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Omnichannel
HCP engagement
Differentiating
where it truly matters



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Executive summary

In today's dynamic pharmaceutical landscape, effective engagement with healthcare practitioners (HCPs) is fundamentally important. This publication explores the journey of the pharmaceutical industry towards establishing a more personalized and relevant HCP experience.

From recent research and working with leading pharmaceutical companies, the following avenues for differentiation amidst the burgeoning influx of information and communication channels emerged:

- A true omnichannel engagement approach, tailoring user experiences to individual needs across various platforms, is an ambitious yet crucial goal for pharma companies. Leveraging AI and machine learning to personalize content and orchestrate communications can significantly enhance campaign effectiveness and efficiency.
- A superior customer experience is now as vital as the product itself, with HCPs demanding high-quality, scientifically supported content. Recent findings show, that while HCPs are largely satisfied with the engagement as experienced today, there remains substantial room for differentiation.
- Content quality stands out as the most significant predictor of overall HCP engagement satisfaction. HCPs highly satisfied with content quality, are four times more likely to report high overall satisfaction and less likely to complain about being contacted too frequently. Pharmaceutical companies should prioritize value-driven, scientifically supported content, with excellence in delivery being key to successful overall engagement.
- Pharma companies must recognize the diverse information needs across different medical specialties and product lifecycle stages. Tailoring content to these varying requirements is essential. Moreover, engagement frequency preferences vary by age and specialty, highlighting the need for targeted interaction strategies.

“Achieving differentiation in HCP engagement hinges on providing exceptional, scientifically supported content and utilizing advanced data-driven strategies to tailor interactions. Deloitte’s Next Best Engagement framework exemplifies how integrated solutions can drive measurable growth and enhance engagement outcomes.”

Melena Weise, Director | Deloitte

Context

Effective engagement with healthcare practitioners (HCPs) is crucial for pharmaceutical companies. This engagement spans various key activities, including, e.g., sharing product information, providing educational resources, and ultimately improving patient outcomes.

The evolution towards an omnichannel approach has been driven by the need to adapt to the preferences and expectations of modern HCPs. Adopting an omnichannel marketing strategy places HCPs at the center, allowing them to navigate and customize their user experiences according to their specific expectations. When executed effectively, an omnichannel approach utilizes integrated data and content across channels, to deliver consistent and personalized campaigns. The incorporation of AI and machine learning models further enhances the ability to tailor content and orchestrate communications across platforms, boosting both the effectiveness and efficiency of engagements.

Achieving excellence in customer engagement has evolved beyond being merely a commercial asset—it's now often seen as a license to operate. Superior customer experiences, driven by innovation, personalization, and seamless interactions, are becoming a standard expectation in the healthcare industry. With the rise of digital natives, who will constitute most of the workforce by 2030, the demand for a holistic and personalized engagement experience will intensify. Consequently, distinguishing oneself in a crowded marketplace where digital and tra-

ditional communication channels converge will be essential for maintaining relevance and attention.

In the face of increasing content saturation facilitated by generative AI, pharmaceutical companies must strive to ensure the relevancy and authenticity of their communications. Recent Deloitte research highlights that HCPs frequently seek information from non-pharma channels and often find pharma communications lacking in scientific authenticity. Despite significant investments in omnichannel engagement, transparency around the outcomes of these efforts remains limited.

In our publication, we evaluate the current state of HCP engagement within the pharmaceutical industry, focusing on the creation of an omnichannel, real-time experience. Additionally, we identify opportunities for companies to differentiate themselves amidst the increasingly dense flow of information and communication directed toward HCPs. In the following paragraphs we will explore in depth, what it takes to stand out and succeed in HCP engagement amidst the overwhelming volume of content directed towards them.

Evolution of HCP engagement: A brief recap

The pharmaceutical industry has significantly evolved from primarily relying on face-to-face interactions between sales representatives and healthcare practitioners (HCPs) to creating a truly connected customer experience.

