

Reimagine customer
engagement

 The webinar series

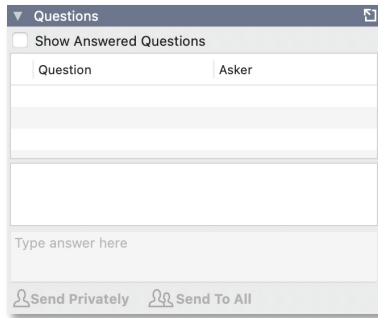
Omnichannel “myopia” in the post-Covid era: Importance of Cx benchmarking

Webinar #2 – THURSDAY 23/03



Ground rules

- This webinar will take around 40 minutes, followed by questions
- You can submit questions at any time via the “Questions” box



Question	Asker

Type answer here

- 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





“ *What a business needs most for its decisions – especially its strategic ones – are data about what goes on outside it. Only outside a business are there results, opportunities and threats* ”

Peter Drucker



Agenda

1

“Myopia” – Condition, causes, consequences

2

How the pandemic has driven the need for improved omnichannel Cx

3

Creating a burning platform for omnichannel Cx through periodic benchmarking

4

How robust benchmarking can support sound business planning: case study

The condition

“Myopia is a short-sighted and inward-looking approach to marketing that focuses on fulfilment of immediate needs of the company, such as sales, rather than focusing on customers’ point of view”

Theodore Levitt,
Marketing Myopia, Harvard Business Review, 1960



Causes/symptoms

The Self-Deceiving Cycle*

Not paying attention to how competitors are serving customers

Giving importance to just one aspect of the marketing/medical/sales attributes without focusing on what the customer actually wants

Focus on selling rather than building relationships

Not changing with dynamic customer environment (e.g. Covid)



Business =
a customer-satisfying
institution

and hence should be based
on customers' needs
and desires...

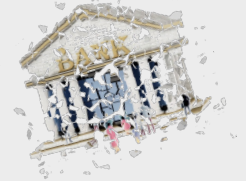
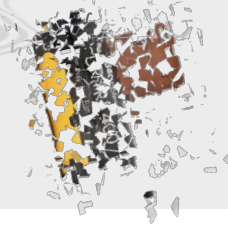
*Inspiration: Theodore Levitt, Harvard Business Review, 1960

Consequences...

Ignoring what is happening outside...



led to **disruption** in many businesses...



while creating sustainable competitive advantage for others.



Starting from evolving customer needs and solving through technology

The cure?



Poll

What would be your ultimate goal for omnichannel Cx benchmarking?

1. Actionable competitor & Cx insights
2. Improved omnichannel strategy
3. Improved Cx
4. Improved customer engagement KPIs
5. Improved sales/market share



How effective benchmarking leads to improved business outcomes



Agenda

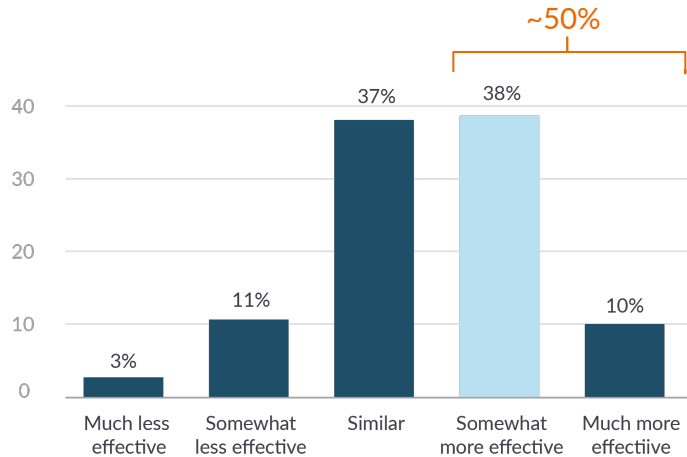
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- 2 How the pandemic has driven the need for improved omnichannel Cx
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- 4 How robust benchmarking can support sound business planning: case study

Above the surface it seems like the industry has made some improvements to meet changing customer needs...



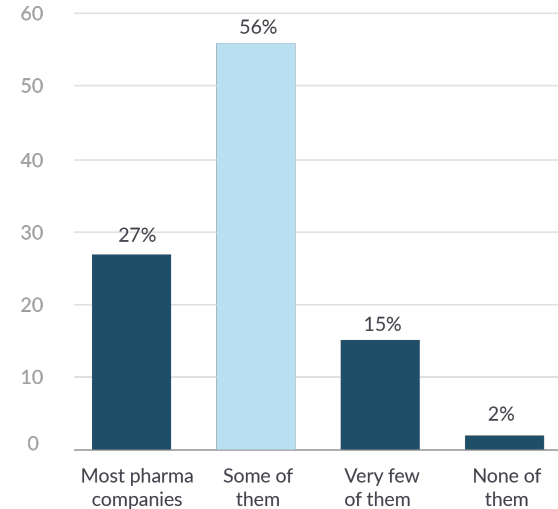
How much more effective are pharmaceutical companies currently, vs before Covid-19, at engaging with you seamlessly across online and offline channels?

