

Reimagine customer  
engagement

Maturometer™



The webinar series

## Maturometer™ 2021 - The results

June 24<sup>th</sup>, 2021



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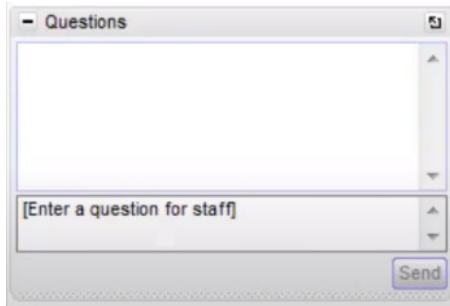
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# Ground rules

- This webinar will take around **45 minutes**, followed by questions
- You can submit **questions** at any time via the “Questions” box



- **Please give us your feedback!**
  - Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!
- The webinar will be **recorded** and made available after the session. We will send you an email with the details



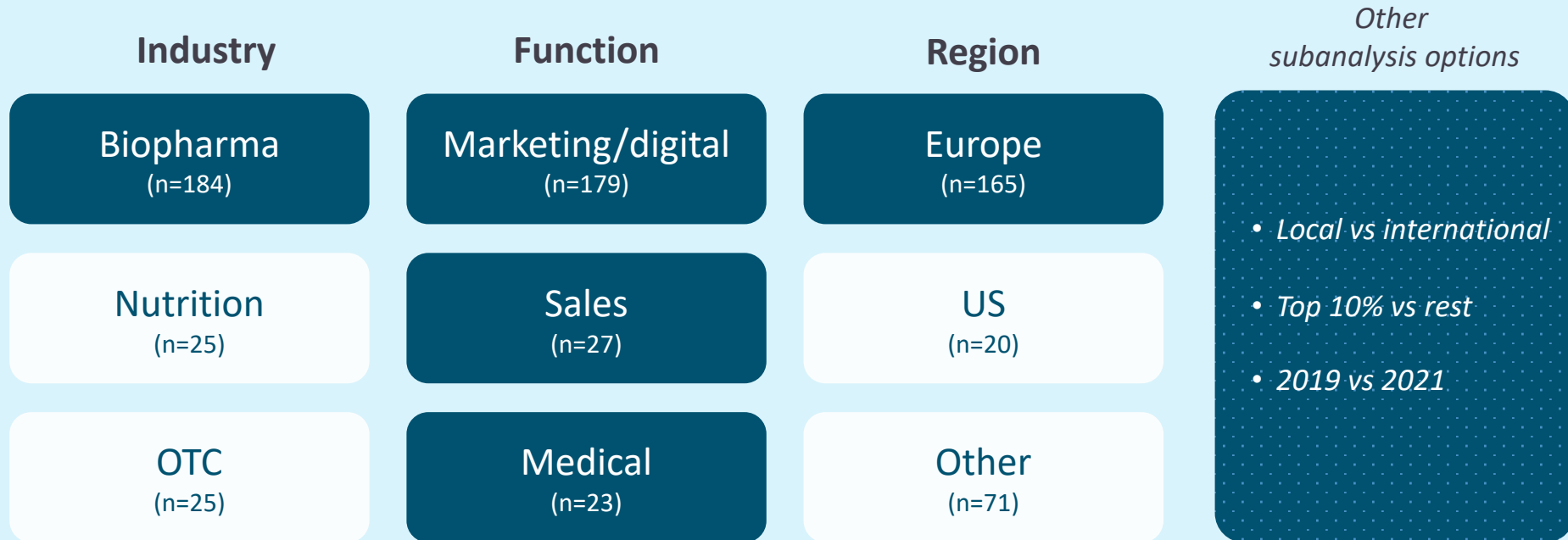
# Digital transformation in Life Sciences: Acceleration (waiting) in the wings?

FIRST STEPS  
CAPABILITY TO CHANGE  
VISION & GOALS  
NEED FOR CHANGE



## Maturometer™ 2021

# Focus of this webinar is on commercial functions, Europe and Biopharma



Reach out to [sander.geysen@a-cross.com](mailto:sander.geysen@a-cross.com) if you want to discuss another sample





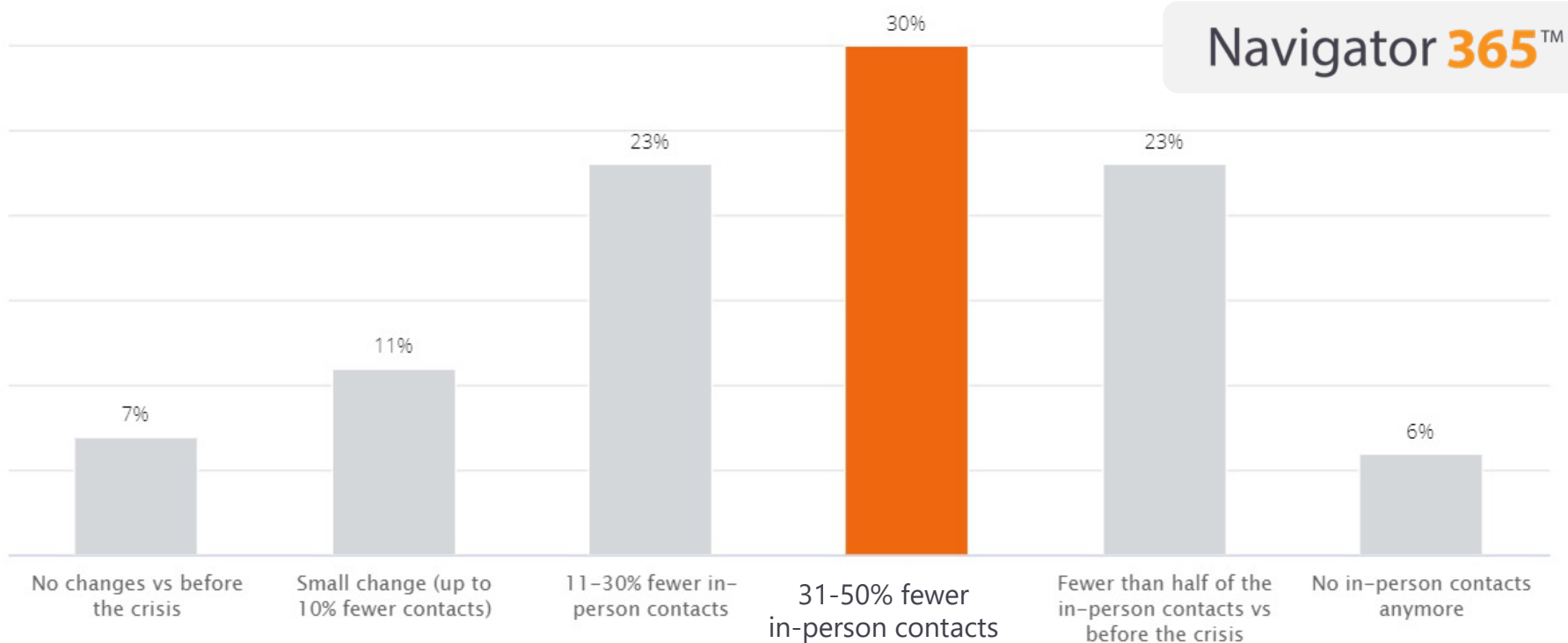
**BC ⚡ AC**

**BEFORE  
CORONA**

**AFTER  
CORONA**

# The engagement from HCPs with biopharma changed...

## Effect of Covid-19 on future contacts with rep/AM

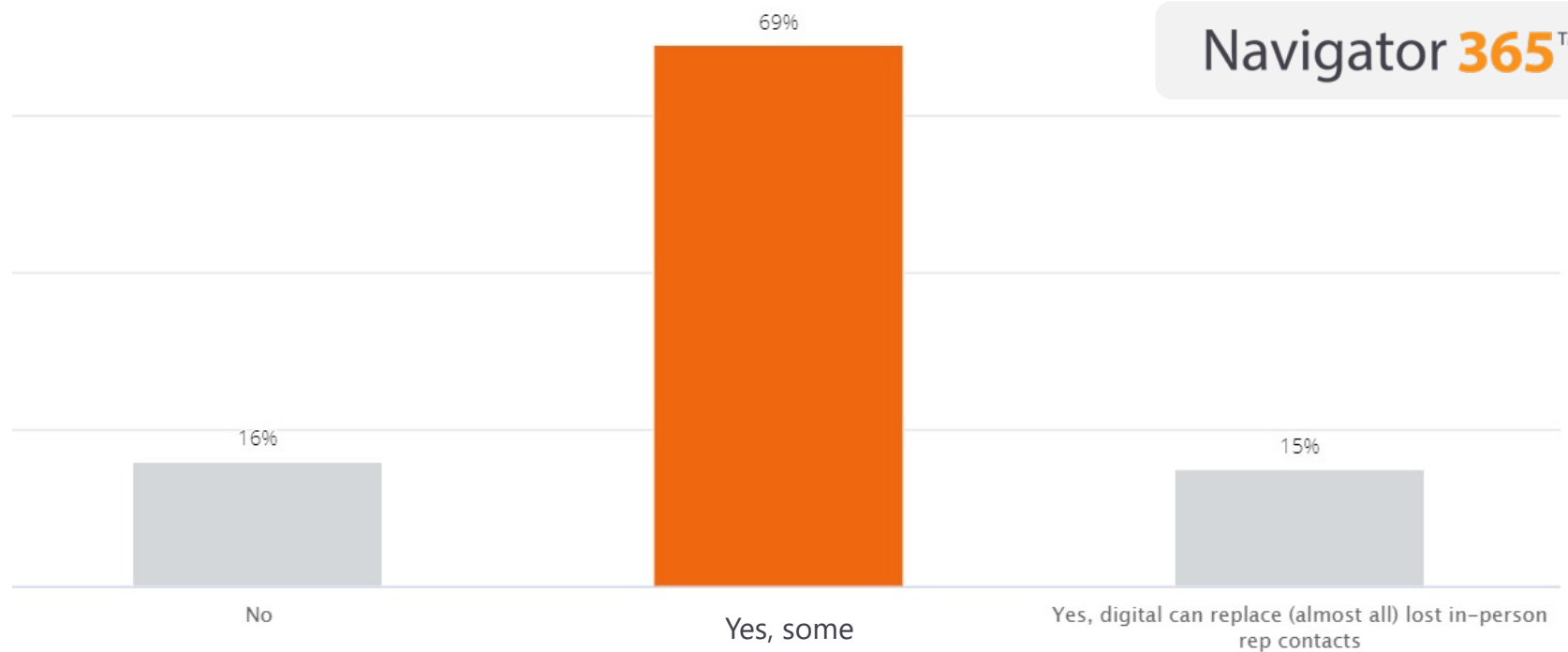


Source: Across Health  Navigator365™ Core - 2020, 2021

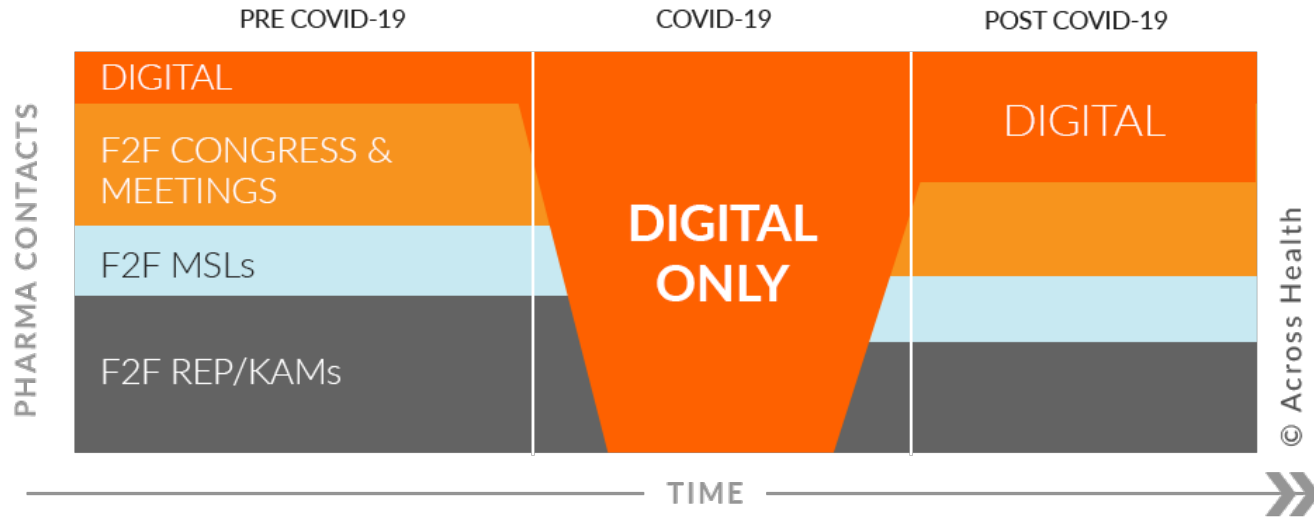
EU4/UK Spec n=3029

And will be partially compensated by digital

## Digital compensation for reduced Rep/AM engagements



# Biopharma industry needs to reimagine customer engagement for the post-C19 world – with the customer in mind



*“Pump up the digital volume” without customer focus is a dangerous strategy”*

(Across Health 2021)

*“Doctors disappointed in pharma’s digital pandemic efforts”*

(Fiercepharma 2021)

*“Promotional models are obsolete”*

(Iqvia 2021)

# Question for you...

Spending more budget on digital has a positive impact on pharma staff's satisfaction levels?

1. Agree
2. Disagree



## A second question for you:

Which of the items below is considered the main bottleneck for digital in the industry?

