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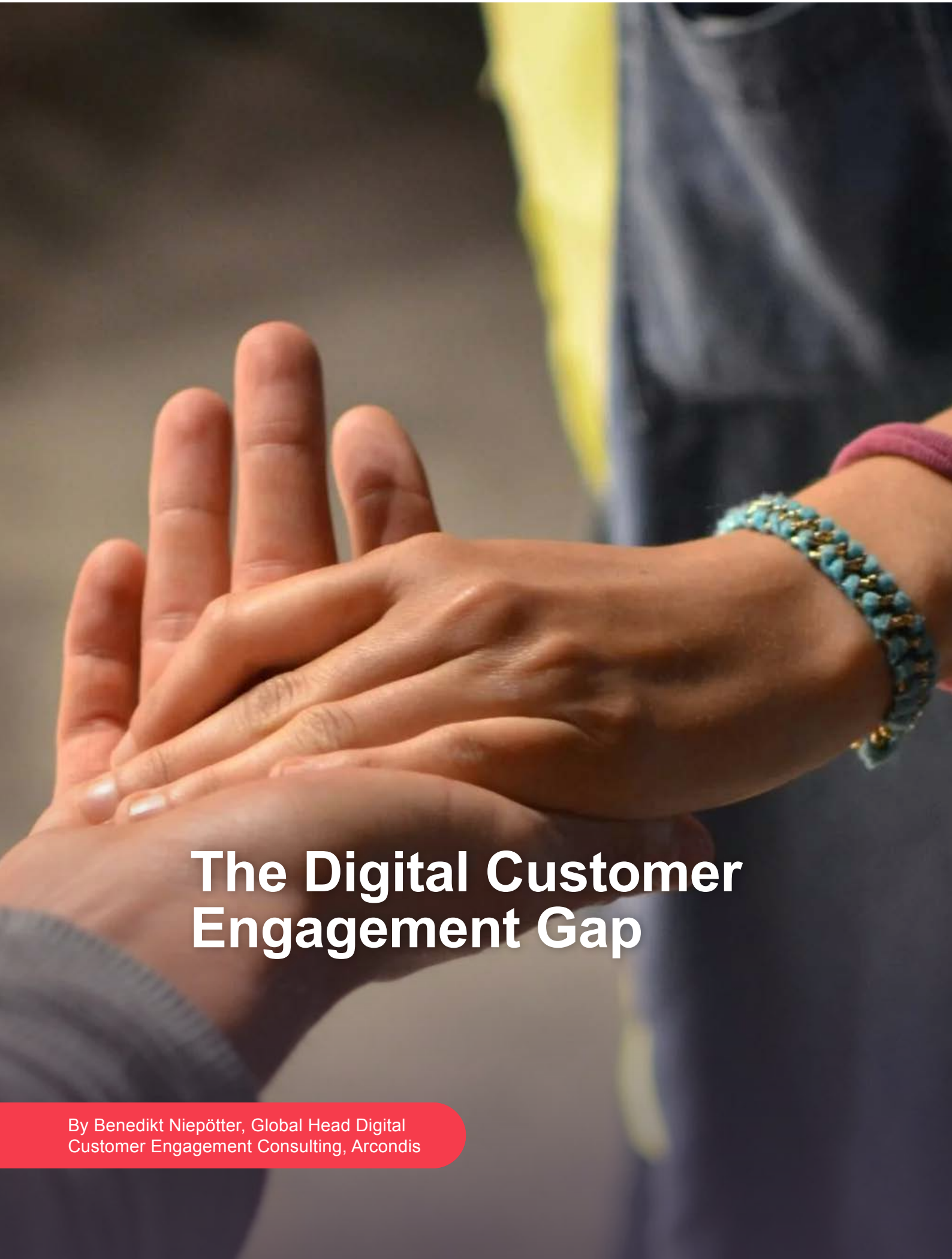


The Digital Customer Engagement Gap

By Benedikt Niepötter, Global Head Digital Customer Engagement Consulting, Arcondis

Alaska Airlines, online ticket sales pioneer

In December 1995, Alaska Airlines sold the first ticket online. By 1998, almost all other carriers were selling tickets online, with 42% of tickets booked online by 2005. Today, 90% of bookings are made online and the digital service has expanded to include experiences spanning the full travel experience.

