

# Pharma's Omnichannel Challenges

CSL White Paper

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## **omni** Benchmark

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# Introduction

Pharma's recent migration to Omnichannel marketing has been largely forced onto the sector by COVID-19. While many industries have been transitioning to more inbound marketing techniques during the past ten years, pharma has remained, for the most part, heavily reliant on its tried and tested field-based sales model.

When the primary channel of our sales and marketing was severed overnight, we were forced to accelerate our journey into a new world of more uncertain marketing, with less visibility and control over our customer engagement than at any time in our professional lives.

This analysis is based on learnings from our syndicated Omni Benchmark service, and in it we review:

- The key challenges we've seen the industry face over the past two years
- The differences in exit strategies as pharma companies return to normal operations
- The impact this has on BI and how we measure success and track engagement
- Where these changes might ultimately lead us



# Consent, Content & Contribution

The first wave of activity was focused on stockpiling the most valuable asset in the new world – consent. This endeavour was already underway before COVID, as data protection laws introduced several years earlier meant that most companies were making efforts to gain the consent of HCPs to be able to push outbound marketing to them digitally. With the overnight cessation of traditional sales methods, one of the industries main preferences for communication became email, as this enabled companies to control the message and the timing, so the battle for consent was on.

As independent bystanders of this challenge, we were struck by the big differences in consent rate targets that were being set by different companies. The truth is most companies don't know what "good" looks like, and even fewer know what is possible. As a result, consent rates for target HCPs varied by 50 percentage points between the highest and the lowest on the Omni Benchmark panel in Q4 2021.

Another challenge appeared and isn't going away any time soon: the insatiable appetite for new content. In a face-to-face interaction, you can concentrate on delivering the company's key messages because a good salesperson creates engagement through their presence. In the digital world things are different, and promotional prose does not have the same impact when written in an email. This is why the vast majority of emails sent are never opened, and hundreds of pharma companies were suddenly emailing the same group of HCPs, exacerbating the problem.

Omnichannel is a customer centric methodology and requires engaging and useful content to be made available to customers and prospects in the manner and at the time of their choosing. Across the board, pharma companies found, and are still finding, this a real challenge for several reasons:

- The workforce is weighted heavily towards sales, and marketing resource has traditionally had a primary function of supporting the salesforce with materials; now marketing is in the spotlight, and it is under resourced
- The need for medical approval of new content slows down the process, making it difficult for pharma to work in an agile way

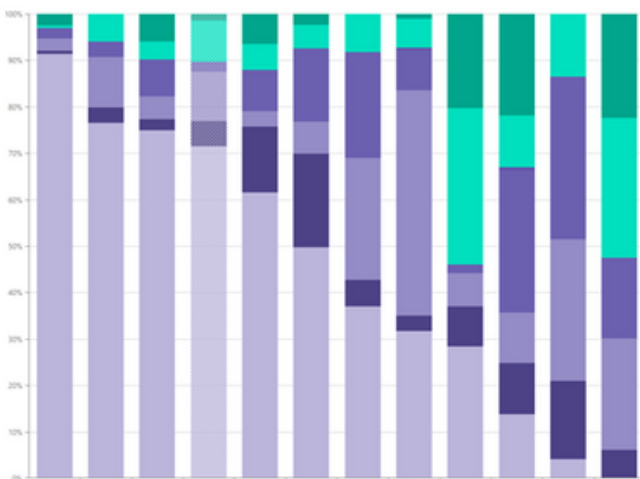
- The need for content generation is relentless and requires a different type of approach and skill than promotional content. HCPs will be tempted to “inbound marketing” only if it is worth their time and effort, which means providing interesting and useful material in a convenient medium of their choosing
- Pharma is at a real disadvantage compared to other “business to business” sales industries. We all know that we are more likely to respond to a marketing email that has clearly been written specifically to us; that mentions aspects of our “pain” or situation that has obviously been personalised. Regulatory constraints in pharma mean that most companies only allow emails to be made up of pre-approved paragraphs and don’t allow for the kind of customisation that is required to create rapport and build relationships digitally

Despite all these challenges, pharma is making strides to address these issues, and we will come on to that next. The first step in the solution was to do what the industry has always done when faced with a new paradigm shift – give everyone new job titles containing the phrase “Omnichannel”.



