

# The Commercial Leader's Guide to Digital Excellence

How to improve customer experience and field productivity through digital engagement



Copyright © 2023 Veeva Systems

## The future of engagement is hybrid

For many life sciences companies, digital engagement has strengthened existing relationships with healthcare providers (HCPs) and provided reps greater access to those who were previously difficult to reach. Commercial teams have been able to improve productivity and better serve customers, while HCPs have benefitted from the flexibility and convenience that digital channels provide.

Yet success with digital channels requires a clear plan for integrating virtual and in-person engagement. An inadequate strategy and plan can not only limit your sales potential it can negatively impact the HCP experience. Digital excellence requires new ways of thinking and a continued focus on driving behavioral change within the commercial organization.

In this ebook you'll learn why a new approach is needed to succeed in today's hybrid world, what changes need to happen, and how you can operationalize digital excellence in your organization.

## Longer meetings, greater productivity

One of the most interesting trends to come out of pharma's recent pivot to digital engagement has been the extended duration of rep-to-HCP meetings. Globally, virtual sales calls are lasting an average of 19 minutes, compared to the less than three-minute average of in-person meetings.<sup>1</sup>

Virtual meetings have also expanded the number of calls that reps can make, allowing them to connect with HCPs who were previously unreachable. In fact, reps who engage customers virtually are making 15% more calls than those using in-person-only approaches.<sup>2</sup>

Finally, a significant number of doctors are also showing a preference for digital, driven by the fact that nearly 70% of all HCPs are now digital natives<sup>3</sup> and 100% are consumers that have come to expect digital experiences. As shown in Figure 1, even as access restrictions lifted in 2021, digital engagements have continued at a relatively similar volume.



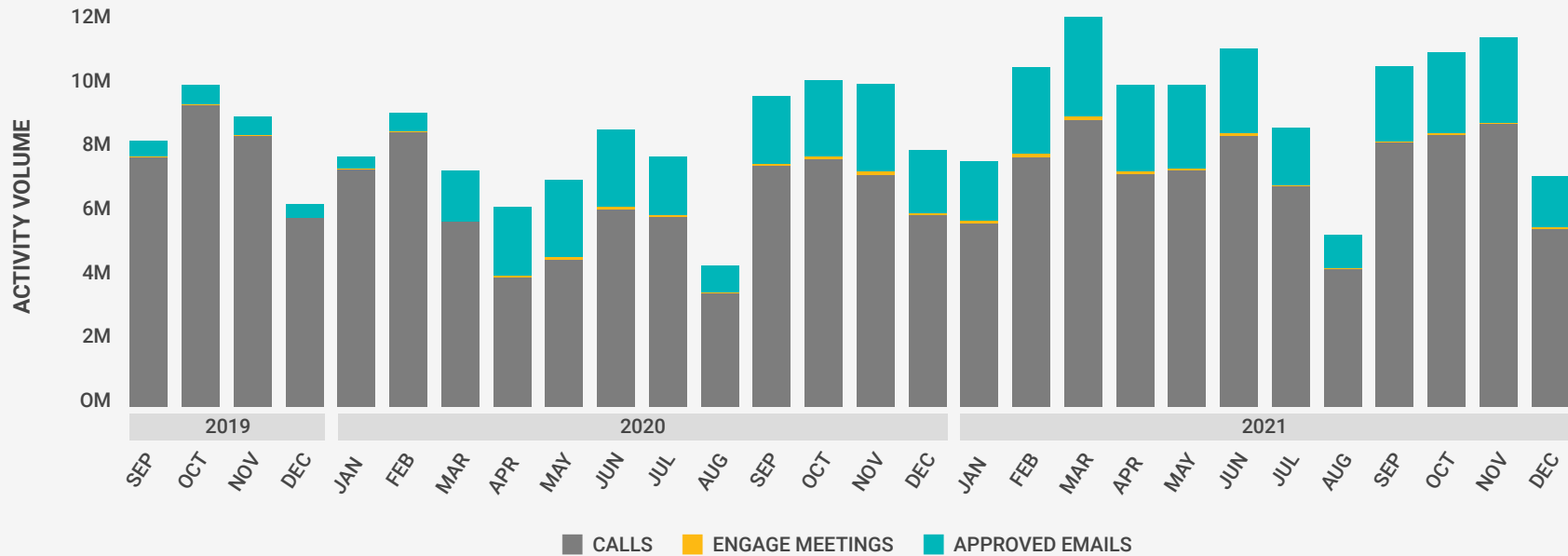
Reps who engage customers virtually make 15% more calls than those using in-person-only approaches.