Building a digital society with e-Estonia

In 2000, an online service was provided as an alternative to paper-based tax filing in Estonia. Today, the country is one of the most advanced e-societies in the world, allowing its taxpayers to login online, review a prefilled tax form, change and approve it within minutes. The system is a tremendous success and 97% of all tax declarations in Estonia are managed using this service.

Towards a one-stop healthcare ecosystem platform

Digital services in the healthcare insurance area are rapidly evolving. Companies such as Ping An in China and Oscar in the US offer online access to all documents and invoice scanning with a smartphone. Recently, their digital platform can also connect patients, doctors and pharmacists online, while incorporating AI for around-the-clock medical prescriptions.

Mature digital services for Healthcare Professionals – what's in it for Pharma?

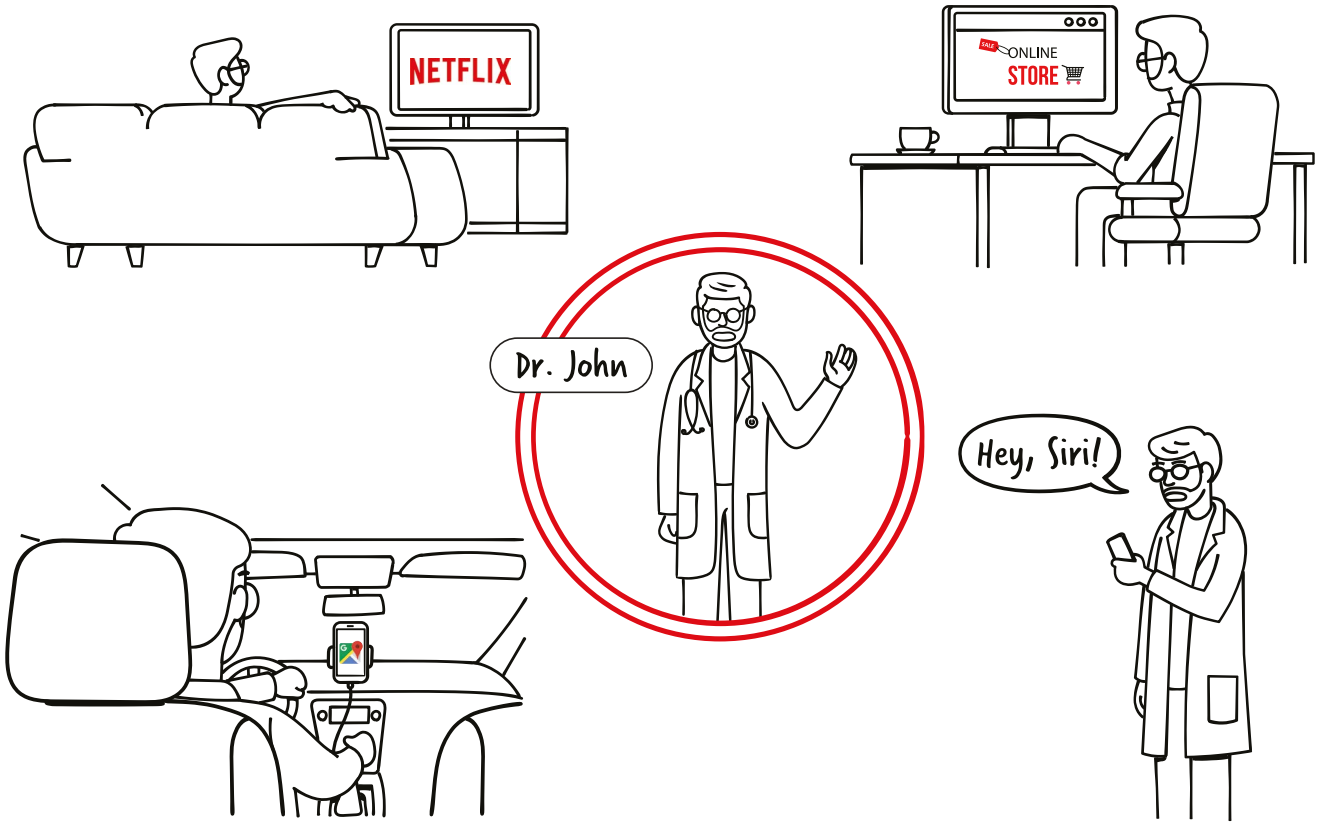
Today's online digital services across a broad range of industries offer a level of engagement and customer experience that few could have imagined a decade ago.

