



# A Blueprint for Medical Omnichannel Engagement

**Veeva**

## Delivering the right information to medical stakeholders in their preferred channel

A fundamental shift in expectations for medical affairs has accelerated the need for a customer-centric, omnichannel approach to engagement—one that understands stakeholders' educational needs and modifies the engagement plan to meet their preferences. This growing complexity in future engagement delivery means medical teams must refocus investments in data, technology, and business transformation more than ever to orchestrate an omnichannel approach.

While some organizations have begun executing holistic, customer-centric omnichannel plans, many are still establishing the foundational elements. This eBook offers a guide to realizing omnichannel engagement to deliver the right information to medical leaders in the format that best meets their needs.

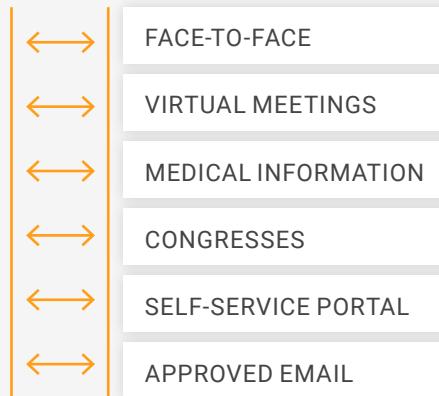


# What is an omnichannel approach to medical engagement?

Most life sciences companies have relied on pushing out identical messages to HCPs and KOLs through multiple, siloed channels. Little consideration was given to stakeholder channel preference, nor was there any attempt to understand if a message was even relevant for that stakeholder based on where they were along their knowledge journey.

An omnichannel approach, by contrast, creates an integrated customer experience across all potential communication channels and touchpoints whether medical, clinical, or commercial. With omnichannel, medical teams can deliver the right message to each stakeholder through their preferred avenue. Teams can orchestrate all channels to provide personalized communications tailored to specific decision points and stakeholder educational needs.

## Multichannel engagement



*Multiple channels but not integrated*

## Omnichannel engagement



*Fully integrated across channels and customized to needs and preferences*

To achieve this, medical teams need a deeper understanding of the stakeholder's educational needs, pain points, and channel and engagement preferences. A consistent process will capture the needs and preferences of stakeholders by combining structured survey capture alongside observations from MSLs.

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*Omnichannel engagement ensures fully integrated and orchestrated channels to deliver personalized communications with HCPs:*

- ➔ Tailor messages to specific decision points along the HCP knowledge journey
- ➔ Align channels to messages based on:
  - HCP preferences
  - HCP past interactions
  - Channel relevance for the message
- ➔ Ensure engagement plans are targeted to specific stakeholder segments
- ➔ Provide a consistent and personalized experience across all channels
- ➔ Preferences are remembered across all channels