Evolution of omnichannel Effectiveness



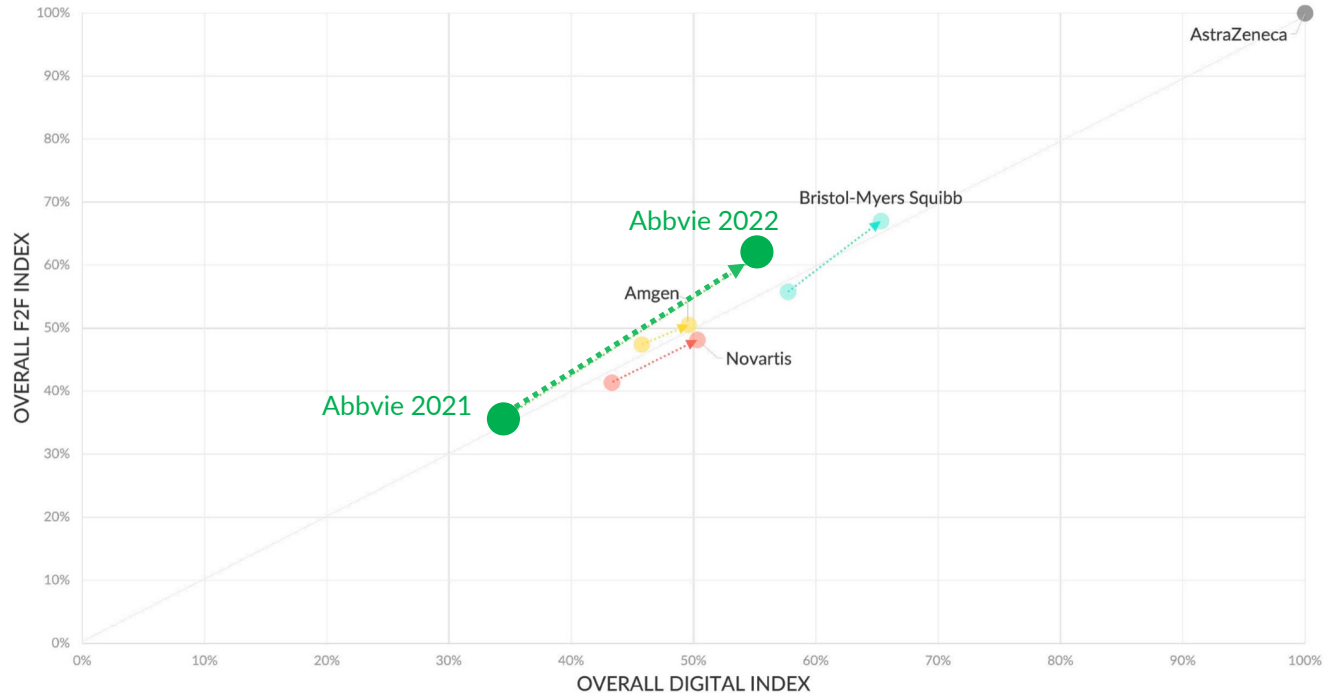
...but below the surface there could be strong differences

Relevant content from pharma



Two years of pandemic have resulted in significant digital investments by the industry overall but wide variability in effectiveness

EVOLUTION OF F2F AND DIGITAL EXCELLENCE - ONCOLOGISTS, GLOBAL, 2021-2022



F2F channels: rep, rep tablet, MSL, MSL tablet, offline scientific meetings; **digital channels:** remote rep, remote MSL, rep email, MSL email, pharma email, pharma website, webcasts, eMedical education, online conferences

Index = company's score divided by the leading score, therefore the leading company has an index of 100%

Source: Navigator365™ Core, oncologists, 2021 (n=1560), 2022 (n=907)

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Poll

What describes best how your company is approaching omnichannel Cx benchmarking ?

1. We only track omnichannel Cx KPIs internally
2. We have a clear view on competitor omnichannel Cx KPIs
3. We have a clear view on customer omnichannel Cx KPIs
4. We have a holistic view on all of the above
5. None of the above



Just focusing on internal effectiveness while ignoring customer perception and competitors might lead to a wrong strategic direction

CUSTOMER PERCEPTION

Capitalize on opportunities

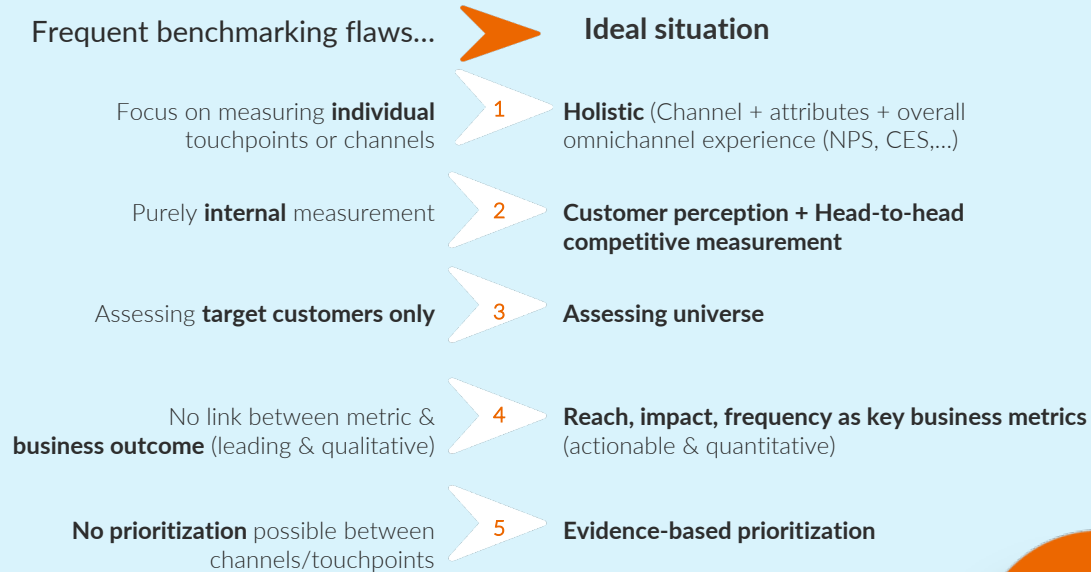
INTERNAL BENCHMARKING



COMPETITORS

Anticipate industry trends and stay ahead

Point metrics without actionability may lead to the wrong focus



Benchmarking pillars we typically consider for achieving OCE and improved Cx

Omnichannel Cx = “Right message, right channel, right frequency, right customer”

Customer relevance

- Content types
- What defines good content?