Looking back, however, the journey of marketing maturity in the pharmaceutical industry showcases the steps taken to enhance HCP engagement. Initially, companies relied on a one-to-many communication model, sending mass emails with minimal interaction. With the advent of new technologies, diverse communication channels now complement the traditional face-to-face approach. Initially, pharmaceutical companies used digital channels to deliver the same content provided during

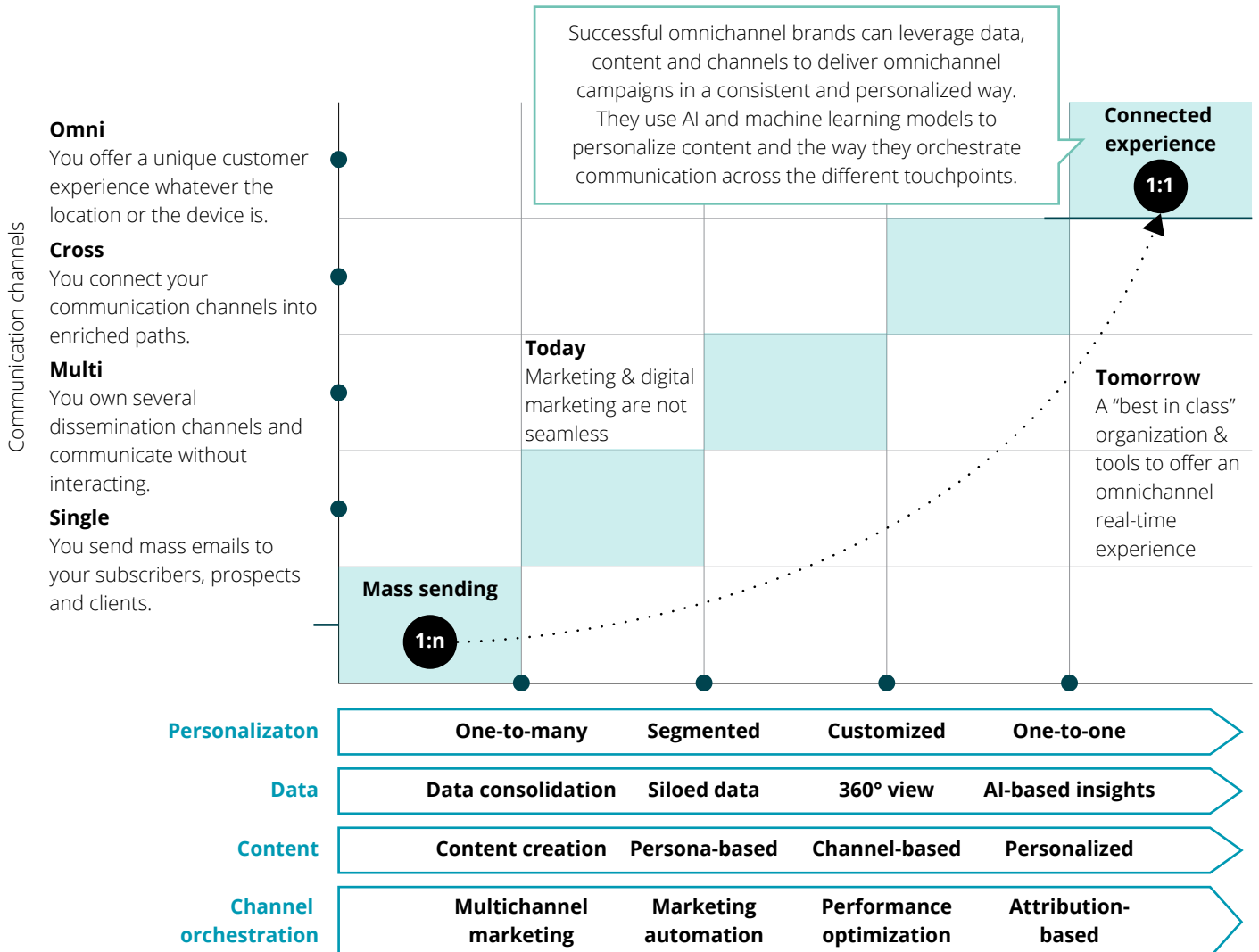
in-person interactions, a strategy known as multi-channel marketing. Over time, these companies started integrating various channels, thereby constructing content journeys offering diverse information in different contexts (cross-marketing). Despite these advances, personalization remained limited, often failing to cater to individual HCP needs and preferences. The next phase involved connecting communication channels to create enriched content journeys, allowing for segmented and customized interactions that better met individual HCP needs.