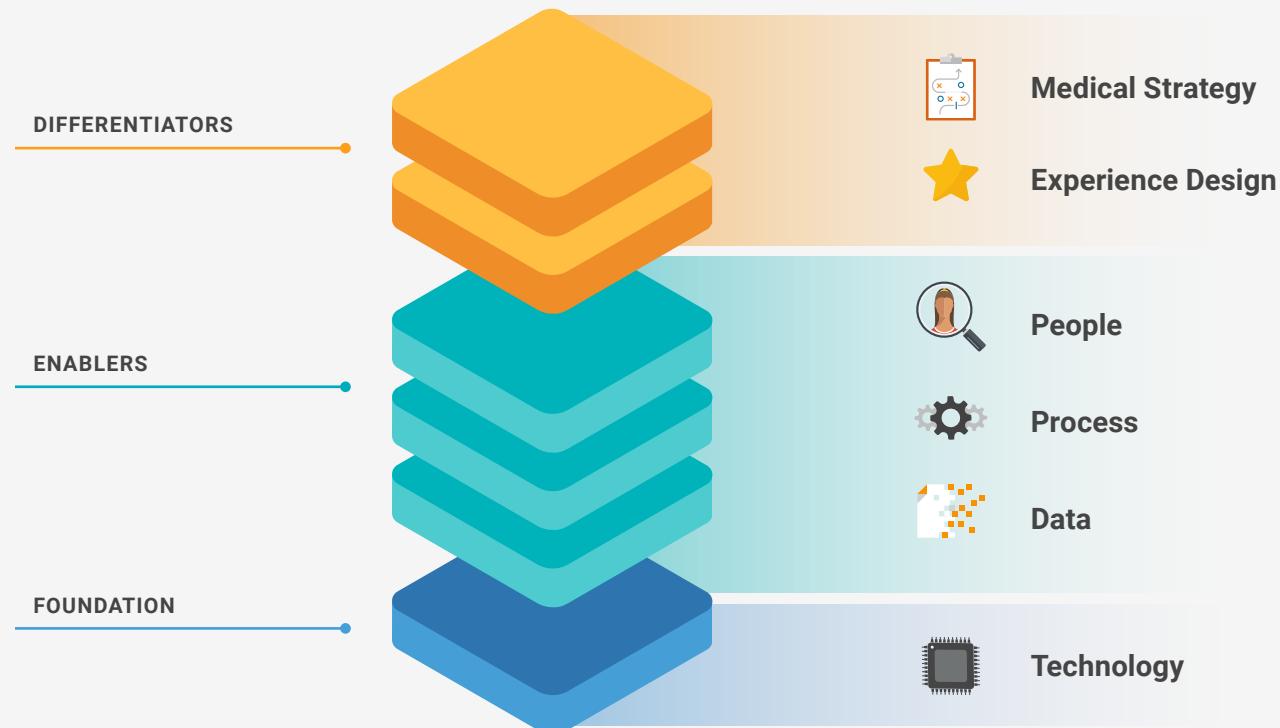
# An omnichannel approach transforms engagement

Using an omnichannel approach can help medical affairs maximize their time with stakeholders, and determine the methods and topics they'll need at crucial decision points to equip HCPs and KOLs with evidence. It expands partnership opportunities, ensuring that stakeholder engagement is in the type and form they seek and will readily inform decisions that improve patient outcomes. It can also better meet the expectations of digitally native stakeholders by allowing them to share targeted digital content before or after a call or in the gaps between in-person engagements to maintain continuity of thought and discussion.



# Foundational elements of omnichannel engagement

Building a true omnichannel approach for medical engagement is a journey that requires a detailed plan that defines both immediate actions and a long-term roadmap. Here are six foundational requirements to get you started:



Understanding the rationale for each, their interdependencies, and the potential roadblocks to implementation can help you plan for success and sustainability while keeping engagement focused on your stakeholders. Here are guidelines for each component:



## Medical strategy

Having a customer-centric approach to medical engagement should be grounded in strategic imperatives. Understanding the scientific landscape, product attributes, lifecycle considerations, and business will directly feed into clear medical objectives and the steps to reach your goals, from awareness and differentiation to building trusted relationships. Identify and prioritize your key stakeholders. For each have a clear sense of their educational needs, engagement goals, and channel preferences.



## Experience design

To form your stakeholder segmentation, you will gather information on customers' information-seeking behavior and channel preferences, including contact frequency, timing, and preferred content type. Know your stakeholder's unique educational journey and information needs.

You should have an integrated approach to establishing customer insights, considering other plans in your organization, such as your KOL engagement plan and integrated medical communications plan. Set the metrics for assessing insight success—key performance indicators (KPIs) and engagement goals—then iterate to optimize. Gathering stakeholder insights will be quantitative and qualitative, from field medical's use of each knowledge journey to content usage metrics, and feedback from HCPs, KOLs, MSLs, medical information, and leadership.



## People

People are at the heart of omnichannel transformation, so your organization will need visibility into opportunities for collaboration and upskilling. As you define your operating model, roles, and responsibilities, keep cross-functional collaboration between medical affairs functions in mind and establish a governance process early. This approach will help you execute faster and has a direct bearing on your ability to stay compliant and agile.

