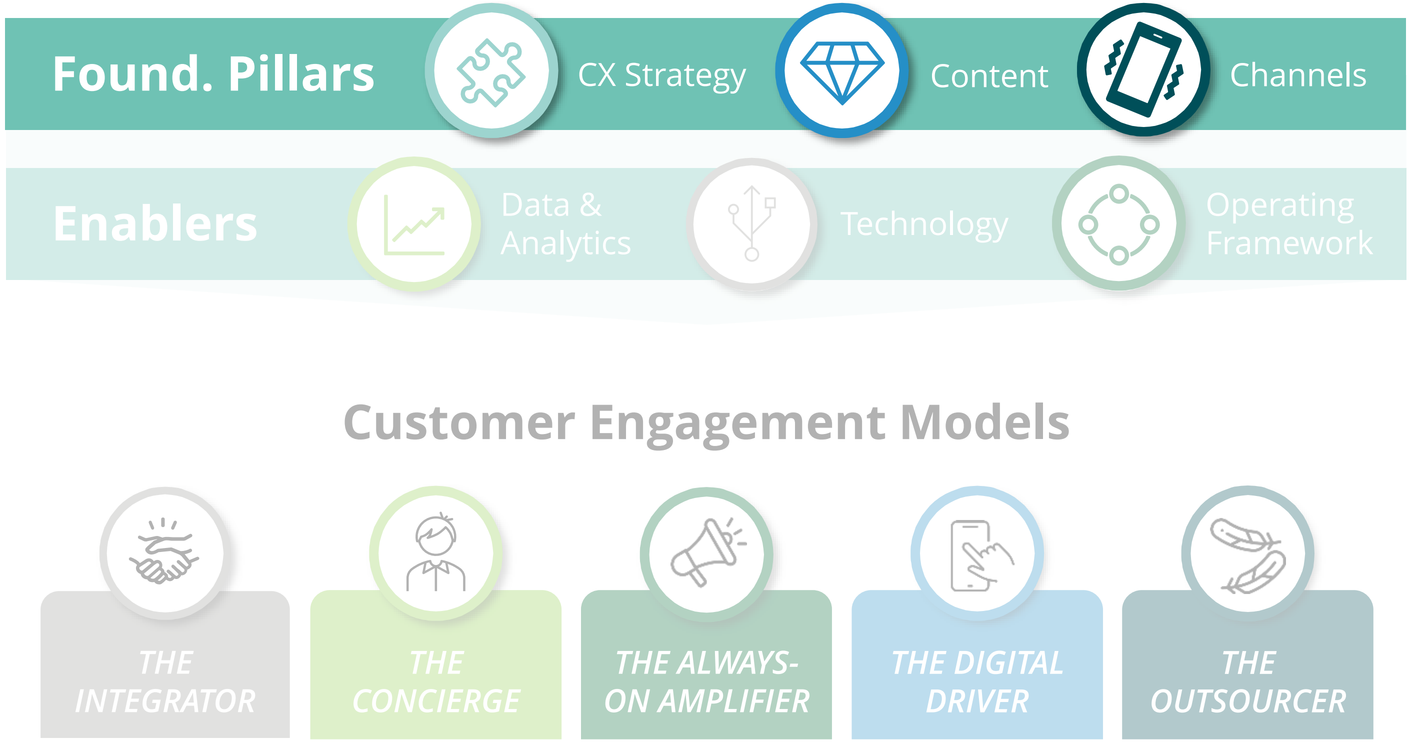
SCOPE OF THE SURVEYS

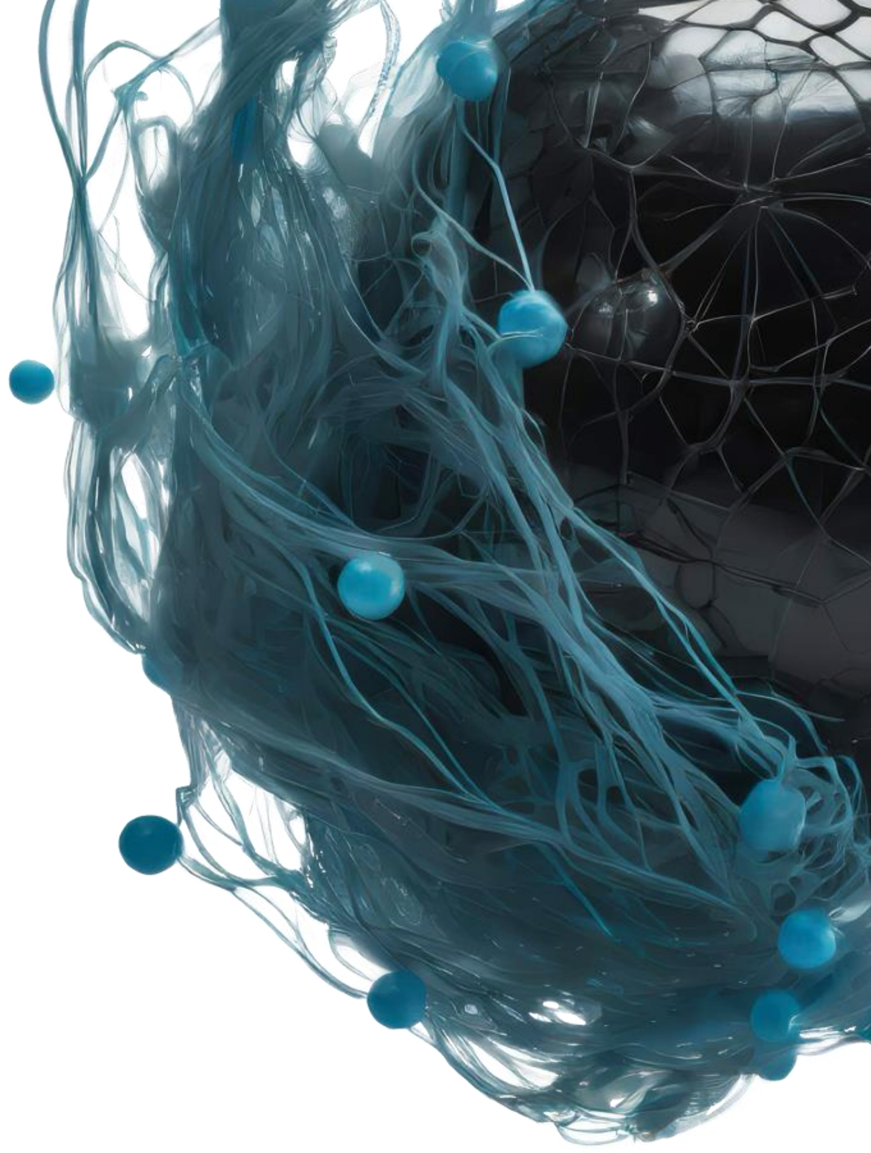
HCPs: UK, Spain, France, Germany
Pharma: EU region

HCPs: 19 Questions
Pharma: 4 Questions

HCPs: 61 from different specialities
Pharma: 17 executives

The foundational pillars were thoroughly assessed in the European surveys of HCPs and Pharma Executives





The EU HCP Survey examines 3 customer engagement pillars to address unmet needs, evaluate current interactions & enhance understanding of HCP preferences

CUSTOMER ENGAGEMENT **FOUNDATIONAL PILLARS**

	Customer Experience Strategy	Content	Channels
Description	Encompasses **strategies** used by Pharma Cos to generate the **overall customer experience**, including ease of access to information, responsiveness, and personalization	Involves the **quality, relevance, and clarity** of the information provided to HCPs, including scientific data, treatment options, and patient support materials	Refers to the **various platforms and methods** used to engage with HCPs, such as digital platforms and face-to-face interactions
Relevance	*Ensuring a positive and tailored customer experience to build trust, loyalty, and long-term relationships with HCPs*	*Meeting the informational needs of HCPs can enhance their decision-making process and improve patient outcomes*	*Utilizing the most preferred and effective channels ensures that communications are received and engaged with by HCPs, maximizing impact*