> 20 marketing, medical, sales & patient channels

- Right frequency
- Right time
- Personalization
 - Ease of access/use
 - Creativity

- NPS + drivers
 - Cx
 - CES
 - C-SAT
- Patient centricity



Navigator365™ Cx Benchmark

Benchmark your brand for OCE leadership

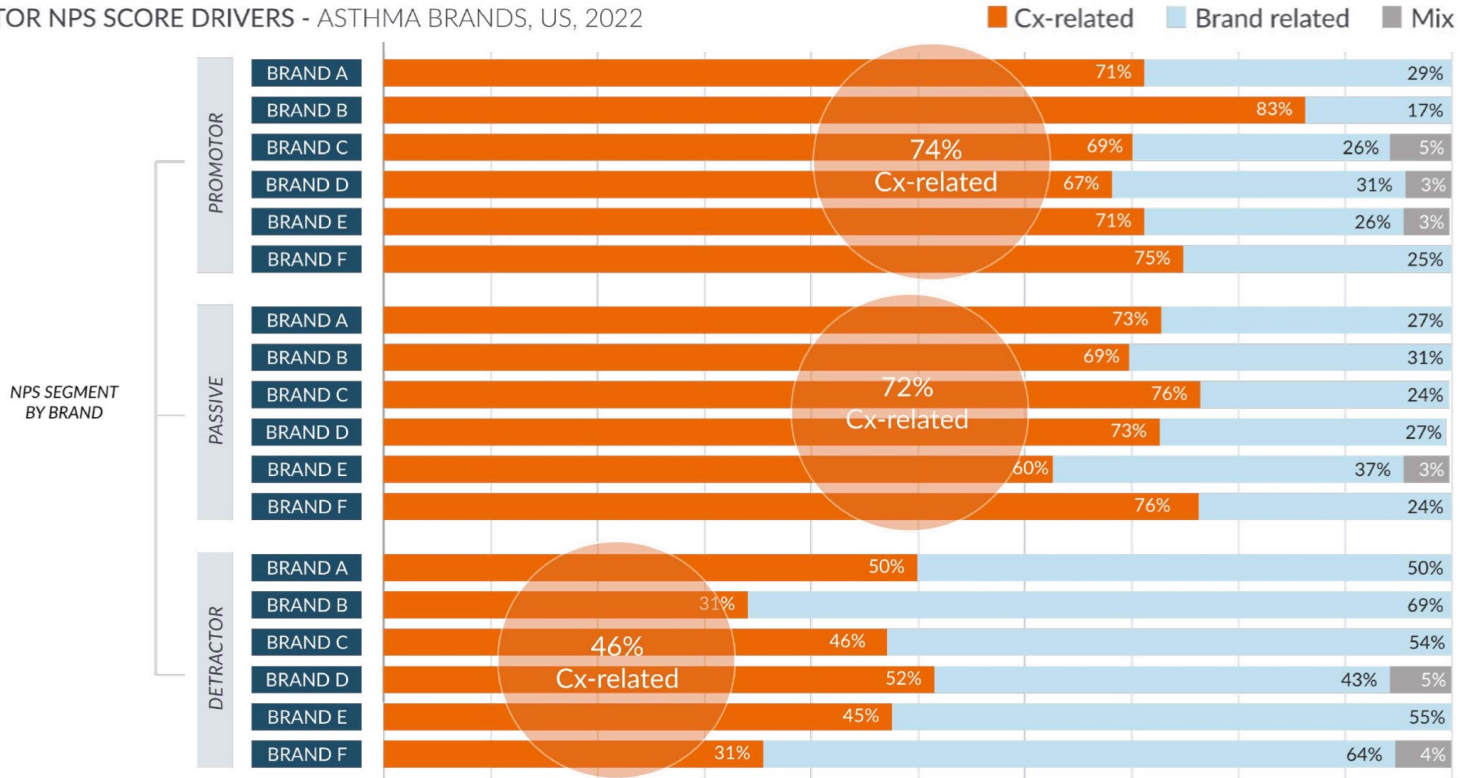
Brand perception

NPS=Net Promoter score
CES=Customer Effort score
C-SAT=Customer satisfaction

Why is it important to include Cx as part of overall brand benchmarking?

>70% is Cx-related for 'promoters' and 'passives'