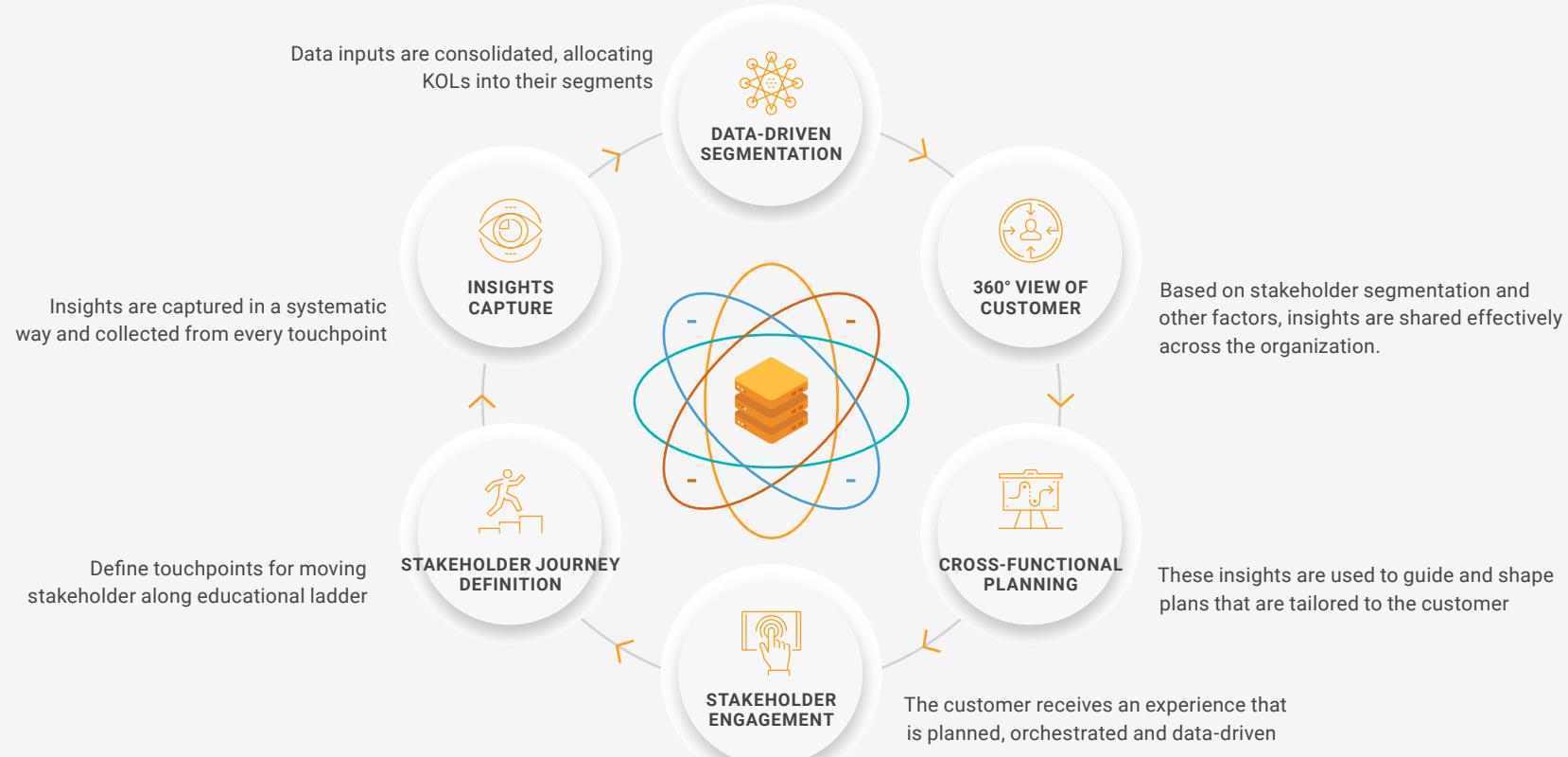
Your focus should also include an assessment of current skills and capabilities: What will you need from your field medical professionals for them to embrace omnichannel engagement? The answer will likely require training in basic and advanced features of your CRM system, analytics tools, and information gathering approach.



