White Paper

Riding Out the Storm:
The Future of Post-Pandemic Customer Engagement

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Introduction

In the wake of the global COVID-19 pandemic, it has become apparent that lessons from the past are insufficient when navigating the new customer engagement landscape. The impact was felt by the healthcare community across the world, with pharma companies and healthcare systems pressed to fundamentally re-think their day-to-day operations. Both sides have responded in a variety of ways[1] and increasingly embrace digital channels to interact with each other across the EU4+UK.

From a pharma company perspective, adopting more digital ways of engaging with customers is undoubtedly challenging and, to date, there has been great disparity in building digital capabilities and modifying customer engagement models. Hesitancy remains around how to create an optimal operating model in practice, although it is clear that collaboration between health systems and pharma is central to reaching common healthcare goals.[2] Despite the challenges, building and maintaining a future-proof go-to-market is a vital topic for senior leadership, as change has been forced, fast and fierce.

This white paper sets out to address the conundrum of finding the right customer engagement model for the long term as health systems recover from the effects of the COVID-19 pandemic by analysing the peri-pandemic promotional landscape and mapping a vision of future customer engagement. Challenges to overcome are explored alongside six key enablers for operating successfully in a post-pandemic world: channel mix, content, customer focus, people, technology and change agility.

x4 — *Spending on remote 1:1 detailing experienced a four-fold uplift between Q4 2019 and Q4 2021.*

72%↑ — *Email volumes grew by 72% between Q4 2019 and Q4 2021, indicating that HCP inboxes have been inundated with digital content pushed out by pharma companies.*

Peri-pandemic channel mix evolution

IMPACT ON TRADITIONAL AND DIGITAL CHANNELS

Analysis of IQVIA's ChannelDynamics™ data,[3] an audit of promotional interactions between pharma and a wide range of HCP types, shows a shift in the promotional landscape since the start of the pandemic. Unsurprisingly, all countries experienced a downturn in traditional channels in Q2 2020 but are beginning to find a new equilibrium.

Figure 1: Contacts via traditional and digital methods (Q4 2019 to Q4 2021)

Source: IQVIA ChannelDynamics (TM)

The country-level variation is due to a number of factors:

• Response of healthcare systems to COVID-19

• Pre-existing promotional environment and culture

• Access to physicians

• HCP channel preferences

• Pharma company choices and preparedness (e.g., digital capabilities, technology investment, process adaptation and training)

On the digital side, there has been uplift in all EU4+UK countries, with Spain leading the way. The transition can be mainly attributed to:
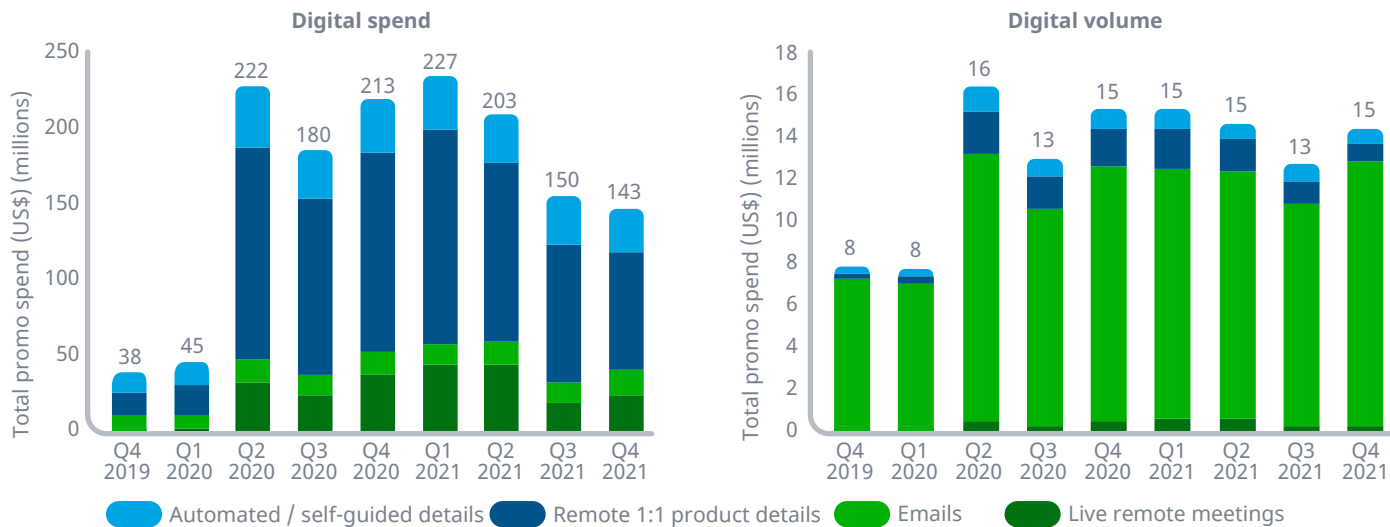
• Limitations on in-person meetings and travel

• Promotional necessity

• Novelty of virtual engagements

• Flexibility of scheduling digital interactions

• Increased digital familiarity and channel preferences of customers

INCREASED FOCUS ON DIGITAL ENGAGEMENTS

Looking more closely at digital engagements, spending on remote 1:1 detailing experienced a four-fold uplift between Q4 2019 and Q4 2021.

Looking more closely at digital engagements, spending on remote 1:1 detailing experienced a four-fold uplift between Q4 2019 and Q4 2021. In fact, investment in all digital channels remained higher than 2019 levels across 2020 and 2021 although the digital shift is slowing down as more in-person meetings return. Email volumes grew by 72% between Q4 2019 and Q4 2021, indicating that HCP inboxes have been inundated with digital content pushed out by pharma companies.

