

September 2015

Orchestrated Customer Engagement

Orchestrate Every Customer Experience to Drive Results



Introduction

Soon, backed by deeply analyzed data from up to 100,000 global streams, Life Sciences sales professionals will enter every meeting knowing precisely what their customers need in order to improve the delivery of healthcare benefiting patients. Attendees of seminars will never wonder why they wasted an hour. Website visitors will be presented with information that is uniquely tailored to their information needs and practice preferences. And sales, marketing and information technology teams will be working together, as one, to focus on providing their customers relevant and timely information, resources, and experiences.

Today, Life Sciences sales ,marketing, and information technology leaders implement a number of customer engagement disciplines including Multichannel Marketing (MCM), Omnichannel Marketing (OCM), and in some cases, proprietary home grown sales and marketing strategies derived from digital initiatives coupled with analytics. MCM and OCM are defined as the broadcast on multiple channels, with a focus on a customer's channel preference and the customer buying journey.

MCM and OCM are steps in driving a more effective customer engagement, but each can potentially fall short of providing the higher levels of confidence, transparency and return now mandated around every dollar spent in sales and marketing. What is the next generation of sales, marketing and technology beyond MCM and OCM? And can this next generation's approach to customer engagement improve the relationship between Life Sciences companies and their customers, and increase efficiencies across all channels of communication while bolstering ROI?

The answer to these questions is a resounding yes. Orchestrated Customer Engagement (OCE) is the discipline for sales AND marketing to accomplish more productive and efficient customer engagement.

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Executive Summary

What is Orchestrated Customer Engagement?

OCE seamlessly marshals the **sequence, context, and purpose** of messages from multiple influencing stakeholders, in an effort to improve engagement with customers through multiple channels. In OCE, customers, (such as HCPs, formulary managers, ACOs, KOLs, pharmacists, patients and payers) are the decision makers in the commercialization of a medical brand. Influencing stakeholders are members of the field force and information technology systems of the sales and marketing teams of a Pharmaceutical manufacturer.

The trifecta of sales, marketing and information technology in Life Sciences is increasingly replete with a multiplicity of channels, message formats, stakeholders, and changing business models. As a result, the need to orchestrate across all channels with precise sequence, context and purpose is reaching a critical inflection point.

Un-orchestrated planning and activities across the communication mix, from multiple influencing stakeholders, can be ineffective at a minimum and potentially detrimental to a brand if the messages across multiple channels or from different influencing stakeholders are not consistent and cause confusion to customers.

With OCE, Life Sciences is being presented with a customer engagement discipline that enhances the trifecta's capabilities in order to increase the return from every customer touch point, improving brand loyalty and outcomes, and positioning organizations to more readily and efficiently meet their commercial goals. OCE does not merge/converge sales, marketing and information technology into a single function, but improves the coordination across all, driving improved sequence, context, and purpose.

This white paper defines, describes, and documents the journey Life Sciences organizations may take to move from MCM and OCM to OCE.

RESPONSIBLE ENTITIES

Who is responsible for orchestration?

There is still vibrant debate about which entity will orchestrate the trifecta – sales or marketing. Will customer preferences be the orchestrator? Will it be members of the field force, the marketing team, or a set of information technology systems that calculate the next best customer, next best action, next best message or next best question? And let's not forget... the next best channel. The jury is still out on a clear winner, largely because there may not be a single leading entity of orchestration, as the contribution made by each entity to evolve to orchestration may evolve over a maturity model.

Entities Responsible For Orchestrated Customer Engagement

1. Customer
2. Sales
3. Marketing
4. Information Technology

Rarely will organizations be able to leapfrog from their current model to one where the central business process intelligently and immediately adapts to and anticipates customer wants and needs to improve practices and benefit patients, and subsequently effectively informs all sales, marketing and technological channels. More likely, the shift to OCE will involve an evolution through various stages of a maturity model.

“ The commercial organization in large pharmaceutical organizations - encompassing sales, marketing and technology functions - needs to dramatically change to address a challenging external environment. The Orchestrated Customer Engagement strategy and approach provides an important signpost on the path to positive transformation, and offers useful insights about how to translate strategy into high performance. ”

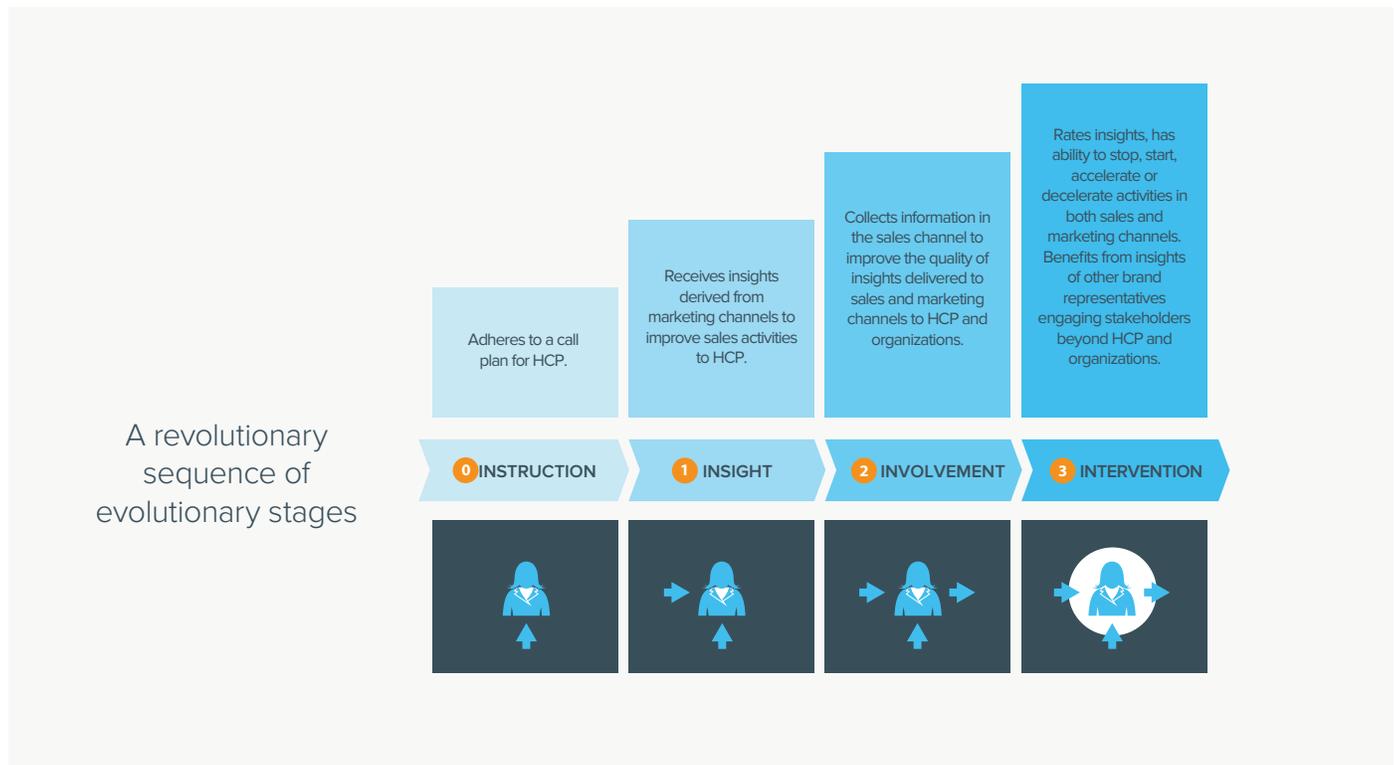
Michael McNally

Digital Health Strategist

What are the stages of the journey to OCE?