1. No clear digital strategy
2. Not enough internal knowledge
3. MLR issues
4. ROI questions



# Is pharma moving?

Let's first look at this through rose-coloured glasses



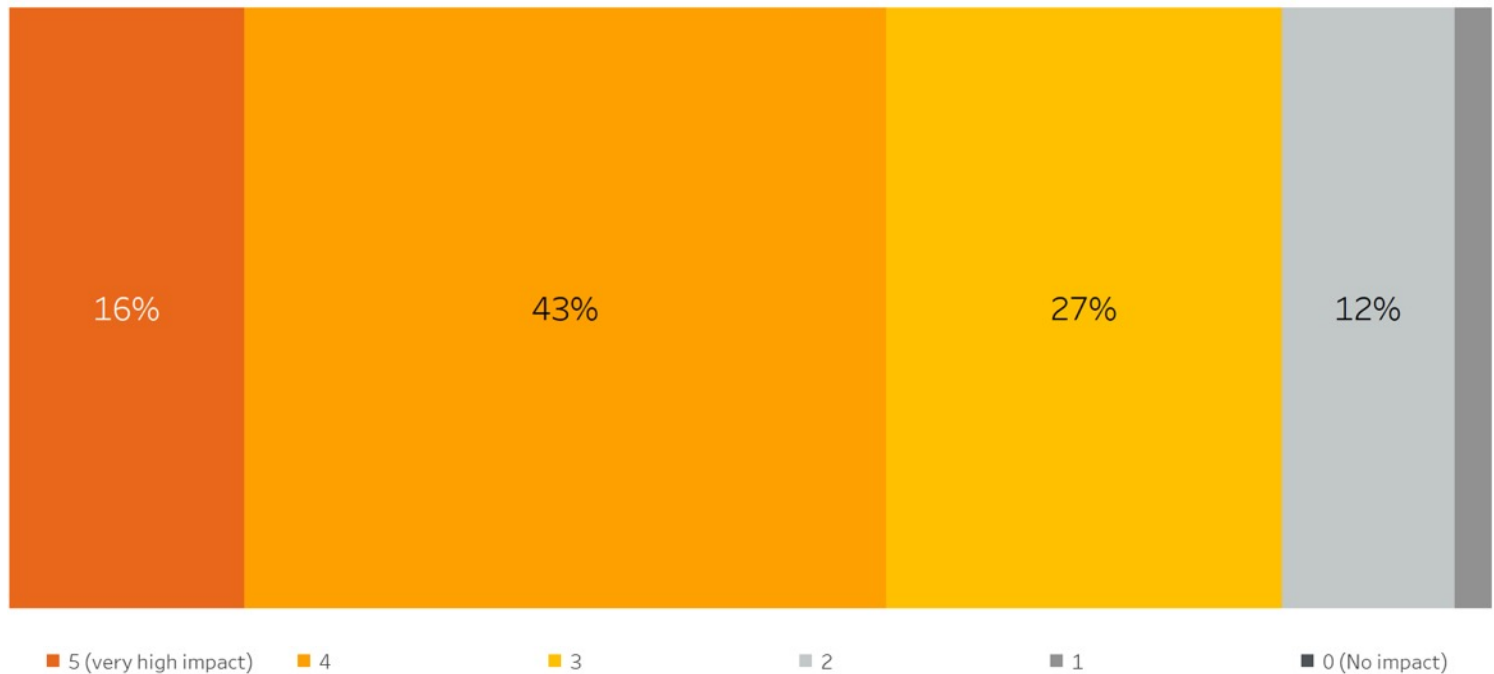
**Maturometer™ 2021**





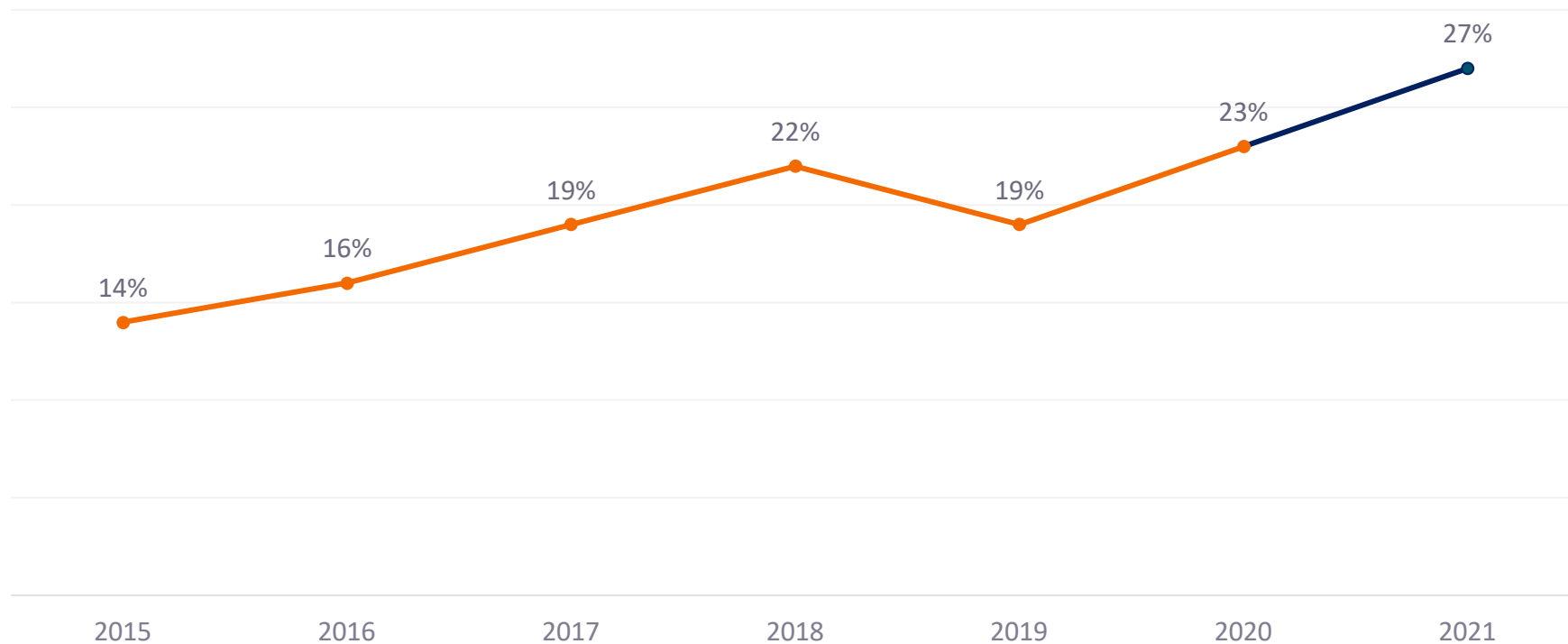
There is general agreement that omnichannel offers a competitive advantage - and hence will impact company performance

### How big do you think the impact of digital transformation in sales and marketing will be on your company's performance?



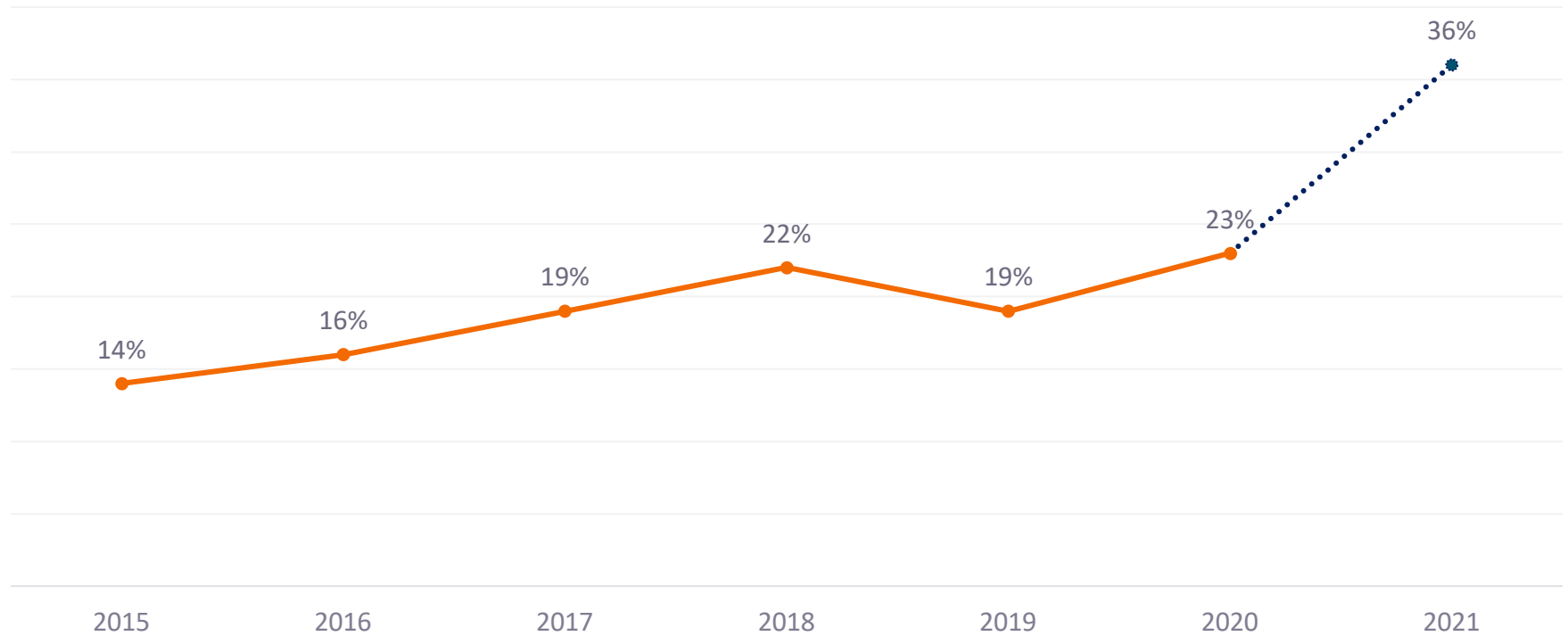
As a result, more budget is being funneled into digital... and 78% intends to increase it by at least another 10% in 2022

## Which percentage of your marketing budget is allocated to digital initiatives THIS YEAR? (EU)



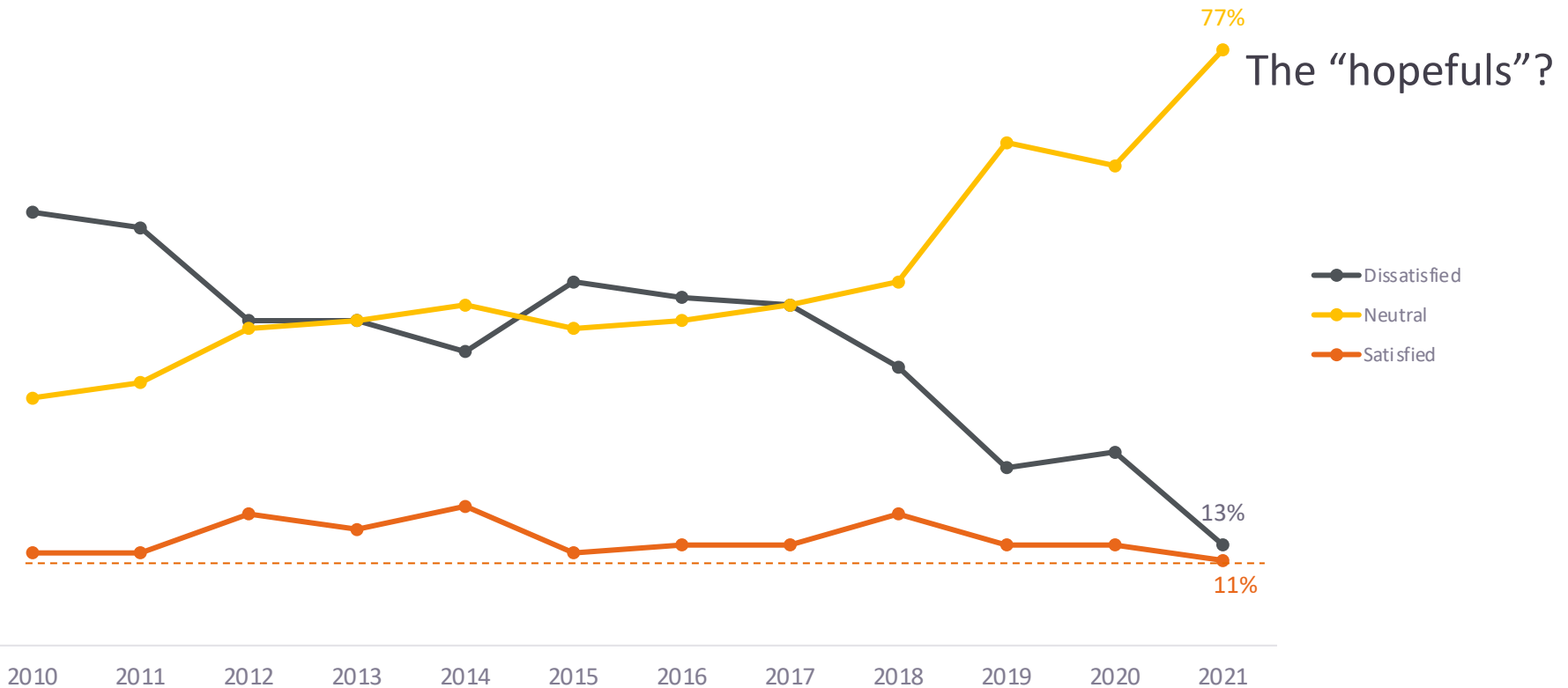
But the shift is smaller than what you predicted in early 2021...