Figure 2: Digital spend and contacts (Q4 2019 to Q4 2021)

Digital spend

Total promo spend (US$) (millions)

Q4 2019: 38
Q1 2020: 45
Q2 2020: 222
Q3 2020: 180
Q4 2020: 213
Q1 2021: 227
Q2 2021: 203
Q3 2021: 150
Q4 2021: 143

Digital volume

Total promo spend (US$) (millions)

Q4 2019: 8
Q1 2020: 8
Q2 2020: 16
Q3 2020: 13
Q4 2020: 15
Q1 2021: 15
Q2 2021: 15
Q3 2021: 13
Q4 2021: 15

Legend: Automated / self-guided details — Remote 1:1 product details — Emails — Live remote meetings
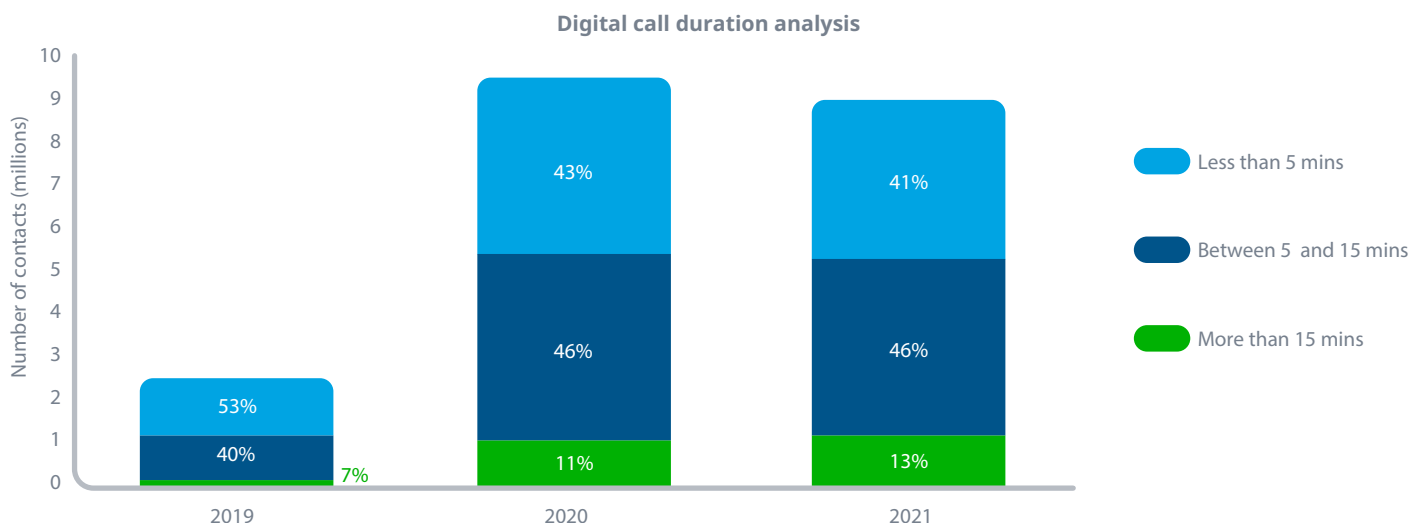
Source: IQVIA ChannelDynamics (TM)

HCP ATTENTION AND NET PROMOTER SCORES (NPS)

The total time that industry spent digitally interacting with HCPs increased by almost 700% between 2019 and 2021 across the EU4+UK. This is mainly because the pandemic catalysed the use of digital and HCPs became more accepting of remote channels for in-depth interactions with pharma. The proportion of digital calls lasting more than 15 mins nearly doubled from 7% in 2019 to 13% in 2021, as HCPs set aside more time than if the interactions had been conducted in-person.

Figure 3 shows how the balance has tipped from 2019, when the majority of digital calls lasted less than 5 mins whereas, in 2020 and 2021, the largest call segment was between 5 and 15 mins. The proportion of calls lasting less than 5 minutes has reduced slightly from 53% of all digital contacts in 2019 to 41% in 2021.

Pharma companies with robust digital infrastructure in place pre-pandemic found it facilitated much-needed promotional activity when travel and in-person interactions were restricted.

Figure 3: Digital contacts and call duration segments (2019 to 2021)

Digital call duration analysis

Number of contacts (millions)

2019: Less than 5 mins 53%, Between 5 and 15 mins 40%, More than 15 mins 7%
2020: Less than 5 mins 43%, Between 5 and 15 mins 46%, More than 15 mins 11%
2021: Less than 5 mins 41%, Between 5 and 15 mins 46%, More than 15 mins 13%

