

Optimizing your biggest promotional channel – A responsive, data-driven approach to empower field teams

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Introduction

The link between life sciences field teams and the healthcare community has been vital in delivering valuable drug information that supports informed decision-making by the physician. With the growing importance of digital channels and faster ways to search for information, physicians' engagement preferences have changed, resulting in reduced face-to-face (F2F) access for the sales rep. Then, COVID-19 delivered a big blow overnight, halting in-person interactions for a significant time and further strengthening the digital habits of the healthcare community. As the world embraced a new normal, the industry considered how best to use what it learned from this rapid change to enhance the effectiveness

of Sales Representatives, Key Account Managers, and Medical Scientific Liaisons.

Most of the tools of the trade for omnichannel orchestration, such as triggered communications, A/B testing, and Customer Data Platforms, were originally developed for digital marketing. The people in field teams work differently than digital channels. They have additional customer insights and make decisions that sometimes conflict with the plans, actions, and triggers from the omnichannel orchestration program. Furthermore, the timing for healthcare professional visits and remote contacts will always be partly planned and partly opportunistic. Companies must be careful to design



omnichannel programs that respect the unique knowledge and capabilities of field teams to enhance their impact with customers.

In this whitepaper, we propose some practical answers to two questions:

- How can we help teams adopt more data-driven, responsive ways of working?
- How can we best coordinate customer engagement across digital and field teams while acknowledging the very different ways they operate?

Synergistic planning between digital and sales rep promotion

Life sciences digital promotion spend in the US and Europe increased five-fold from 2019 to 2021, according to IQVIA ChannelDynamics data (MAT Q2 2021).¹ Despite this massive growth, field teams still represent 80% of promotion spending (excluding direct-to-consumer advertising) in these regions.

Digital promotion spending increased not only because rep access to physicians became more difficult but also because digital channels are effective. Axtia analyzed ROI benchmarks aggregated over many marketing mix studies in the US covering the years 2017-2021. On average, digital promotion yields better ROI than sales calls. The main outlier is email promotion for mature products, which on average, has a low ROI just above breakeven. While digital promotion may have better ROI because field team investments are so high, **sales calls have a much higher sales impact.**

The traditional approach for field teams was to set a call plan and track the execution of that plan in terms of reach and frequency. As the needs and behaviors of HCPs are changing, life sciences companies are changing the call planning approach to respond to these customers more promptly. Axtia surveyed its customers (Customer Engagement Survey 2021), and almost all say they are still working to “improve the planning process for a synergistic approach between field team activity and digital channels.” Fortunately, technology has matured to a point where it is not merely wishful thinking, but it is possible to deliver this.

“Now, the frequency and volume of data that is being generated is so great that you can no longer operate by blind faith. Instead of looking at retrospective data, you can now use data to plan and start your activities.”²

*John Wang,
Senior Director, Commercial Insights
and Analytics, Jazz Pharmaceuticals*

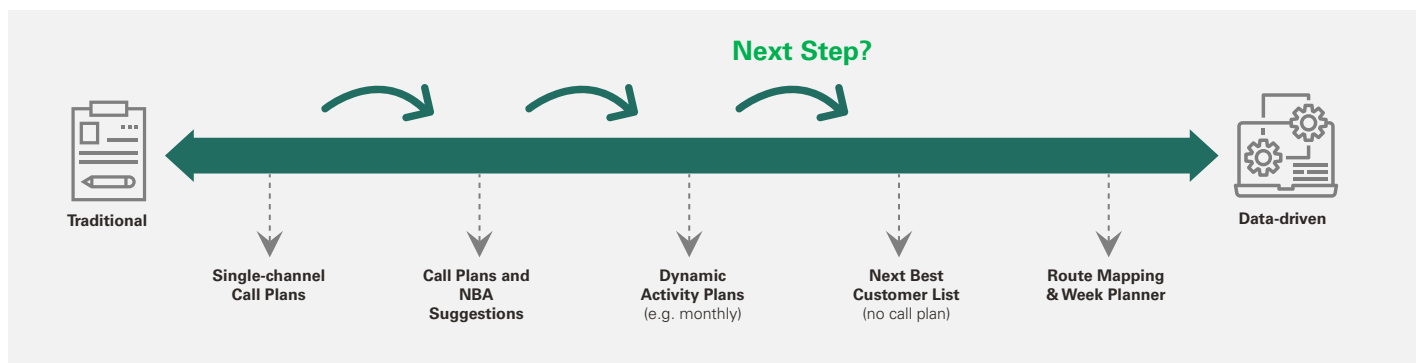
Moving towards a more dynamic, data-driven model