The EU HCP Survey highlights a critical need to boost personalized engagement through awareness, clinical data, and MSL interactions

Customer Experience Strategy

67%

of HCPs believe pharma engagement should drive high **patient awareness** about health issues[5]

"***Value-based engagement**, focusing on delivering meaningful content and experiences aligned with customer values[6]*"

Content

52 %

of HCPs are actively searching for more **clinical data/results**[5]

"*Provide **tools and information** on how to use the medication, who should be getting it, cost, and side effects[6]*"

Channels

42%

of HCPs emphasised as their primary challenge with MSLs that they **didn't interact with them enough**[5]

"*MSLs should have **more frequent interactions with HCPs** and refreshing updates[6]*"

Crafting a winning customer experience needs a customer-centric & value-based engagement that truly shifts towards data-driven

CX Strategy

*"Focus on a **customer-centric approach** rather than a product-centric approach."*[7]

*"**Value-based engagement**, focusing on delivering meaningful content and experiences aligned with customer values."*[7]

*"Shift towards **data-driven insights and cross-channel integration** for a customized experience."*[7]

Data insights		Key questions	Actions to address these questions
#1	*The #1 improvement to engagement is to **demonstrate the effectiveness of treatments** to HCPs*[5]	***How can the effectiveness of treatments be better demonstrated to HCPs?***	› Ensure **effective communication of clinical data** through content, channels, formats, tone, and interaction frequency
52%	*of HCPs believe that Pharma companies **should interact across all stakeholders** to build advocacy and communicate both branded and unbranded messages*[5]	***How can interactions be enhanced to effectively communicate both branded and unbranded messages?***	› Develop an **integrated strategy with stakeholder** collaboration to drive HCP adoption through omnichannel interactions
67%	*of HCPs believe pharma engagement should drive high **patient awareness** about health issues*[5]	***How can disease awareness be effectively driven through engagement with HCPs?***	› Collaborate with HCPs to create and share **educational campaigns on disease awareness** using digital and traditional media
16 out of 17	*of Pharma executives believe **Marketing and Sales** will drive customer engagement over the next 5 years, but HCPs value medical channels, making **Medical functions** crucial*[5]	***How can cross-function team be balanced to optimize customer engagement?***	› Form a **cross-functional team** to create a cohesive engagement plan that leverages each function's strengths and meets HCP preferences

Creating impactful, easy-to-understand & personalized content that is adapted to the right context will be pivotal to drive meaningful customer engagement

Content

*"**Adapting information** to my particular environment."*[6]

*" **Be more objective** in conveying messages."*[6]

*"Well-founded scientific studies, **online information platforms**."*[6]

*"Clarity and brevity. **No jargon,** and information **easy to digest**."*[6]

	Data insights	Key questions	Actions to address these questions
#1	***The top piece of information HCPs regularly seek is clinical data***[5]*, which they get from non-pharma channels 79% of the time*[5]	***How can we create relevant content that can be reused and scaled?***	› **Use a modular content approach** with reusable components for consistent, efficient, personalized, and scalable content creation and distribution
34%	*of HCPs say **reps don't tailor their messages** and are **ineffective** in telling the scientific story*[5]	***How can we meet HCPs expectations?***	› Focus on **delivering integrated, personalized experiences** to meet HCPs' changing expectations by leveraging **Generative AI** for precise, up-to-date information
56%	*of HCPs regularly seek **for information on ¨new innovations¨***[5]	***How can we create compelling content with flexibility, consistency and efficiency at scale?***	› **Work with KOLs, SMEs, and professional organizations** to create credible content. Scale production and distribution (**content at scale**) to match HCPs' evolving expectations and industry trends
80%	*of HCPs **consider educational programs at least somewhat effective or very effective**; none of the HCPs considered these programs as not effective*[5]	***How do I ensure content is compliant?***	› **Streamline MLR approval process** by leveraging AI, automating compliance and quality checks, ensuring accuracy