In many ways, each of the four entities involved in orchestration has a maturity model of its own. The road to orchestration for each entity starts in a stage (0) we refer to as the **instruction** stage; evolving to a first stage of (1) **insight**; then to a second stage of (2) **involvement**; and finally, to a third stage of (3) **intervention** – just prior to achieving the stage of OCE. Each of the four potential orchestration entities – customer, sales, marketing, and information technology – will contribute to orchestration at various levels across each stage of the maturity model.

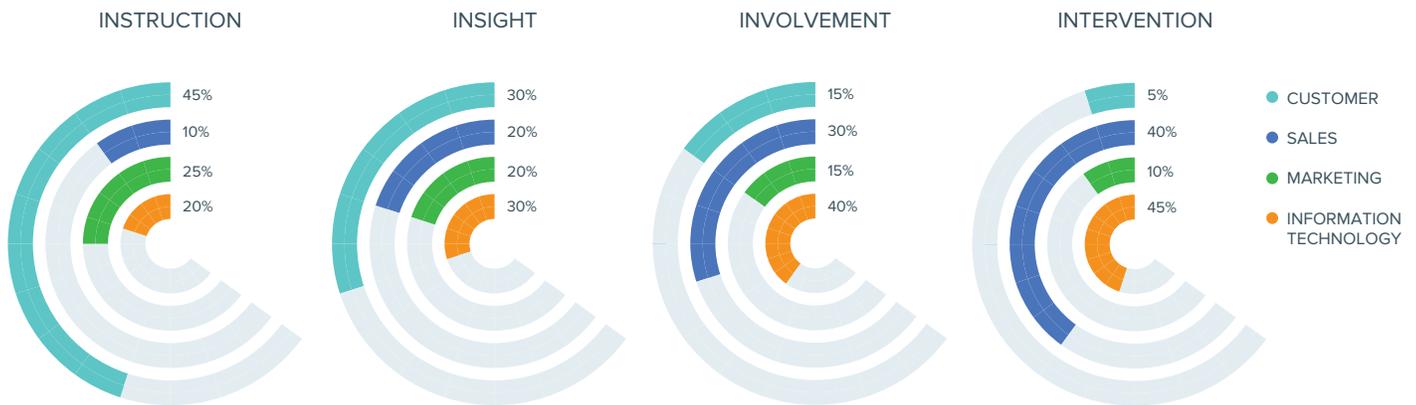
Orchestrated Customer Engagement – Sales Maturity Model



ENTITIES AND MATURITY

Below is an example of how key stakeholders could evolve through their maturity models.

Entity Contribution to Orchestration Over Time

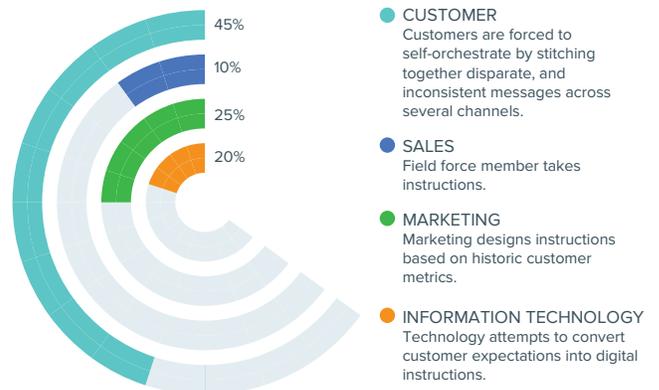


What are some real examples?

(Although there are many stakeholders involved in the maturity towards OCE, for the purpose of this paper and to provide some context, we will only follow the journey of a sales representative.)

Meet Kendal, he is a representative in stage “0” – Instruction

Kendal is a representative in the “instruction” stage of the maturity model. He receives instructions from his manager helping him create his call plan – which changes infrequently. His alignments are fairly fixed, and his sales manager, also in the “instruction” stage, tracks his progress to a set of reach and frequency targets that are expected to be realized from the instructions sourced from



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traditional targeting and segmentation exercises. Simultaneously, he is being asked to be an account-focused and customer-centric sales professional.

Kendal does not have much latitude. The CRM/SFA tools are mostly systems of record for him. He “records” that he has engaged in a sales call and detailed his customer so that his manager can review his actions and Kendal can get paid. Kendal is not unhappy, but he is severely underutilized, and, more importantly, he has loads of information and context on customers needs to improve their practice and patient outcomes that are only in his head, not shared or leveraged with other systems of engagement, marketing plans, and worse - with other field colleagues and counterparts in sales.

Now meet Jack, he is a representative in stage “1” – Insight

Jack receives instructions but, more importantly, the mobile CRM/SFA tools provide insights to Jack. He is in the “insight” stage of the maturity model to OCE. These insights stem from the context collected systematically from all channels across sales AND marketing about customers needs to improve their practice and patient outcomes – including weekly data provided but previously not integrated – and the precise insights are calculated by technology systems. Jack’s manager, who is in the “insight” stage as well, ensures that Jack sees and leverages the insights and emphasizes the value of making judgment calls based on insights. His manager also prepares him to really start owning the relationship with

MEET JACK

1 INSIGHTS

Receives insights, derived from marketing channels that improve sales activities to HCP.

MI Customer

Walsh, Susan
Springville Healthcare
123 Main Street, Springville GA 30300

Organization (3)
Influences (6)
Institution (1)
K.O.L. Infectiolog... (4)
K.O.L. Urologues... (1)
Managed Care Cr... (1)
PC Hemato3 Fra... (3)
PC Hematin3 Cas... (2)

A Jackson Diorne

Meilberg, Darren
University Medical
10 Normal Ave, Galveston TX 77550

Bloom, Robert
Oncology

Cooke, Dana
Oncology

Ferrante, Joseph
Oncology

Jones, Kimberly
Oncology

Khoury, Amir
Oncology

Landsis, Mark
Oncology

Patel, Ravi
Oncology

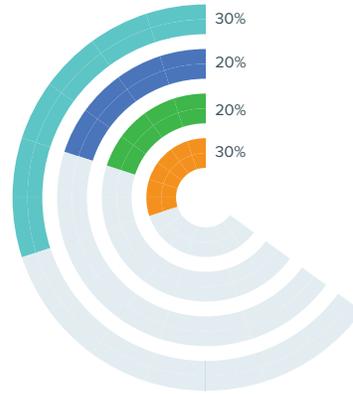
Prano, Michael
Oncology

Rodriguez, Jessica
Oncology

Whitney, Michelle
Oncology

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the customer – within the market and customer framework activated by marketing and information technology. Jack is happier than Kendal and feels like he is doing more than just “recording” calls into the mobile CRM/SFA. Jack is receiving insights from the CRM/SFA, and supplemented by coaching from his manager who encourages him to drive engagement (not just hit reach and frequency targets).