New communications channels, marketing companies, and innovative data sources have created an explosion of data. This is great for analysts and data scientists who have the tools and training to process these for powerful new insights and automation. However, this has also created a challenge. Life sciences companies gather more customer information than field teams can process. Too much raw data is overwhelming for field teams who plan actions for their customers one at a time. Technology should simplify this vast amount of information, and careful attention should be paid to the delivery of data and insights. Without this, the investments in omnichannel analytics will not bear fruit for field teams.

Sitting between data analytics and field teams, commercial operations teams play a crucial role. They are the gatekeepers who ensure that all insights and analytics output can be consumed by field teams. To move from the traditional call planning model to a dynamic data-driven model, life sciences companies can take a step-by-step approach, as there is no magic algorithm that will solve this. These steps must be taken in a way that is relevant and sustainable for the life sciences industry.

Most life sciences companies have already moved away from single-channel call plans in favor of multi-channel call plans (e.g., sales calls plus rep-triggered emails). Companies analyze customer channel preferences and their target list to create a plan. This method is well understood. Many companies have also added Next Best Action (NBA) programs that help field teams break from their plans to be responsive to immediate customer needs (Figure 1).

Figure 1: Activity management models for field teams

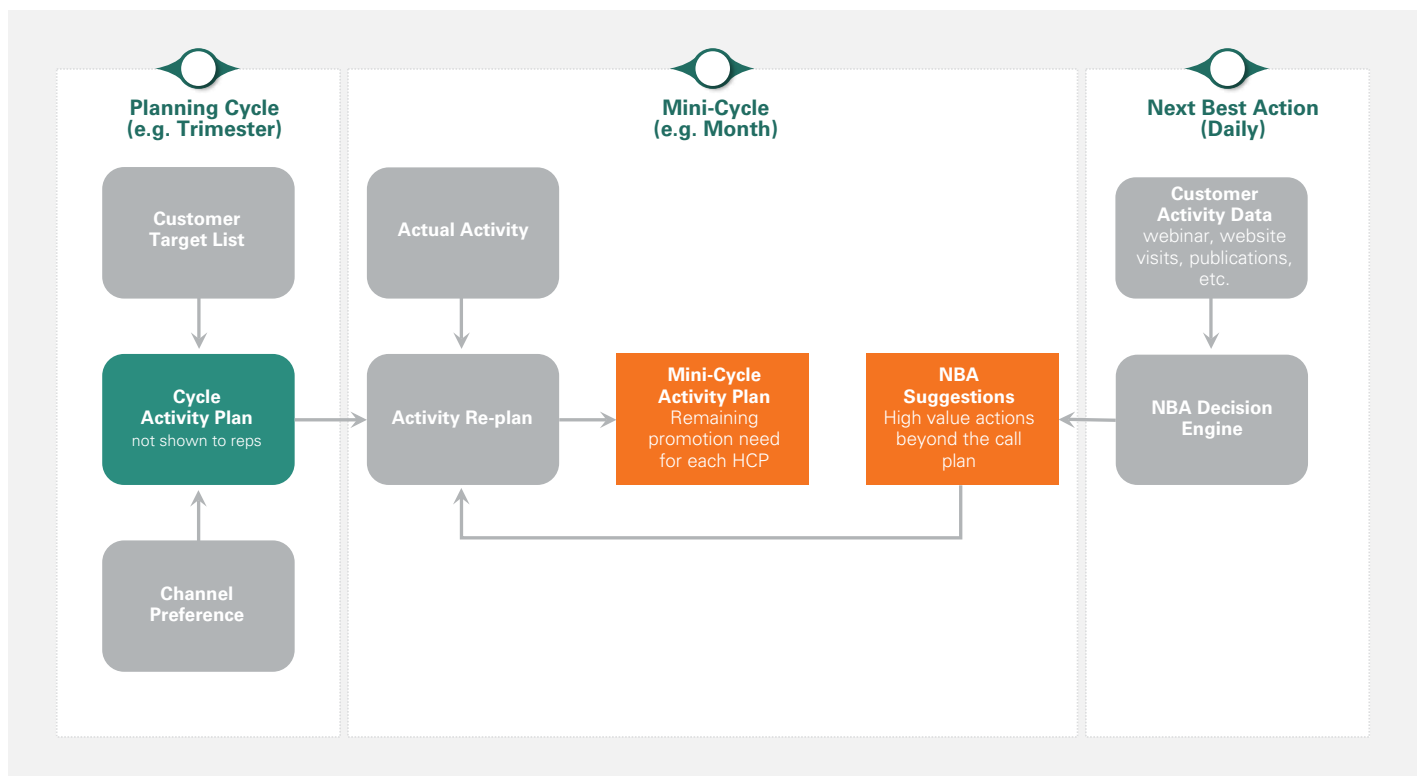


Source: Axtria Inc.