Today, leading organizations strive for an omnichannel marketing strategy that integrates data and content across all channels to adapt to the modern HCPs' preferences and expectations. This approach places

HCPs at the center of the strategy, allowing them to navigate and customize their own experiences based on their specific needs. When effectively executed, this approach utilizes integrated data and content across channels to deliver consistent and personalized campaigns. Leveraging artificial intelligence (AI) and machine learning (ML) models further enhances the ability to personalize content and orchestrate communications across different platforms, boosting both the effectiveness and efficiency of engagements.



Fig. 1 – Pharma marketing maturity journey



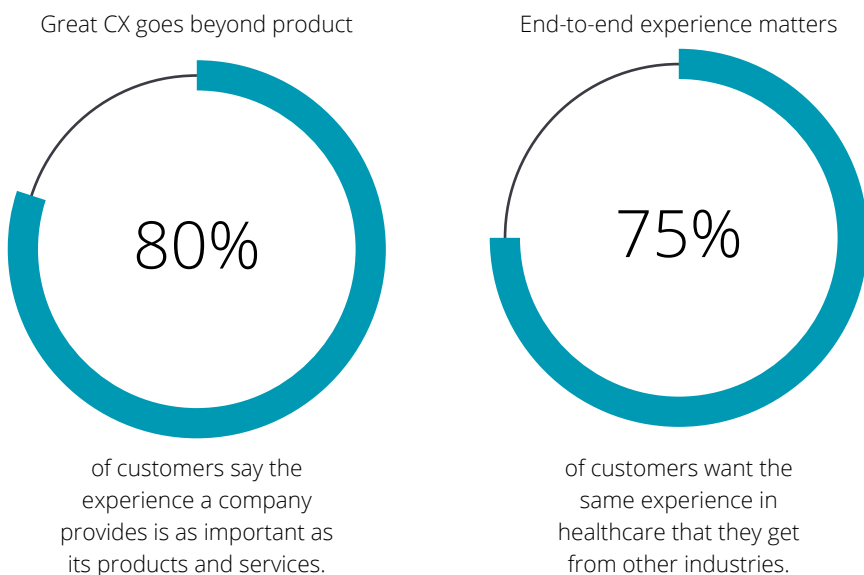


Ensuring excellent customer engagement has transcended from being merely a commercial value driver; it has evolved into a license to operate in many sectors. Superior customer experiences are just as crucial as the products and services themselves. This trend is evident in consumer-driven industries and extends to healthcare as well. Innovations in information accessibility, personalization of offerings, and user-friendly interactions are reshaping daily life. Consequently, HCPs now expect

similar experiences when engaging with pharmaceutical companies. The confluence of mobile applications, social media, and novel communication channels creates a complex landscape that HCPs expect to be holistic and personalized. While many current HCPs are comfortable with less digitalized interactions, this will inevitably change. By 2030, digital natives will constitute three out of four members of the workforce.¹

Fig. 2 – Impact of customer-experience-led design

CX-led design has a measureable impact



Simultaneously, access to HCPs has become less exclusive. Digital platforms like email and social media provide easy access not only for pharmaceutical companies but also for other suppliers of products, software, and services. This increased accessibility makes it challenging to stand out and be recognized. The rise of generative AI exacerbates this issue by making content creation and dissemination easier, leading to content saturation. Consequently, maintaining relevance and capturing attention become a critical challenge in HCP engagement. A recent Deloitte survey confirms

this trend: 74 percent of HCPs now seek support and information from non-pharma channels, and nearly half find pharma communications ineffective in conveying scientific evidence and consider them inauthentic.