PROMOTOR NPS SCORE DRIVERS - ASTHMA BRANDS, US, 2022



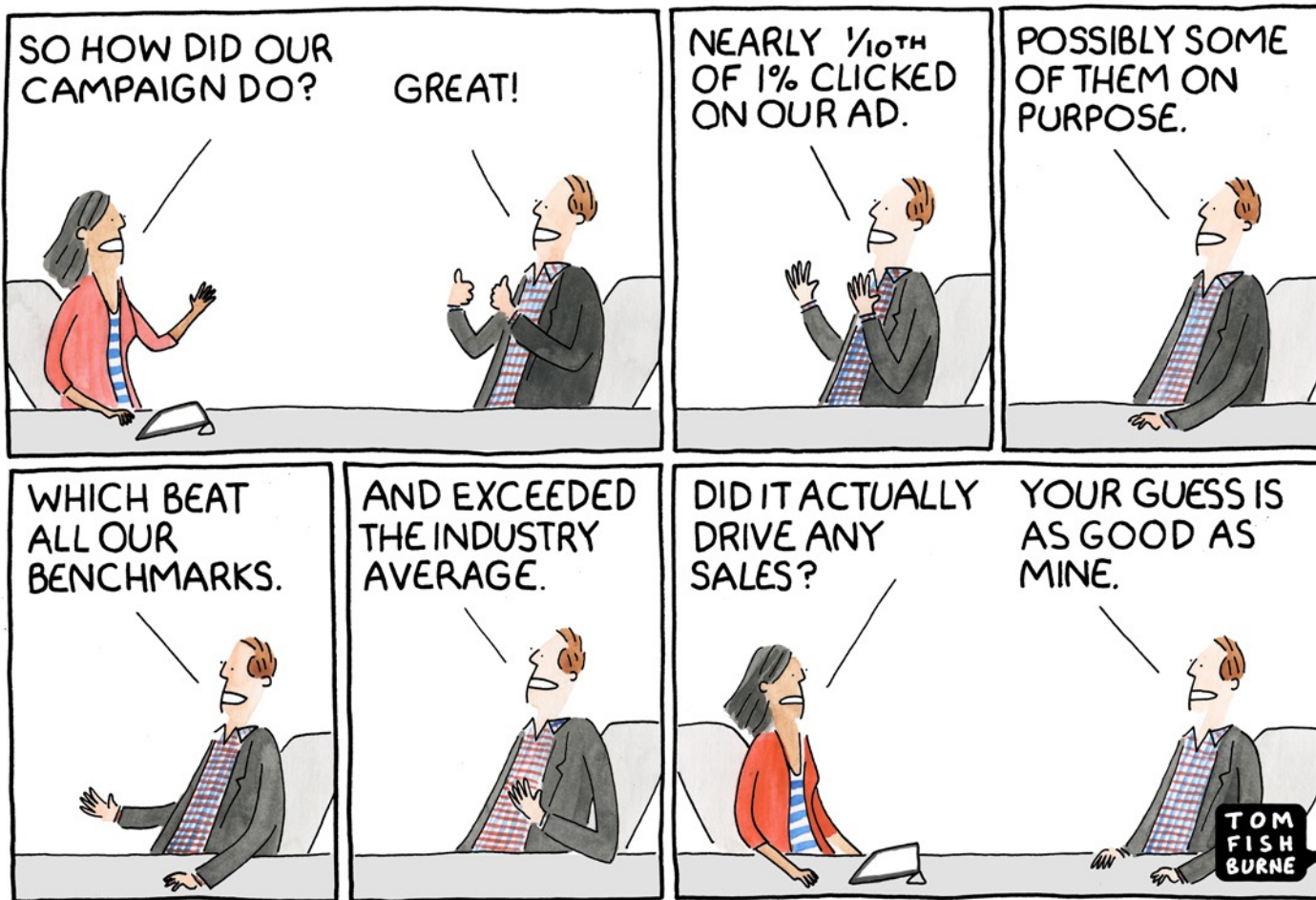
Source: Navigator365™ Cx Benchmark, 2022

Proprietary and confidential information

What drives an optimal Cx ?

	EU5	US	APAC	LATAM
Driver	n=1154	n=659	n=182	n=101
Fast response/feedback	1st	1st	1st	1st
Knowledgeable staff	2nd	3rd	2nd	3rd
Knows my professional interests	3rd	2nd	6th	2nd
Knows & respects my channel preference	4th	7th	4th	5th
Respects my time	5th	4th	5th	4th
I can get information & service through any channel	6th	6th	3rd	7th
Easy to contact/engage with	7th	5th	7th	6th

Source: Navigator365™ Cx Benchmark, all specialists, 2022



© marketoonist.com

Agenda

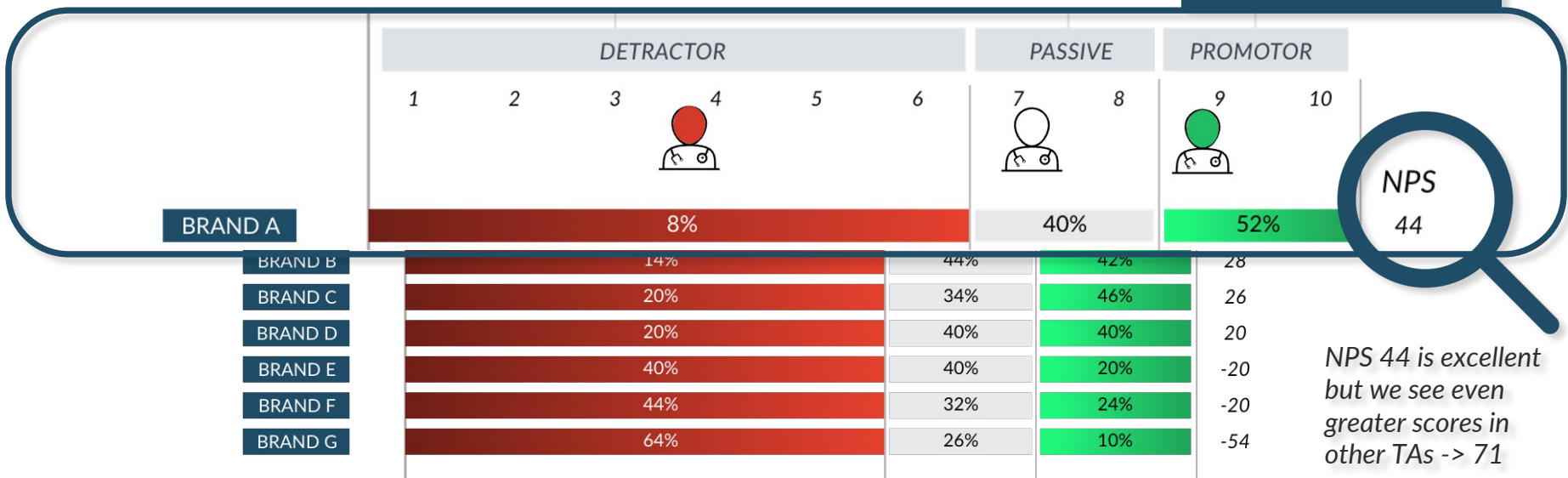
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Looking at the multiple sclerosis (MS) market in France