- **CUSTOMER**
 Customers' preferences on channel-mix are correct, and timeliness is good. But the customers' needs are not anticipated, and they have to ask.
- **SALES**
 Field force member receives insights and is able to make judgment calls.
- **MARKETING**
 Marketing focuses on sharing insights to be leveraged in personal and non-personal sales channels.
- **INFORMATION TECHNOLOGY**
 Technology prioritizes insights based on efficacy.

Meet Jennifer, she is a representative in stage “2” – Involvement

Jennifer loves insights from which she can make judgment calls. She is also convinced that the overall outcome for her customer’s needs to improve their practice and patient outcomes is owned by her and jointly with those in marketing, information technology and the rest of the sales organization. She is motivated to help marketing and her sales counterparts leverage what she knows about her customers. Jennifer, the sales organization, marketing, information systems, and the customer are all in the “involvement” stage of the maturity model. Jennifer is keen to enter everything she knows about her customers into the mobile CRM/SFA. This is because she knows that these insights will help other

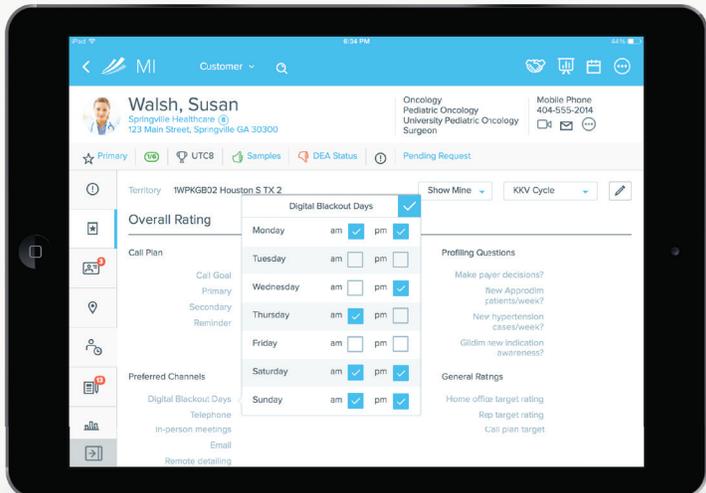


MEET JENNIFER

2 INVOLVED

Collects information in the sales channel that improves the quality of insights delivered to sales and marketing channels to HCP and organizations.

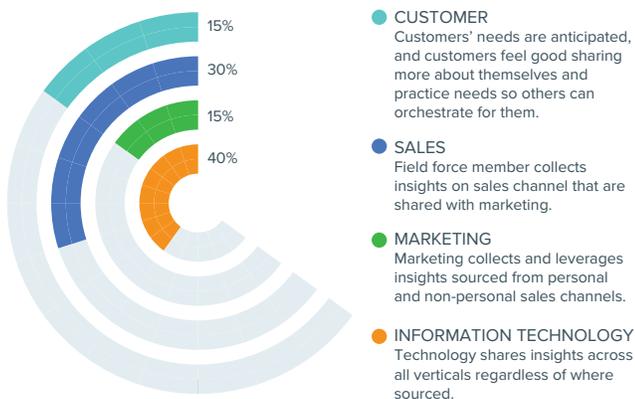




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channels in sales and marketing with her customers, much like the insights she receives from them help her.

Jennifer's manager also in the "involvement" stage of the maturity model is excited about Jennifer's commitment to insight use and collection, and as a result, the resources provided to Jennifer are driven by a framework to identify the mix of must-win stakeholders that drive Jennifer's territory. The technology system prompts questions about customers that it "doesn't know" through the mobile CRM/SFA.



As a result, Jennifer not only proactively collects and records insights, but also is reactively prompted with a list of questions about customers that she seeks, and records answers in the mobile CRM/SFA.

Jennifer is much happier than Jack, and more importantly, she is starting to take ownership of the orchestration of the overall experience of her customers by being provided the right marketing mix.

“Orchestration is the natural evolution of Multichannel Marketing and Omnichannel Marketing as we move closer to engagement at scale to a segment of one. A maturity model for the evolution to Orchestration is paramount.”

Mark J. Stevens

Senior Vice President,
Strategy & Commercial Effectiveness
Publicis Touchpoint Solutions

Meet Victoria, she is a representative in stage “3” – Intervention

Victoria is the champion for the informed, must-win customers, and is in the “intervention” stage of the maturity model. Every action she takes is the most optimal action, and creates the best overall outcome for the brand and organization with customers across sales and marketing, in both personal and non-personal promotional channels. She leverages near real-time insights, collects new insights, and has visibility into all of the activities from multiple verticals’ systems such as marketing, as well as her field force counterparts and colleagues. Victoria can stop, start, re-sequence, or change the priority of each activity on other sales or marketing channels, or from other members of the sales force working in her territory, with the same customer.

Within the marketing mix framework the OCE tool has activated for Victoria, she is enabled to assess and intervenes when the activities do not match what she believes to be in the best interest of the customer practice and patients. Victoria’s manager, in the “intervention” stage, measures her efficacy on the

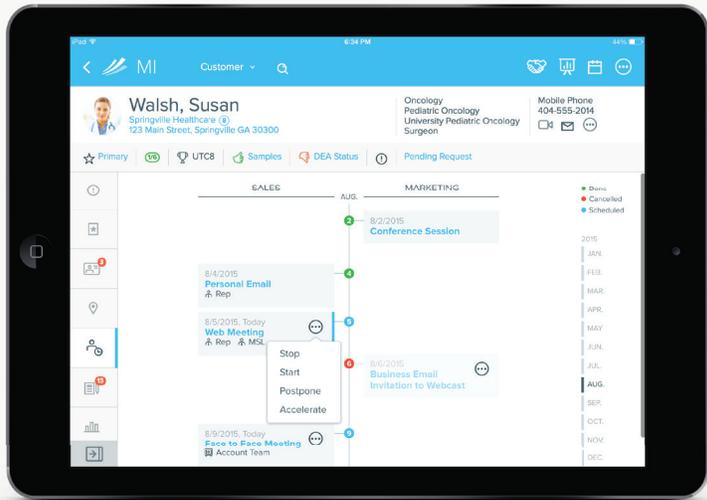


MEET VICTORIA

3 INTERVENTION

Rates insights, has ability to stop, start, accelerate or decelerate activities in both sales and marketing channels. Benefits from insights of other brand representatives engaging stakeholders beyond HCP and organizations.