More companies are now taking the next step to create dynamic activity plans that retain the benefits (and comfort level) of the traditional call plan while analyzing the latest data and insights to better optimize activity. Dynamic activity plans can be modified or updated regularly, typically every two weeks or every month. Some companies may choose to modify mini-cycle plans to create a longer-term cycle plan that achieves the brand strategy.

Once established, it's easy to refine the mini-cycle plans to incorporate digital insights or align the call guidance with the NBA program, as shown in Figure 2 below. Companies can update the algorithms over time, invisible to the field user, and improve the mini-cycle plan accuracy.

Figure 2: Example of a dynamic call plan framework that leverages cycle plans and NBA



Source: Axtria Inc.



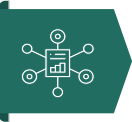


Moving beyond the call plan

How can life sciences companies ensure coordination across different channels over time without relying on some black box magic algorithm that’s going to do it for them? Customer-level orchestration should cover much more than NBA suggestions (Figure 3). Life sciences companies do not take full advantage of the platforms that drive NBA programs. The NBA suggestions tell people or systems what to do right now. Companies can also use their orchestration platforms in other ways that better fit the business processes.

NBA infrastructure can be used to create insights that look similar to NBA suggestions. However, the insights are not linked to an immediate action. These suggestions are best delivered to a different solution, such as a Customer360 or pre-call dashboard.

The same infrastructure can automate dynamic scores and segments. These scores and segments help target activity (high-score customers) by channel (score by channel) and messages (by segment or microsegment). These scores and segments enable orchestration as companies update them in response to customer needs.

Figure 3: Dynamic scores and segments, alerts (NBA), and insights have different purposes