Despite significant investments in customer engagement activities aimed at achieving a true omnichannel approach, transparency around the outcomes and returns of these efforts remains limited. In the following section, we will take a closer look at the current state of HCP engagement, investigate the

root causes of existing challenges, and outline what it takes to differentiate amidst the overwhelming amount of content directed at HCPs. This includes understanding the varying information needs along the product lifecycle, preferences across medical specialties, and leveraging advanced data-driven solutions to orchestrate personalized, effective engagement strategies.

¹ US Bureau of Labor Statistics.

HCP engagement: Status quo and opportunity for differentiation

Recent Deloitte research² provides a nuanced view of HCPs' current perspectives on pharmaceutical companies' engagement activities.

On the bright side

HCPs overall have a generally positive view of the current state of engagement. Despite the rise of digital engagement – significantly accelerated during COVID-19 – non-digital channels remain among the most used and desired methods of interaction. The majority (85%) of HCPs report being fully or reasonably satisfied with the quality of content provided by pharmaceutical companies. However, it is noteworthy that 84 percent of HCPs perceive significant variations in content quality across different pharma companies, suggesting past investments have largely been in the right direction.

On the downside

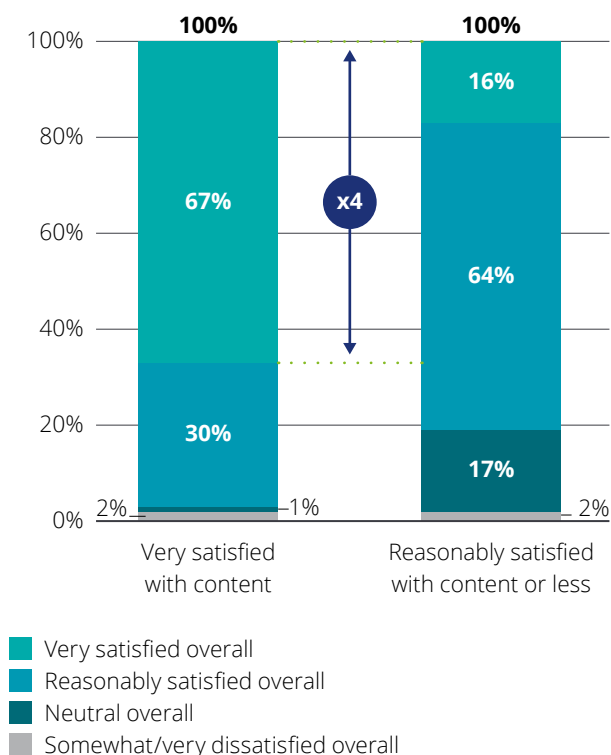
One of the key challenges identified is the struggle of pharmaceutical companies to differentiate their content and messaging. Most HCPs do not see strong differences between the companies. Being perceived as merely as good or as bad as others in engaging with HCPs makes it difficult for companies to create a competitive advantage.

The following sections will delve deeper into the primary drivers of HCP satisfaction and explore strategies for achieving true differentiation.

High quality content is key – ideally supported by scientific evidence

Content quality stands as the most significant predictor of overall HCP engagement satisfaction. Data reveals that 67 percent of HCPs who reported to being very satisfied with the content quality are also very satisfied with their overall engagement experience. This means that HCPs highly satisfied with content quality are four times more likely to report high overall satisfaction and less likely to complain about being contacted too frequently.

Fig. 3 – Overall HCP satisfaction driven by content quality



Note: Percentages may not total 100 due to rounding.

Conversely, HCPs who are only reasonably satisfied or neutral regarding the content quality are twice as likely to complain about excessive contact (30 and 32%, respectively). Among those somewhat dissatisfied, the likelihood of such complaints rises even more (43%). This underscores the importance of delivering exceptional customer engagement experiences through high-quality content. Merely good content is not sufficient.