Highly competitive, with multiple players and huge variation in customer satisfaction

- Sample of 50 neurologists
- Half of whom prescribe at least 5 out of 7 of the drugs in scope
- All HCPs are treating MS patients

Brand A in a very leading position in the market



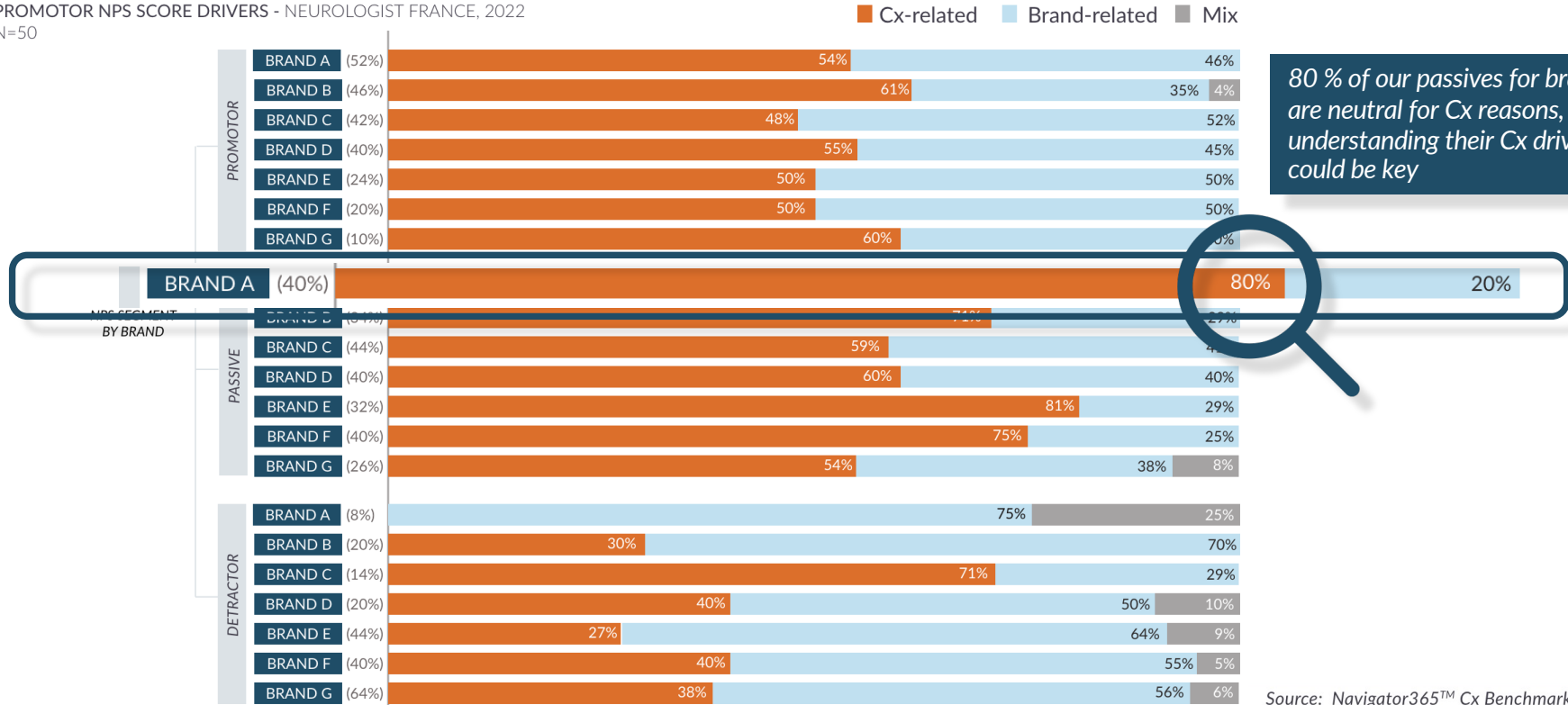
NPS 44 is excellent but we see even greater scores in other TAs -> 71

Source: Navigator365™ Cx Benchmark, 2022

The 50/50 split « Cx vs Brand drivers » for promoters is not surprising knowing product complexity in MS

Since promoters tend to prescribe significantly more than passives, moving from 'good' to 'great' experience could have a large business potential

PROMOTOR NPS SCORE DRIVERS - NEUROLOGIST FRANCE, 2022
N=50



80 % of our passives for brand A are neutral for Cx reasons, understanding their Cx drivers could be key