Maximizing customer engagement with strong tech-enabled channel integration, with an enhanced focus on digital channel expansion

Channels

*"**Strong partnership with major opinion leaders** and **healthcare providers** will allow you to meet more needs that correspond to demand"*[6]

*"Switching from in person events to **digital experiences**"*[6]

*"**Expand their digital channels** with their own digital strategy to have the best results in the industry"*[6]

	Data insights	Key questions	Actions to address these questions
#1	*The **most valuable interaction** with pharma companies for HCPs are **pharma-sponsored events** (e.g., seminars/webinars)*[5]	***Do we leverage multiple channels to enhance the value and impact of pharma-sponsored events?***	› Develop a cohesive **channel integration strategy** to **amplify the reach and impact of events**, ensuring personalized and relevant communications
42%	*of HCPs emphasised as their primary challenge with **MSLs that they didn't interact with them enough***[5]	***Are we effectively considering HCPs' preferred communication channels?***	› Segment HCPs by **channel preference** to tailor communication strategies accordingly and ensure that HCP interactions with pharmaceutical representatives occur with **whom they prefer and when they prefer**
52%	*of HCPs would prefer **quarterly interactions with sales representatives***[5]	***Are we making the best use of HCP interactions with pharma representatives?***	› **Integrate channels technology** to track and analyze HCP-pharma representatives' interactions, identifying patterns and opportunities for personalized, impactful engagements
64%	*of HCPs considered **social media at least a moderately valuable** channel for engagement*[5]	***How can we optimize channels to for effective communication and enhanced customer experience?***	› Focus on accessible, consistent channels like **webinars, social media, HCP portals, and digital platforms**. Use **analytics** to track engagement and refine strategies based on feedback and **performance data**

The enablers are essential for unlocking the full potential of Future of Customer Engagement