## Which percentage of your marketing budget is allocated to digital initiatives THIS YEAR? (EU)



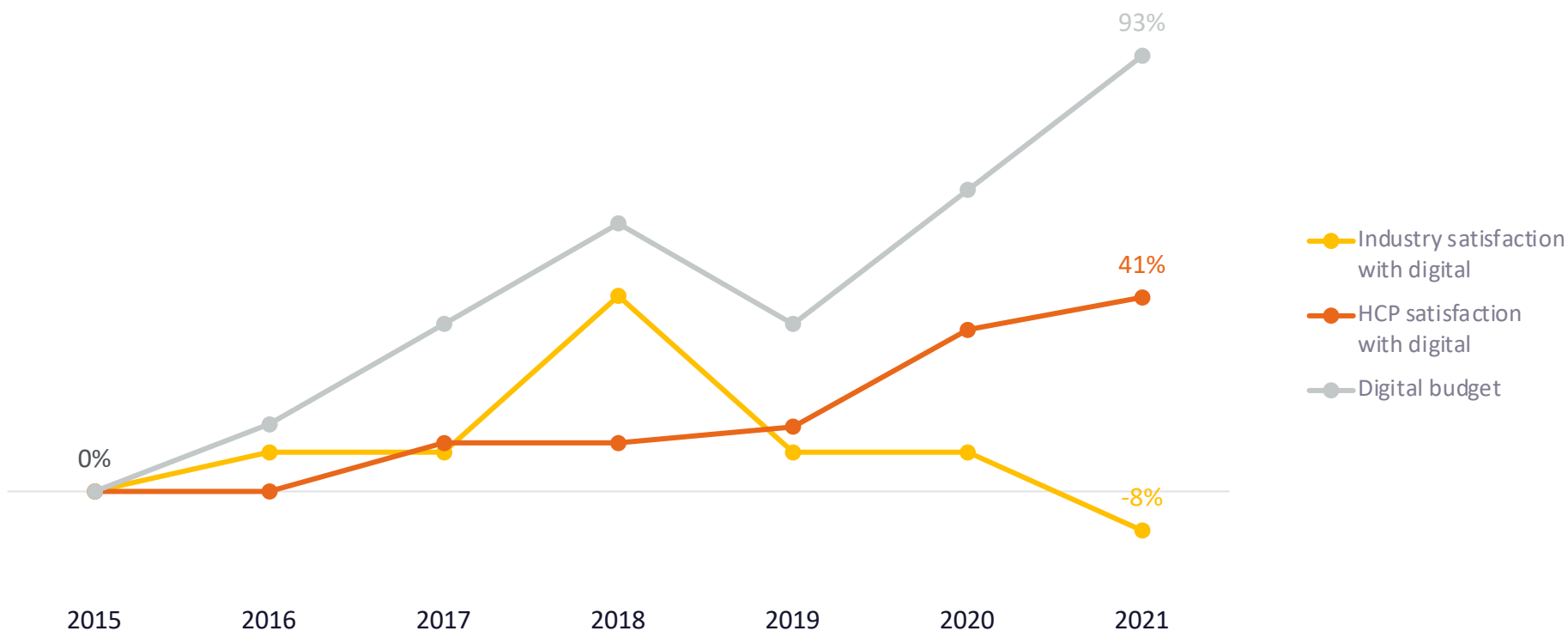
But, despite the bigger focus and budgets, satisfaction is at an all-time low... why would that be?

### How satisfied are you with your current digital/omnichannel activities?



Despite a significant uptake in budget spent on digital over the past years, satisfaction levels didn't evolve at the same pace

## Evolution since 2015 of digital budget and internal/external satisfaction with digital



## From limited by technology to not knowing how to leverage the technology

“

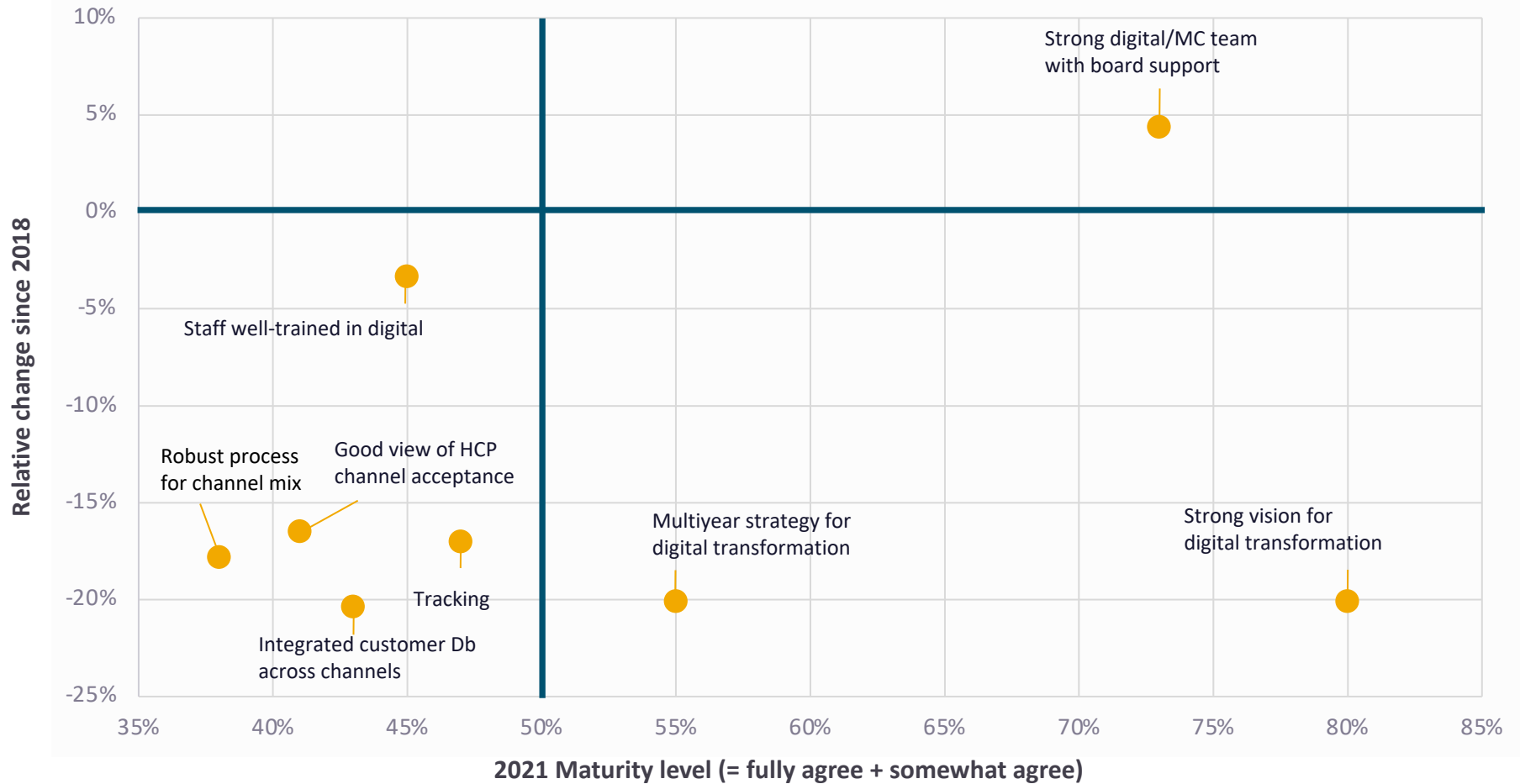
*“We have flipped the situation from our customer engagement model being limited by technology to having ‘too modern’ technology and not knowing how to best leverage it. Now it is about organizational change, vision, strategy, and roadmap.”*

”

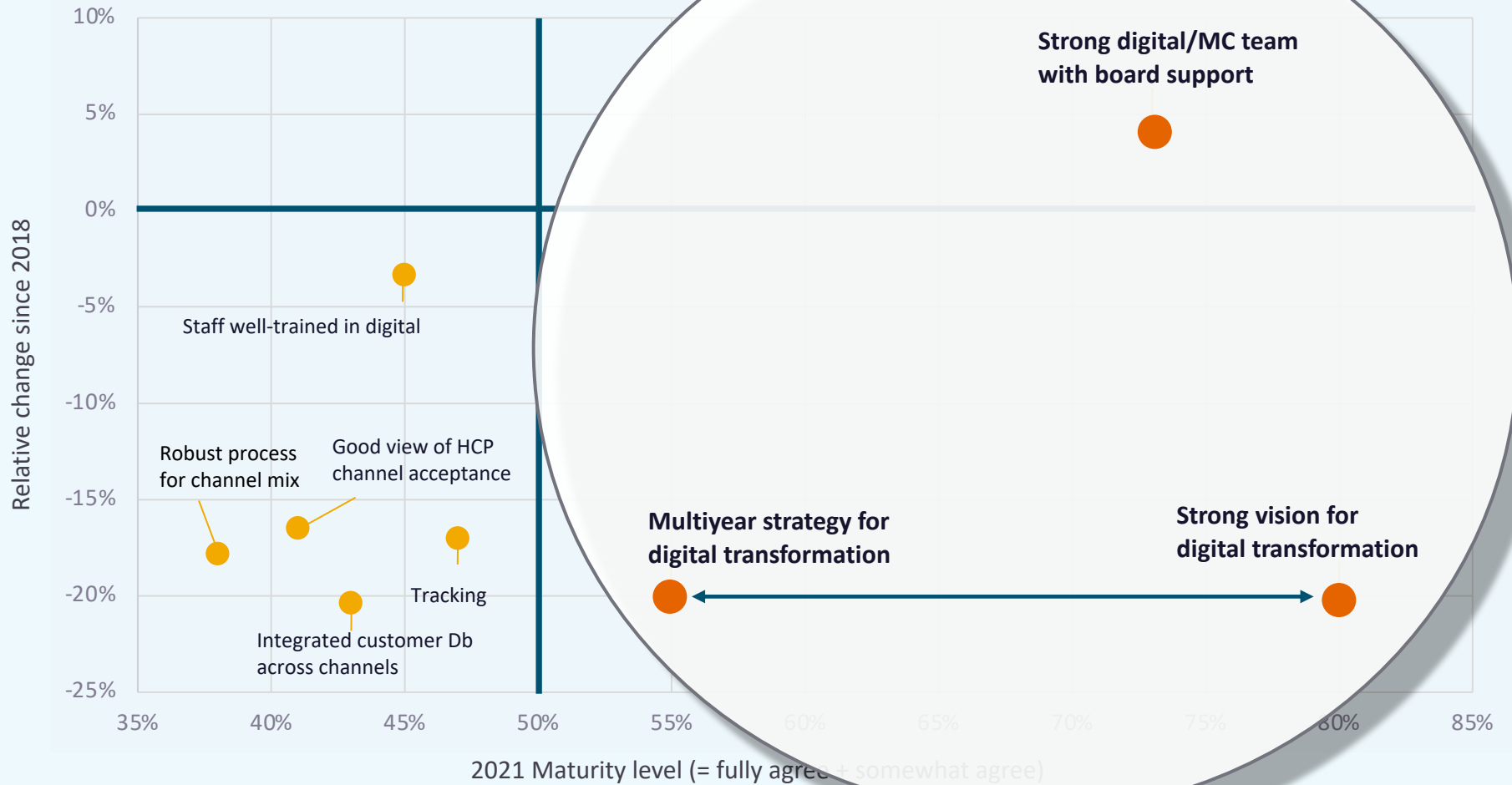
***Affiliate Commercial Excellence Lead, Mid-sized Pharma***

Source: Strategy& (2021)

# What could be the root cause(s)? Let's look at which capabilities have gone up - and which were low & have even gone down vs 2018