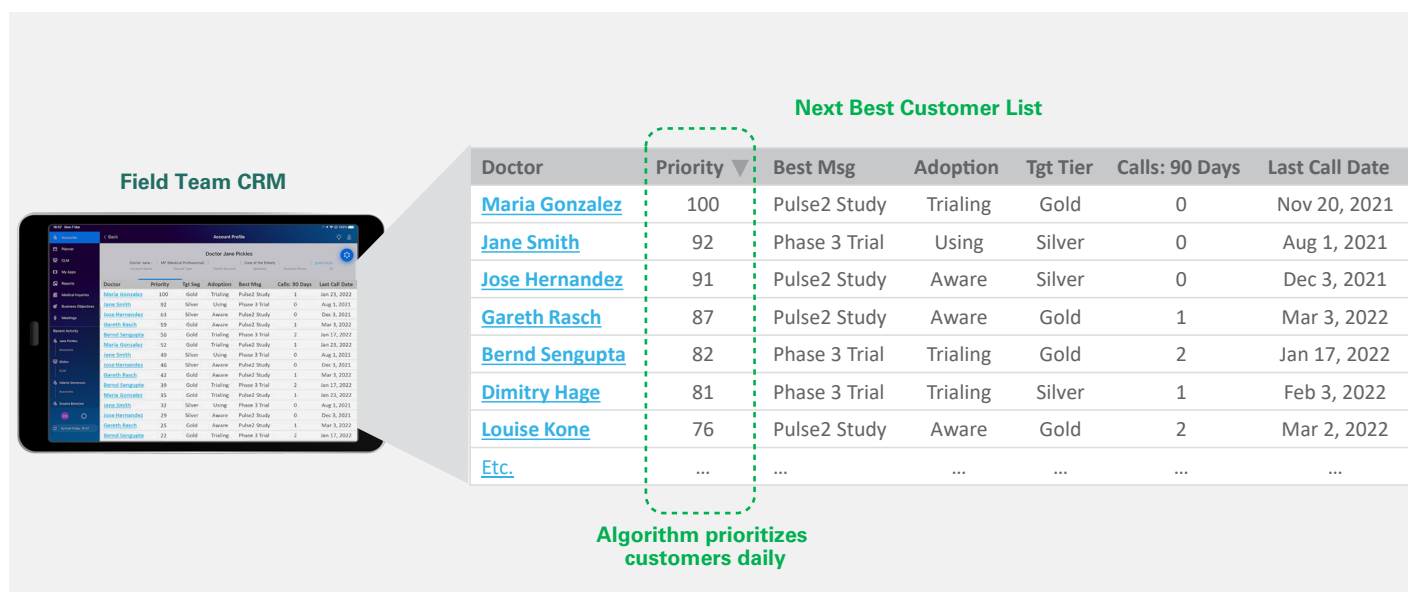
Customer-level automated analytics	
	Main purpose
 Alerts (NBA)	Drive immediate action
 Insights	Help users understand their customers
 Dynamic Scores & Segments	Target the best customers at any given time

Source: Axtria Inc.

Some life sciences companies are abandoning call plans to work with Next Best Customer lists. Algorithms drive a dynamic Priority Score (found under many names across companies) that can rank customers with the top priority customers listed first. This changes the focus to help field teams prioritize their activity as opposed to tracking performance against a fixed plan. And while they do not need

to know every detail of the calculations or algorithm behind the list, it's important to give some key facts that drive the prioritization for transparency and trust. In the mocked-up example in Figure 4, the Next Best Customer list includes Target Tier and Last Call Date, which are important factors for the Priority Score.

Figure 4: Example of Next Best Customer list



Note: No call plan!
Source: Atria Inc.

Extending priority scores to coordinate activity across all channels

Making these scores and segments very dynamic, ideally refreshed daily, is a powerful way to unlock omnichannel coordination across channels. Dynamic scores and segments drive the Next Best Customer list, prioritize customers' channel mix over time, and help optimize channel mix and messages over time. This approach integrates well with all channels, digital and field teams, internal stakeholders, and partners.

We'll use the example of Dr. Maria Gonzalez, our top doctor in the Next Best Customer list in Figure 5, and guide her hypothetical customer journey using scores and segments. Dr. Gonzalez is a GoldTier customer who received zero calls in the past 90 days, so her face-to-face daily priority score is 100 out of 100.

After the sales call in that first step, we refresh her scores, and the next day her face-to-face daily priority score drops to 10. It does not make sense to see any physician two days in a row, so our GoldTier customer is unimportant to see on that day. Her daily priority score will increase as time passes without contact and then decrease after each call. Data scientists may add additional factors, such as digital contacts and persona insights, to make the scoring algorithm more intelligent.