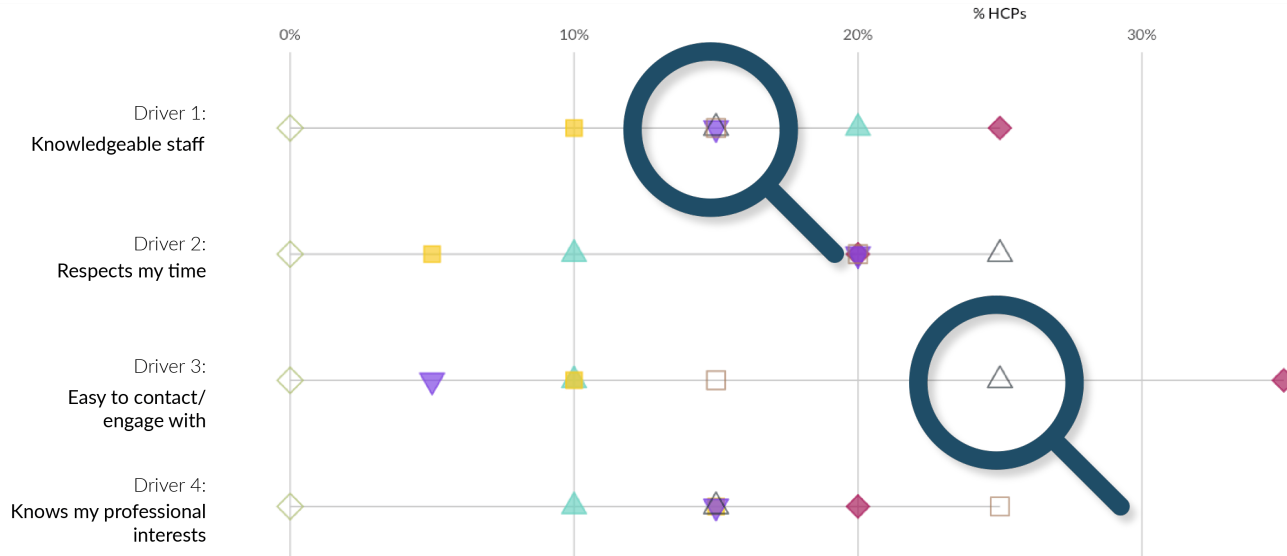
Source: Navigator365™ Cx Benchmark, 2022

« Knowledgeable staff » who « respects my time/is easy to engage with » is a must for a French neurologist

Same priorities for "passives" respondents of brand A

BRAND-LEVEL CX FEATURE PERFORMANCE – Brand A passives

△ Brand A ▼ Brand B ◆ Brand C ▲ Brand D ■ Brand E □ Brand F ◇ Brand G



Brand A must prioritize improving :

1. the perception of its staff's knowledge and expertise > ongoing training

2. The convenience of getting in touch regarding brand A

Right content, right channel: What are the key dimensions for MS products?

Real world evidence data is highly appreciated and the content needs to be actionable and concise – on top of bringing the relevant content, channels need to be personalized and easy to use



Top channel's attributes

1. **Content quality**
2. Personalized approach
3. Ease of use



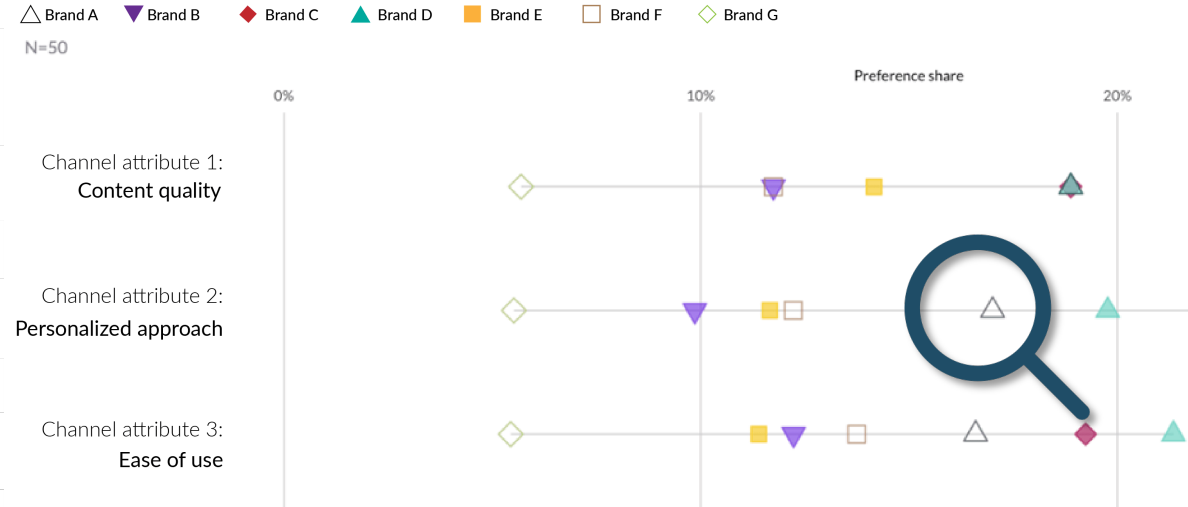
Top content's dimensions

1. **Real-world evidence**
2. Concise
3. Applicable/pragmatic

Source: Navigator365™ Cx Benchmark, 2022

Differentiation for brand A could be a personalized approach and facilitating user experience