Legend: Less than 5 mins — Between 5 and 15 mins — More than 15 mins
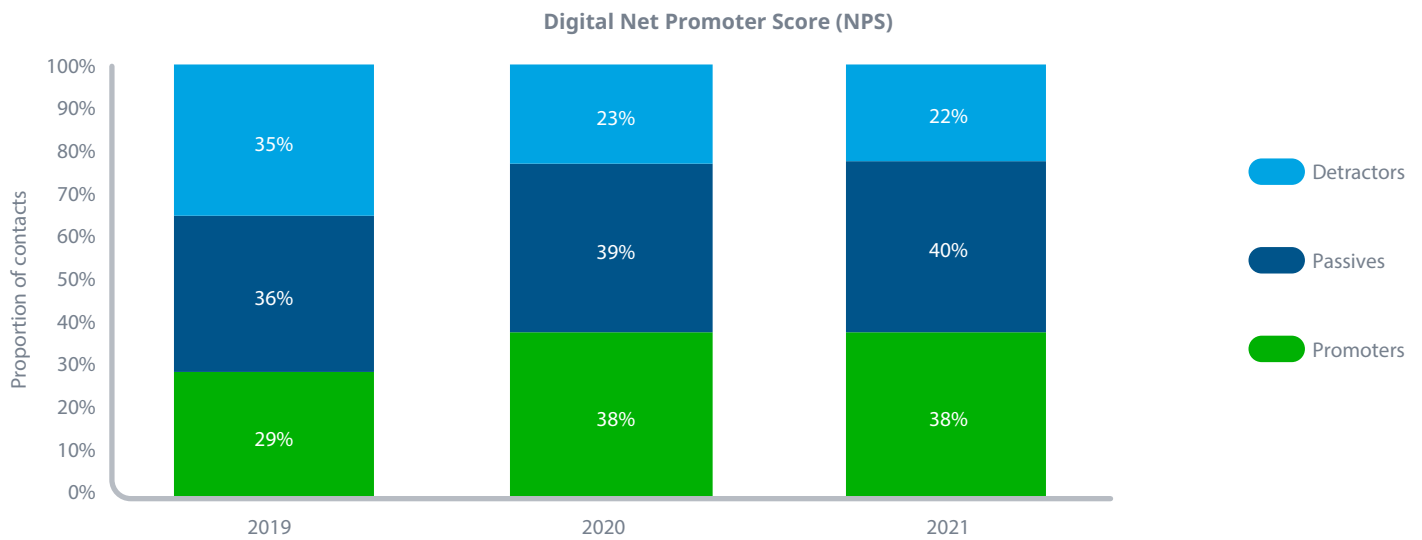
Source: IQVIA ChannelDynamics (TM)

The subsequent plateauing of digital interactions is explained by the 2021 IQVIA Channel Preference survey, as 57% of HCPs surveyed from across the EU4+UK preferred F2F interactions for receiving drug and treatment information from pharma companies with no restrictions in place.

In addition, the NPS metric measured via IQVIA's ChannelDynamics™ survey, found the proportion of "promoter" HCPs who received digital calls from pharma increased from 29% in 2019 to 38% in 2021, whilst the share of "detractors" declined from 35% to 22% over the same period. Although the value of digital remote calls clearly improved from the perspective of HCPs in 2020, it stayed constant throughout 2021 as customer experience and satisfaction levels remained broadly similar.

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Figure 4: Digital contacts and Net Promoter Score (NPS) segments (2019 to 2021)

Digital Net Promoter Score (NPS)

Source: IQVIA ChannelDynamics (TM)

# Developing a future-proof customer engagement model

Post-pandemic customer engagement means transitioning to more hybrid and omnichannel interactions, with an increased focus on digital approaches. At the same time, it is not just about the quantity of digital methods but the quality of these interactions that is important. Customer engagement, as figure 5 illustrates, is in fact a cycle, and customers might choose to engage with pharma at any point in the cycle — it is up to pharma companies to maintain a close and productive relationship across multiple touchpoints.

Achieving better collaboration between pharma and healthcare professionals is essential, and the channel mix should align with customer preferences to foster strong, lasting relationships. Customer facing teams must have a broader range of skills and greater agility to conduct F2F, remote and digital interactions. Pharma companies implementing a future-proof customer engagement model must master the six enablers for success.

1. CHANNEL MIX AND THE INCREASED USE OF DIGITAL APPROACHES

Pharma companies must first build capabilities and infrastructure to interact seamlessly across a wide variety of methods. The shift from multichannel ("many"-channels) towards omnichannel ("all"-channels) engagement is about not just having multiple channel options but orchestrating across them for optimal impact. It is then up to the customer-facing teams, from MSLs to promotional specialists, to make use of these channels to provide a unified customer experience across multiple devices and touchpoints.[4] Getting the customer journey right is extremely important and involves three key aspects: generating compelling reasons for interactions, meeting or exceeding expectations and making sure the overall experience is consistently positive.