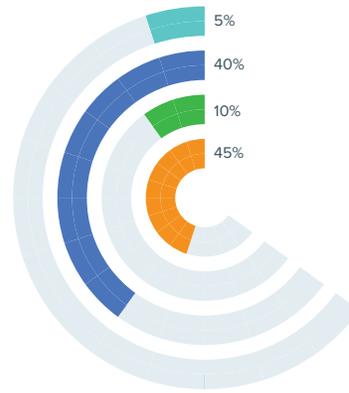




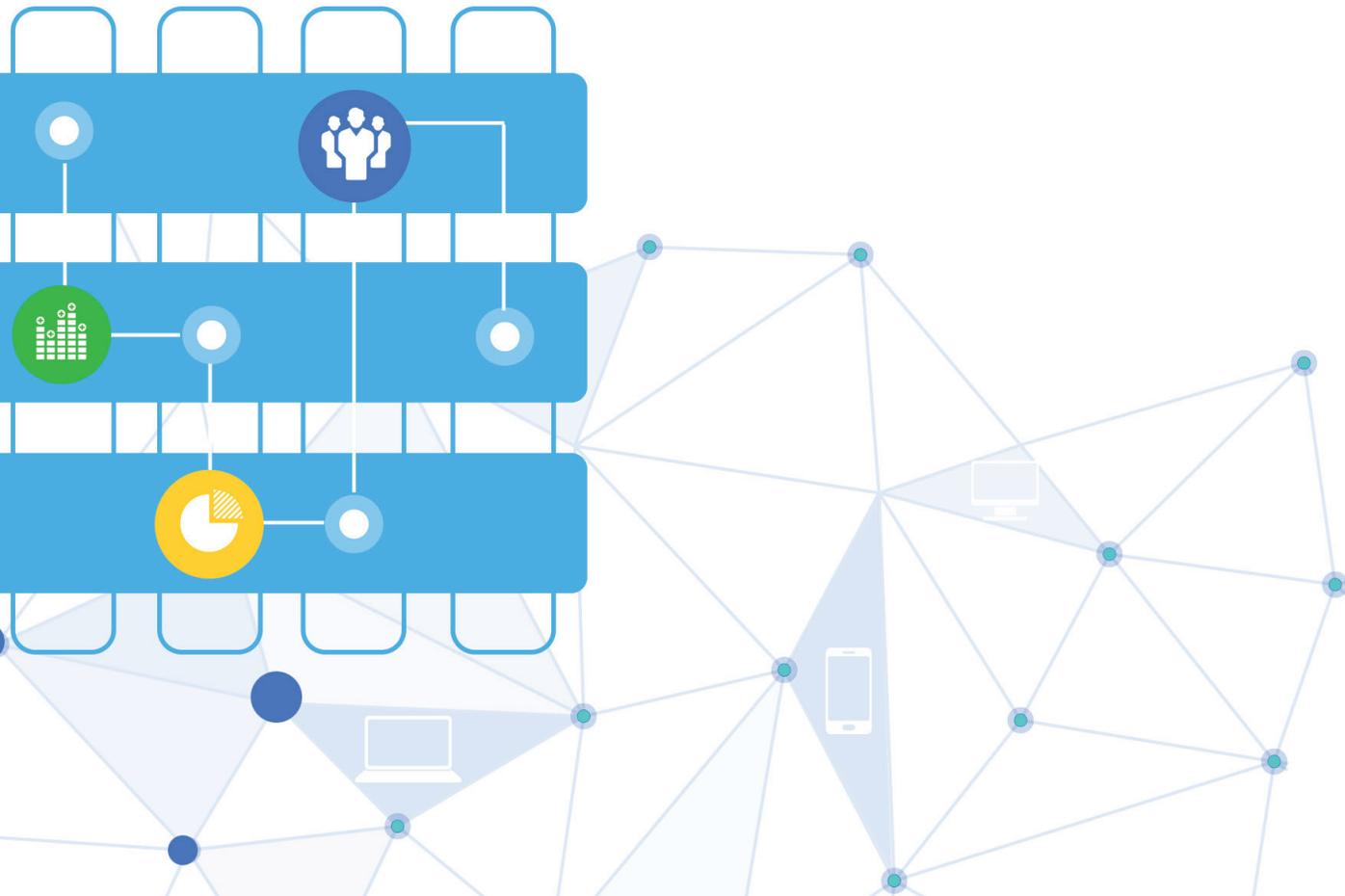
ENTITIES AND MATURITY

overall outcome and relationship with the customer. Victoria is much happier than Jennifer and prepared to really start to orchestrate the overall customer experience and engagement through all available channels

In OCE the mobile CRM/SFA tool is much more than a system of record, system of engagement or system of prediction. It is a system of intervention and orchestration. In short, the underlying technology learns from Victoria's interventions over time, gathering information and synthesizing it, leading to predictive analytics.



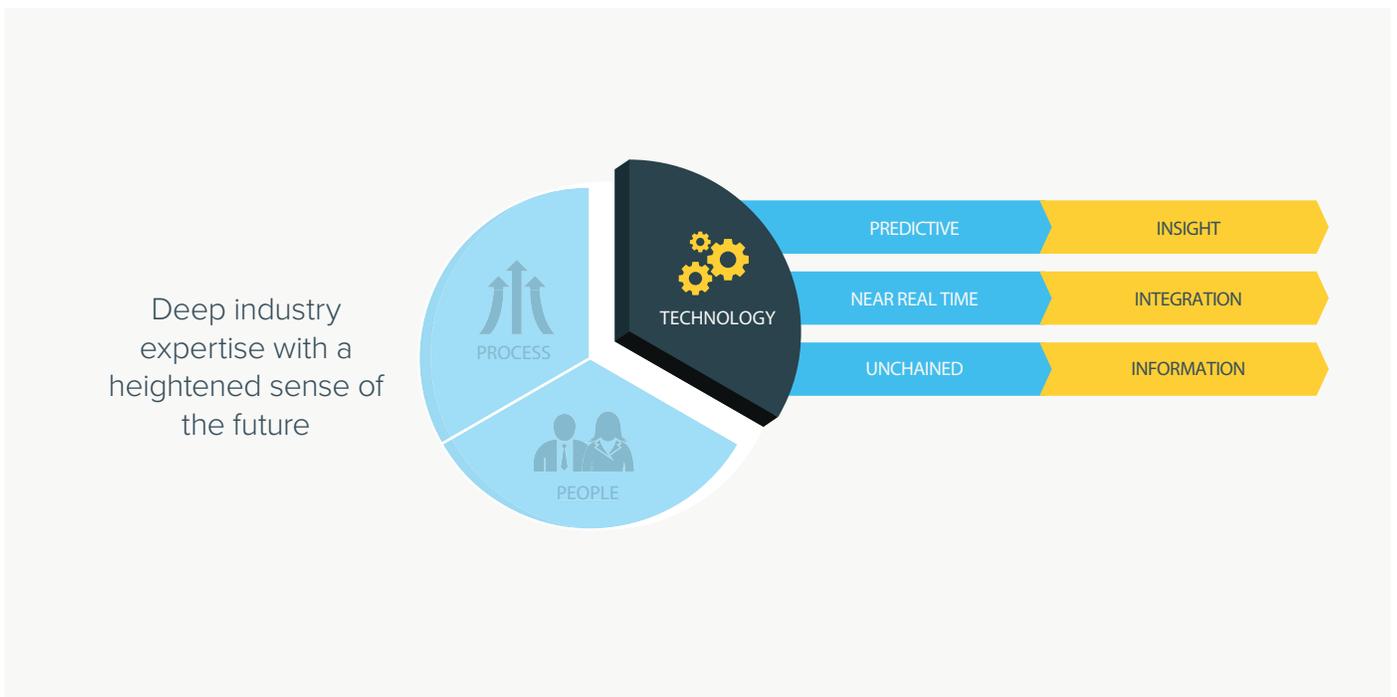
- CUSTOMER**
Customers select orchestration experiences across geographies, therapeutic classes and brand maturity to improve practice and patient outcomes.
- SALES**
Field force member intervenes on activities on other channels, and rates other channel insights.
- MARKETING**
Marketing can contribute to the ranking and prioritizing of actions taken in sales to best benefit the customer's practice and patients.
- INFORMATION TECHNOLOGY**
Technology learns from intervention instructions by sales and marketing and executes them.