Since the pandemic, Omnichannel Engagement (OCE) initiatives have been launched in nearly every pharma company. However, healthcare professionals (HCPs) interacting with pharma companies today, via any number of online portals are experiencing the kind of services that were last cutting edge in the early 2000s.

Bringing HCP experiences into the digital age not only provides a huge business opportunity but also a win-win for both HCPs and industry.

1 Healthcare Professionals are Human Too

Meet Dr. Leslie, a typical HCP who, when not working, shops online, watches Netflix shows, uses Siri to navigate his phone and find information online, and relies on Google Maps for turn-by-turn navigation when driving. In short, Dr. Leslie, like the rest of us – has come to expect personalised, high-engagement, connected online services.



At the hospital where he works, Dr. Leslie often interacts with pharma companies, both online and in person, to stay up to date with new treatment options, clinical trial data and other information. He can log into the HCP portals of individual pharma companies, where he can search for the information he needs.

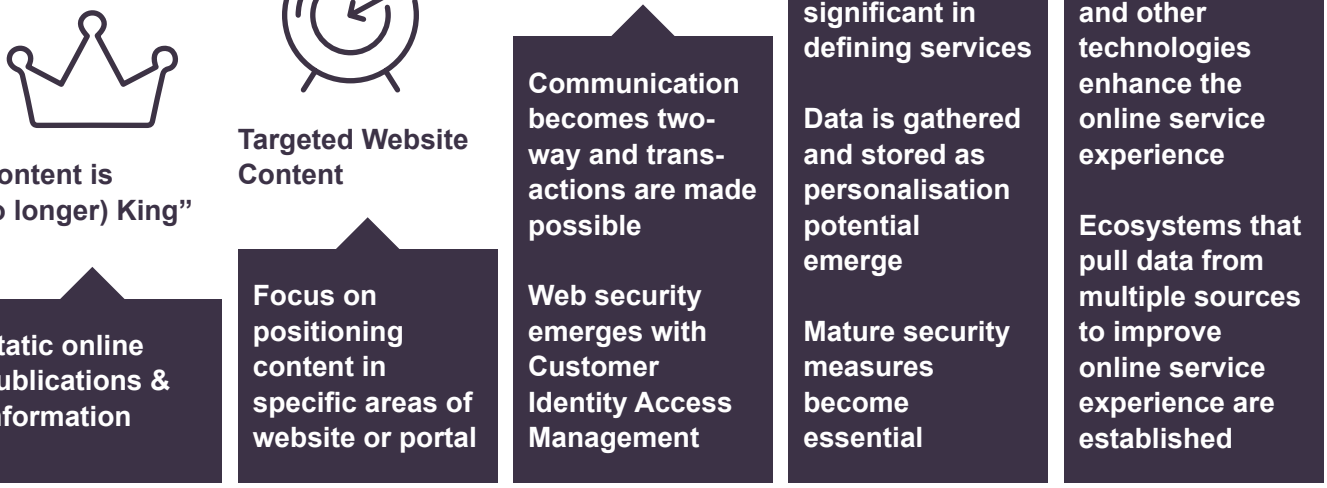
But he experiences little of the pleasure he derives from using Netflix, Amazon or the many Google services. What's missing from these pharma portal sites?