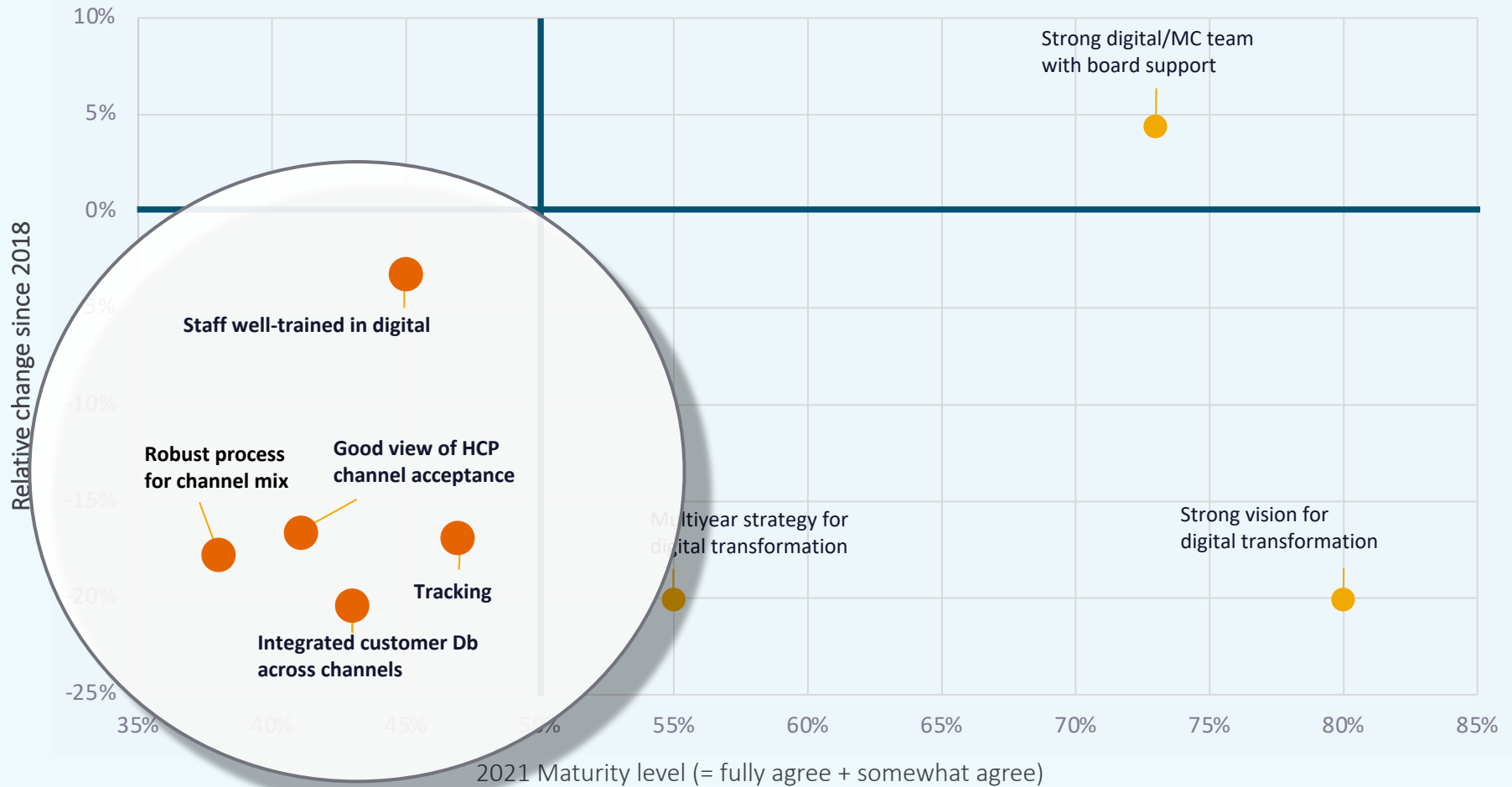


# The willingness to transform is here, but lacks a clear strategy/roadmap with concrete milestones



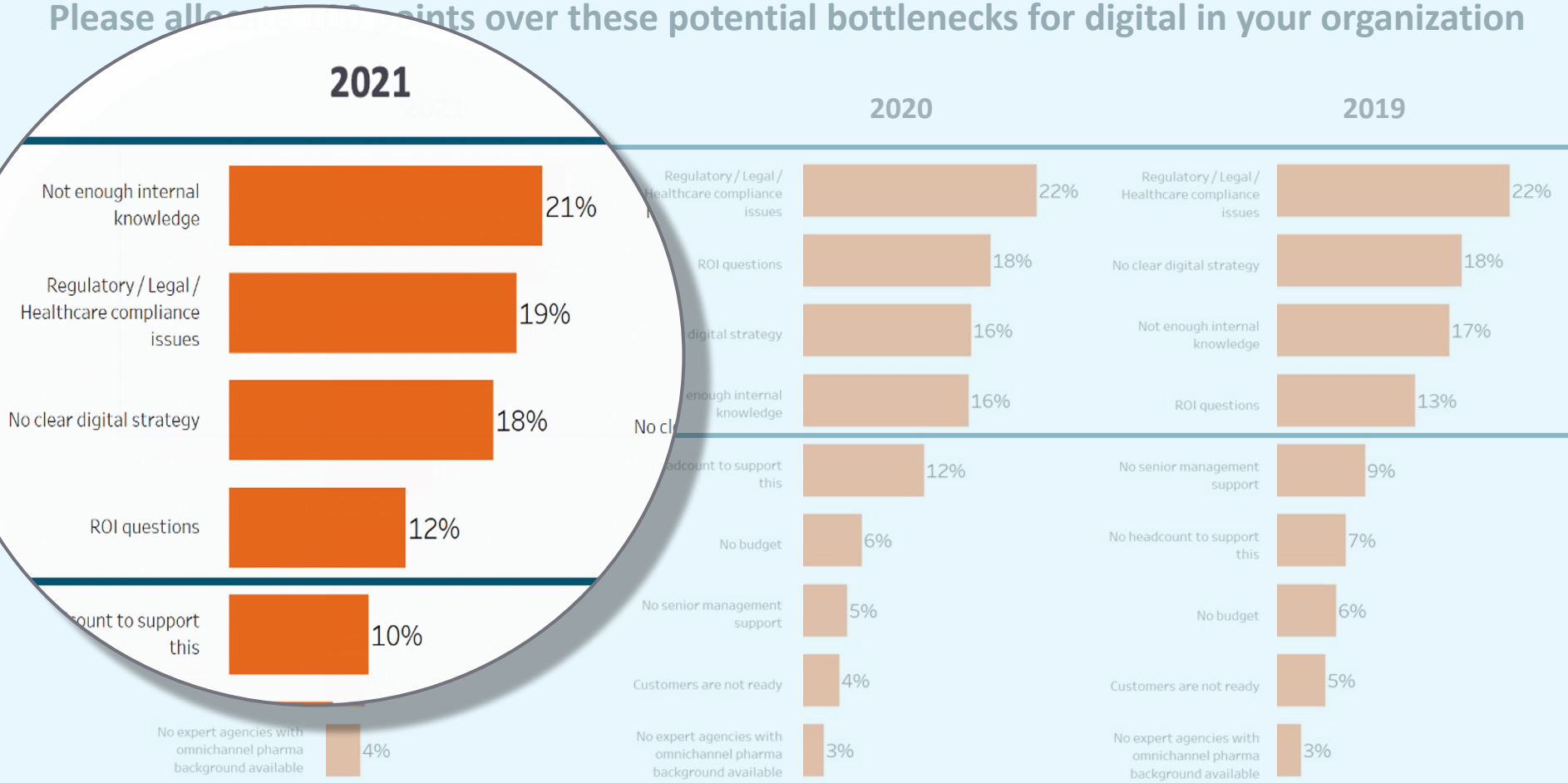


Let's now look at "the real zone of pain": there is a clear lack of capabilities to drive change...and the pain increases vs 2018 as more people need these skills

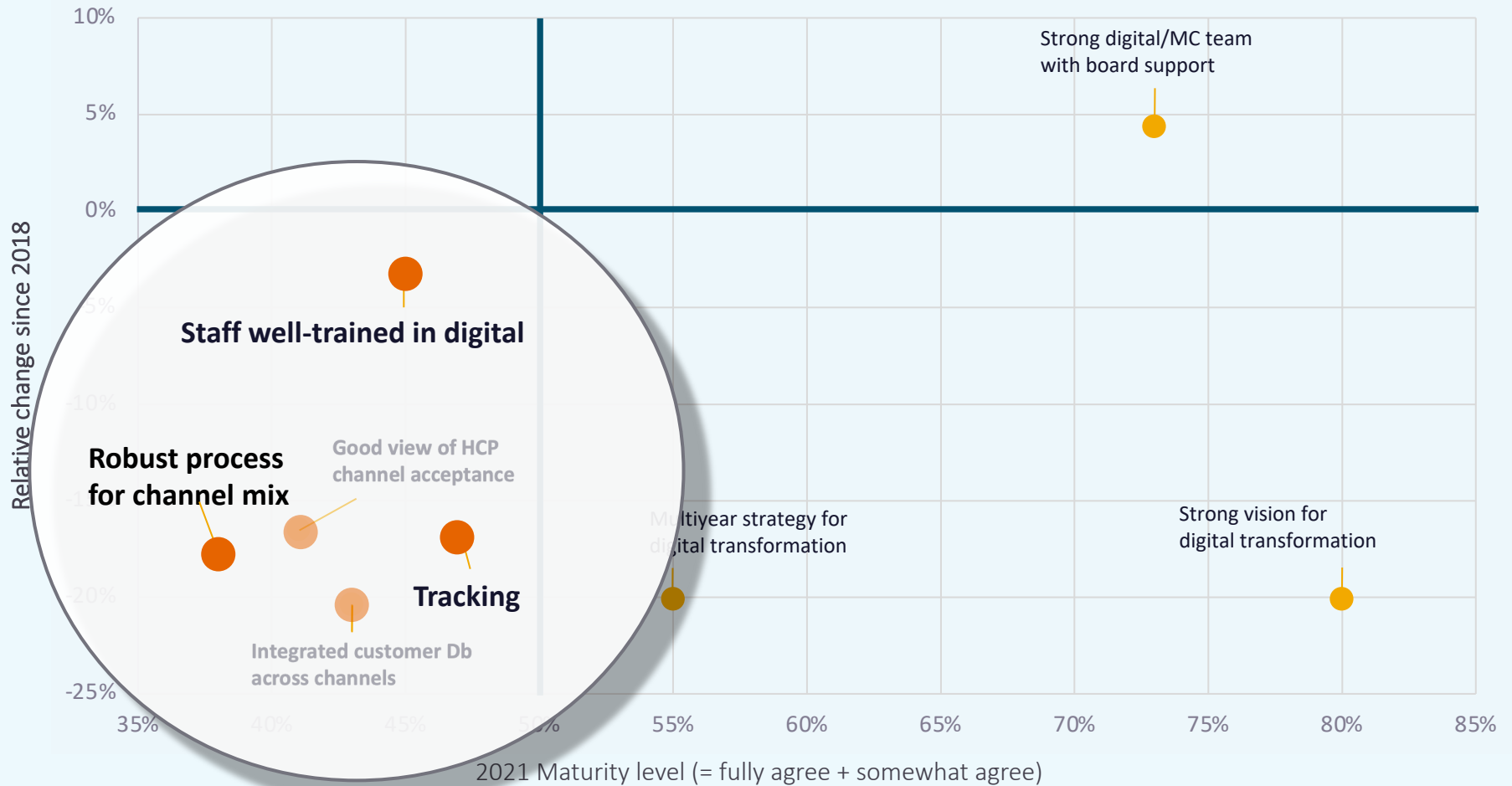


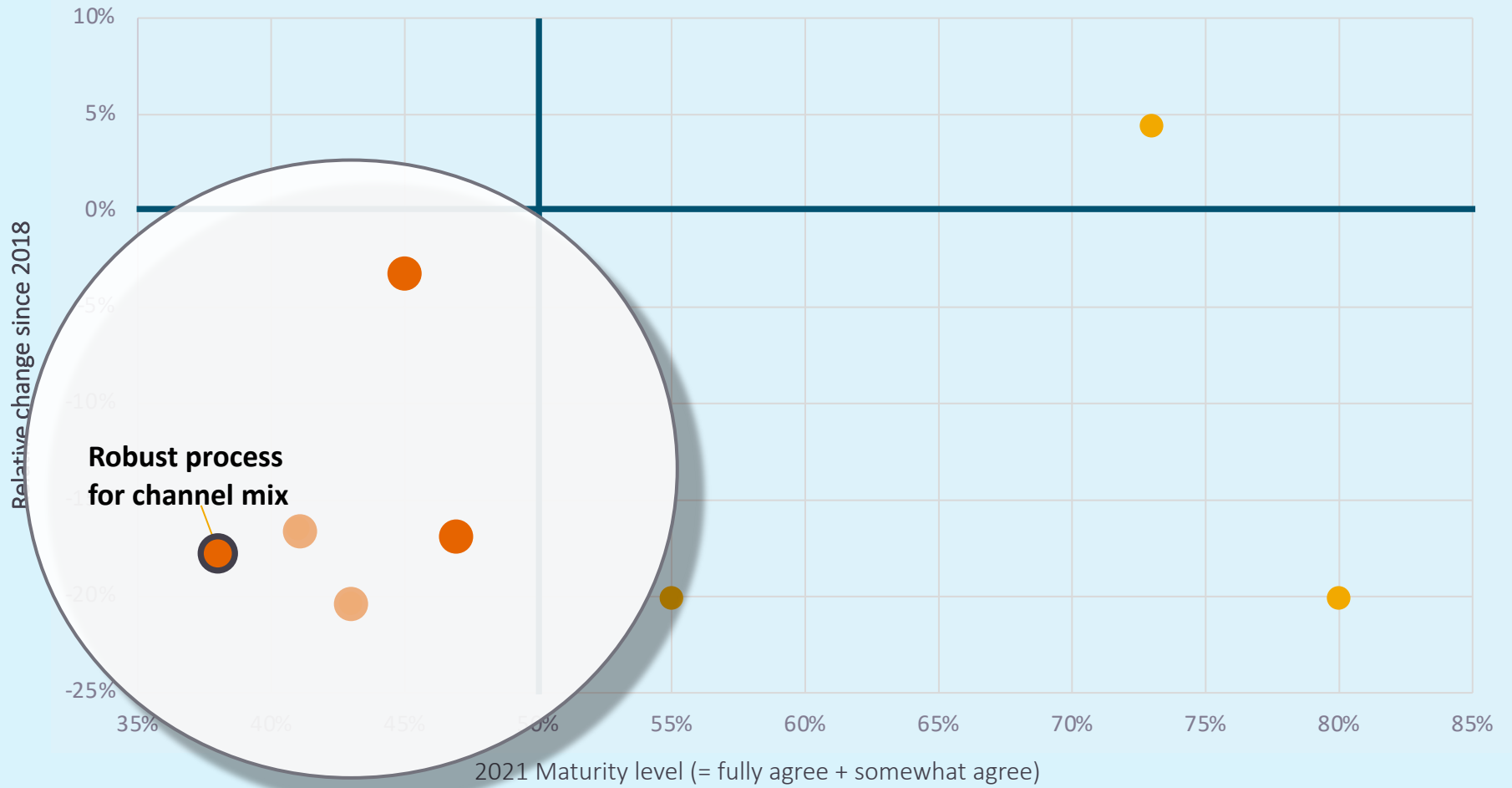
These pain zones are also reflected in the key bottlenecks, which have been stable over time...quid MLR education?

Please allocate your top 5 pain points over these potential bottlenecks for digital in your organization