BRAND-LEVEL CX FEATURE PERFORMANCE – NEUROLOGIST FRANCE



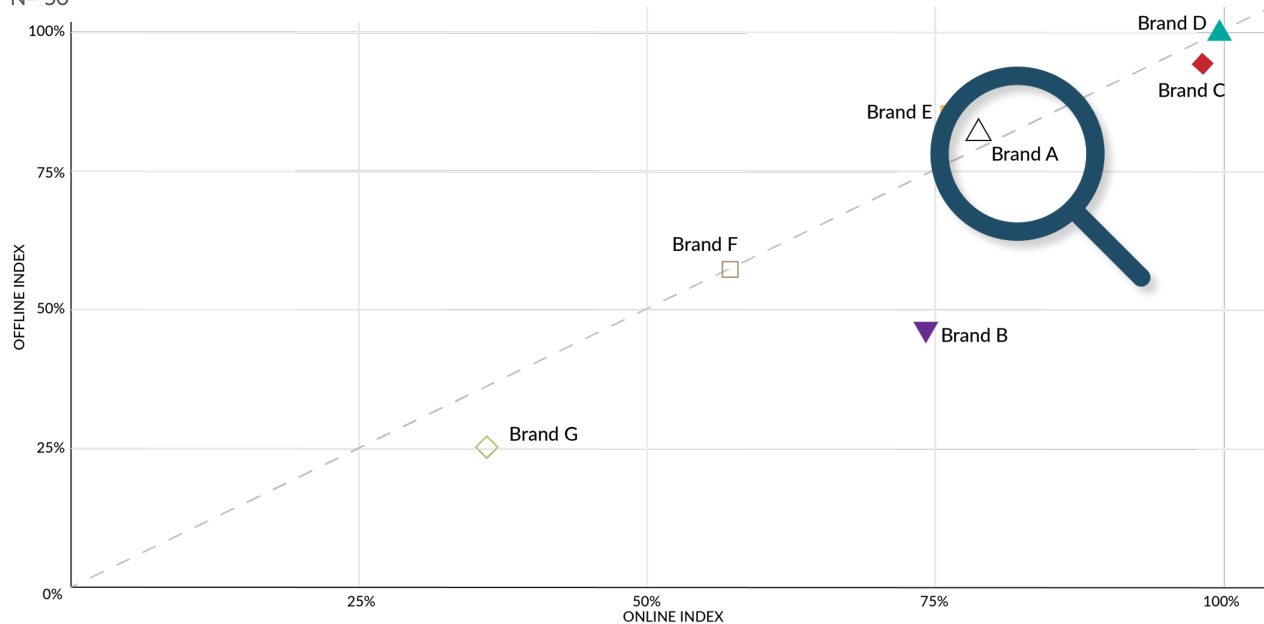
To bring personalized customer experience Brand A must keep investing in :

1. Segmentation that reflects customers' behavior, attitudes, preferences, and needs
2. Omnichannel engagement: consistent Cx and personalized regardless of the channel
3. Content optimization: taking into account what is valuable to each customer

Source: Navigator365™ Cx Benchmark, 2022

Brands C and D are leading in overall omnichannel impact across marketing/medical & sales channels

OCE LEADERSHIP – NEUROLOGIST FRANCE
N= 50



Brand A in 3rd position with a well balanced position in offline and online performance

Offline Index = Average performance score of a brand across offline channels (rep/AM F2F visit, local scientific meeting, MSL F2F visit, patient support programme, journal ad) divided by the top average brand score for offline channels.

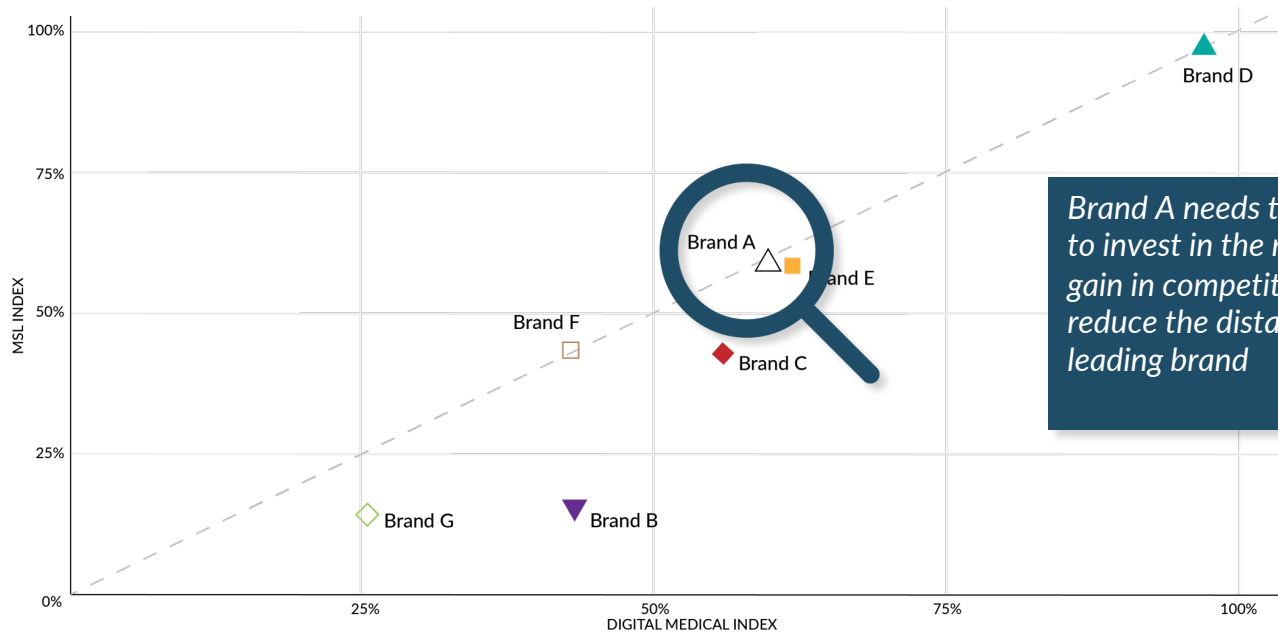
Online Index = Average performance score of a brand across online channels (eDetail, email rep/AM, pharma eNewsletter, pharma website (physicians), pharma website (patients), remote rep/AM, social media (physicians), email MSL, eMedical education, social media (patients), pharma app, pharma webcast, remote MSL, banners, pharma content on 3rd party, search engine) divided by the top average brand score for online channels.

Source: Navigator365™ Cx Benchmark, 2022

Zooming in on « medical channels » shows a total different picture

Brand D is, by far, leading medical activities both offline and online

MEDICAL DIGITAL VS. F2F - NEUROLOGIST FRANCE
N= 50



Brand A needs to identify where to invest in the medical mix to gain in competitiveness and reduce the distance vs the leading brand

MSL Index = Performance score of a brand divided by the top brand performance score for F2F MSL visit.