Some HCPs have raised concerns regarding the effectiveness of sales representatives in presenting scientific evidence, while medical science liaisons (MSLs) are often perceived as unavailable when needed. HCPs primarily source their information from medical journals or press releases, followed by medical conferences and continuing medical

education (CME) courses. These channels are mainly used to seek information on new innovations (e.g., new technologies), clinical data/results, product side effects, and mechanisms of action.

Our data reiterates the importance of pharma companies providing high-quality content, ideally supported by scientific evidence that aligns with other preferred information sources. Consequently, HCPs value formats that address these needs, such as pharma-sponsored events (seminars/webinars) and MSL interactions, much more than promotional or informative emails.

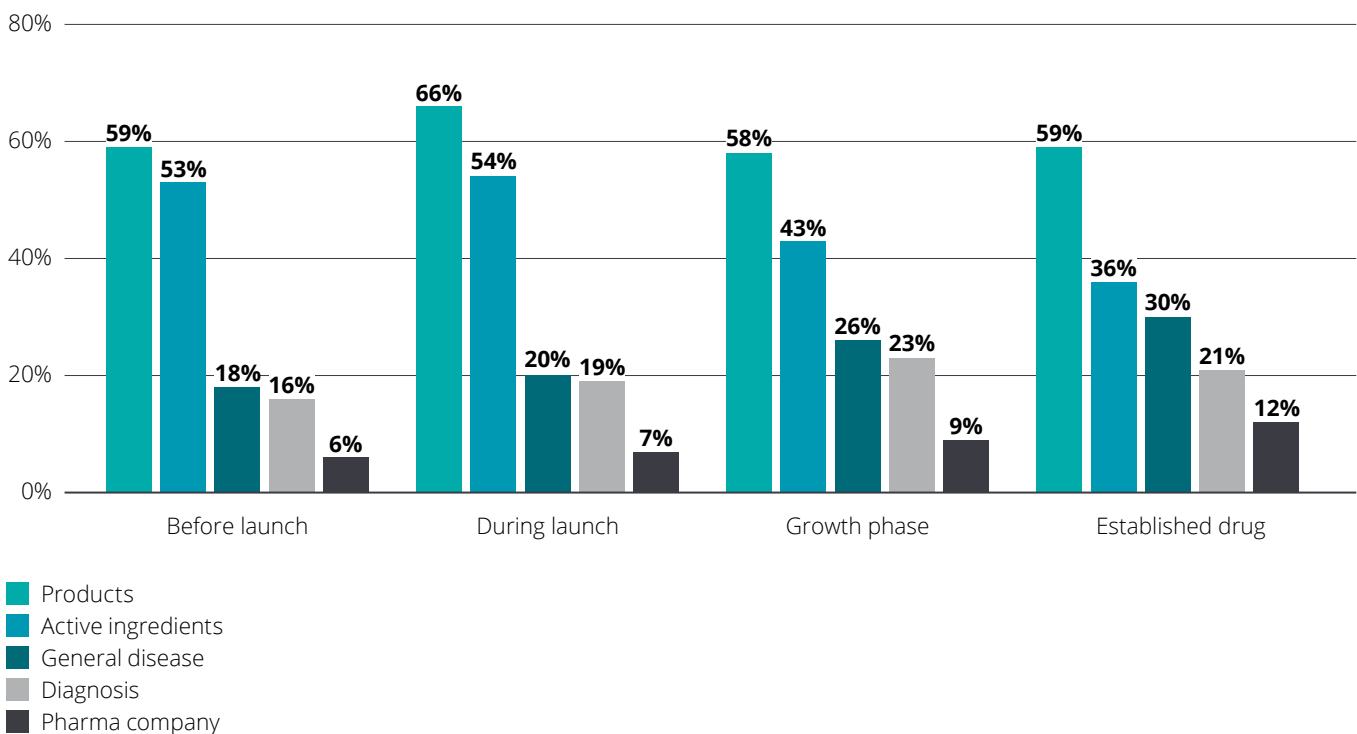
In summary, superior content quality substantially impacts HCP satisfaction. To optimize engagement, pharmaceutical companies should prioritize delivering value-

driven, scientifically supported content in formats such as seminars, webinars, and MSL interactions. Excellence in content delivery, rather than mere adequacy, is the key to successful engagement.