# Let's take a closer look at channel mix, training levels and tracking

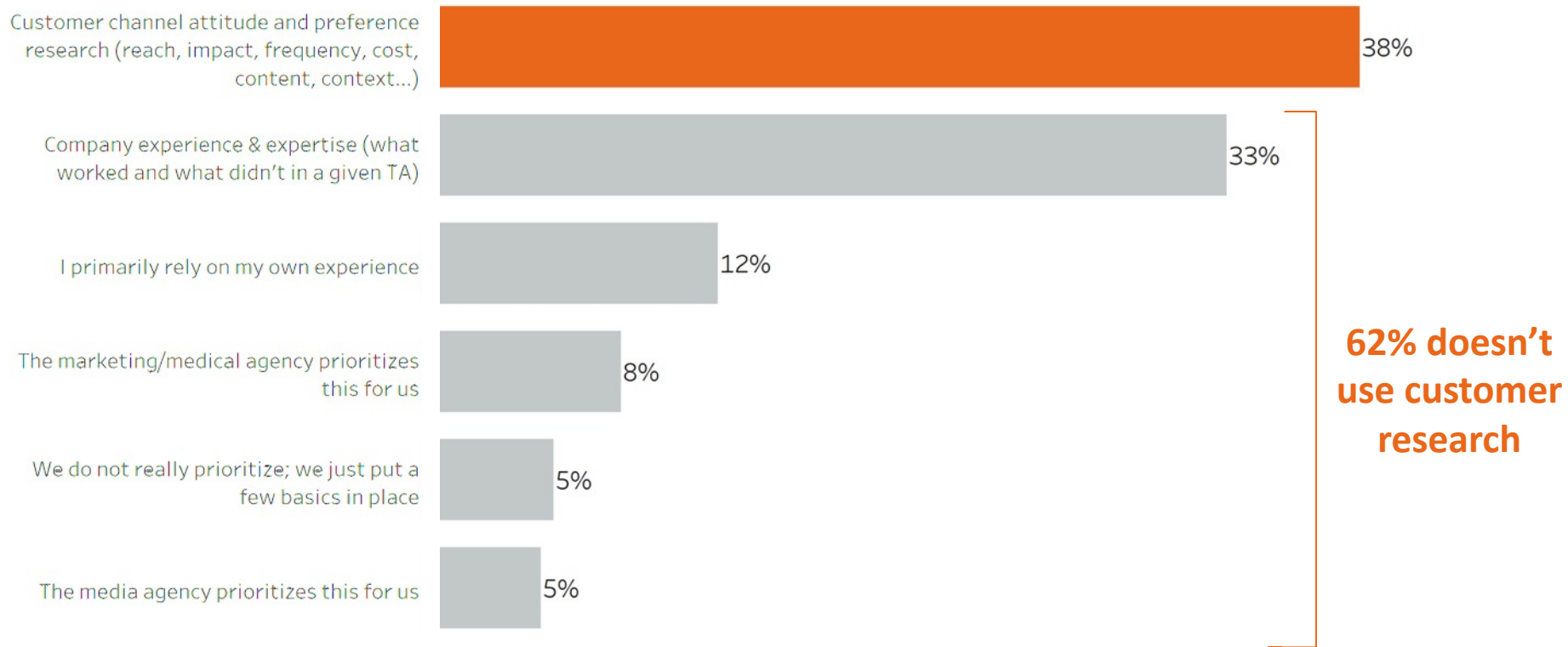




Robust process for channel mix

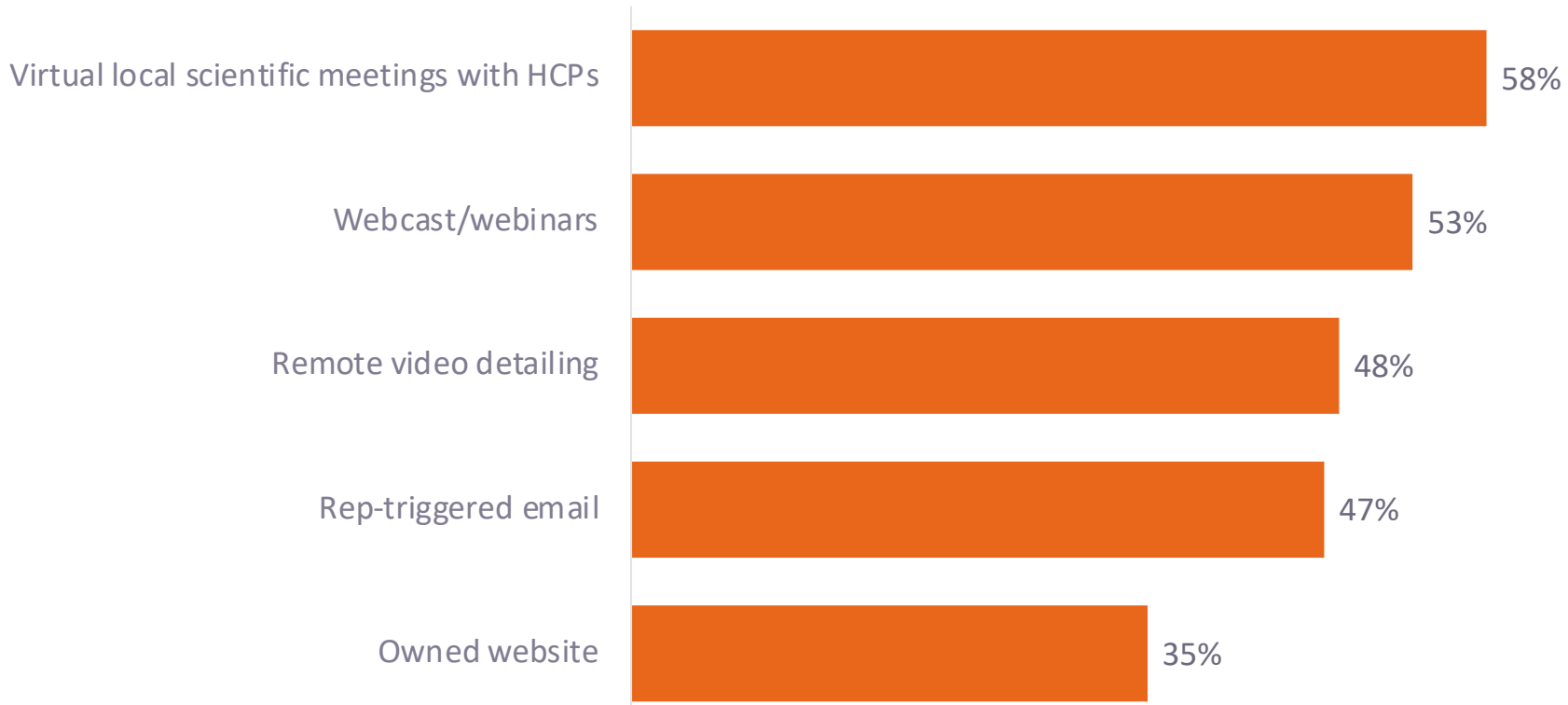
While customer OCE insights remain a persistent hurdle, 62% does NOT perform customer research ahead of launches (and in general?)

## How do you prioritize digital channels for a product launch?



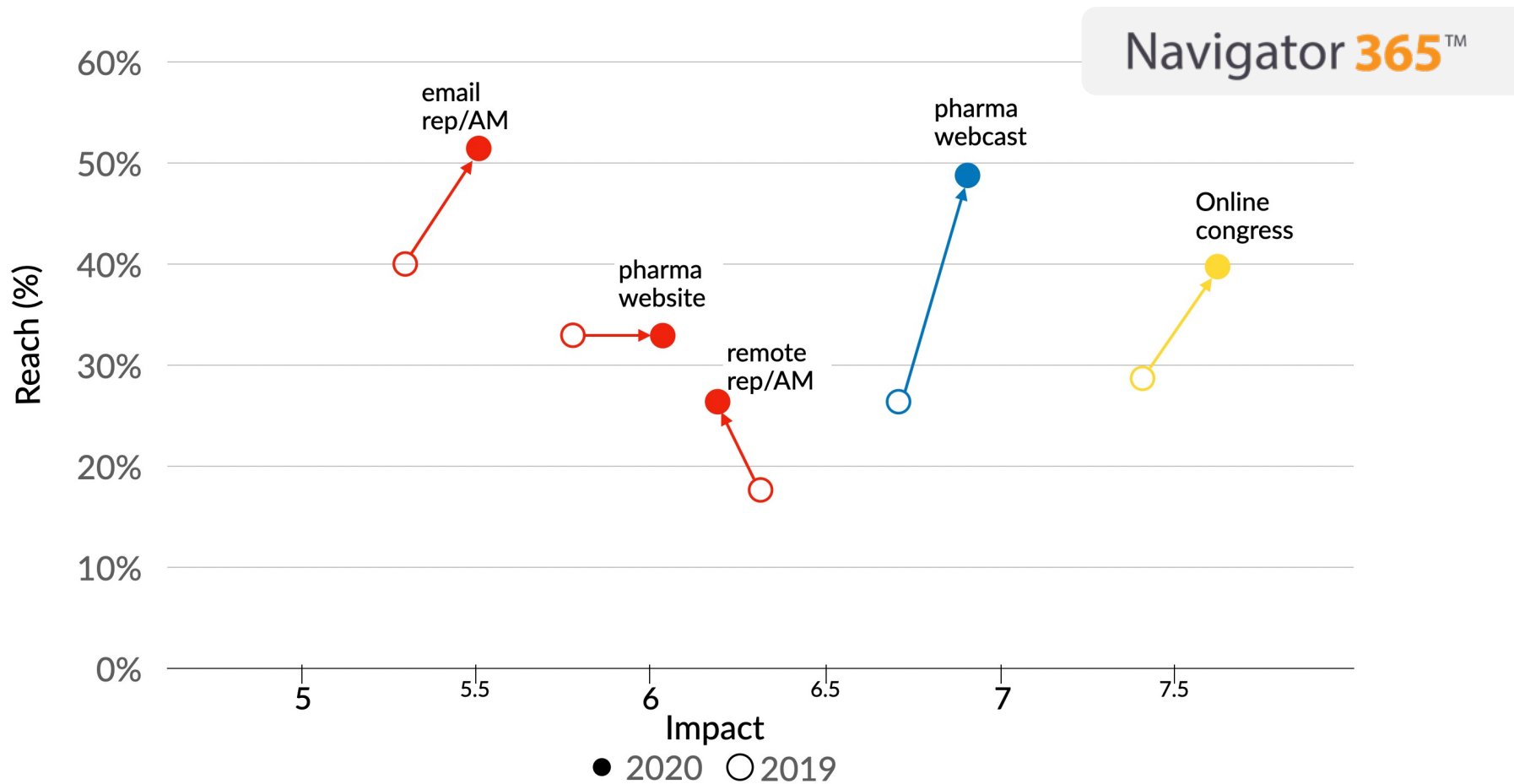
# Which results in a few channels that are planned to be used much more often in the (near) future

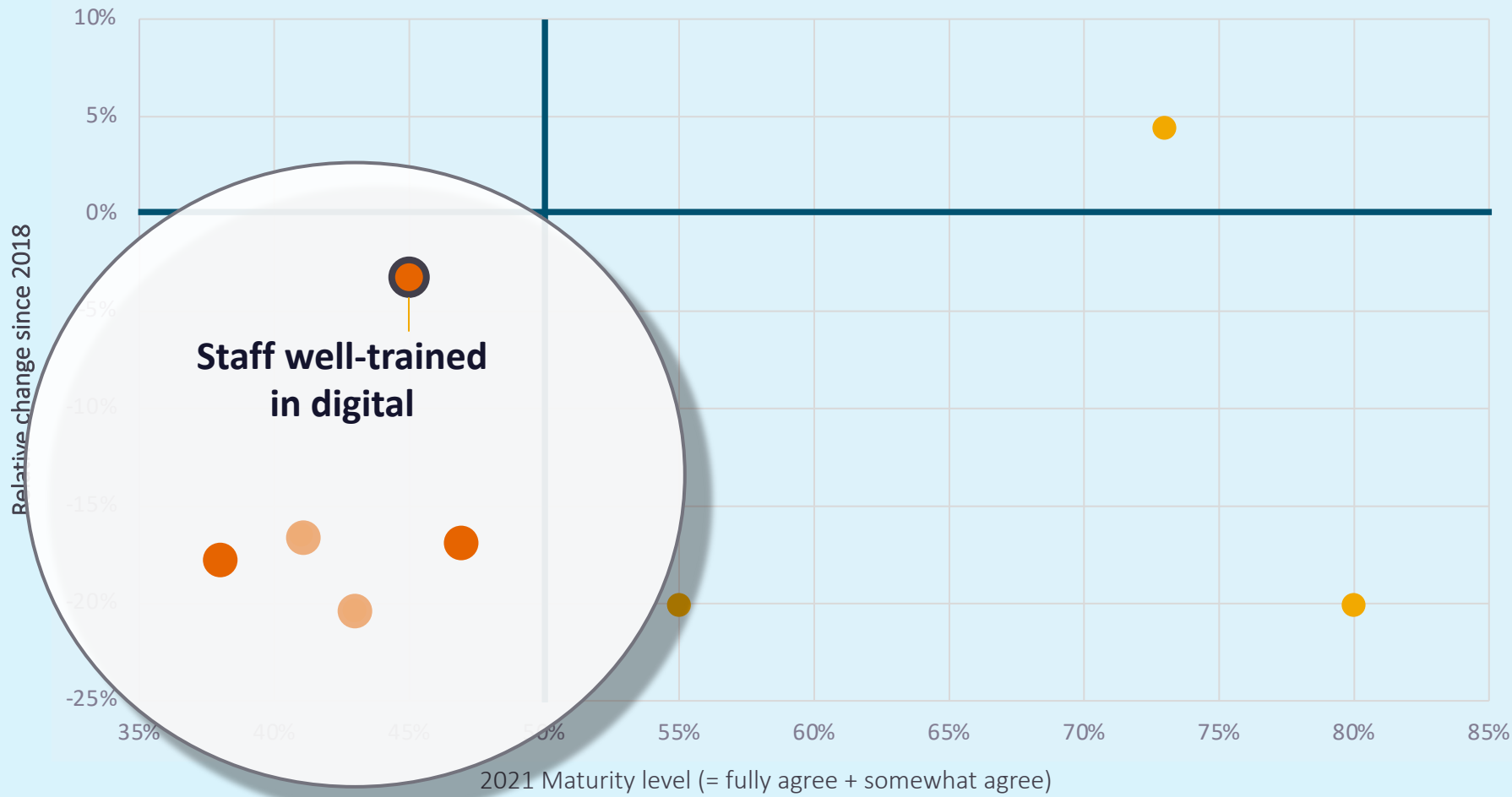
## Tactics the industry plans to use much more