Figure 5: Circular customer engagement flow and six enablers for future customer engagement models
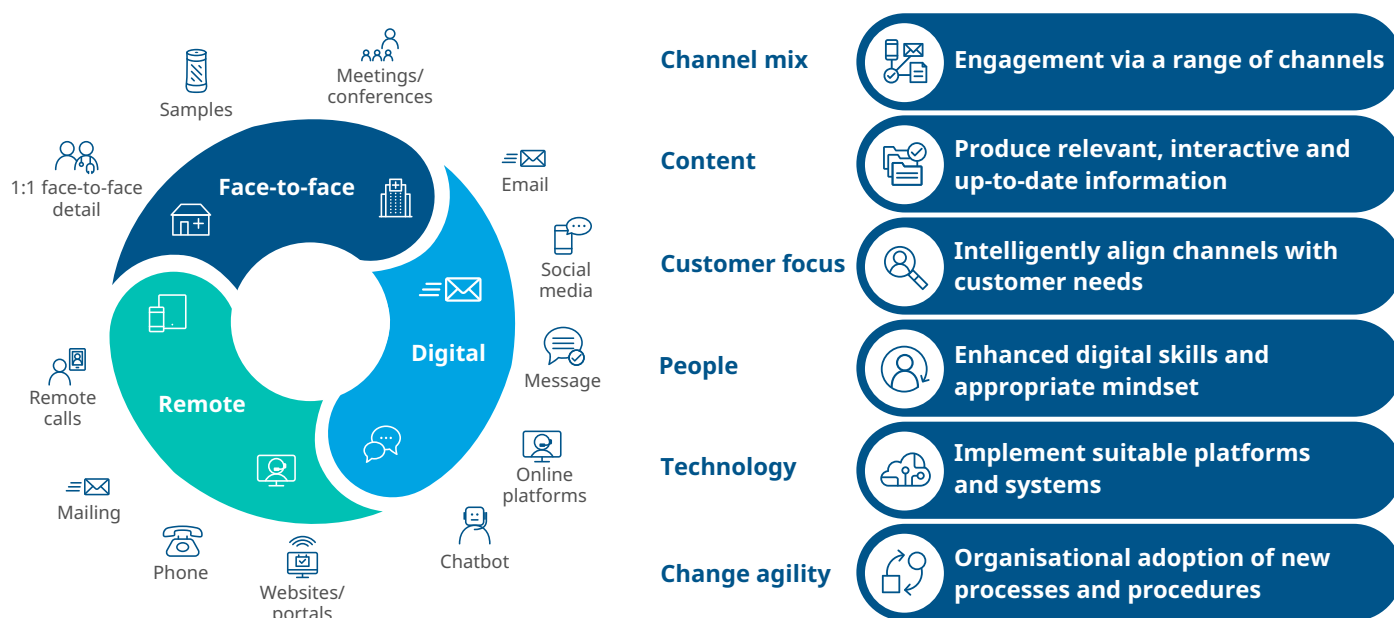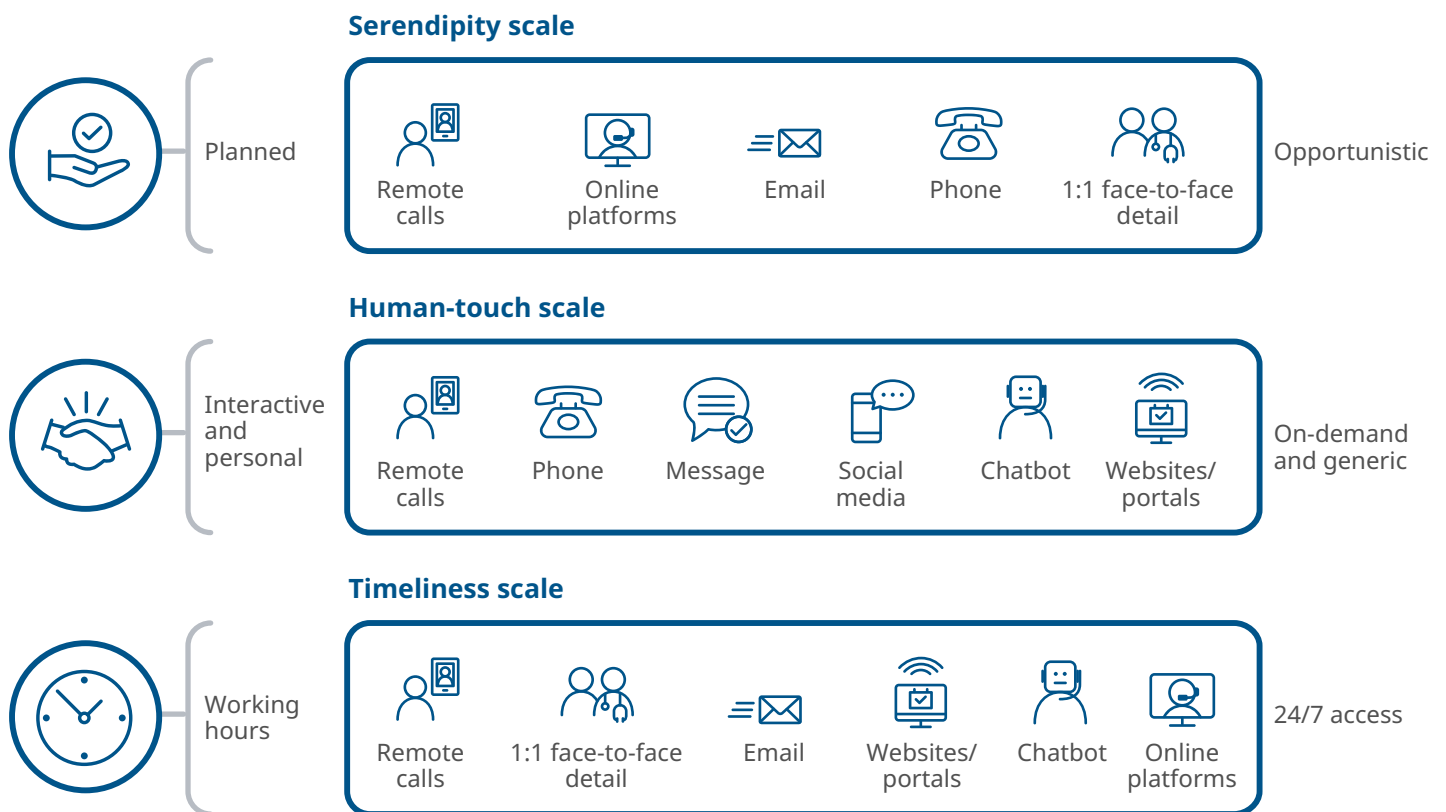
Interacting with HCPs with the right channel at the right time is crucial.[5] Long-term commercial success revolves around intelligently matching supply of traditional and digital channel combinations with HCP demand for a hybrid mix of channels. The pandemic catalysed the use of digital engagement methods as traditional F2F interactions were restricted during parts of 2020 and 2021, accelerating a shift that had already begun.

Increased uptake of digital channels can lower the costs of promotion compared with deploying a large field-based sales force, grow efficiency in contacts per day and improve access to healthcare professionals who engage only digitally. If teams spend less time travelling, they can carry out more customer calls per day and recoup time for in-depth call planning. Many companies, such as Pfizer,[6] have also started to realise operational efficiencies by reducing headcount and the associated costs relating to fuel and company cars.

Digital engagement can greatly enhance the customer journey — for example, virtual meetings can be scheduled at convenient times from various locations. At the same time, digital approaches must be used in combination with traditional channels for maximum impact, for example, pairing a F2F meeting with a follow-up email. Customer-facing teams must decide what hybrid combination of channels works best in different situations and make best use of diverse channel attributes to optimally reflect customer needs and preferences.