Relevance of content type changes with brand lifecycle – and differs between medical specialties

The type of content most relevant to HCPs changes throughout the brand lifecycle and varies across medical specialties. Generally, information regarding the product and its active ingredients is paramount throughout the entire product lifecycle, and this is true across most medical disciplines. However, it is essential for pharmaceutical companies to recognize that information needs fluctuate depending on the brand lifecycle phase.

Fig. 4 – Desired content types depending on product maturity



During the pre-launch to launch phases, the importance of information about the product and active ingredients typically increases. In contrast, as the product matures, this type of information decreases in importance. Conversely, information related to the disease, diagnosis, and the pharmaceutical company itself tends to be less crucial during the early phases but becomes increasingly important as the product matures.

Different medical disciplines exhibit distinct content preferences. For example, only 4 percent of dermatologists rank disease information among the top three types of information before a product launch. In stark contrast, 26 percent of cardiologists, 23 percent of rheumatologists, and 20 percent of general medicine practitioners consider disease information among their top content preferences before product launch.

In essence, understanding the shifting information requirements along the product lifecycle and adapting to the varying

preferences across medical specialties is crucial. Early phases demand detailed product information, while later stages require enhanced focus on disease and diagnostic information. Tailoring content to these dynamic needs is key to effective engagement.

Preferences regarding engagement frequencies differ by age and between medical specialties

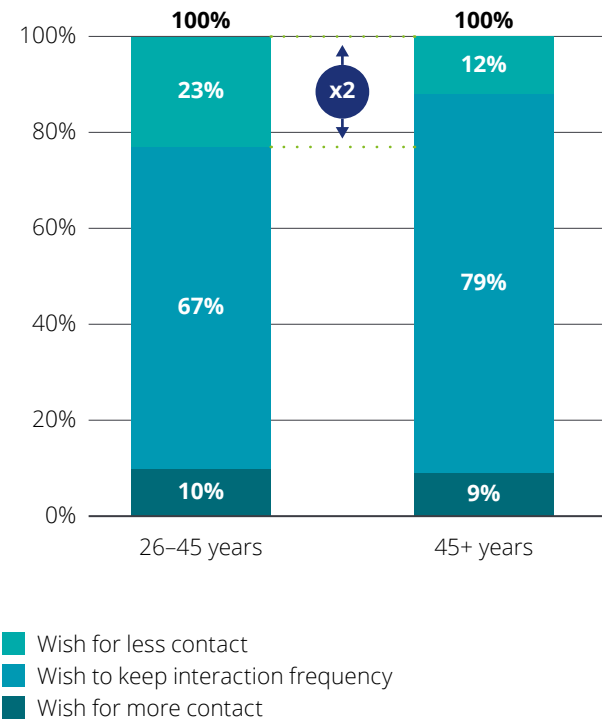
Pharmaceutical companies already unconsciously differentiate themselves in HCP engagement frequency, as evidenced by the perception of 70 percent of HCPs who notice variance in interaction frequency among different firms, with roughly a quarter noticing significant discrepancies.

It's imperative for pharmaceutical companies to recognize, that less can sometimes be more when it comes to engagement frequency. Significant differences exist between age groups and medical specialties regarding their preferred engagement frequencies. Younger HCPs are twice as likely

to prefer fewer contacts compared to their more senior counterparts. Additionally, various medical specialties exhibit distinct interaction patterns. Over 40 percent of general medicine practitioners and dermatologists engage with a single pharmaceutical company on a weekly basis, while only 24 percent of oncologists and neurologists do the same. Interestingly, a substantial proportion of oncologists (41%) and neurologists (40%) express a preference for even less frequent contact.

In summary, HCPs distinctly notice varying engagement levels among pharmaceutical companies, suggesting a potential advantage in opting for less frequent but more targeted interactions. Factors such as age and medical specialty play a significant role in these preferences, underscoring the need for tailored engagement strategies.