It's not that the content isn't there; it's that – in many cases – the content is all there is. Virtually no effort is made to get to know the HCPs as individuals with particular sets of wants and needs, to then personalise the service to them. The result is a service that feels like (hard) work to use – Dr. Leslie has to do all the work to find what he needs which is clearly not an enjoyable experience.

Compare that to Netflix for example, which serves up one tailored recommendation after another and motivates you to spend even more time with the service.

2 A Hierarchy of Online Service Maturity Levels

As online services have matured and become more sophisticated, we can see a distinct evolution, from basic static content provision – the 'Content is King' model – to highly personalised (self-)services that make use of advanced technologies such as blockchain, predictive AI and seamless integration with other services.



LEVELS OF SERVICE MATURITY

3 Customer Experience by Industry Sector

When it comes to customer experience, pharma strongly underperforms compared to the other sectors.

PHARMA

Ideal Service

HCP-centric aimed at improving patient care

Personalised services that make use of preferences, profiles, search histories and previous interactions

Analytics from data generated directly by customer

Current Service Level 1.5

Most online offerings aimed at HCPs are stuck in the 'Content is King' paradigm – the lowest level of digital service evolution

HEALTH INSURANCE

Ideal Service

Buy insurance personalised for individual needs

Targeted choice of products depending on needs

Claims handled smoothly, transparently and objectively

Current Service Level 2.0

Insurance companies still need face-to-face interactions to sell rather than support

Easing the pain of covering bills with direct interfaces to hospitals, etc.

RETAIL

Ideal Service

Consume NOW from a choice of all available products

Interactive experience to find the right product specification

Integrated reviews, FAQs, suggested alternatives

Current Service Level 3.5

Almost there

TRAVEL

Ideal Service

Seamless online booking process, including tickets and itineraries, visa applications, personalised offers and add-ons

Streamlined airport experience with minimal face-to-face contact

Personalised offers during travel

Current Service Level 3.5

Good and getting better

90% of travel is booked online

Add-on services exist but not yet personalised

Airport experience could be improved

GOVERNMENT

Ideal Service

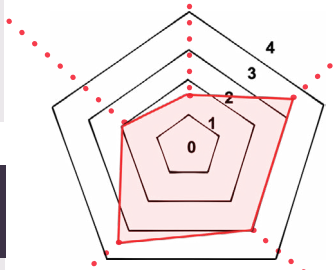
All government services/procedures accessible online, including tax returns, benefits claims, status updates, etc.

Current Service Level 2.0

HCP-centric aimed at improving patient care

Personalised services that make use of preferences, profiles, search histories and previous interactions

Analytics from data generated directly by customer



4 Online services for Healthcare Professionals

Where did pharma take the wrong turn?

We know that pharma companies often know a good deal about their individual HCPs because registration is required to prove that these individuals are truly healthcare professionals. This alone is a huge missed opportunity to provide a richer customer experience.

Moreover, even after the pandemic induced digitalisation boost, most of the online services available to HCPs today are still stuck in the least mature stages of service evolution, essentially just providing content that is (sometimes) targeted or personalized via cookies, compared to the sophistication we experience in some other industries (see pages 2 & 5).

The starting point for the pharma companies in developing the HCP customer journey should be 'how can we improve patient care?' with the aim of offering an enhanced, personalised digital service to Dr. Leslie that expands beyond the marketing/commercial-driven portals currently being offered in the industry.

CONTENT AS A SERVICE (CAAS)

It is evident that HCPs would want more educational resources from pharma companies, which opens a door for the development of customer-focused digital experiences. For example, an app, which keeps Dr. Leslie up to date with the latest research, journal articles or medical conferences. This app could then be expanded to include in-app registration for conferences, webinars or training courses, while potentially offering other add-ins to the learning environment.