Making best use of each channel is not easy but appreciating the fundamental differences between channels will help pharma companies optimise engagement with customers. All too often, pharma companies have tried to substitute F2F contacts with virtual interactions, but attention must be placed on when channels work best depending on their position on the following scales.

Figure 6: Channel attribute scales

Serendipity scale

Planned — Remote calls · Online platforms · Email · Phone · 1:1 face-to-face detail — Opportunistic

Human-touch scale

Interactive and personal — Remote calls · Phone · Message · Social media · Chatbot · Websites/portals — On-demand and generic

Timeliness scale

Working hours — Remote calls · 1:1 face-to-face detail · Email · Websites/portals · Chatbot · Online platforms — 24/7 access

2. CONTENT

Pairing channels with compelling content is the winning engagement combination. Of the two, it is the content which leads, and channel strategy should follow. IQVIA research suggests HCPs are most engaged with content that supports their clinical practice,[7] such as by helping them to manage patients or learn from peers. IQVIA has also shown that the most commercially successful launches are also those which have the highest level of Real-World Evidence publication productivity.[8]

Pharma companies should produce high quality content alongside a cohesive channel strategy, with user guides to help physicians navigate digital content. Digital content hosted on a portal or website should be easily downloadable with processes in place to alter content as necessary and at speed. Feedback from IQVIA, which provides outsourced field teams to customers, showed these teams recommend digital content be reviewed regularly by a cross-functional group, to discuss elements that work particularly well to engage with customers.

It is also important to modify content for computers and mobile devices, to ensure messages distributed via email and online are well received. Ideally, digital materials should be interactive and aligned to each specific channel (i.e., the same content presented F2F may not work well on a website), and the quality of digital materials and channel optimisation still needs to be improved. The matrix below can be used as a guide to align content with channel strategy so that the message can be matched to an appropriate channel. For example, in many regions across the world, relaying a value proposition is not possible using social media for compliance reasons but could be done virtually or F2F in a call with HCPs.

Figure 7: Example messaging and channel mix matrix

MESSAGE	DIGITAL CHANNEL						TRADITIONAL CHANNEL					
	Email	Remote calls	Online platforms	Websites/portals	Chatbot	Social media	1:1 F2F detail	Meetings/conferences	Phone	Messages	Mailing	Samples
Product value proposition (e.g., active ingredients, dosing regimen, target patient population)	In certain instances	Yes	Yes	Yes	In certain instances	No	Yes	Yes	Yes	No	Yes	Not applicable
Data (e.g., clinical trials, real world evidence)	Yes	Yes	Yes	Yes	In certain instances	In certain instances	Yes	Yes	Yes	In certain instances	Yes	Not applicable
Clinical practice (e.g., patient caseloads, prescribing opportunities, licence indications)	In certain instances	Yes	No	No	No	No	Yes	In certain instances	Yes	In certain instances	No	Not applicable
Upcoming events (e.g., conferences and round table meetings)	Yes	Yes	In certain instances	In certain instances	In certain instances	Yes	Yes	Yes	Yes	Yes	In certain instances	Not applicable
Additional licence indications or formulations	In certain instances	Yes	Yes	Yes	Yes	In certain instances	Yes	Yes	Yes	In certain instances	Yes	Yes
Pricing, costs and re-imbursement	In certain instances	Yes	In certain instances	In certain instances	No	No	Yes	Yes	Yes	In certain instances	In certain instances	Not applicable
Device demonstrations or delivery mechanisms	In certain instances	In certain instances	In certain instances	In certain instances	No	In certain instances	Yes	Yes	No	No	In certain instances	Yes
Patient testimonials	In certain instances	Yes	In certain instances	In certain instances	No	In certain instances	Yes	Yes	Yes	In certain instances	In certain instances	Not applicable
Educational material and support guides	Yes	Yes	Yes	Yes	In certain instances	Yes	Yes	Yes	Yes	Yes	Yes	Not applicable

KEY: ● Yes ● In certain instances ● No ● Not applicable

3. CUSTOMER FOCUS

Personalising content and messaging to individual HCP needs is central to post-pandemic customer engagement models. Factors such as channel preference, HCP priorities and the wider context around changing methods of information consumption should all be considered before interacting with customers.

To help navigate through the complexity, pharma companies must create a "persona" for each specific HCP type and, at a high level, align the engagement approach (e.g., nurses may prefer direct F2F interactions whereas hospital consultants often opt for a phone conversation after liaising with a secretary). These personae should focus on the qualitive aspects of archetypal customers such as behaviours, constraints and motivation, facilitating a deeper understanding of how to meet their expectations. Messaging should then be tailored appropriately based on the context of customer goals and priorities.

The new environment requires a forward-thinking approach to customer centricity. Many HCPs still value personal interactions, but there is a growing group of HCPs who engage with self-guided content on company websites/portals instead of interacting via traditional F2F methods. There is no one-size-fits all approach to customer engagement, as certain interaction styles resonate better with some customers more than others.[9] With this in mind, an optimal engagement strategy should be tailored to each individual HCP, drawing on a mixture of digital and traditional methods.

4. PEOPLE

From promotional specialists to MSLs, customer-facing roles must project a positive image on behalf of the organisation, ensuring the relationship is based on integrity, competence and adding value. In a post-pandemic world, teams that have regular contact with HCPs need future-proof skills and an adaptable mindset to ensure they are equipped to effectively tailor their approach.

Figure 8: Wordcloud outlining the future attributes of people in customer facing roles

Organisations must focus on their people and competencies, paying close attention to upskilling and instilling the requisite mentality.