Found. Pillars: CX Strategy, Content, Channels

Enablers: Data & Analytics, Technology, Operating Framework

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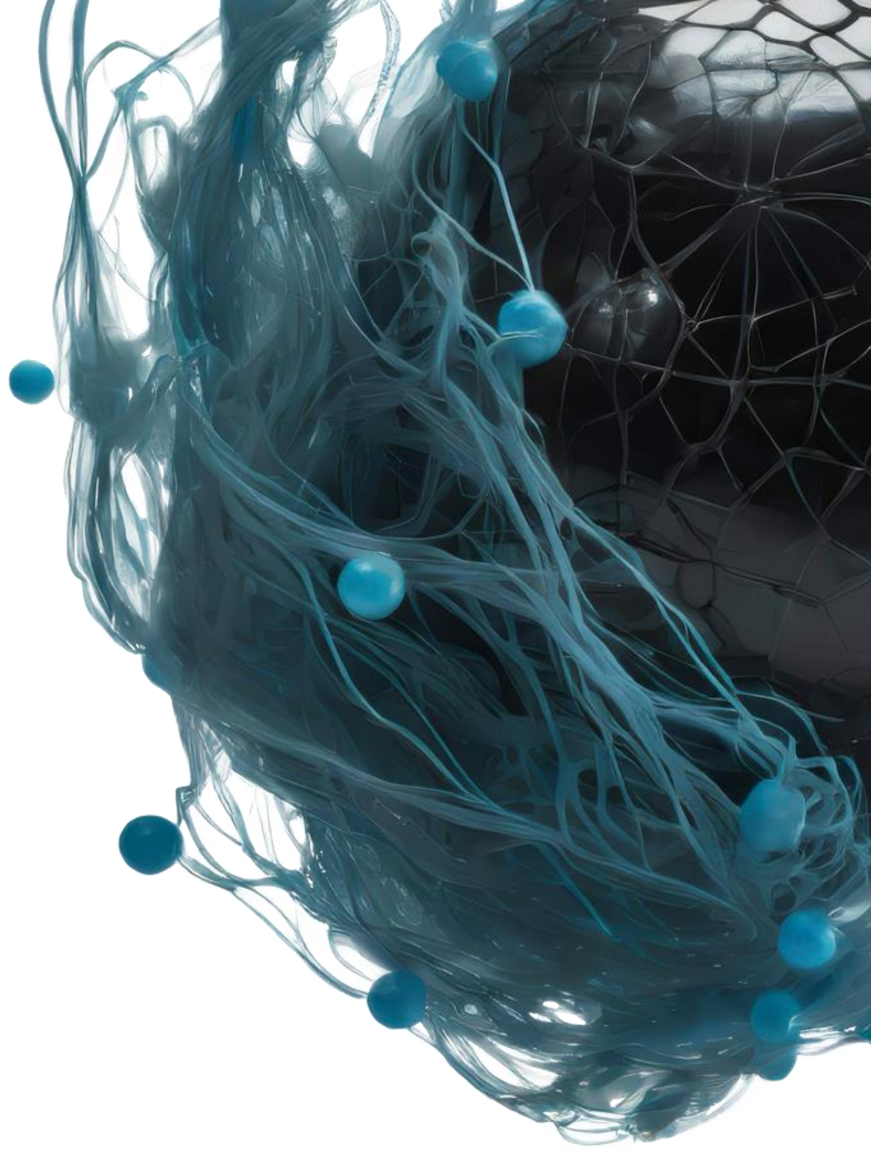

Three pivotal enablers supplement the foundational pillars to bolster the required capability building and addressing the customer engagement gaps

CUSTOMER ENGAGEMENT **ENABLERS**

	Data & Analytics	Technology	Operating Framework
Description	Enable personalized interactions, **optimizing** customer journeys, facilitating **effective segmentation**, and providing continuous feedback for **strategy refinement**	Enable **seamless omnichannel interactions**, **automating** customer service, improving accessibility, and providing **innovative platforms for personalized** experiences	Align **organizational processes**, resources, and practices to deliver consistent, efficient, and customer-centric experiences
Relevance	*Enhances precision in targeting, improves patient outcomes, and refines marketing strategies*	*Elevates engagement efficiency, enhances patient accessibility, and fosters innovative patient care solutions*	*Ensures scalable, compliant, and consistent delivery of customer-focused services*

Deloitte's 5 distinct research-backed Future Customer Engagement Models

with differentiated focus on foundational pillars & enablers can help companies prioritize capabilities and investments