<sup>1</sup> "Emerging Trends in Global HCP Engagement," Veeva, 2021.

<sup>2</sup> Veeva Pulse, Global Market, July 2021.

<sup>3</sup> "Addressing the Need for Digital Engagement with Healthcare Providers," mHealth, January 2020.

FIGURE 1: HCP ENGAGEMENT IN THE EU



Given this permanent shift toward hybrid engagement, now is the time to revamp commercial strategies and help reps effectively transition into new digital and hybrid roles. However, to successfully adapt to a blended model of engagement and achieve true digital excellence, commercial operations teams need to:

- ➔ **Understand evolving customer preferences** to ensure reps are engaging with HCPs on the customers' terms, and not their own
- ➔ **Ramp up content production** to keep pace with the new demands of digital, including the need for more personalized—and compliant—materials
- ➔ **Optimize field resource planning** and maximize investments through more advanced data and analytics use cases

## Tailoring engagement based on HCP preferences

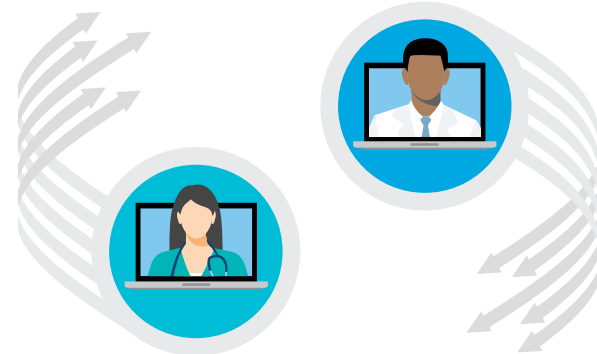
While digital opens new doors for engaging with HCPs, it also creates more questions around how to use what channels when, and for which customers. Due to differing HCP preferences, it's nearly impossible for reps to figure out, doctor-by-doctor, what the best engagement strategy should be. But the benefit of digital is that it provides some answers.

With CRM systems automatically recording each engagement, commercial teams can start by leveraging the robust data they already have on HCP preferences and behaviors. This data can then be combined with prescriber, sales, and patient data, allowing for better segmentation and targeting. Companies selling modern, complex products can particularly benefit from an AI-powered, longitudinal patient data platform because it can provide more complete and accurate data linkages with no downstream privacy risks.

### Moving beyond outbound communication

In addition to refining rep outreach, companies can also make it easier for doctors to quickly find the people, information, and services they need by taking advantage of new inbound engagement channels.

With a greater focus on customer-centricity, two-way engagement allows HCPs to connect with experts, request medicines, and find patient-facing materials instantly online. This means being available when doctors need pharma most, making it more efficient to get the right treatments in the hands of the right patients.