The wordcloud, as shown in Figure 8, is derived from desk research of the latest job descriptions for customer facing roles and feedback from IQVIA experts, which set out the key attributes, skills and abilities customer facing roles of the future.

Organisations must focus on their people and competencies, paying close attention to upskilling and instilling the requisite mentality. Four key themes are pivotal to making the future model work in practice:

- **Digital skills**: Confidently conduct virtual, remote engagements both internally and externally.

- **Collaboration**: Construct cross-functional partnerships (e.g., between MSLs and marketing teams).

- **Customer-focus**: Deliver personalised content to high value HCPs within their territory via a bespoke channel strategy.

- **Mindset**: Driven individuals with strong business-acumen and unrivalled therapy area knowledge.

As health systems recover from the pandemic, it is important to implement appropriate incentive schemes to motivate, encourage the right behaviours and build the right attributes in the team. Do not underestimate the challenge of initiating, developing and sustaining people-focused relationships with a digital edge, especially when a greater proportion of the workforce are based at home.

The fact that remote digital calls do not have to be conducted from a specific location opens up new geographic areas and allows more flexibility to hire new people with suitable skillsets. This is an exciting prospect when recruitment and retention of highly talented individuals is challenging, and, regulations permitting, the roles could be carried out from anywhere in the world. On the other hand, pharma companies must offer training programmes to help existing customer facing teams develop their digital abilities and fluency with new technologies, simultaneously allowing them to build confidence in conducting remote calls.

In the post-pandemic world customer-facing team organisation must be re-evaluated. Just as engagement approaches are hybrid in nature, so can the structure of the field force. The spectrum spans from exclusively F2F to fully digital and remote, with the choice of employing multiple specialised teams to own digital and F2F channels, or appointing a dedicated, single team to cover all channels. In addition to customer facing teams, it is sensible to hire people, either based remotely or at company HQ, to manage on-demand materials, social media and centralised email content.

5. TECHNOLOGY

Employing the right people is crucial but success is hampered without the fundamental tech infrastructure in place, making the case for early investment in best-in-class technology to stay ahead of the competition. Technology plays a key role by continually capturing data about engagements with customers and, through careful analysis, business operations and engagement approaches can be improved.

A core challenge life sciences companies face is the increased pressure to know when, where and how to deliver information to technology advancements can now enhance the decision-making process by focusing on the overall customer journey across multiple touchpoints. Companies should expect that, across all channels, customer interactions are connected so past actions are built on and used to drive relevance in future engagements.

A core challenge life sciences companies face is the increased pressure to know when, where and how to deliver information to HCPs, with many interactions involving making informed decisions about how best to engage.

As HCPs conducted more remote patient consultations, many have become well-acquainted with digital video conferencing technology and feel more comfortable conducting virtual conversations with pharma. From IQVIA research, the engagement platforms HCPs are most familiar with are Zoom and Teams, but the software choice is unlikely to significantly affect the discussions, assuming the content is properly displayed, screen sharing is possible and the ability to ask questions is not compromised.

In response to the changing promotional environment, many pharma companies have started to implement innovative customer engagement systems and platforms that facilitate fully compliant and impactful virtual interactions.[10] Often, these systems are enhanced with Artificial Intelligence (AI) and Machine Learning (ML) which are central to the future of remote customer engagement. This is because they can provide recommendations to customer-facing teams about engagement strategies that work best with different physician types and leverage user input to constantly improve suggested actions over time to achieve "next best action" precision.

More frequently, improvements in technology are pulling in HCPs to engage with digital content. For example, Novartis has recently rolled out a "Netflix-style" approach by setting up an online hub for HCPs, providing tailored, education-based videos on-demand which cover a range of topics from healthcare disparities to clinical trial design.[11] Data such as "clicks" and "average video watch time", captured using analytics software, can then feed into a bespoke technology system to generate insights about the customer base.

These insights can help to personalise the journey for HCPs by tailoring interactions in line with HCP interests and preferences. To further enhance the process, all technology within a pharma organisation should be connected, allowing for a co-ordinated engagement approach and frequently leading to a stronger pharma-customer relationship and greater commercial success.

Figure 9: IQVIA Orchestrated Customer Engagement (OCE) technology on a mobile device
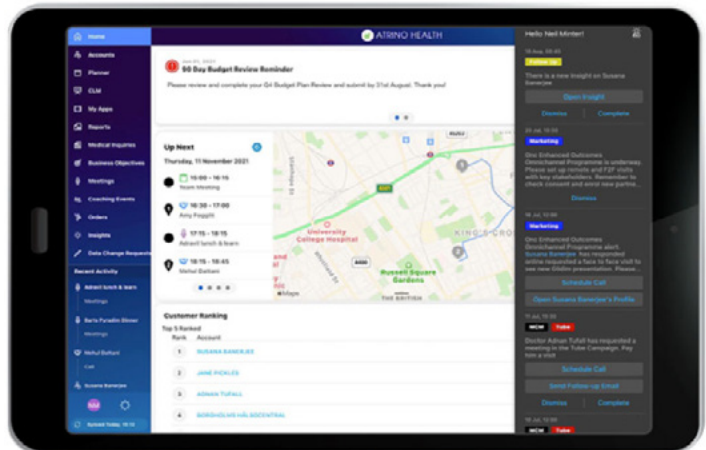
6. CHANGE AGILITY