TRANSFORMATION COMPONENTS

What are the changes that need to happen?

Like most macro paradigm shifts, the following components go into the transformation: people, processes and technology.



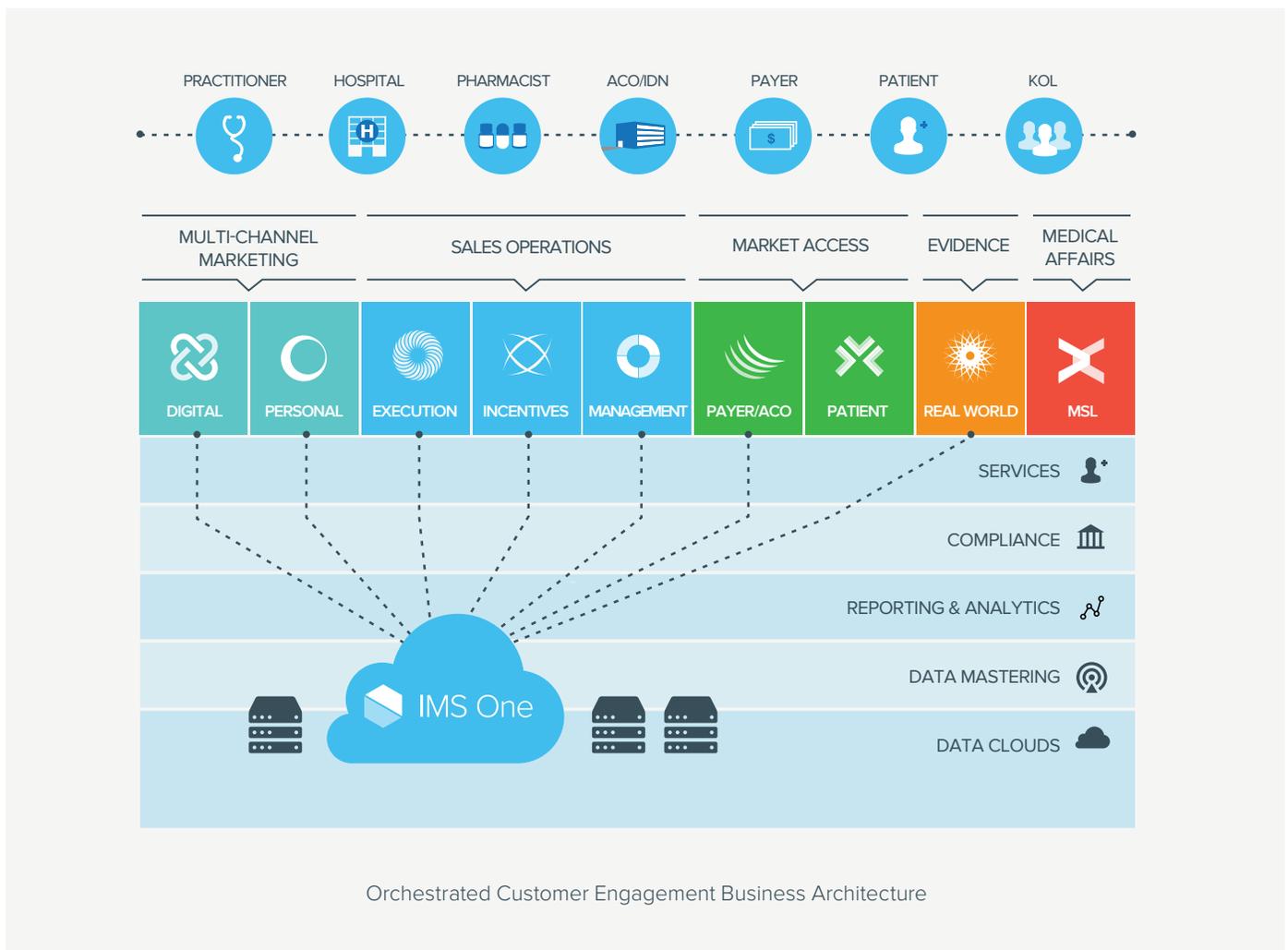
With OCE, Life Sciences is being presented with a customer engagement discipline that enhances the trifecta's capabilities in order to increase the return from every customer touch point, improving brand loyalty and outcomes, and positioning organizations to more readily and efficiently meet their commercial goals.



Technological Changes

Technology must work the way we have been imagining it should. There are three realities that technology must deliver: (1) we have to unchain information across vertical silos; (2) we need near real time integration; and (3) we need to get to “predictive insight.”

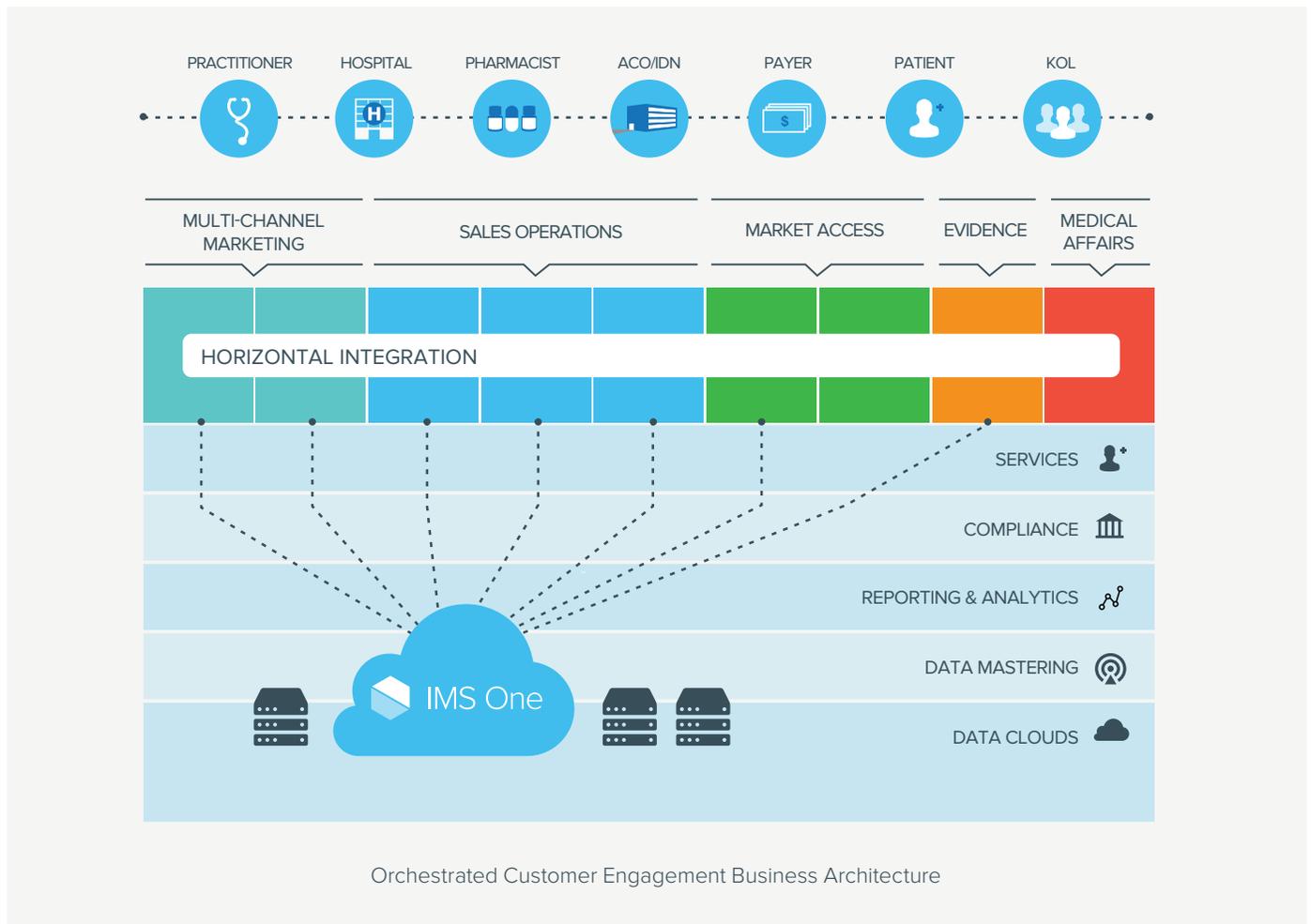
The chart below represents the current formation of IMS Health, combining information assets, technology, and services to enable Orchestrated Customer Engagement in commercial operations in Life Sciences organizations.