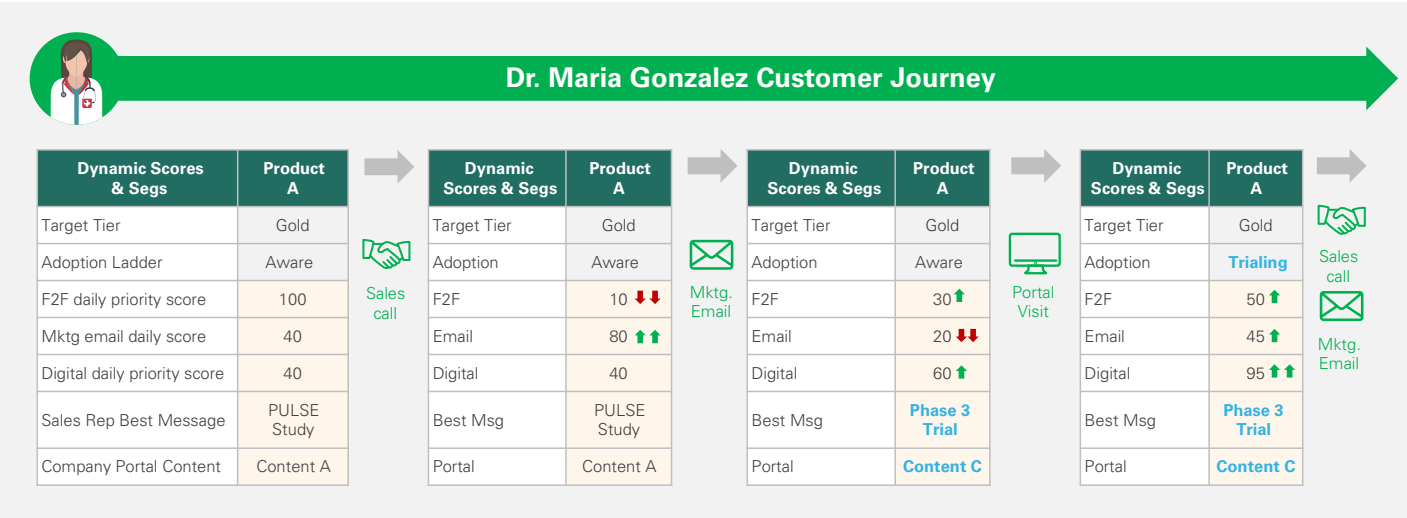
It gets interesting when we add more channels. Several studies have shown that sending an email shortly after a sales call has more impact than only a sales call. We add an email priority score that shoots up when there is a face-to-face contact and will trend down when there have been many recent emails and a risk of annoying the customer. These scores can also be extended to prioritize customers for digital marketing partners, banner ads, etc.



Algorithms that recommend content and messages are essentially creating segments: the list of customers for each best message/content is a type of customer segment. In our example below, the best message for Dr. Gonzalez is “PULSE Study.” After delivering this message face-to-face and through email, and aligning with the campaign plan, the content

recommendation updates to “Phase 3 Trial,” and the portal will update for a new content package in concert. This is the dynamic scores and segments framework for orchestration.

Figure 5: Example of dynamic scores and segments in omnichannel orchestration



Note: Adoption ladder: Many life sciences companies use a ladder of adoption to categorize customers’ awareness and usage of products as an internal measure of customer progression from product awareness to product advocacy.

Source: Axtria Inc.