Fig. 5 – Desired engagement frequency of HCPs



When asked about the differences observed between pharmaceutical companies in terms of customer experience, 71 percent of HCPs reported that the differences between biopharma companies are rather subtle. This lack of differentiation poses a significant challenge, especially for companies aiming to be recognized as best-in-class organizations targeting above-average growth and market share.

So how can pharma companies implement true differentiation in their HCP engagement approach?



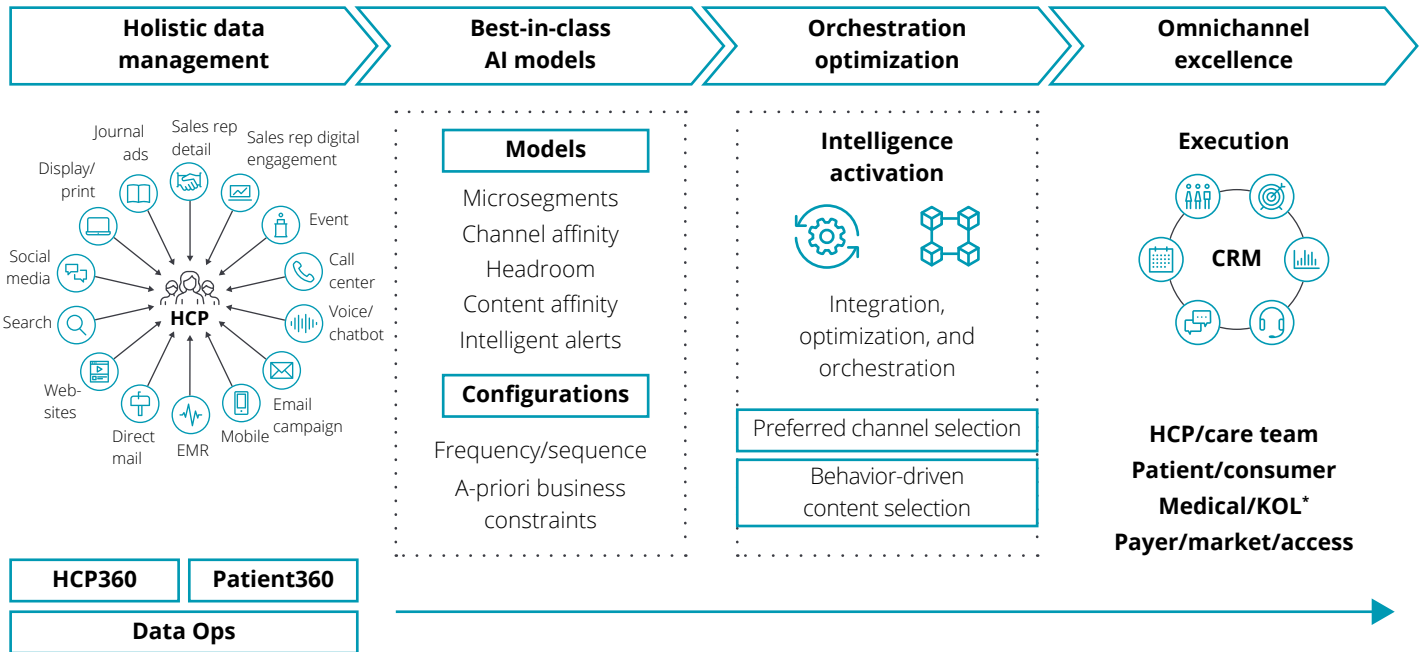
Differentiating when and where it truly matters

As demonstrated earlier, delivering high-quality content at the right time through the right channel is crucial for creating a personalized customer experience. Given the multitude of attributes unique to each HCP – such as age, medical specialty, and channel preferences – as well as the brand-specific factors like product lifecycle, clinical evidence, and sales data, more advanced solutions are necessary. These solutions must harness the full potential of connected data, analytics, and technology to support dynamic engagement that measurably drives growth.