Changing tack to recruit and retain people with the right capabilities, invest in suitable technology and develop content to distribute via a mix of channels poses challenges for many organisations. In a post-pandemic world with an increasing focus on hybrid and omnichannel customer engagement, appoint dedicated change leaders to advocate for and oversee the adoption of new ways of working.
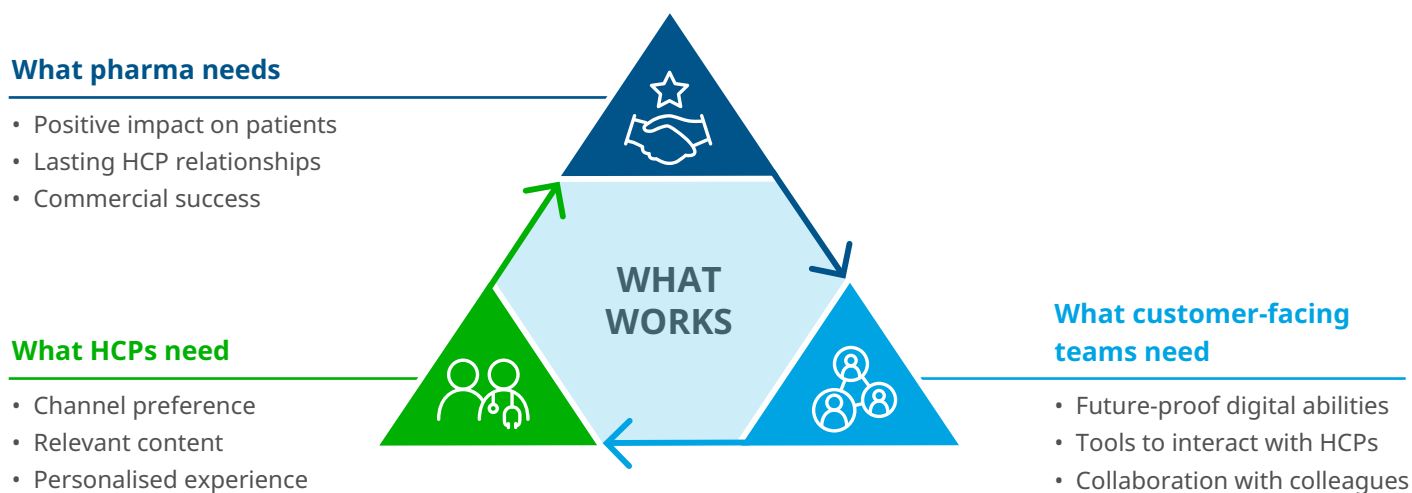
Seeing change as an opportunity rather than a threat is important to enabling any major business transformation. It is imperative to choose an appropriate transformation-enabling framework, to identify potential road blocks and analyse the impact on different stakeholders. However, in reality, implementing change will never satisfy all stakeholders and the "what works" equilibrium is found in the middle as described in the diagram below.

Implementing change begins with senior leaders communicating an overarching vision to align on the overall strategic direction of the company.

Seeing change as an opportunity rather than a threat is important to enabling any major business transformation. It is imperative to choose an appropriate transformation-enabling framework, to identify potential road blocks and analyse the impact on different stakeholders.

Becoming "change agile" then relies on all individuals taking responsibility for incorporating change into their work practices. Employees must also embrace a mindset which is open to change, and operate within an environment where people are comfortable to share ideas and be adaptable in their approach.

Figure 10: Triangular diagram showing the relationship between internal and external stakeholder needs

What pharma needs
- Positive impact on patients
- Lasting HCP relationships
- Commercial success

What HCPs need
- Channel preference
- Relevant content
- Personalised experience

WHAT WORKS

What customer-facing teams need
- Future-proof digital abilities
- Tools to interact with HCPs
- Collaboration with colleagues

Overcoming challenges and implementing future-proof, post-pandemic customer engagement models

Implementing different customer engagement models is likely to involve addressing a number of challenges and adopting new approaches:

| CHALLENGES	POST-PANDEMIC RECOMMENDED APPROACH
1. CHANNEL MIX	
Many customers value F2F interactions; others prefer to engage via digital channels.	Conduct interactions via a variety of channels without overlooking the importance of F2F. Allow teams to tailor the channels to HCPs as necessary.
Accessing HCPs is often challenging, and digital methods leave no chance of any hallway conversations or serendipitous encounters.	Build a hybrid team, with some degree of geographical spread to conduct F2F interactions. Being in the same physical location as key customers can bring benefits, even if the teams are smaller and F2F interactions are less frequent than before the pandemic.
2. CONTENT	
Snippets of information are being pushed out online via the corporate website, but customer engagement is low.	Create interactive, relevant and channel-specific content that piques the interest of customers to encourage engagement by pulling them in.
It is difficult to ensure content is resonating with customers.	Spend time optimising content and matching messages to different channels to drive better HCP engagement. Analytics tools should be implemented to monitor ongoing campaign success.
3. CUSTOMER FOCUS	
Digital fatigue[12] can result from over-use of "push" digital strategies so there must be an equalising balance of "pull" approaches.	Adopt a customer-centric approach by matching supply and demand for different channels and content, balancing push and pull approaches in line with customer preferences. It is also important to advocate for a collaborative, partnership-style approach with customers by offering patient support information and educational materials.
Current planning processes for segmentation and targeting are predominantly based on prescription volumes and job roles.	Develop more sophisticated methodologies that account for HCP digital affinity and channel preference to better inform go-to-market models and ongoing interactions.
4. PEOPLE	
Customer-facing teams have had limited need to conduct remote, virtual calls with customers, leading to a skills gap.	Expand the digital capabilities of the entire organisation. Training courses need to be implemented and sufficient time allowed for building confidence in conducting remote, virtual calls.
Digital calls need to be scheduled in advance and HCPs may prefer unsociable time slots, meaning customer-facing teams may work outside the traditional 9-5 with gaps throughout the day.	People should be given the freedom to own the business in their territory and decide how best to engage with HCPs. For maximum impact, customer-facing teams should have a number of key attributes such as resilience and flexibility with the appropriate digital skills and mindset.
Accessing HCPs is often more difficult remotely. Even if time is freed up to carry out more virtual calls, there may not be the calls to conduct.	Set up a forum to share best practice on accessing customers remotely. Make the case for multiple dedicated teams of different sizes (e.g., one solely to make F2F calls and the other being 100% virtual).
5. TECHNOLOGY	
HCPs can get frustrated if they are contacted too frequently with the same messages, especially when they are overloaded with emails.	Ensure all business systems are connected to maintain a cohesive approach across customer touchpoints.
The systems that are used across the organisation are not set up for increasing digital customer engagement.	Implement a future-proof customer engagement systems, ideally enhanced with AI technology, and ensure that engagement platforms are suitable for interacting with customers.
6. CHANGE AGILITY	
Scepticism/vested interest amongst individuals across the organisation can lead to inertia in actually adopting new ways of working in practice.	Set out a compelling evidence-based vision for the future of customer engagement and, specifically, what it means for the organisation. Time and money should be invested to facilitate new ways of working, with effective incentives in place to change behaviours. Hire business transformation leads to advocate for digitalisation and oversee changes to everyday practices. Clear expectations and timelines need to be set, being mindful that business change does not happen overnight.