Found. Pillars: CX Strategy · Content · Channels

Enablers: Data & Analytics · Technology · Operating Framework

Customer Engagement Models

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- *THE CONCIERGE*
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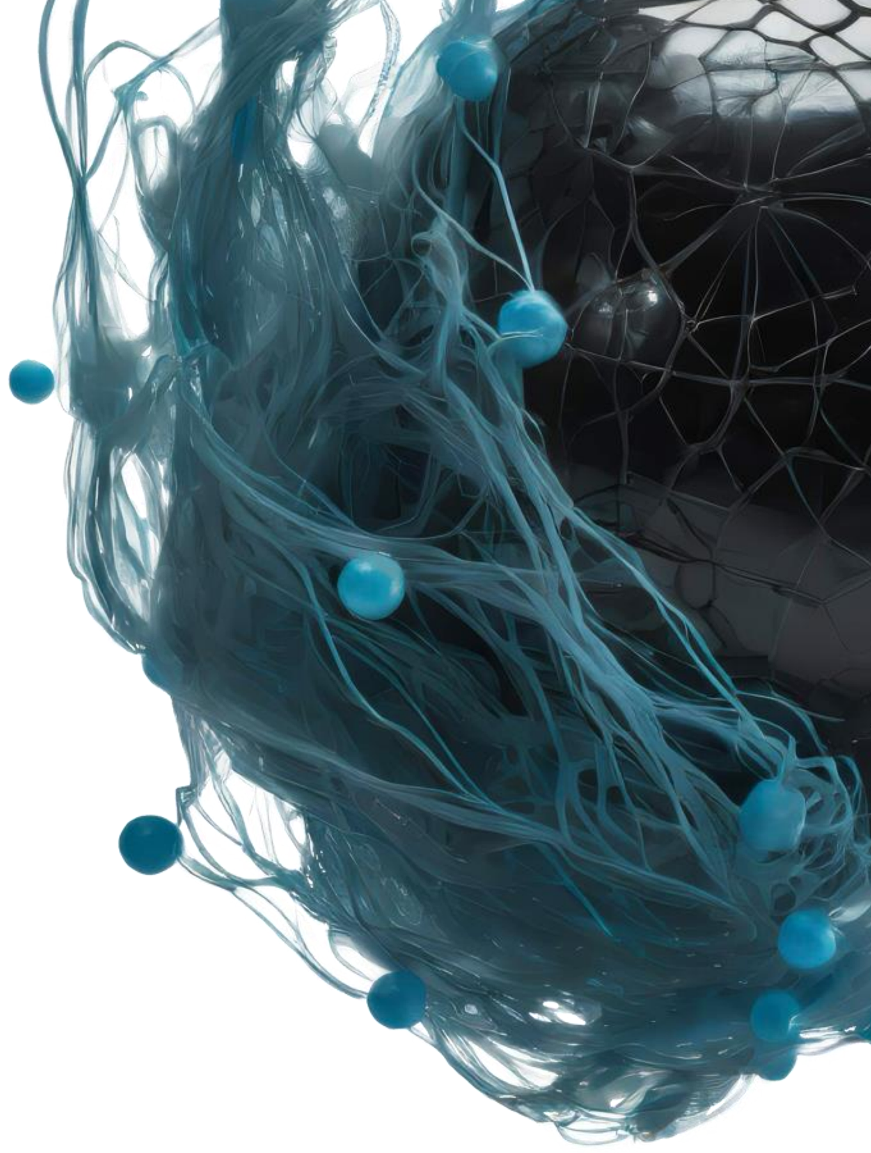
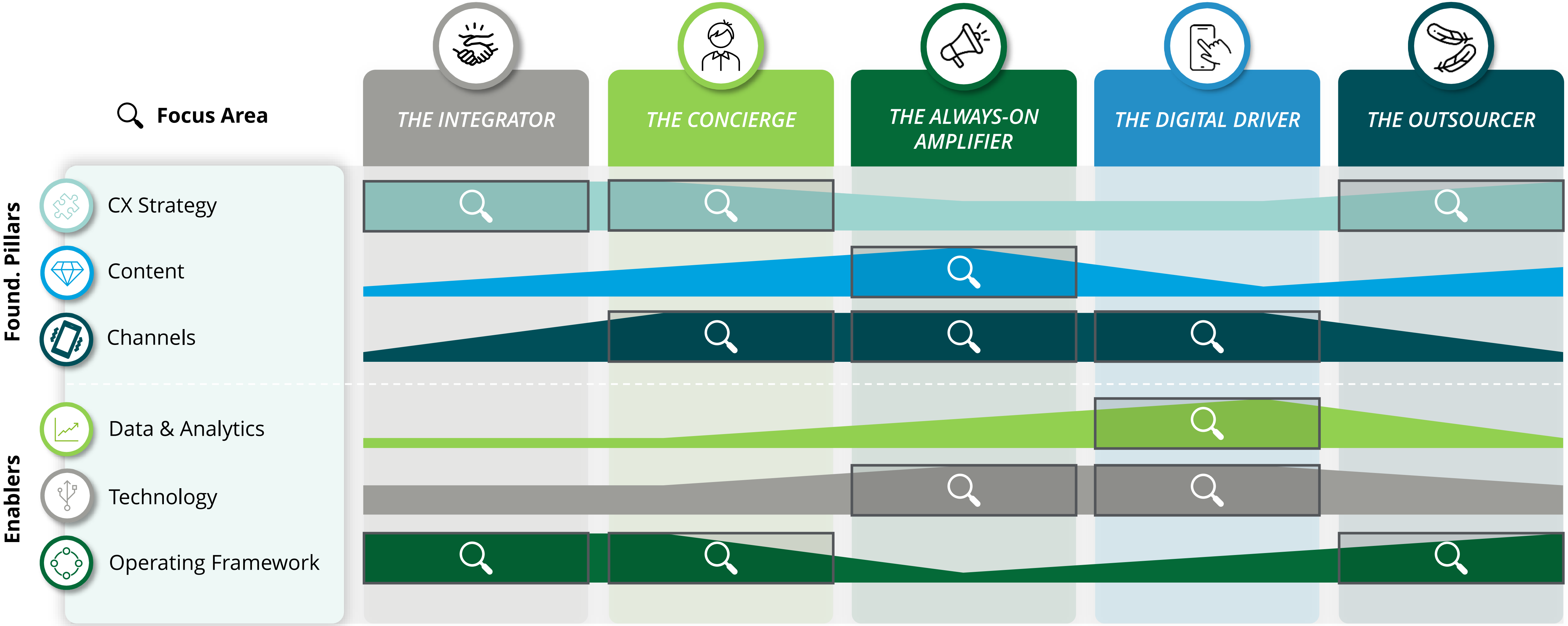