## Process

Your execution strategy must cover experience planning and orchestration for a differentiated engagement across cross-functional workflows. This includes identifying stakeholders, understanding their needs, defining a target educational journey, creating and distributing content to support each stage and channel, and measuring impact.

Executing omnichannel engagement with excellence is an iterative process informed by ongoing insights about stakeholders' needs and preferences. Therefore, a key process to get right is the flow of customer-related insights. That begins with a structured capture of insights on stakeholders and mapping this data to specific segments. Your teams will use this information to create customized plans. These will come from multiple sources, including field medical engagements and content usage in CRM. Digital insights from other sources (publication and website performance, social media, and digital surveys) can be analyzed to determine the next best actions.



*Data and insights must be effectively managed around every customer touchpoint in a continuous loop to achieve high-impact scientific engagement.*

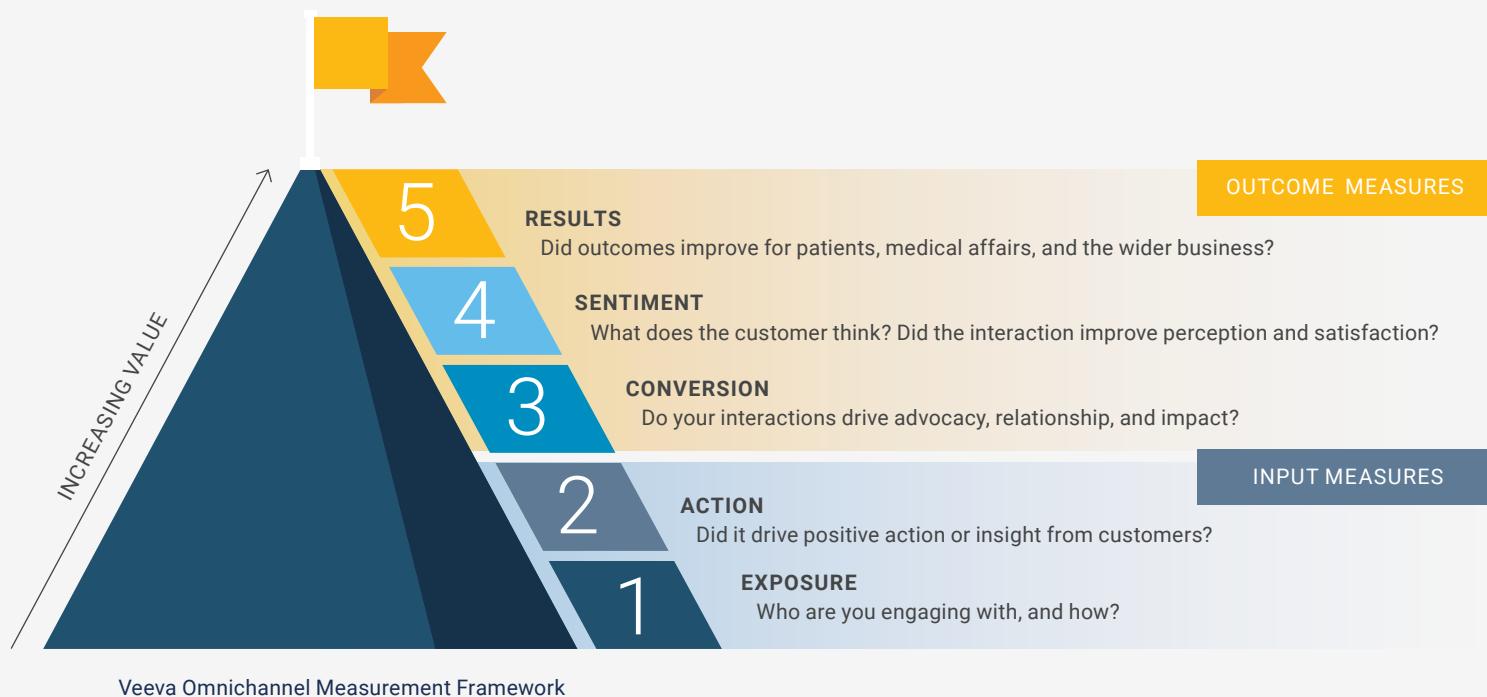
Your process should include determining the relevant content needs, the appropriate format for your channels, and how to execute your strategy. Be sure to streamline content production and have a process for reviewing, updating, and reusing content.