Unchaining silos of information

Our organizational structures are vertical by design, and as a result, system ownership and governance still remains mostly vertical. In order to unchain vertical silos of information, there needs to be an emerging horizontal mandate of horizontal ownership and horizontal governance structures. A vendor already with a horizontal string of SaaS applications spanning sales, marketing, market access, real world evidence, patient data and medical sciences can assist Life Sciences with “horizontal integration.” This will accelerate Life Sciences organizations to take the first steps in unchaining silos of information, while internally, the emerging horizontal mandate of horizontal ownership and horizontal governance structures is carefully realized.

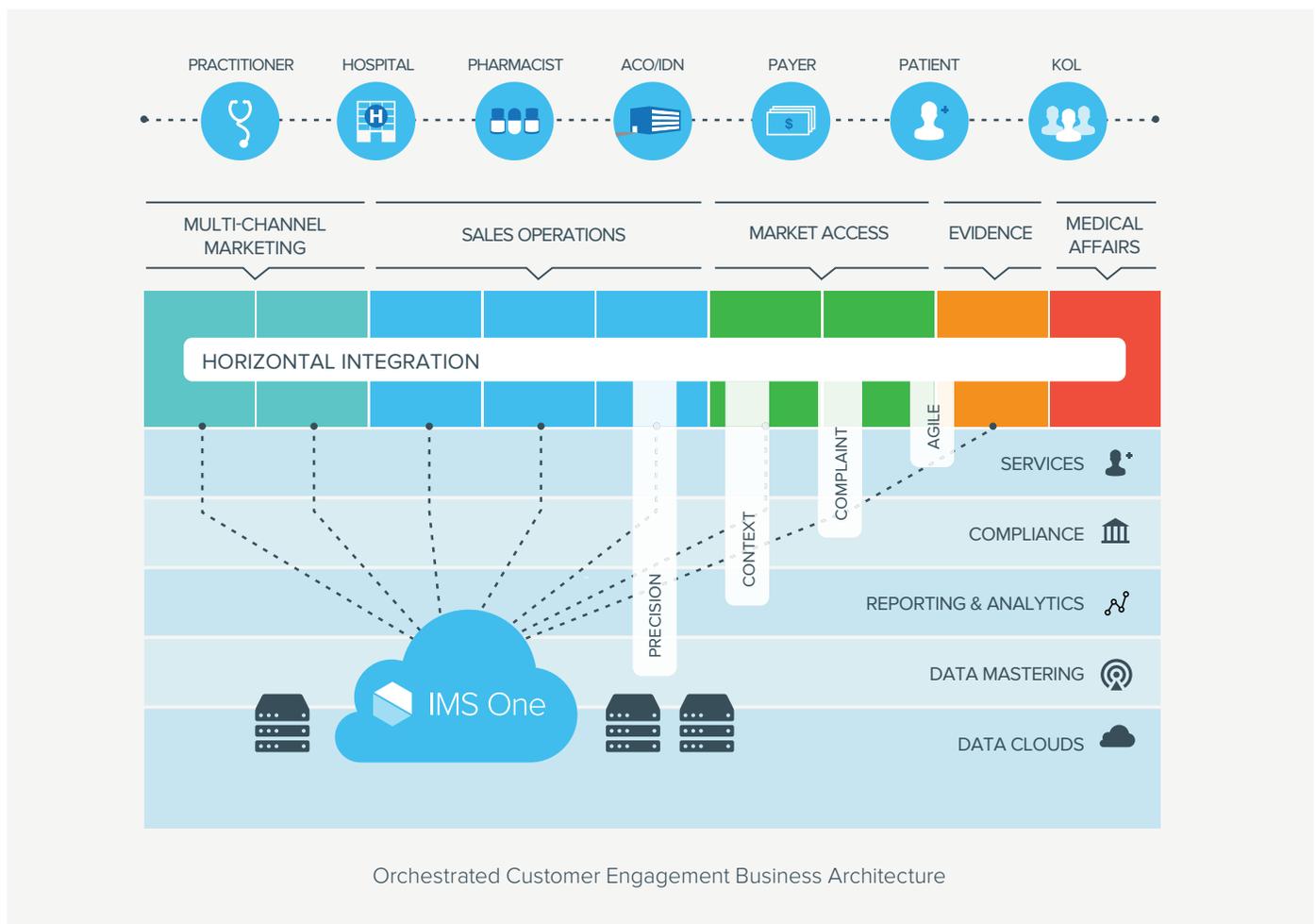
Unchained silos of information are required for effective OCE



Near real time integration of data into applications

Our estimates suggest that less than 10% of the data collected or used in commercial operations in Life Sciences are stored or served up in near real time. Largely, this is an inadequacy derived from a set of existing business processes built on last generation technology with limitations such as batch loads, replication challenges, and capacity issues. While Life Sciences organizations re-platform most of the data management technologies and data mastering capabilities away from last generation’s limitations, a vendor with a horizontal string of cloud applications that are already connected into a data cloud can provide the bridge Life Sciences organizations need to serve and apply intelligent data at the time of need. These connectors enable precision from integrated data, context from analytics, compliance, and agility from ancillary services.