Our Future Customer Engagement Models have a clear, differentiated focus on various required capabilities relevant to your organizational needs

Complex Stakeholder Engagement	*High-touch Personalization*	*Broad Brand Awareness and Product Access*	*Digital-first to Streamline Customer Engagement*	*Light-touch, Lean Approach to Drive Margins*
THE INTEGRATOR	***THE CONCIERGE***	***THE ALWAYS-ON AMPLIFIER***	***THE DIGITAL DRIVER***	***THE OUTSOURCER***
• Builds **deep relationships** with large, complex customers (e.g., payers, government, accounts) • Applies technology and teamwork to ensure **seamless and clear communications** across • A multitude of stakeholders	• Delivers **high-touch, one-to-one engagement** with key customers • Focuses on addressing the **full range of medical and non-medical needs** for both providers and patients	• Uses an **array of digital and mass media** to share key health and product information • Strives for **exciting messaging** tailored to specific audience to communicate clear, valuable information	• Relies on **digital-first engagement** (e.g., AI Chatbots) for supporting customers to create a low-cost margin approach • Creates **scalable personalized experiences** through advances in AI/ML, data and analytics	• Shapes **vision and value story** for products without driving significant promotion or direct customer engagement • Shares that story with **targeted external stakeholders** (e.g., KOLs, distributors, contract sales) to ensure product is **positioned to be the customer's first choice**

Each Customer Engagement Model is unique and interacts with the foundational pillars and enablers of customer engagement in distinct ways



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Footnotes:
1. The industry is falling short based on customer engagement perception gap between LS executives and HCPs needs. | 2. Data taken from Deloitte pharma executives survey. | 3. Deloitte HCP EU survey: On a scale of 1 (not satisfied) to 5 (very satisfied): values 4 and 5 indicate "satisfied", values 1 and 2 "not satisfied", and 3 "neutral". | 4. Deloitte HCP EU survey: On a scale of 1 (not well) to 5 (exceedingly well): values 4 and 5 indicate "well", values 1 and 2 "not well", and 3 "neutral". | 5. Data taken from Deloitte HCPs survey. | 6. Quotes taken from Deloitte HCPs survey. | 7. Quotes taken from Deloitte pharma executives survey.