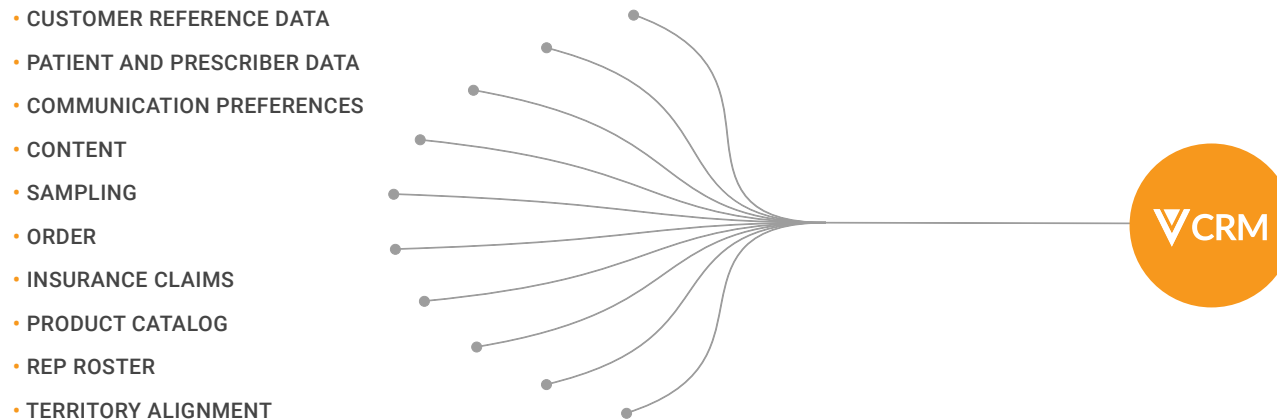
### Ensuring sales and marketing alignment

Now that digital engagement is as important to field teams as it is to marketing, visibility into all the personal (sales-led) and non-personal (marketing-led) tactics being used with customers is crucial to ensuring an optimal customer experience.

For example, by measuring the impact of non-personal promotion on prescribing behavior, companies can better understand how their marketing efforts are reinforcing field activities, and communicate with HCPs who may not be as receptive to rep outreach.

Commercial teams can orchestrate strategies across marketing and sales using their CRM platform to trigger the next best action in the customer journey. A holistic view of every customer touchpoint will help companies engage at the right time, in the right channel, and with the right content.

## SALES & MARKETING DATA SOURCES FEEDING INTO CRM



## SETTING THE FOUNDATION FOR HYBRID ENGAGEMENT

When COVID-19 unexpectedly forced companies to reconsider their engagement strategies, Otsuka Pharmaceutical Europe decided to digitize its promotional model to better understand and act upon customer preferences. Using **Veeva CRM** as its digital engagement foundation, field reps are able to send compliant, brand-consistent emails to HCPs while consistently capturing consent. As a result of its push toward digital, Otsuka has seen:

**55%**

average consents captured across Europe

**90%**

average consents captured in Italy

**47%**

email open rate

To learn more about Otsuka's story, [read this case study](#).

## Creating more relevant content, faster

The rise in digital engagement has put marketers under increasing pressure to maximize customer value and deliver more personalized omnichannel experiences. At the same time, due to more field emails and longer virtual meetings, they've had to support the field's growing need for more relevant—and compliant—content, faster.

In fact, the volume of digital and email content being produced in life sciences organizations increased more than fourfold between January and December of 2020. And it's no wonder: Roughly 80% of virtual meetings used content as part of closed-loop marketing (CLM) versus just 30% of in-person HCP calls.<sup>4</sup>

All of these factors introduce compliance risk in medical, legal, and regulatory (MLR) processes. Instead of making a trade-off between speed versus risk, consider the following approaches to accelerate the content lifecycle, from planning and creation to distribution and measurement.

### A single source of truth

With content creation often handled by external agency partners, marketers must deal with an added layer of complexity when managing the content supply chain. Having a single source of truth for all commercial materials makes it much simpler for teams to share, edit, approve, and reuse documents in one place.

Whether it's email templates, website wireframes, or video storyboards, a digital asset management (DAM) system can store content, collect feedback, and provide visibility into all associated files. Not only does this help with version control by making it easy to see the latest iteration of a document, but it also ensures there's an audit trail with comments collected in one central location—all while enabling further efficiencies at scale.