\*% of respondents that indicates using the channel much more

# But does that resonate with what the HCP wants?



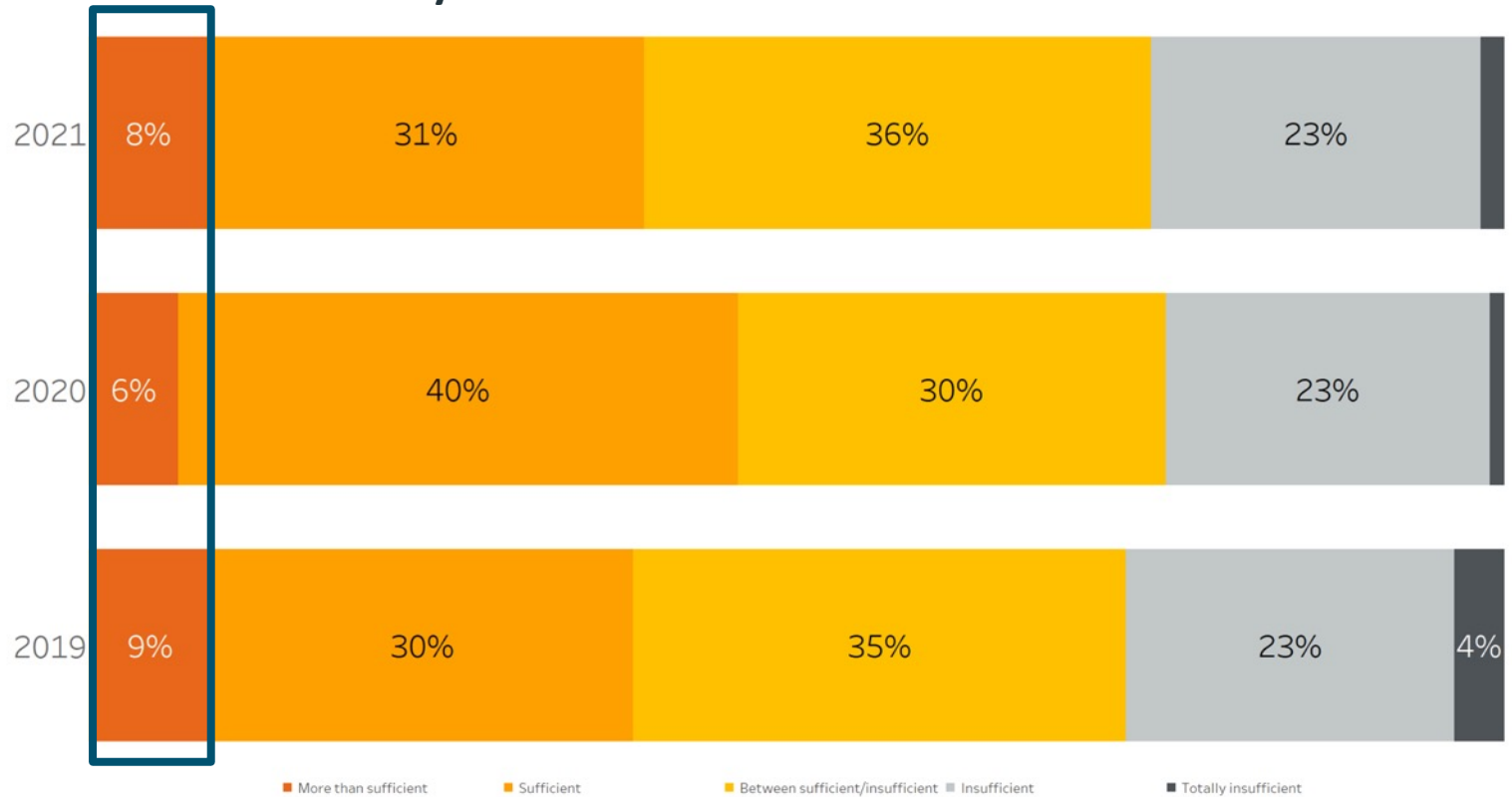


Capability building



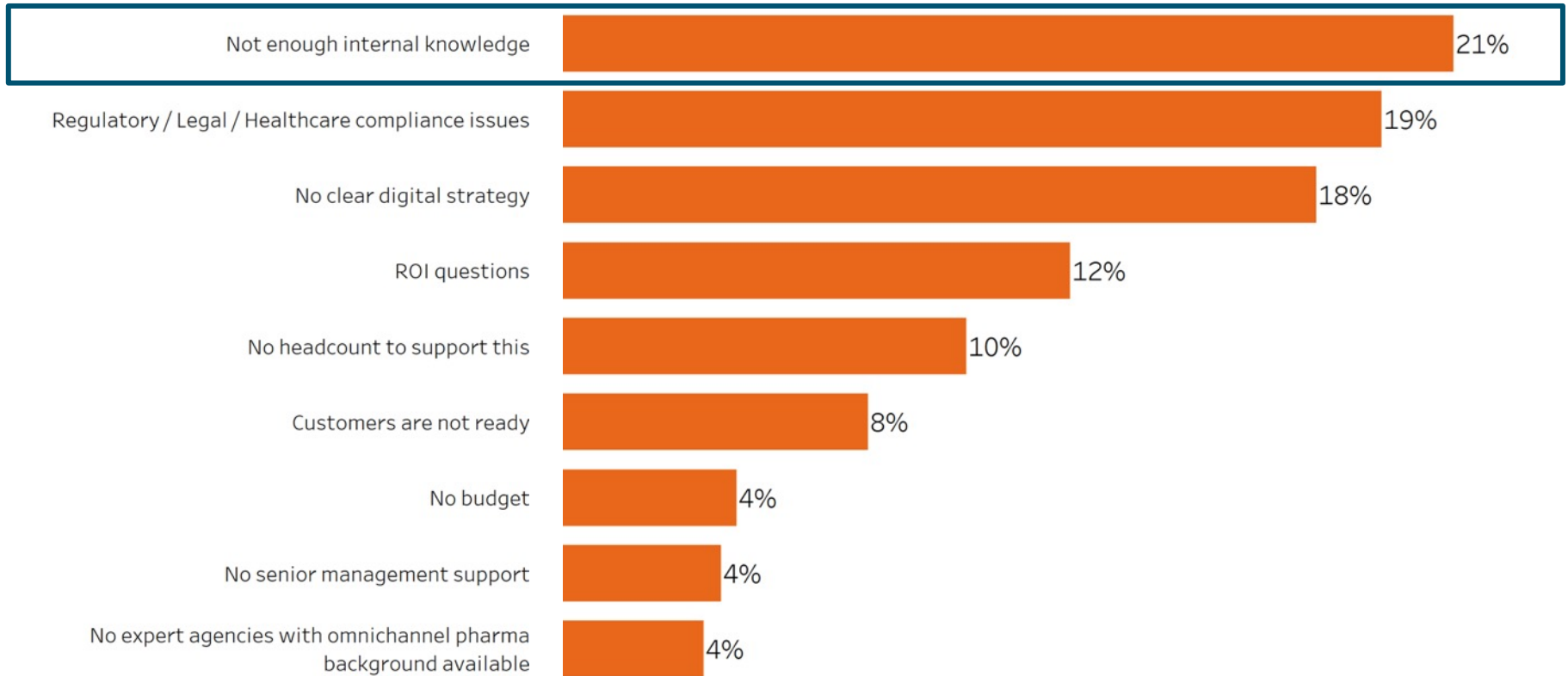
A lot of people became an expert on Covid in the past year – that doesn't seem to be the case for digital...

## Do you feel that you have sufficient knowledge of all opportunities offered by digital for your business activities?



With digital having a more prominent role, the pain of not having enough internal knowledge was felt

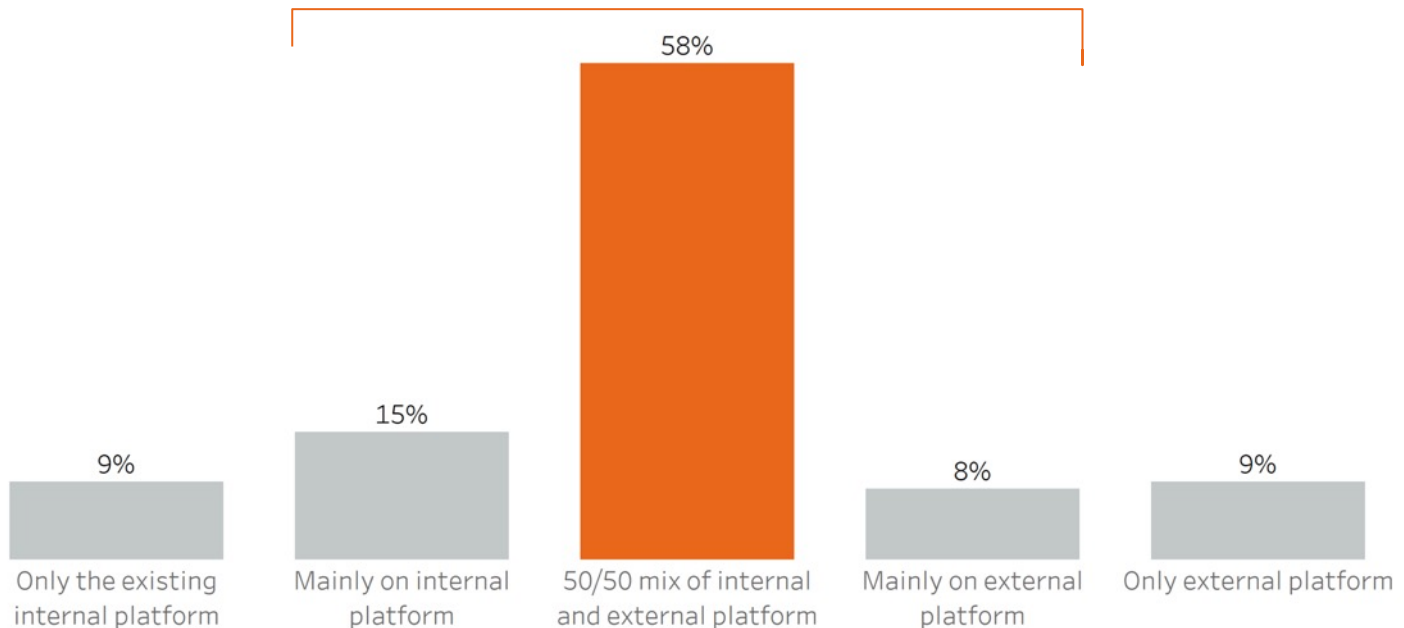
## Please allocate 100 points over these potential bottlenecks for digital in your organization



To close the knowledge gap, a mix of external and internal knowledge will need to be offered

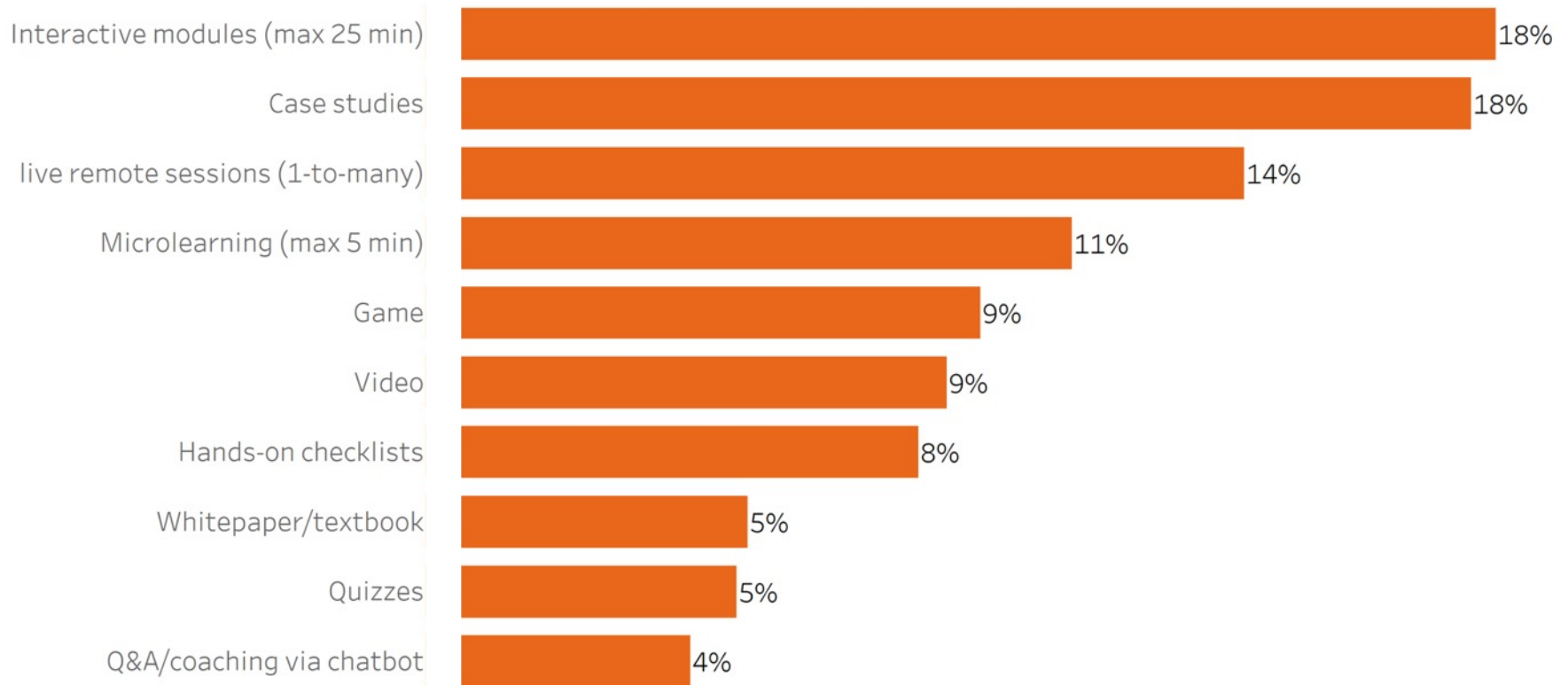
## On what type of platform would you like to see the omnichannel excellence training offerings?