Near real-time connectors into data that provide context, precision, compliance, and agility are required for OCE

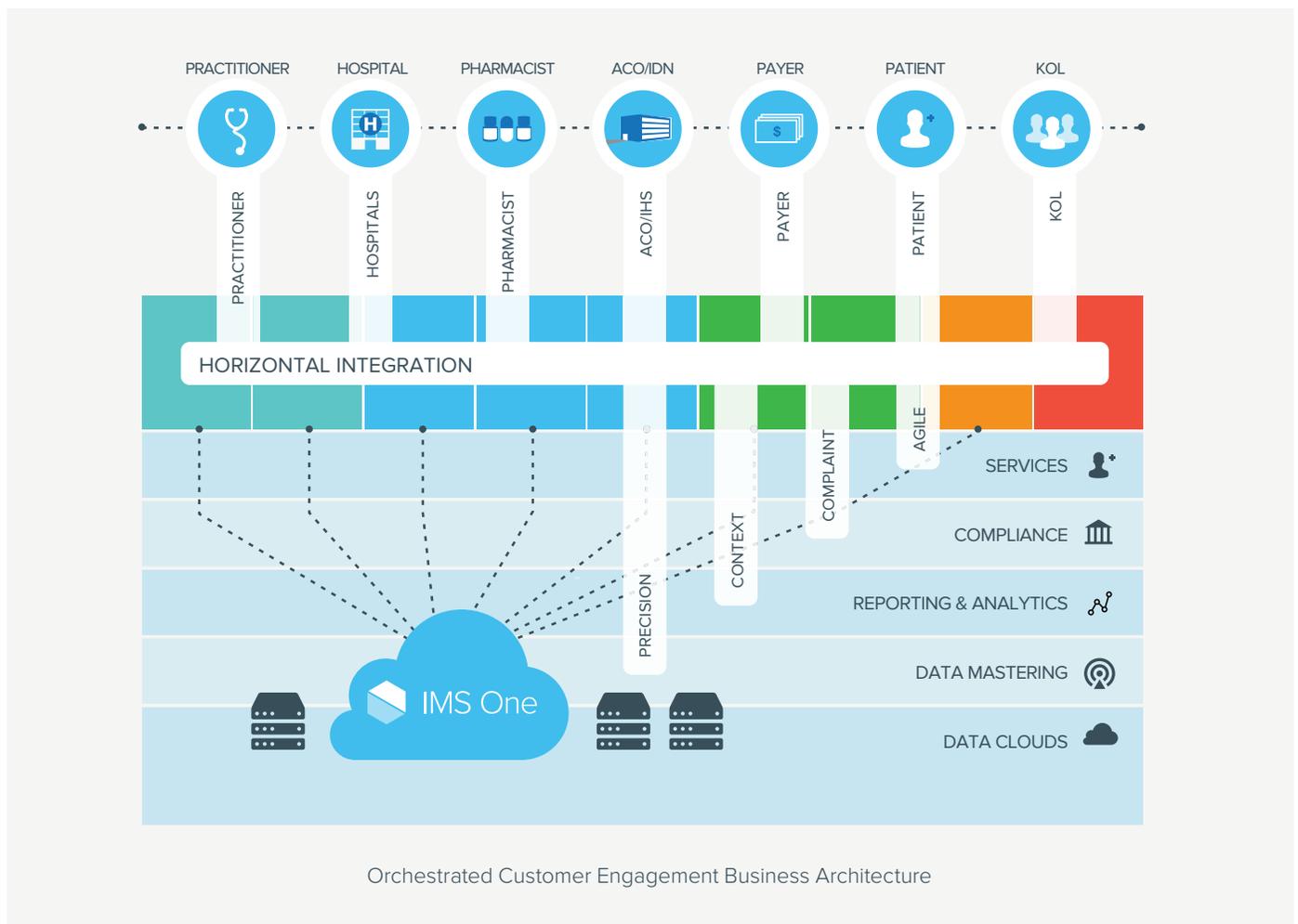


Predictive insights

In order to improve the efficacy of predictive analytics, organizations can leverage two things:

1. Behavioral data needs to be collected from all stakeholders across all relevant channels and stored into a single location. This means data on the behavior of the healthcare professional, the pharmacist, the patient, the payer, the provider, the thought leader, and others must be stored, accessible and considered when making business-driven predictions.
2. Predictions must be “tested” for efficacy over time so that sales, marketing and technological systems can act confidently on them.

This element of artificial intelligence is needed for OCE



Process Changes

Moving away from the instruction stage, to the insight stage, into the involvement stage and then eventually into the intervention stage (to enable OCE) requires process changes. Sales may need to be incentivized to collect insights or find answers to unknown customer attributes that can help marketing and technology evolve both strategy and systems. In addition to the processes around sales, processes around customers, marketing and information technology will also require change. Sales, for example, will need to be trained in measuring more than reach and frequency.

The customer will be more empowered, and will have to be educated on the new ability they now have to select experiences. A customer may be able to select “experience packages” at different times of the year and journey, across different therapeutic classes, and during product launch vs. product maturity. Lastly, the processes that drive information ownership, consumption and maintenance will need to be considered for change. With the implementation of OCE, the idea of a golden copy of a piece of information – and what it means to own and maintain a golden copy – will need to change. As organizations evolve to customer engagement that is orchestrated, the negative impact of bad quality data most definitely increases.



The level of system integration fostered by Orchestrated Customer Engagement is extremely valuable at the execution level (i.e., promotional tactics, channel optimization, interaction and sequencing), but moreover, at the brand insights level. Implemented appropriately, with a broader scope we could also unlock actionable insights impacting our upstream strategy. Leveraged to the fullest, we could begin to predict where the opportunities for our brands exist at the prescriber level, leading to more specificity as to where to spend our promotional dollars.