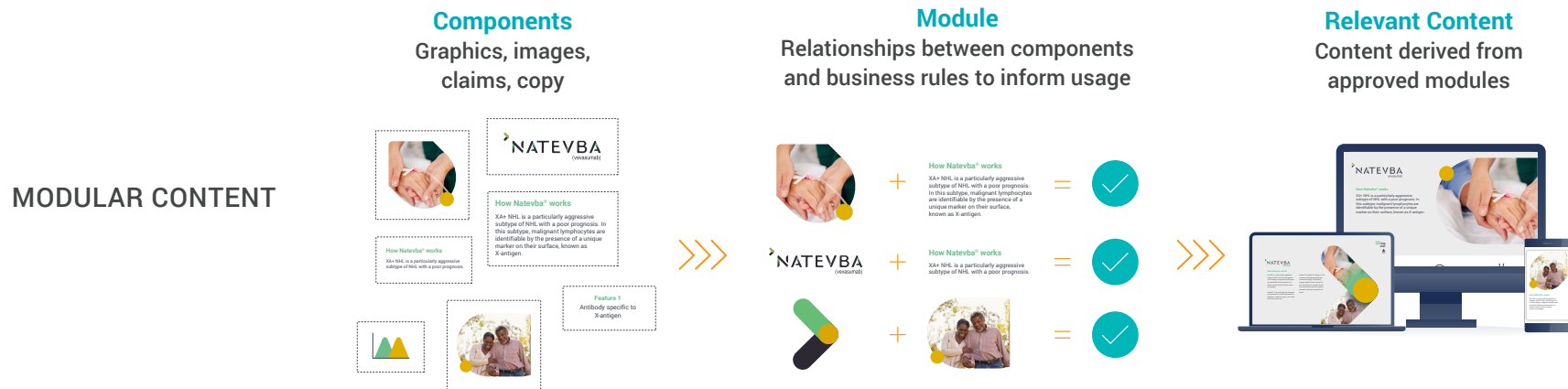


<sup>4</sup> "Emerging Trends in Global HCP Engagement," Veeva, 2021.

## The power of modular content

With the right technology in place to create, manage, distribute, and measure approved digital assets, brand and marketing teams can easily reuse and adapt existing content for reps in customer interactions. They do this by adopting a modular approach to content creation.

Unlike traditional content strategies that require each new asset to be built from scratch, modular content simply reassembles existing, pre-approved content blocks, or modules, into a variety of assets that can be used in different channels and regions. This empowers commercial teams to engage customers digitally by using relevant, compliant assets at every touchpoint in a fast and easy way.



A modular content strategy can further benefit the organization by accelerating MLR review cycles. At Novo Nordisk, for example, the marketing team is increasingly leveraging pre-approved, modular content, so reviewers simply ensure that the references are as they should be instead of spending hours reviewing them as a brand-new asset.<sup>5</sup>



*Modular content answers our three biggest content requirements: it stays true to the brand, ensures local market fit, and unleashes creativity.*

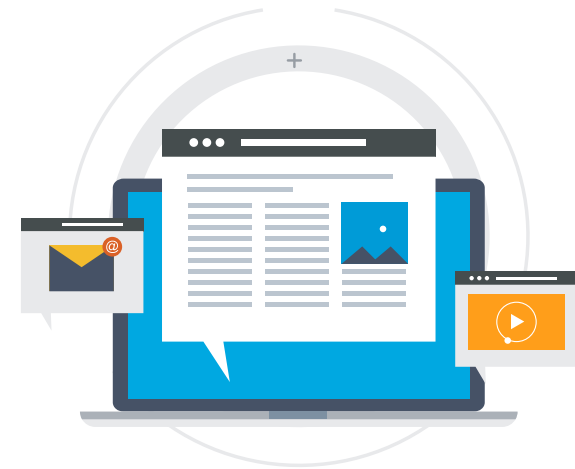
Morten Kruse Sørensen, global director of multichannel excellence and operations at Novo Nordisk

<sup>5</sup> "Novo Nordisk's Modular Content Journey," Veeva, 2020.

## Extend reach through multichannel delivery

With digital adding new channels into the traditional field mix, commercial teams need to push content through various platforms, in different formats—each targeting different audiences. A compliant, cloud-based content management solution will let you create, approve, and distribute content all from the same system, while also helping with content withdrawal when needed.