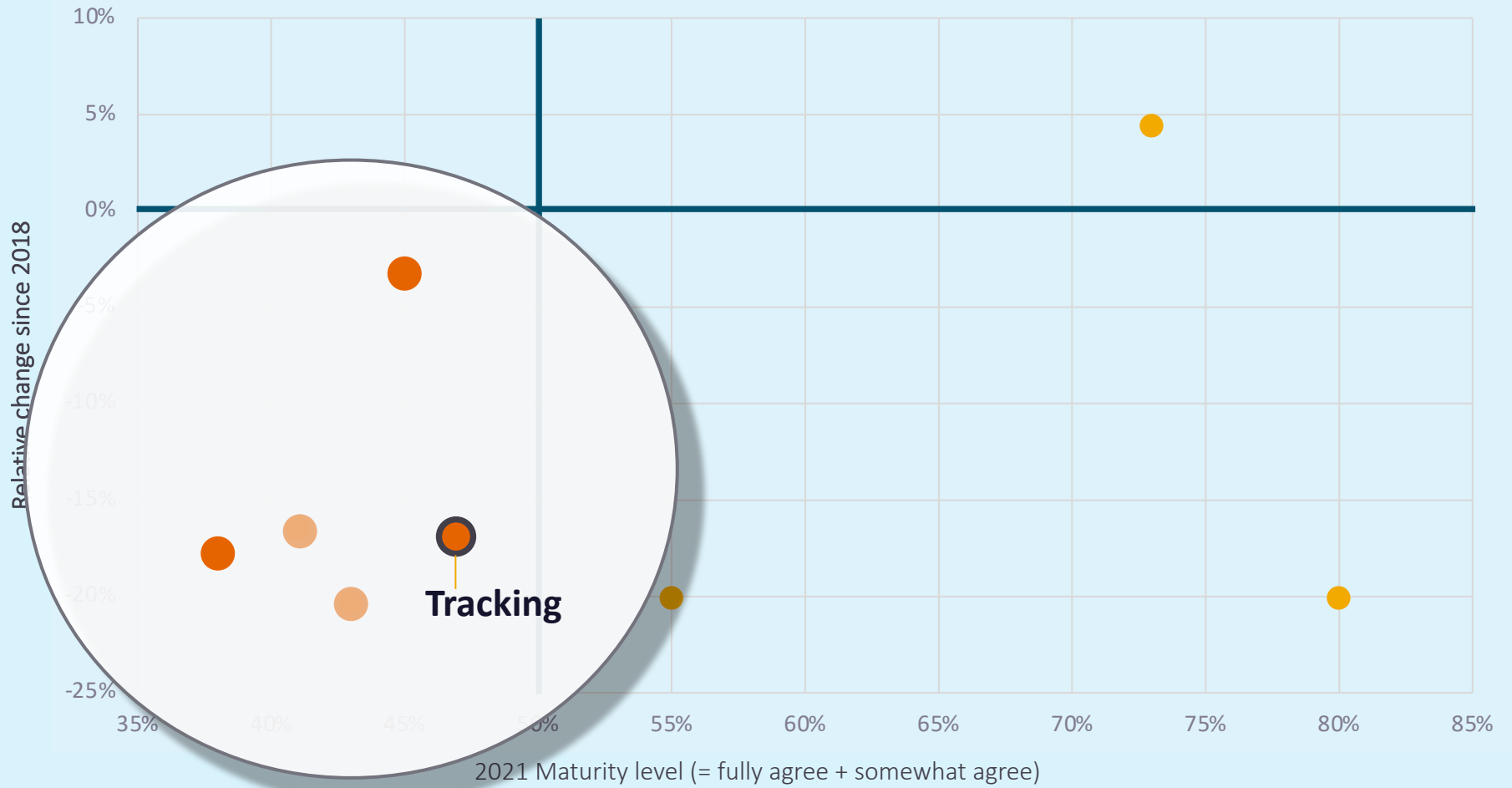
**82%** prefers to be trained via a mix of internal and external platforms



Learning at your own pace and being challenged, real life cases & the human touch is what's required to transfer knowledge in an online environment

### Which types of content would you prefer in an online environment?





Impact measurement

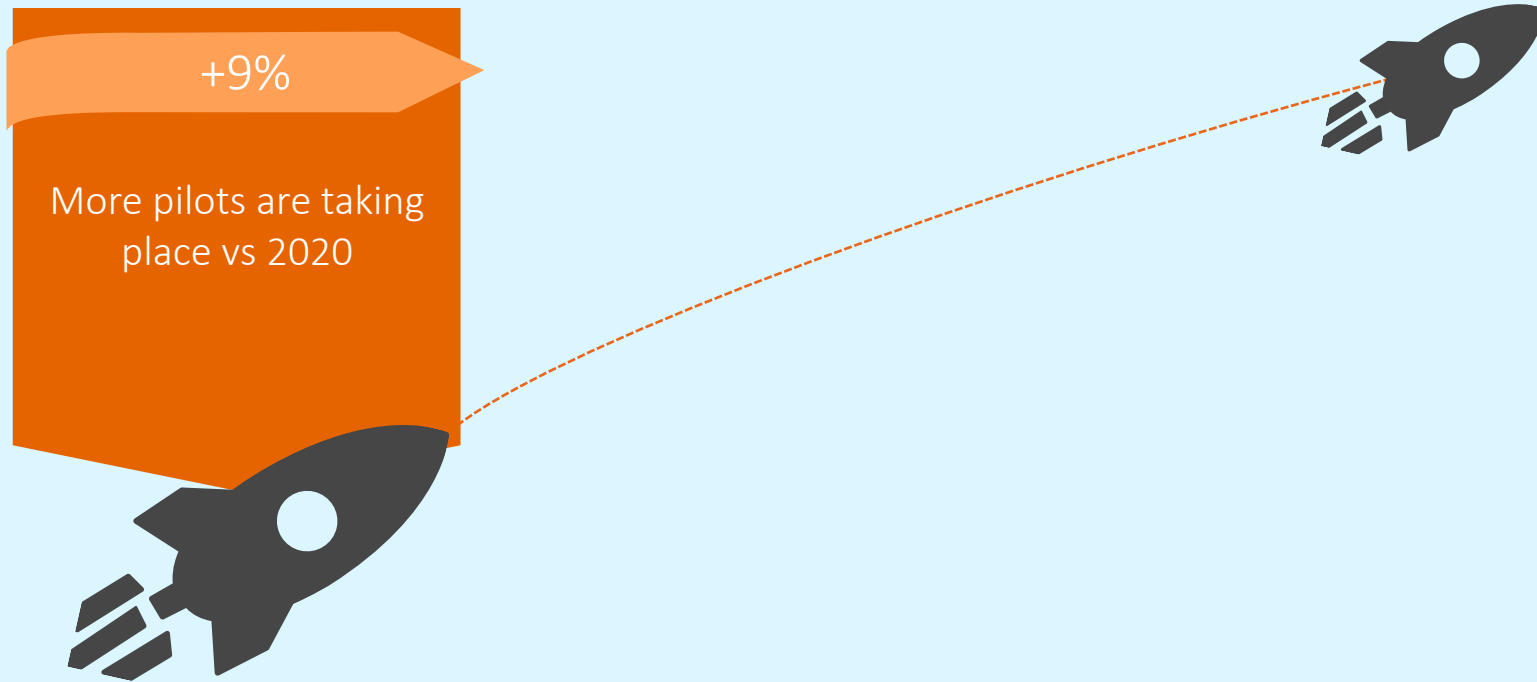
To keep the momentum high and learn-as-you-go, new go-to-market approaches and mixes need to be selectively piloted and tracked



# It's not about... ROI as in: Running On Instinct

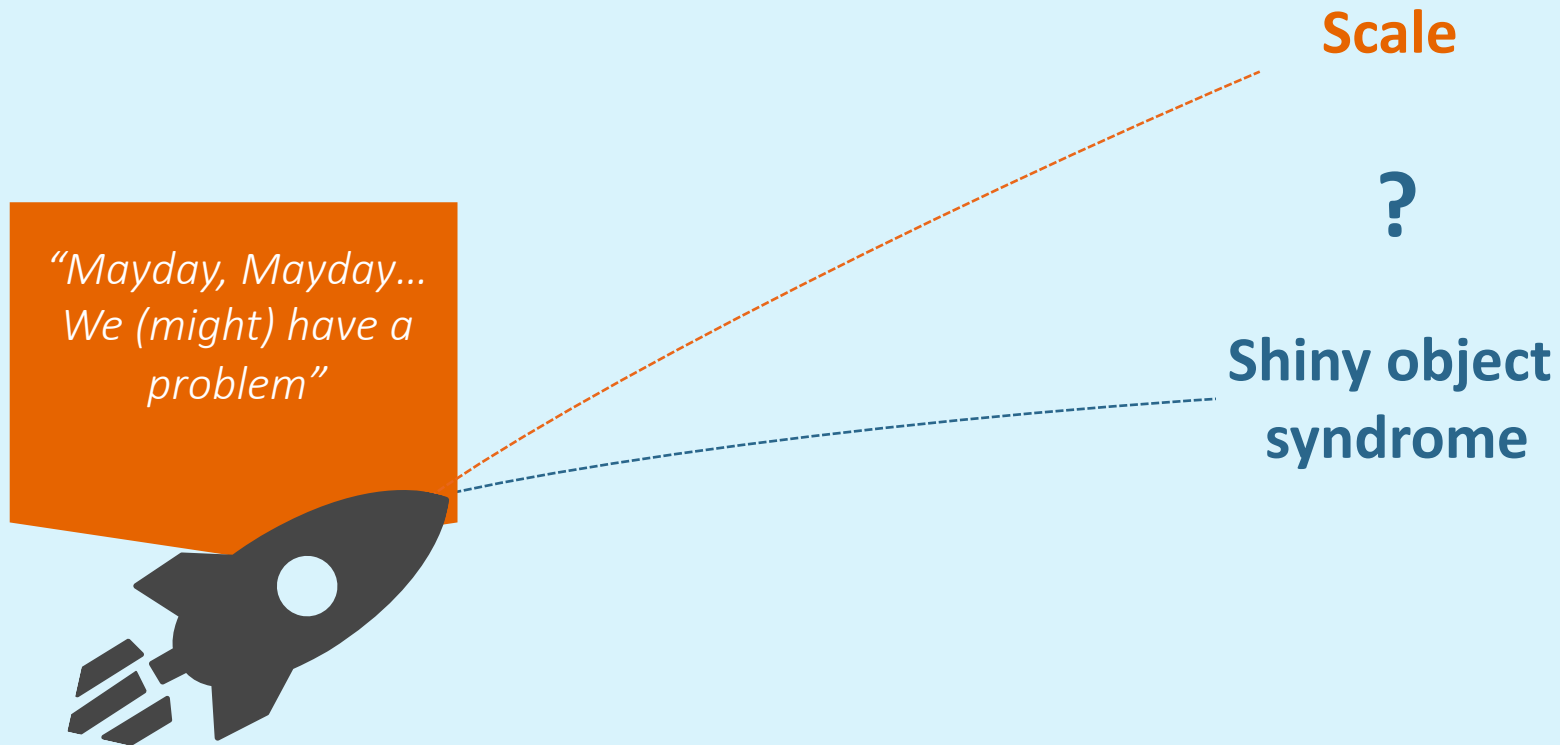


In line with higher budgets and a clear understanding the importance of digital in the overall mix, more pilots are being launched