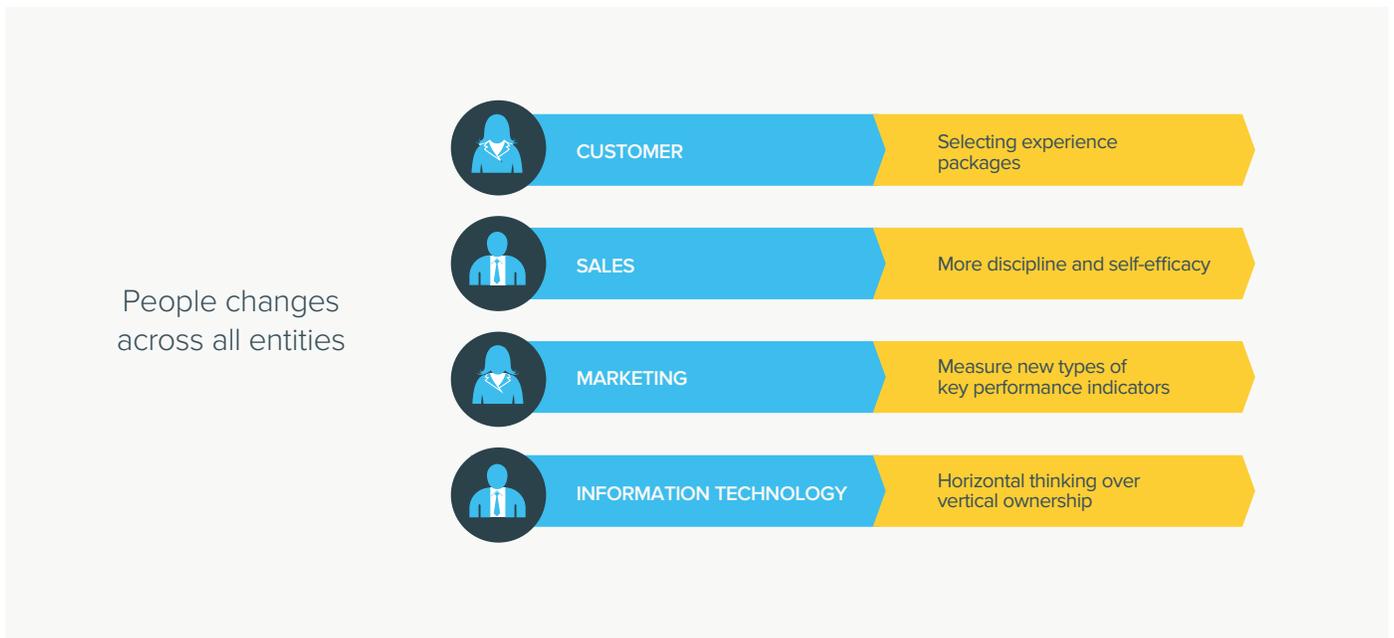


Vincent Mair

Vice President, Head of Commercial Operations
NEOS Therapeutics

People Changes

People changes will not be the most immediate, but will eventually be the most important. The shift to OCE will rely on individuals possessing higher levels of discipline and self-efficacy. However, these individuals will also be empowered and energized by the aligned mix of activities and resources opened to them by an informed trifecta-driven organization – aligned ultimately to those that influence and control their performance. Sales will become more entrepreneurial in their behavior, entrusted with the ability to control their own outcome within the stakeholder framework. Marketing will be required to measure an entirely new set of key performance indicators. And lastly, those managing information assets and technology systems will need to value leaders with horizontal thinking over those with the ability to only excel at vertical ownership.



Conclusion

The road to good orchestration starts with understanding your markets intimately, and from the right vantage points. How many sub-markets should be created for a country like the United States, and how much Orchestrated Customer Engagement should each sub-market have? For some sub-markets in the US for example, is the instructions stage (status quo) of the maturity model adequate? And in other sub-markets, are sales and marketing investments best applied to the intervention stage of the maturity model?

Want to know your customer's mind? IMS Health can help

OCE requires strong alignment across information, technology, and services. With current infrastructures, many Life Sciences organizations will struggle to effectively implement OCE expeditiously, as most are still in the process of a horizontal transformation to align and integrate various verticals as well as information assets, technology, services, and internal and external partners.

At IMS Health, we have already aligned and integrated the industry's most precise data, a suite of the industry's most innovative technology solutions, and the industry's most experienced services personnel. We connect solutions to drive healthcare performance unlike any other organization. We provide the marketplace more than;

- 10+ petabytes of healthcare data;
- Two dozen integrated SaaS applications for sales, marketing, market access, medical technology, real world evidence, and patients; and
- Five-thousand healthcare informatics and industry experts delivering services globally

This distinctive combination of offerings uniquely positions IMS Health to empower Life Sciences organizations to orchestrate customer engagement through today's most pioneering technologies, processes and ideas – so that they may achieve their commercial goals.

IMS Health is dedicated to understanding customers and their needs, as well as the marketplace and the environment in which Life Science organizations engage.

About IMS Health

IMS Health is a leading global information and technology services company providing clients in the healthcare industry with comprehensive solutions to measure and improve their performance. End-to-end proprietary applications and configurable solutions connect 10+ petabytes of complex healthcare data through the IMS One™ cloud platform, providing comprehensive insights into diseases, treatments, costs and outcomes. The company's 15,000 employees blend global consistency and local market knowledge across 100 countries to help clients run their operations more efficiently. Customers include pharmaceutical, consumer health and medical device manufacturers and distributors, providers, payers, government agencies, policymakers, researchers and the financial community.

As a global leader in protecting individual patient privacy, IMS Health uses anonymous healthcare data to deliver critical, real-world disease and treatment insights. These insights help biotech and pharmaceutical companies, medical researchers, government agencies, payers and other healthcare stakeholders to identify unmet treatment needs and understand the effectiveness and value of pharmaceutical products in improving overall health outcomes.

Additional information is available at www.imshealth.com.

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Richie Etwaru is IMS Health chief digital officer, which is a role designed to help bridge the innovation and efficiency gap for healthcare stakeholders and life sciences customers using analytics and technology. He assumed this role in April 2015.

Richie joined IMS Health as part of the Cegedim acquisition where he served in the same chief digital officer capacity. Before that, he was a member of the Cegedim Executive Committee serving as Group Vice President, Cloud and Digital Innovation for two years. Prior to joining Cegedim, Richie worked for eight years in roles of increasing responsibility and scope for UBS Wealth Management and Barclays respectively where he focused on innovation and technology.

A frequent keynote speaker at leading tech-related events and forums, Richie casts a vision of a technologically-enabled healthcare system in the near future. He is also a serial entrepreneur who has started several companies, as well as an author and regular contributor to Forbes.com and Huffington Post.

Richie was a former Clinton Global Initiative delegate and currently serves as a board member for multiple not-for-profit organizations.

Richie earned his Bachelor degree in Management Information Systems from Queens College as well as his M.B.A. in Technology Management from University of Phoenix where he's currently pursuing his PhD in Organizational Leadership.

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An accomplished marketing and communications veteran, Drew leads the marketing efforts for Multichannel Engagement (MCE) and Master Data Management (MDM) for IMS Health. Prior to this position, Drew was the Vice President of Global Communications at Cegedim Relationship Management where he was responsible for public relations, social media, analyst relations, marketing execution, creative design and brand management. Before joining Cegedim in 2004, Drew spent six years holding general management, brand strategy, channel marketing strategy, operations and product management roles at Excel Communications. Prior to Excel, Drew spent over seven years at AT&T, serving in various roles with increasing responsibility in product management, project management, instructional training design and sales.



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As Senior Principal of U. S. Healthcare Solutions at IMS Health, John provides strategic next-generation commercial improvements, leveraging over two decades of sales, operations and pharmaceutical commercial leadership experience with industry leaders Merck, Schering-Plough and Bayer. John has led the development of multiple IMS Health innovative solutions for successful and scalable client improvements in commercial effectiveness. John continues to combine deep industry experience leading traditional and Integrated Delivery Network (IDN) commercial teams - with healthcare and IMS Health expertise - to harness emerging healthcare stakeholders, integrated advanced analytics, technology and the fundamentals of U.S. sales and marketing effectiveness for actionable solutions within the new biopharma environment.



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As Vice President of Product Management at IMS Health, Emiliano is responsible for global product innovation and commercialization. He meets with customers regularly to share product direction and to solicit customer feedback. Prior to joining IMS Health, Emiliano held several roles at Cegedim in the US and in Europe, including Vice President of Product Management, responsible for Cegedim’s Master Data Management (MDM) and Aggregate Spend solutions; Vice President of Customer Relationships in the US; and General Manager of Cegedim Italy. Emiliano holds an MS in Physics from the University of Milan (Italy) with a specialization in computer science and is author of several articles on Neural Networks and Artificial Intelligence.