Label changes or new drug studies will require rapid updates for all promotional and medical content, typically within three to six months. To avoid being penalized, make sure you have visibility into all content and all channels from which assets are being distributed. This approach ensures that only approved materials make it out to market and allows you to maintain control of assets with instant withdrawal, controlled updates, and automatic expiration.



## Analyze and adjust accordingly

Understanding which materials resonate best with HCPs and through which platforms will ultimately help marketers engage more meaningfully with customers. Tools like tracking links, social metrics, and content sentiment provide greater visibility into each customer's reaction to and engagement with assets. It's also a good idea for reps to ask for feedback directly, especially when meeting with HCPs in person.

By continuously tracking and measuring content consumption and impact, commercial teams can adjust content strategies for future engagements and stay relevant in the competitive landscape.

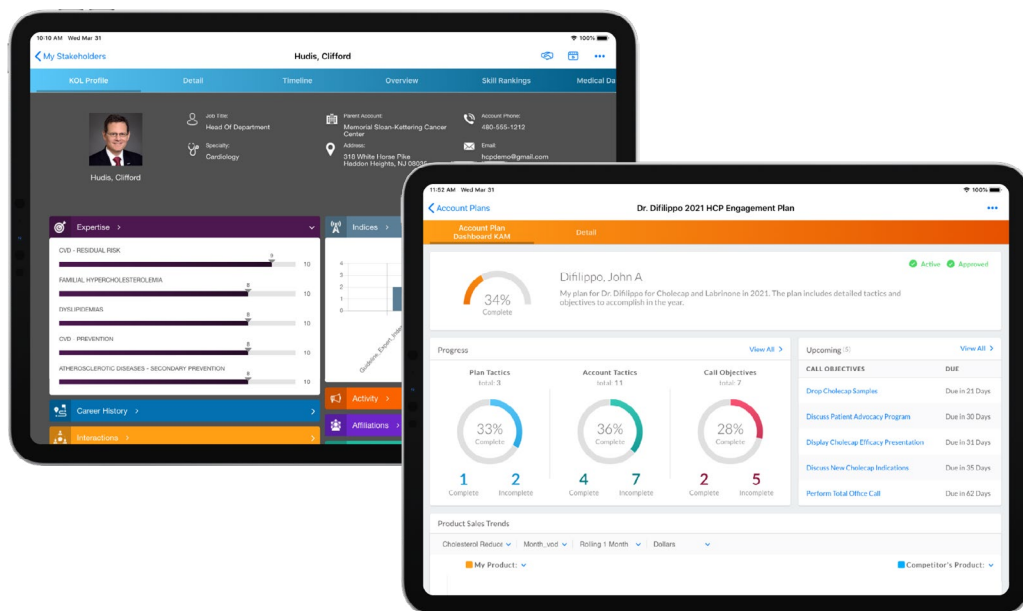


# Maximizing field impact through analytics

Channel preferences, customer reach, engagement frequency, and cross-channel engagement data all play a critical role in helping field and headquarter teams identify which strategies are working and which need refining.

In addition to shedding light on opportunities, data can identify cross-channel anomalies across customers, territories, and districts. Just keep in mind that raw data alone isn't what will improve digital effectiveness and sales outcomes. The ability to transform that data into simple and actionable insights—often through easy-to-understand dashboards and suggestions—will lead to better decisions and follow-through.

By giving your teams access to an analytics platform, you can equip your entire field force with dashboards that provide actionable insights and enable agile decision making. This type of visibility can help drive investment decisions and ensure compliance throughout each customer touchpoint.



## TOP KPIS TO MEASURE

With better insight into digital engagement, you'll be able to assign the field force for maximum impact and customer satisfaction. Here are key data points to track:

- ➔ **Digital adoption:** What percentage of the field force and customers are engaging via digital? What adoption trends can be gleaned?
- ➔ **Channel preference:** Which channels do customers prefer to engage in? How can individual outreach be tailored to maximize effectiveness and impact?
- ➔ **Promotional response:** What is the impact of digital versus face-to-face engagement? How does face-to-face response change when complemented by digital interactions?
- ➔ **Content effectiveness:** Which content is most effective when engaging HCPs? Are there specific content types or modules that should be leveraged more often?
- ➔ **Engagement history:** How is each HCP engaging with reps across channels? What trends can inform engagement moving forward?