Such an experience would of course be curated to match Dr. Leslie's preferences based on his profile, search history and other indicators that can help predict his needs. The service could also include voice assistants to help identify treatment plans, or virtual and augmented reality in training courses. Instead of taking HCP portal content to the next level of digital maturity, pharma companies should start thinking about how to build a digital backbone to enhance their transactions with HCPs.

SELF-SERVICE OFFERINGS

81% of consumers want more self-service interactions. Why should this be any other for Dr. Leslie? Establishing such services for HCPs is what will bring about real changes in digital interactions with them. Of course, HCPs want the ease of being able to request product samples or browse treatment options in the five minutes they have between patients or in the evening when finishing up.

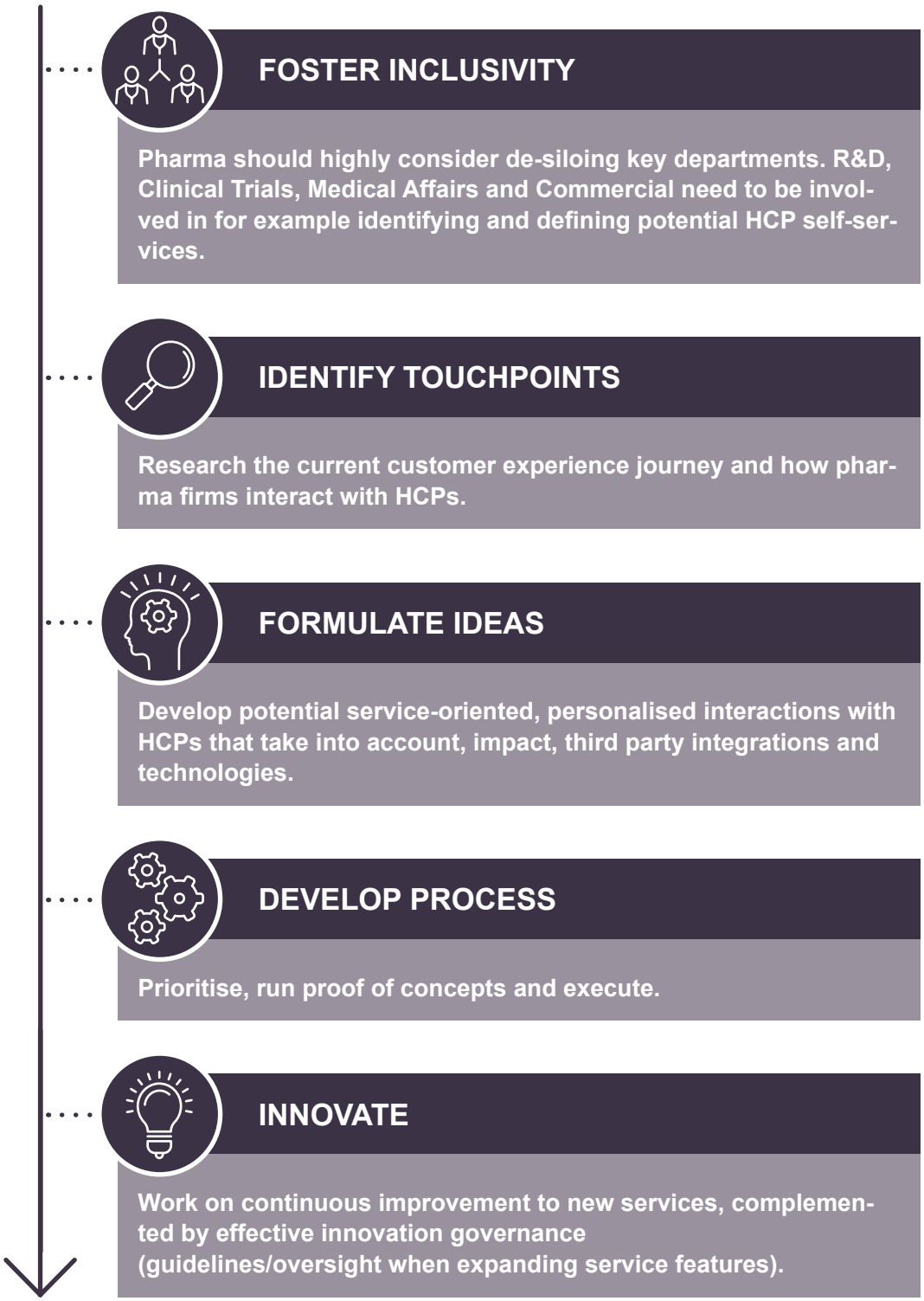
Additionally, self-services bring numerous benefits for the pharma companies too, such as proven increase in loyalty, the possibility to evolve the traditional "relationship-based selling" model, and a discovery of new customer segments.