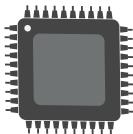


## Data

As pharmaceutical companies gather immense quantities of data, medical affairs can utilize this to gain a deeper understanding of their stakeholders and refine and optimize their strategy for greater impact. When you analyze your data for omnichannel orchestration, think about these five aspects:

- **Exposure:** Who are you engaging with, and how? Through what channels, at what time, and with what content?
- **Action:** Did it drive positive action or insight from customers?
- **Conversion:** Do your interactions drive advocacy, relationship, and impact?
- **Sentiment:** What does the customer think? Did the interaction improve perception and satisfaction?
- **Results:** Did outcomes improve for patients, medical affairs, and the wider business?





## Technology

The foundation for your omnichannel approach rests on technology to provide coordination and process automation. A content management system ensures visibility and findability of appropriate content. A CRM system offers differentiated engagement options (email, virtual meetings, events, medical inquiry) and the ability to gather insights and feed them into a larger analytics framework to show impact.

There is a wide range of technology available to organize contacts and engagements. **Veeva Vault CRM** is tailored to life sciences and supports pharma's elevated need for precise tracking of meetings, shared content, and communication. In addition, the customer intelligence in **Veeva Link** helps identify and prioritize stakeholders and give enhanced insights into their experience, focus, and goals. **Veeva Vault MedComms** provides a single, global repository to manage medical content and distribute it across channels and geographies.

# Starting your journey to achieving omnichannel engagement

To truly deliver relevant engagement with HCPs, medical teams must embrace an omnichannel approach to engagement. While the entire life sciences industry is moving in this direction, your goal will be personalized engagement that sets you apart from other organizations.

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## *Four key takeaways to get started on the omnichannel journey:*

- 1. Build your omnichannel blueprint starting with the cross-functional stakeholder journey and linking data, content, and channel at different points on the KOL advocacy ladder.*
- 2. Start small, pilot and test, and then grow. Focus first on a specific therapeutic, region, or function.*
- 3. Assess your current engagement capabilities and what foundational things are needed. For example, is your content categorized and organized within a single solution so you can deploy it across multiple digital channels?*
- 4. Document your results to demonstrate the value of your omnichannel investment to senior leadership and build on your results to scale.*

Omnichannel engagement is the foundation of customer-centric interactions for commercial and medical affairs teams and the key is knowing your customer. As one medical leader stated at the recent Veeva Commercial Summit, NA,



*We could give them loads of information and in medical we are really, really good at giving a lot of detail. But what's right for them at that time? That's the most important part is really understanding where they are in their journey to make sure that you're delivering the appropriate amount of information in the way they need to consume it.*

Learn more about **software, data, and business consulting** needed to orchestrate an omnichannel medical approach tailored to your customers' precise needs.



## About us

Veeva Business Consulting can not only help you set your medical omnichannel engagement vision and strategy — we can translate it into a tangible, scalable reality with measurable results. We operate at the intersection of business, technology, and data to help transform medical's scientific engagement model and insights orchestration. Our offerings combine strategy, execution, unique insights, and platforms to help our customers deliver great HCP experiences that drive better patient outcomes.

## Contacts

To learn more contact [Veeva Medical Business Consulting](#).