## Know where you stand

Data is key to understanding HCP preferences and adapting to hybrid engagement, but its analysis must be done at the right level of granularity. Instead of requiring that reps solve the engagement puzzle customer by customer, consider turning to industrywide data to accelerate ramp-up.

As an industry benchmark, **Veeva Pulse** data provides a global and local view of HCP engagement across hundreds of life sciences companies. Global pharma leader Takeda uses the insights gleaned from Veeva Pulse to understand gaps in its current field approaches and where other companies' reps are seeing greater success with individual HCPs.

## Bring together patient and prescriber data

For marketers, growing investments in digital engagement are only deepening the need for greater visibility into changing audience behaviors. They need to understand which channels HCPs are engaging in, what type of personal and non-personal tactics they're responding to, and how those interactions are influencing the number of prescriptions they're writing.

When this data is combined with data relating to HCP media consumption, engagement, and patient profiles, marketing investments can be optimized across multiple channels while improving education and engagement for all audiences.

AI and machine learning are also making it possible to find, diagnose, and reach the right patients with greater speed and efficiency. Instead of looking at prescription data for a specific therapeutic area, consider privacy-safe patient data that provides a more comprehensive understanding of the patient journey, including diagnosis, EHR, and prescription data.

With this unified view of patient, prescriber, and sales data, companies will be able to identify potential patients much more quickly and better calculate incentive compensation. Patient adherence will also be easier to manage with visibility into all of an individual's health records and provider interactions.



*By looking for patterns in industrywide engagements and HCP behavior, we can better understand which HCPs are most receptive to which tactics, enabling better rep planning and preparation.*

— Eric Solis, director and lead data scientist, Takeda

# How to operationalize digital excellence

Understanding what digital excellence looks like is one thing, but it's another thing to put it into practice. For most companies, successful digital engagement requires a significant amount of change management. A well-coordinated digital strategy will help ensure the correct processes are built, tested, and standardized to help the organization scale. From there, evolution will take place incrementally, with the pace and scale of change depending on the current landscape, culture, and existing capabilities.

Here are five steps to get your journey started.

## 1. Establish goals and new digital KPIs.

One of the biggest mistakes companies make is establishing KPIs after beginning their digital programs, which prevents them from immediately applying learnings and inhibits overall success. Using your CRM and industrywide benchmark data, you can understand where your opportunities lie and what you're building from.

Sales planning teams can help in this process by evaluating customer segments, territory design, salesforce size, structure, and sales models. Key inputs to decision-making should include promotional response by channel, channel-specific access data, and channel preference observations.

Just remember that the purpose of this exercise is to identify ways to strengthen digital engagement. When sharing goals more broadly, be clear to the field that these KPIs will be used to improve the team's digital effectiveness rather than scrutinize individual rep performance, which leads to the next step.



## 2. Get the field force on board.

Make sure that market-facing teams understand why you're investing in digital, what this means for them in their roles, and how the organization will work together to make the transition. Use data to make your case and show them what's possible to help drive digital adoption and buy-in. Also remember to set expectations by sharing a clear timeline of what's going to happen when so there are no surprises, and all field members feel ready for next steps.

### AS AN EXECUTIVE SPONSOR, IT IS YOUR RESPONSIBILITY TO:

Demonstrate how digital is a key priority for the company

Define vision and values, and align them to business objectives

Coordinate sponsorship across all commercial disciplines

Empower project leadership and ensure continuous communication

Hold teams and individuals accountable

## 3. Give reps the training and skills they need.

As part of change management, all customer-facing roles will need to be trained on how to use digital effectively and in concert with in-person engagement. Digital engagement will require training not just on how to use new technology to interact with HCPs, but also instruction on corporate usage guidelines, appropriate content usage, compliance considerations, and the best methods for personalizing the interaction.