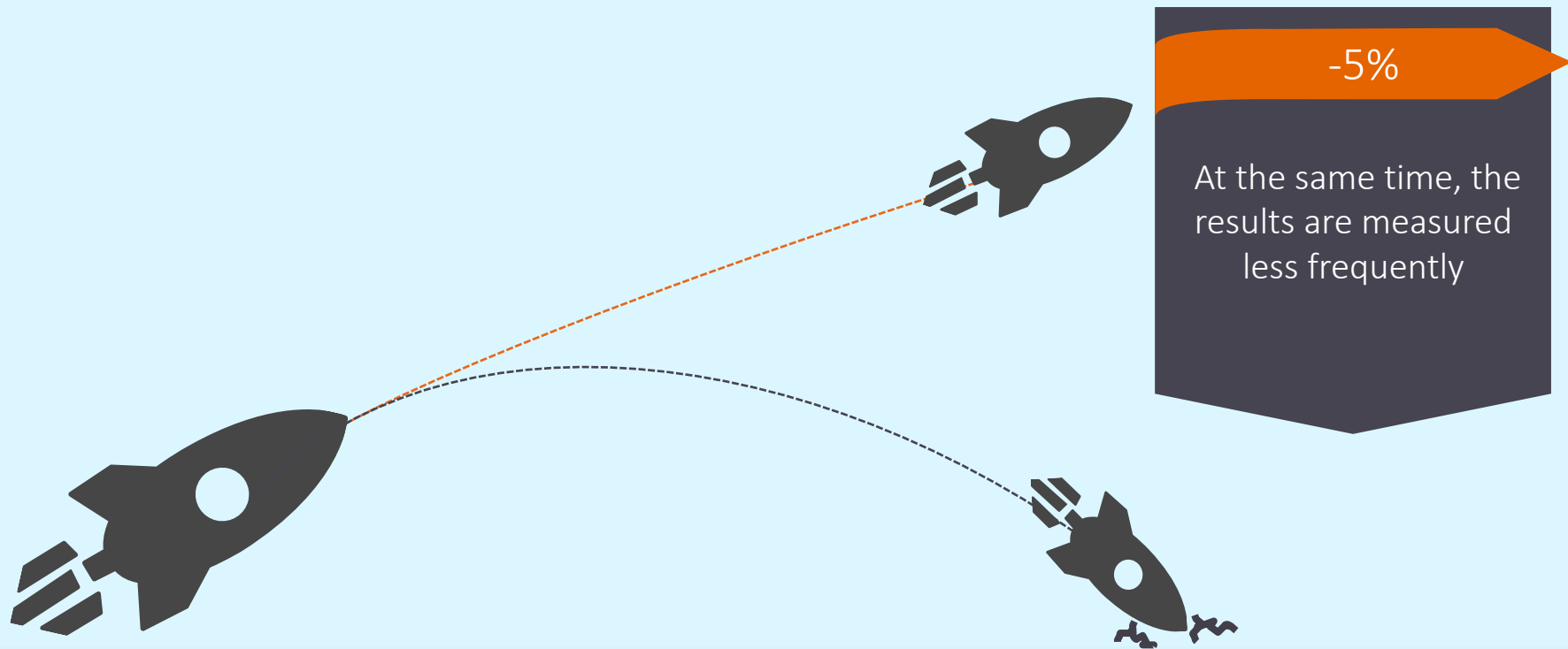




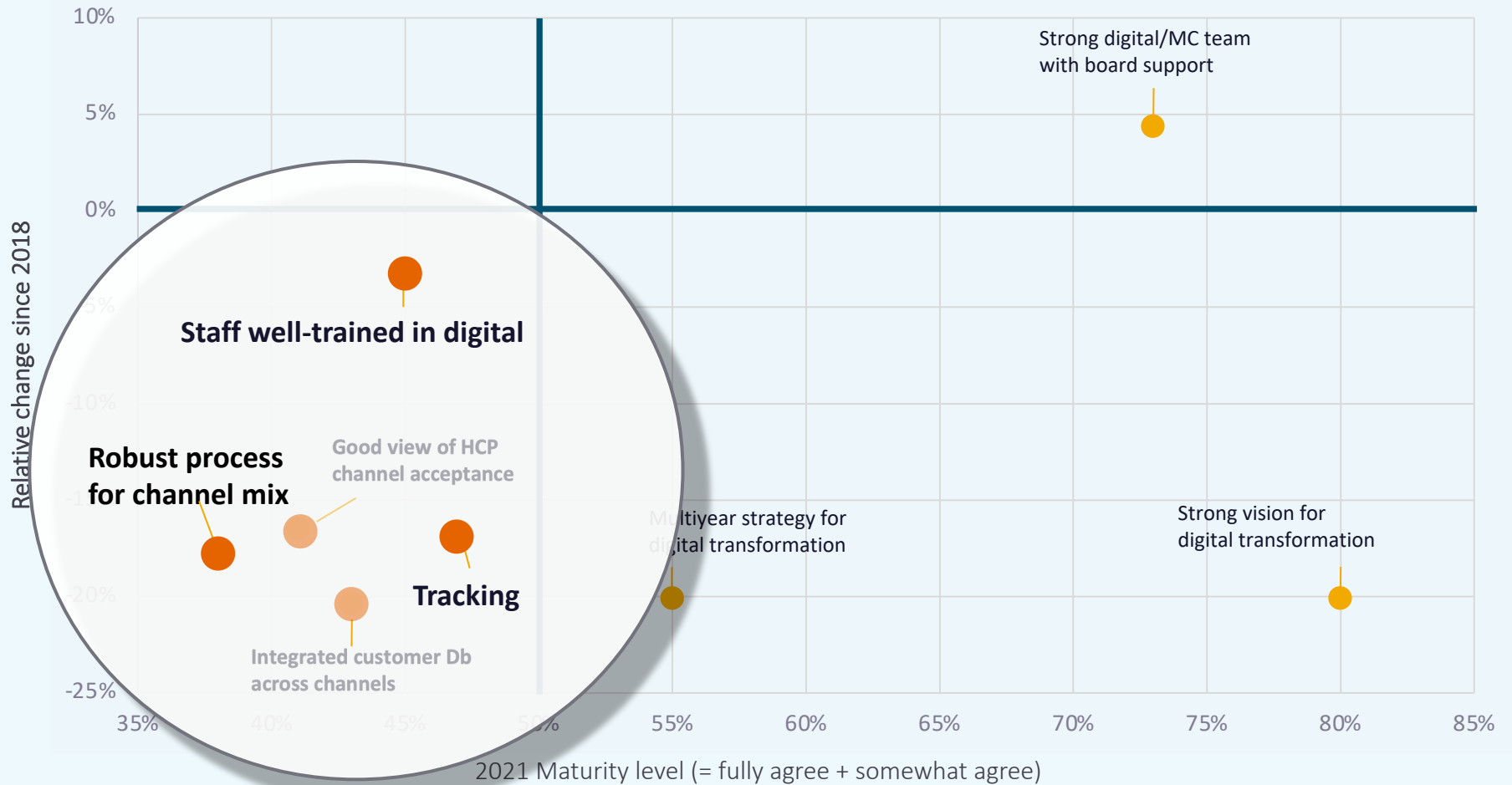
# Are pilots being launched for the right reasons?



These pilots are being tracked less frequently, making it hard to assess the impact for full rollout



# So the entire industry is struggling?





“

*“The future is already here –  
it is just unevenly distributed”*

*William Gibson, science fiction author*

## The future: wrap-up

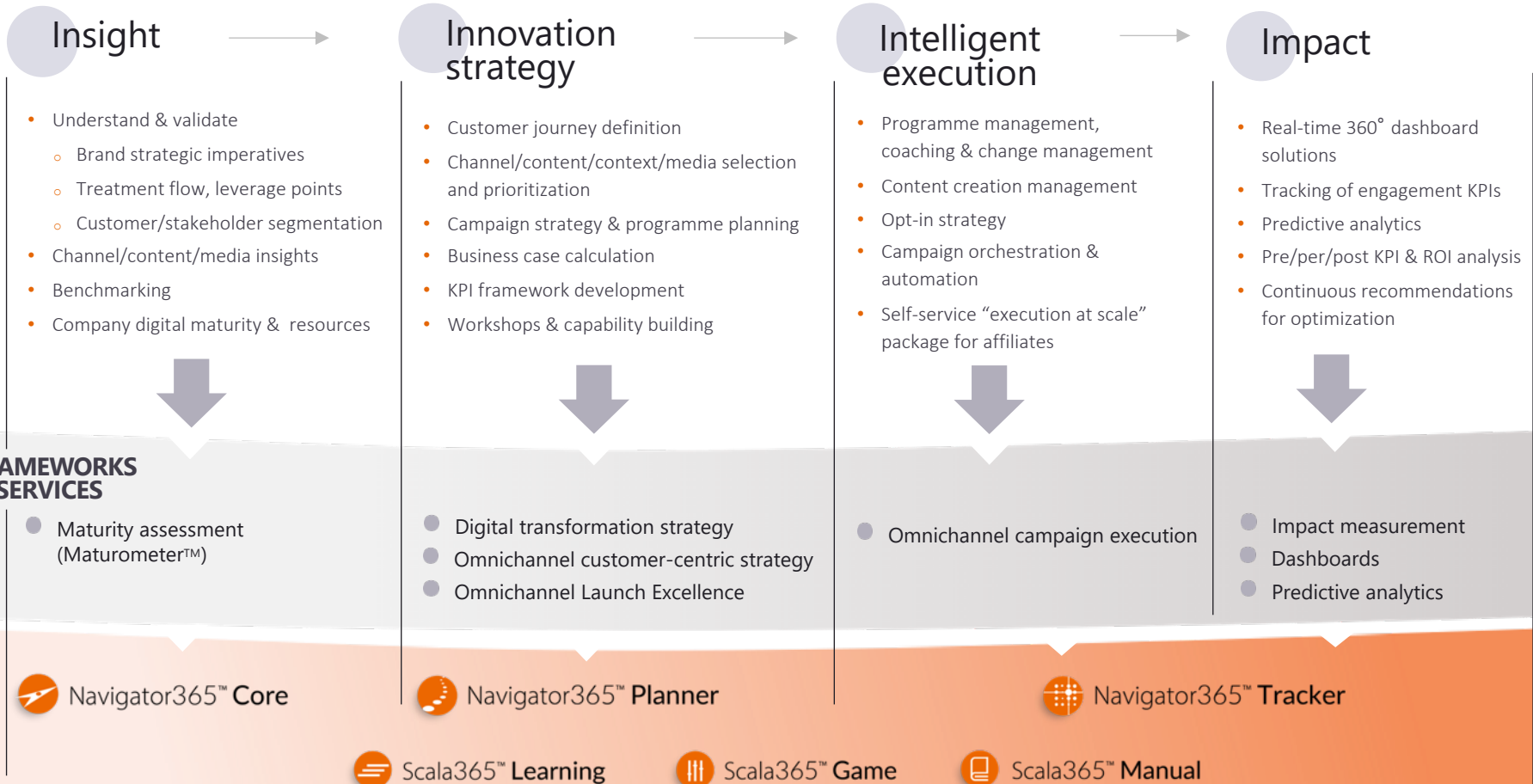
- Solid omnichannel engagement strategy
- Robust process for channel mix decision making
- Top-notch omnichannel staff
- Holistic success measurement approach



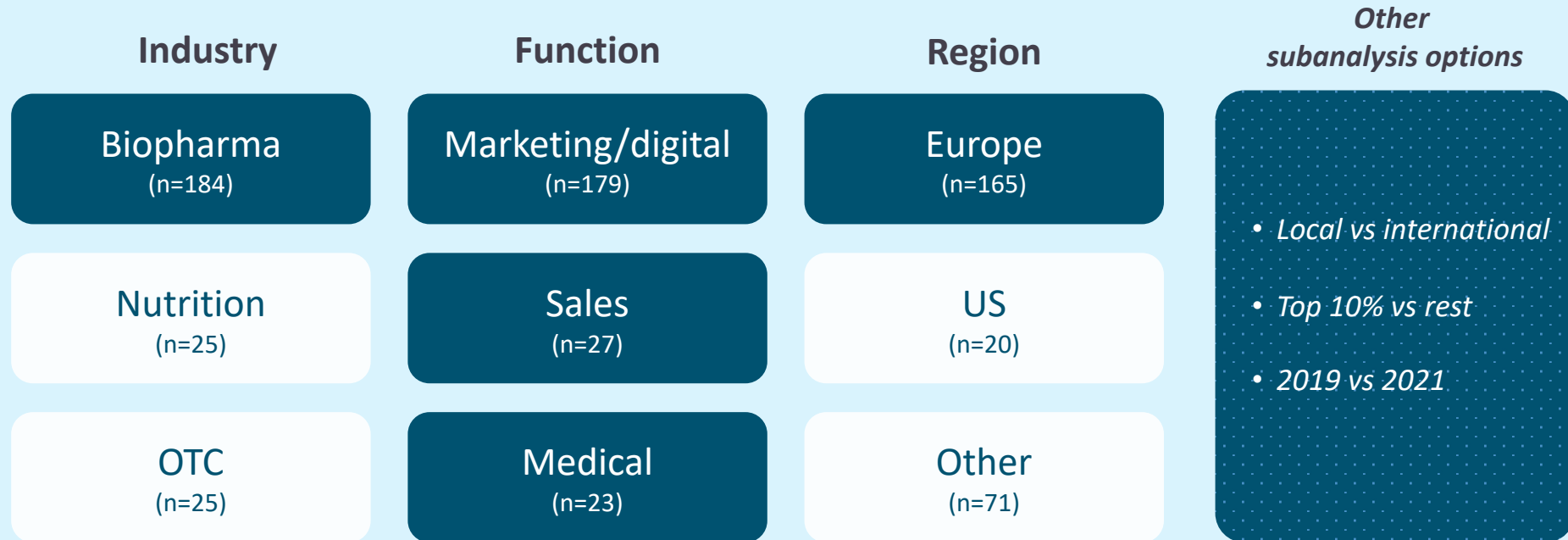
# Your partner for future OC success!



a precision value & health team



There is more...



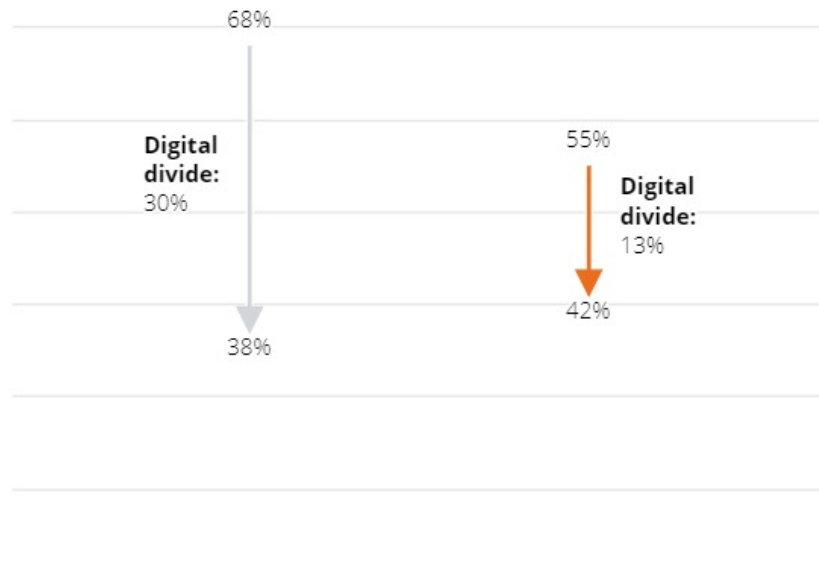
Reach out to [sander.geysen@a-cross.com](mailto:sander.geysen@a-cross.com) if you want to discuss another sample or want to run an internal version and benchmark vs the industry

Despite a larger digital divide for educational content, medical considers a digital component as less important than their promotional counterparts

Navigator 365™

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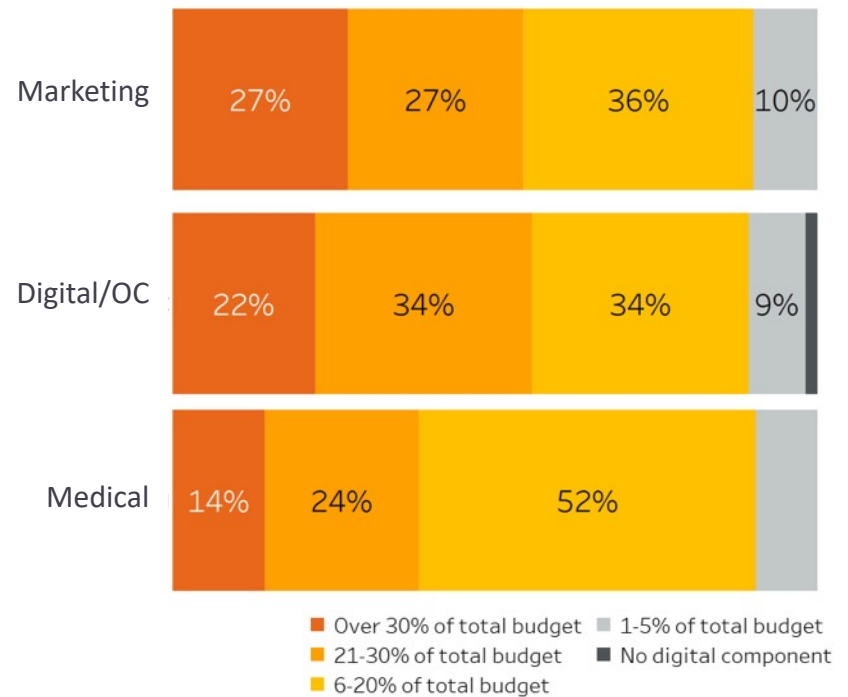
### The digital divide



Digital divide = (% preferring digital/mix) - (% epharma reach)

Source: Across Health Navigator365™ (2020-2021)

### How important is the digital component of your launch brands?





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Reimagine customer engagement



The webinar series

FEB to OCT 2021

1. *2019-2020: Blip or shift? Key trends in the HCP mix Feb. 25<sup>th</sup> 16h CET*
2. *The power of marketing & sales collaboration for Omnichannel engagement Mar. 25<sup>th</sup> 16h CET*
3. *Omnichannel upskilling: transforming customer-facing teams into OCE experts Apr. 20<sup>th</sup> 16h CET*
4. *Measuring ROI in life sciences? Not a black & white story May 11<sup>th</sup> 16h CET*
5. *Maturometer 2021 June 24<sup>th</sup> 16h CET*
6. **Navigator365 advanced uses** Sep. 16<sup>th</sup> 16h CET
7. **Omnichannel Launch Excellence in the Never Normal** Oct. 21<sup>st</sup> 16h CET

[www.across.health/2021-webinars](http://www.across.health/2021-webinars)



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FEB to OCT 2021

**Thank you!**

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