BETTER PATIENT CARE

Least of all, there are countless opportunities to compliantly bring patients into the ecosystem too. For example, we recently supported a customer with digitalising their Compassionate Use Access request process, leading to a drastically improved turnaround time, and with that improving patient care. While that is just one example, connecting HCPs with their patients via new mobile technologies (such as medication adherence apps) could be leveraged, simultaneously providing HCPs with valuable real-time insights, such as estimating patient adopters.

5 Forging new digital relationships with HCPs

How do we move from the current immature level of pharma industry online interactions with HCPs to more mature levels?
We suggest a five-step approach:



6 Conclusions and recommendations

Pharma companies still have to catch up when it comes to services with digital maturity on par with other industries, even government. Services should at a minimum meet the "content as a service" model but should aim for true "self-services" within the next 2–3 years. For this to happen, three shifts need to take place:

01

While it's true the pharma industry is highly regulated, and this will to some extent limit what can be provided (in the short term), there needs to be a shift in the ingrained view that „pharma is different" to other industries. When it comes to customer expectations/experience, pharma is not that different. Reviewing current business processes that involve HCPs and optimising them for digitalisation is a good place to start.

02

A more customer-centric approach is needed so that HCPs have a consistent "joined-up" user experience when dealing with different people and departments within a pharma company. Each department should be able to see the complete history of interactions with the HCP systems for documentation, review, and approval. This shift promises to streamline processes, enhance transparency, and drive innovation in the industry.

03

The ecosystem of HCP services should be integrated with shared technical infrastructure so that HCPs can log into different services (even across different pharma companies) with the same ID, profile information and preferences.

Sources:

1. The Digitally-Savvy HCP Learnings to Engage HCPs Around the World More Effectively and Efficiently
2. Digital-first Customer Experience Report

About the author

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Benedikt Niepötter is the Global Head, Digital Customer Engagement Consulting for Arcondis. He is responsible for leading the specialised consulting group's focus on improving the engagement of pharma clients with HCPs, patients and other external stakeholders. With a PhD in Chemistry/Data Science and 10 years' experience in digitalisation of life sciences, he combines extensive knowledge in digital innovation techniques with a deep understanding of the special needs of pharma engagement.

This paper was authored in collaboration with Jan Deman, VP - DD&T Head for Global Medical and Global Portfolio Division Digital Excellence – Takeda.

About Arcondis

Arcondis is a global professional services company exclusively focused on the life sciences and healthcare sector. Owned by a Foundation and committed to healthcare improvement, we accelerate value creation for our clients in R&D, Manufacturing & Supply Chain, Marketing, Sales & Services, to ultimately benefit patients.

Our solutions and services include Digitalisation, Data, IT & Infrastructure; Product Lifecycle Management; Industry Compliance & Managed Services and People & Culture. As an independent solutions and Managed Service provider, we have the flexibility to prioritise our clients' best interests without being constrained by exclusive partnerships. We follow an outcomes-based approach – from strategy to hands-on delivery and beyond.

With a well-established reputation built over two decades, we have earned the trust of leading companies in Pharma, MedTech, Healthcare and Start-ups. Headquartered in Switzerland, we employ more than 250 specialists and professionals, with offices in North America, Europe and APAC.

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