# Strategies coming out of COVID

Having now collected several waves of data in our Omni Benchmark service, it has been fascinating to see the variety of strategies pharma companies on the panel have adopted as the UK has emerged from lockdown.



The chart illustrates the proportion of activities delivered by channel across the subscriber base for one of our reported therapy areas in Q4 2021.

Even without giving away which channel is which, it is clear that very different strategies are being pursued by companies, with many still dominated by one or two channels in their communication with customers.

Similar deviation is shown in the messaging type used within marketing, with big differences in the extent to which pharma companies are moving away from purely promotional content to more of a mix of services and medical information.

Interestingly though, the percentage of activity that is not promoting products has fallen between Q2 and Q4 2021, from an average of 7.8% to 4.4%, although this varies greatly between syndicate members. This suggests that as things return to normal, pharma is settling into its former comfort space of promoting products rather than providing informational content.

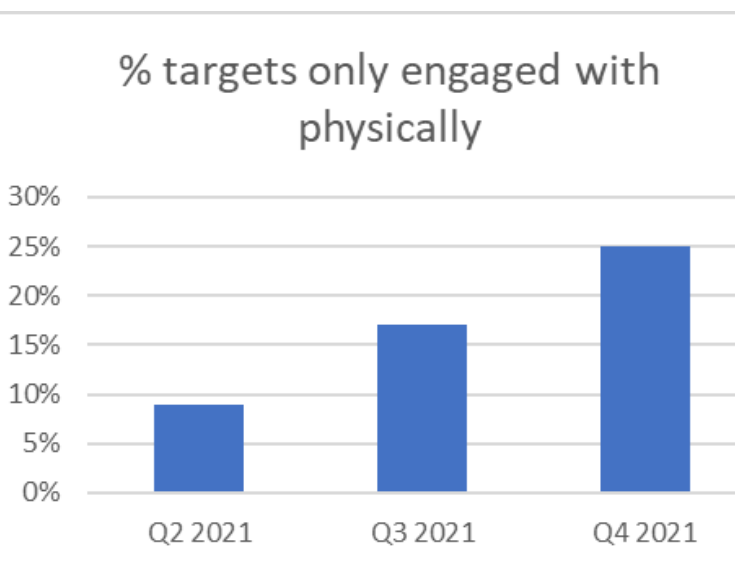
## Are they engaged yet?

For many in BI, the key challenge has been taking on the task of evaluating the success of changing marketing strategies and measuring and monitoring engagement.

From the Omni Benchmark data, we can see that companies are having varying success at engaging with customers across multiple channels, with the average syndicate member seeing around 80% of their target customers via a single channel alone. Again, this varies by customer and one of the biggest insights from the service is the ability to see what is being achieved by the top performers.

Another telling sign has been the extent to which target customers are being seen via a mix of physical and digital channels as things return to normal.

The proportion of target doctors seen only via physical means (F2F or meetings) is increasing with each quarter. This means one of two things. Either we are transferring back from virtual calling to calling in person, or we are re-engaging with target doctors with whom engagement dropped off during lockdown.



## Conclusion

What does this all mean for Pharma? The pre-Covid days are gone, and we will never return to a world so dominated by face-to-face engagement.

In this new, rapidly evolving market, it is essential to have insights into what your peers are doing. Internal KPI's can be a false security blanket, making you feel like you are winning when in fact you may be lagging behind everybody else.

We also expect in the future to see more investment in marketing and medical signatories in order to find a way of delivering more content, faster.

CSL's Omni Benchmark launched in the UK in 2021 and in Europe in 2022 and provides syndicate members with a range of metrics to enable insightful comparison of their performance with their peers, and an insight into what is possible within the industry.

For more information on Omni Benchmark, please contact us via [info@csl-uk.com](mailto:info@csl-uk.com) or call 01483 528302. Or visit our [Omnichannel Benchmarking](#) website page .

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