Digital Medical Index = Average performance score of a brand across digital medical channels (email MSL, remote MSL, pharma webcast, eMedical education, pharma app) divided by the top average brand score for digital medical channels.

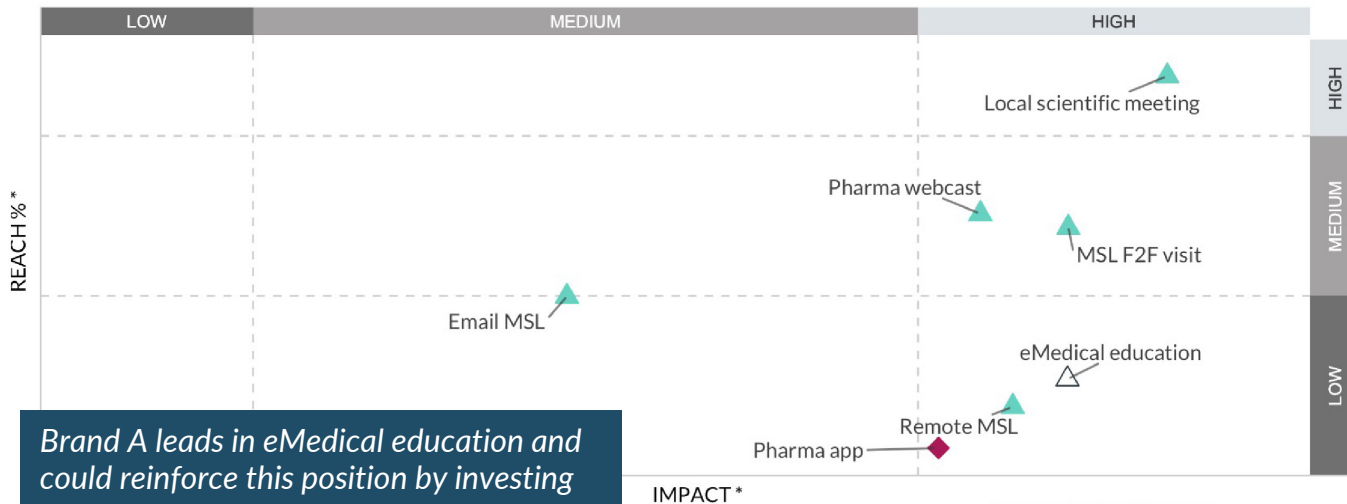
Source: Navigator365™ Cx Benchmark, 2022

Importance to invest in relevant medical channels to reinforce the position for brand A

CHANNEL PRIORITIZATION MAP OVERVIEW (MEDICAL) – NEUROLOGIST FRANCE

△ Brand A ▼ Brand B ◆ Brand C ▲ Brand D ■ Brand E □ Brand F ◇ Brand G

N=50



Brand A leads in eMedical education and could reinforce this position by investing in F2F activities (MSLs and local meetings) while providing online alternatives through webcast programmes

LEADING BRAND PER CHANNEL

Email MSL	Brand D
eMedical education	Brand A
Local scientific meeting	Brand D
MSL F2F visit	Brand D
Pharma app	Brand C
Pharma webcast	Brand D
Remote MSL	Brand D

*BUCKETING FOR REACH & IMPACT
 low: <45% of top medical channel reach/impact score
 medium: 45%-85% of top medical channel reach/impact score
 high: >85% of top medical channel reach/impact score

Source: Navigator365™ Cx Benchmark, 2022

Key takeaways

Relying on quantitative metrics even when benchmarked is not enough to assess your competitive position

Measuring the overall CX is essential to :

Identify areas for improvement



On which Cx driver, channel or content dimensions

Prioritize investments



Where to focus on the omnichannel mix, where to have the best impact

Set target and goals and track progress:



Consistent metrics over the time to track omnichannel Cx at local, regional and global level and leverage best practices

Stay ahead of the competition



Identify quickly where they are outperforming

Increase customer loyalty and engagement



Ready to benchmark your brand for omnichannel Cx leadership?

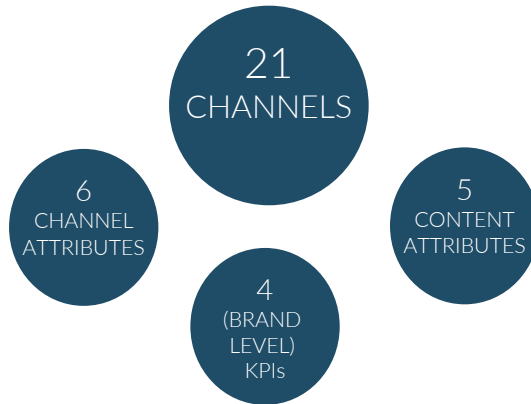


Navigator365™ Cx Benchmark

Benchmark your brand for OCE leadership



across.health/benchmark



Improve your brand's omnichannel leadership & customer experience versus your direct competitors

70 Navigator Cx benchmark reports in 18 different therapy areas were recently fielded



Navigator365™ Cx Benchmark

INDICATIONS

- ACUTE LEUKEMIA
- ASTHMA
- BIRTH CONTROL & MENOPAUSAL HORMONE THERAPY
- BREAST CANCER
- CF
- CHOLESTEROL
- CHRONIC LEUKEMIA
- COPD
- HEART FAILURE
- LUNG CANCER
- LUPUS
- MS
- OVARIAN CANCER
- PROSTATE CANCER
- PSORIASIS
- RENAL
- RHEUMATOID ARTHRITIS
- SMA

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to check
if your brand
is covered

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From global to local
TUESDAY, JUN. 13TH 16H CET
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What's the industry up to (Maturometer™ 2023)?
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