“Deloitte’s Next Best Engagement (NBE) approach addresses these challenges comprehensively. By integrating data management, advanced AI/ML, and intelligent orchestration, NBE provides an end-to-end solution that formulates personalized engagement strategies grounded in individual preferences and insights.”

Sebastian Mueller-Bellé, Director | Deloitte

Fig. 6 – Combination of best-in-class solutions to drive omnichannel excellence



* KOL = Key Opinion Leader

Deloitte's Next Best Engagement framework is designed to answer the most pressing questions supported by a flexible data- and analytics-driven decisioning and orchestration engine. It is an engagement optimization solution that is configured with your environment in mind.

Where do I invest?

Channel spend recommendations to drive campaign ROI, with performance informing future budgets.

With whom should I engage?

In-depth analysis of target personas and predicted behavioral responses across various channel and content combinations.

When should I engage?

Insights that align timely marketing messages and behavioral nudges along the end-to-end journey.

With what should I engage?

Content customizations that are both relevant and authentic, taking the holistic customer view into account.

Deloitte's Next Best Engagement framework delivers a practical solution for achieving differentiation in customer experience by ensuring that the right content reaches the right channel at the right time.

This approach not only enhances the engagement experience but also supports measurable growth and efficiency improvements, enabling pharmaceutical companies to truly stand out in a crowded market.

Client impact

Deloitte's NBE approach has been adopted by multiple clients, including some of the largest multi-national biopharma companies. It was successfully implemented across local affiliates, leading to notable advancements in the field force's ways of working. Advancing in this direction enabled our clients to harness comprehensive data, analytics, and technology, resulting in more dynamic and effective HCP engagements, solidifying their competitive edge.

Key outcomes

- Enhanced personalization
- Strengthened market position
- Positive sales impact

In essence, the Next Best Engagement approach facilitated a game-changing transformation in HCP engagement!

Fig. 7 – From our experience, the impact of NBE is tangible and measurable across multiple dimensions



50% to 65%

increase in HCP prescribing volume for those receiving predictive triggers.



1% to 2%

sales lift with half of the increase attributed to field-call activation.



2x to 4x

increase in market share among HCPs engaged through predictive triggers versus those not.



4% to 7%

increase in digital engagement coupled with a 15% to 20% reduction in promotional spend.



15% to 20%

increase in promotional deliverables and 30% to 35% increase in engagement activities.

What it takes for Pharma to act now

In today's competitive pharmaceutical landscape, true differentiation is essential for sustainable success. Many pharma companies struggle to stand out – to differentiate effectively, companies should focus on several key strategies:

First, enhancing content quality and relevance is crucial. High-quality, scientifically backed content tailored to different stages of the product lifecycle can significantly boost HCP engagement. Early stages require detailed product information, while later stages benefit from an increased focus on disease and diagnostic information.

Further, personalizing engagement through advanced analytics is a powerful approach. Using AI and machine learning to analyze HCP behavior and preferences allows for highly personalized content delivery. Dynamic content and channel strategies based on real-time data may further enhance personalization and ensure content relevance. Nevertheless, optimizing engagement frequency is essential to avoid content fatigue. Tailoring interaction frequencies based on the age and specialty of HCPs can lead to more effective engagement. Segmented engagement plans that reflect varying needs and preferences are also critical.

Finally, adopting an omnichannel marketing strategy provides a seamless experience across all touchpoints. Ensuring all channels work in harmony to deliver a holistic and personalized user experience is vital. Coordinating content in such a setup is critical. Adopting advanced tools like Deloitte's Next Best Engagement (NBE) framework can make a substantial difference. Such frameworks leverage data, AI, and analytics to craft personalized engagement strategies, ensuring the right content reaches the right channel at the right time.



Contact

Standing out in today's saturated market is challenging but achievable with the right strategy and tools. Deloitte combines industry expertise, technological capabilities, and fit-for-purpose solutions to help pharmaceutical companies reach their engagement goals as proven in many client projects.

So, are you ready to transform your HCP engagement strategies and achieve true differentiation? Reach out today, to discuss how we can help you stand out and succeed.



Melena Weise

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