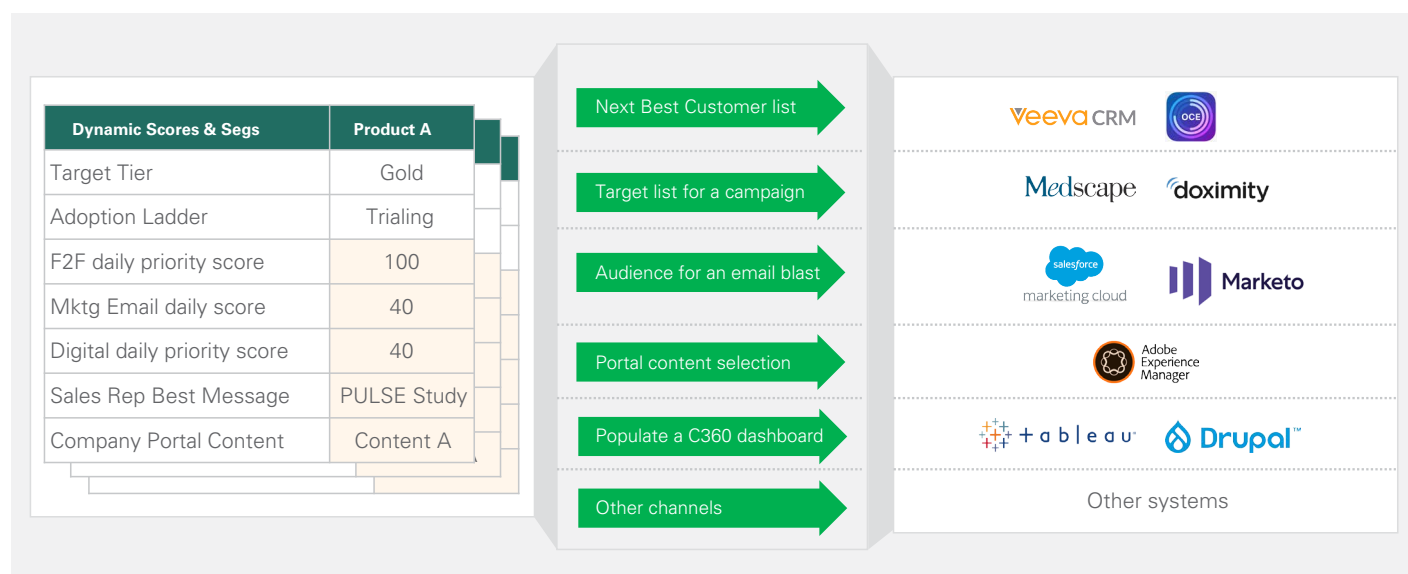
Note that this approach to omnichannel orchestration guides activity without dictating every action. This puts less burden and complexity on the algorithms and is a more realistic way to enhance the customer journey. Read Axtria's blog on *"Why Is Balancing Autonomy Critical To Driving Omnichannel Orchestration At Scale?"* for more insights on working with personal and digital channels.

These scores and segments are very flexible. They can feed all customer engagement platforms to coordinate activity across all channels. While the algorithms that calculate the scores may change and become more complex, the scores themselves are very simple to interface to CRM and digital marketing platforms, smoothing the path for greater automation.

Examples of how these channels use the scores and segments (Figure 6) include:

- **Next Best Customer list** – Use the scores to rank the customers listing the most important at the top of the list.
- **Target list for a campaign** – Target only customers who score high for digital channels.
- **Audience for an email blast** – Include a journey step to wait for email channel scores to reach a minimum threshold for sending the email to each customer.
- **Portal content selection** – Assign different content to different dynamic segments.
- **Populate a Customer360 (C360) dashboard** – Use the scores to display the best channel and best message for each customer on the C360 dashboard.

Figure 6: Dynamic scores and segments guide activity in each customer engagement platform (examples)



Source: Axtria Inc.

Key takeaways

Life sciences companies should use analytics to simplify insights for field teams, not overwhelm them. And what are some practical ways to make this happen?

- Dynamic activity plans, as opposed to the traditional longer-term call plans, can be a way to move the needle without really disrupting things so much that it's rejected by field teams, or it's just too difficult to make the change. Dynamic activity plans are a stepping-stone between traditional and purely algorithm-driven approaches.
- Companies can enhance customer profiles with dynamic scores and segments to coordinate activity across their digital channels and field teams to drive more responsive, data-driven customer engagement.

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 Axtria – Ingenious Insights

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