Conclusion

The pandemic disrupted the fundamentals of customer engagement as the environment shifted at scale and with pace. Pharma companies, healthcare systems, and individual HCPs moved towards more digital interactions but there is substantial variation between countries due to underlying engagement culture and HCP expectations. A degree of uncertainty still prevails in how to respond to changing conditions, and future models must be sufficiently flexible to suitably respond.

Focusing closely on the six enablers gives pharma companies the best chance of creating customer engagement models that work and generate long term business success (see Figure 5 below). Organisations that develop digital capabilities of their workforce and invest in technology infrastructure will build a strong competitive advantage. To further surpass their competitors, they need to create interactive content that resonates with HCPs whilst innovatively optimising content to be disseminated via a range of channels, in line with customer preferences.

Delivering the right content via the right channel at the right time has never been more important. Central to achieving this goal is fostering a people-focused culture where everyone is motivated and adopts the right mindset to embrace change as the landscape continues to evolve. Customer-facing teams also need to be structured appropriately so that they can offer a tailored hybrid and omnichannel engagement approach to support a digitally- enhanced customer journey.

The digital age for pharma customer engagement has already begun, catalysed by the lockdowns and limitations on in-person interactions throughout 2020 and 2021. Pharma companies must quickly modify their go-to-market models to ensure they are not left behind in the post-pandemic world; the time to act is now!

Figure 5: Circular customer engagement flow and six enablers for future customer engagement models
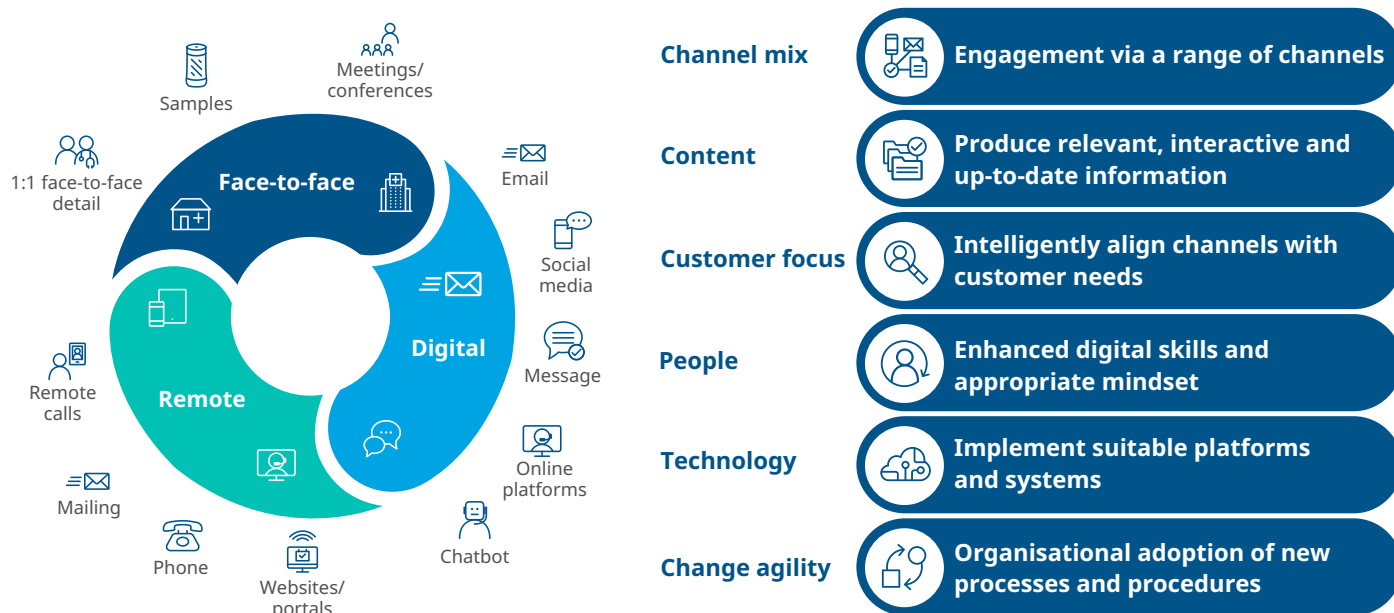
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Tom supports IQVIA's EMEA Thought Leadership team by preparing and publishing white papers on key healthcare topics, working alongside industry experts.

He has over 5 years of pharmaceutical experience in predominately commercially-focused, with experience in business insights, supply chain, pharma sales and consulting. He was also part of the BHBIA's Analyst Team of the Year in 2020.

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