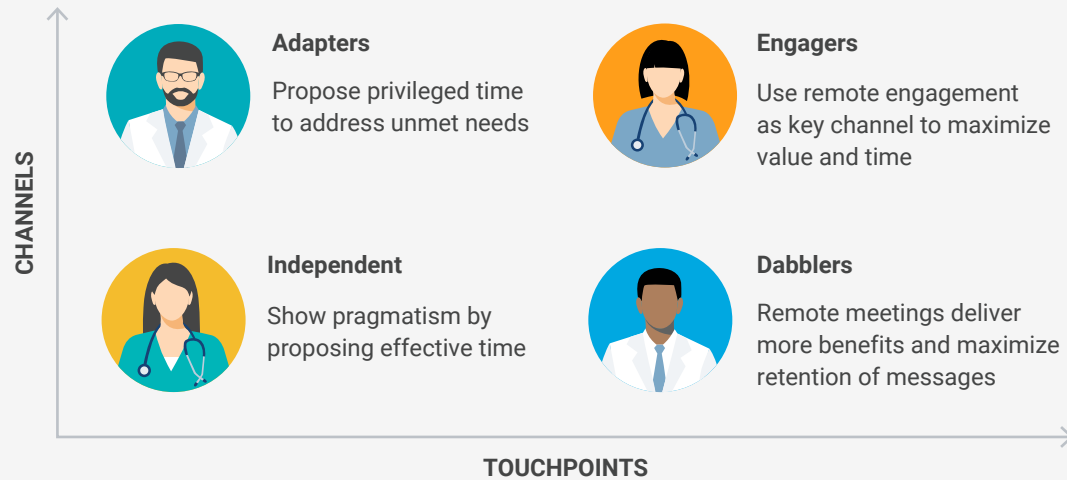
Help reps understand the different nuances between engaging through remote meetings, email, and face-to-face by developing in-person or online training modules. Be sure to arm them with data and analytics dashboards that allow them to tailor engagement based on their customers' channel preferences.

## A CLOSER LOOK AT CHANNEL PREFERENCE ARCHETYPES

Channel preference archetypes can be a valuable tool for reps learning to engage digitally. This method categorizes customers based on common traits and preferences, leveraging industrywide data to recognize patterns in HCP behavior.

For example, on one end of the spectrum you may have a group of “digital engagers” that frequently use virtual meetings and email. On the opposite end you may have “independents” who rarely engage through digital and prefer face-to-face interaction.

By evaluating these preferences across all customer touchpoints, reps can gain a clearer understanding of the best channels to use when engaging with a particular HCP.



### 4. Integrate your technology.

The best way to drive digital adoption is to make the user experience as easy as possible. Connect the various platforms you'll be using across field-driven activities and marketing-led engagements, such as your CRM, DAM, virtual meeting, email solutions, and marketing analytics tools. This will give you a holistic view across all customer touchpoints and allow reps to easily switch between sending an email, logging a call, and setting up a virtual meeting without having to deal with disparate tools.

Seamless, connected, and integrated technology will help improve user and customer experiences while ensuring your data is clean and connected—a must-have for data-driven decision making.

## 5. Measure, adapt, and improve.

With clean, connected data, you'll then have the ability to accurately measure what's happening in the field and create feedback loops that continuously improve digital engagement. Stay on top of ongoing measurement and KPI benchmarking. Continue to share data with the team to uncover learnings and work together to optimize digital effectiveness over time.

With access to new data and insights that were previously unavailable, digital engagement ultimately creates a culture of continuous learning, allowing your organization to adapt and evolve well into the future.

## A new way forward

Digital engagement is here to stay and offers lasting benefits for HCPs and the life sciences industry. With a digital-first approach to engagement, content, data, and analytics, commercial organizations will have the insights they need to navigate skillfully across virtual and in-person channels, flexibly adapting to the needs of each customer.

Through software, data, and services, Veeva can help your organization accelerate toward digital excellence. Find out how by visiting [veeva.com/eu/commercial](https://veeva.com/eu/commercial).