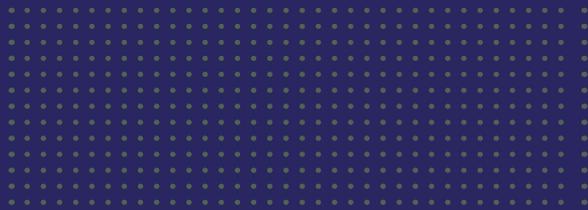




THE HEALTHCARE CUSTOMER EXPERIENCE PLAYBOOK



A prescriptive guide to
orchestrating outstanding HCP
experiences

2021



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WHY THIS PLAYBOOK?

Pharmaceutical organizations are sprinting to keep pace with the changes brought about by digital evolution, both within and outside industry. Interestingly, customer expectations are not being set by the pharma industry any more but by experience driven organizations like Apple, Google, and Amazon. Health care Professionals (HCPs) expect the same level of experience in their professional lives as they witness in their personal lives. Their benchmarks of customer experience often come from the retail or the travel and hospitality industry. Rarely would you hear a physician say, "I love X company's Y products website."

The HCP's experience journey begins with gaining an awareness of your brand, progresses to considering it seriously and deciding whether to prescribe it over alternatives to eventually advocating strongly on your behalf. Through this journey, each and every single touchpoint will have an impact on their experience as well as the outcome

Life Sciences organizations have the same engagement channels to work with as any other industry. However, this 'what' and 'why' of channel experience must be manifested through the 'how.' This playbook is our endeavor to prescribe a guide to build an unforgettable and personalized experience. One that drives a consistent and unified experience across channels.





Simple. We spoke to almost 700 HCPs who interact with global pharma organizations every day. We probed them to understand their specific interests around content, and their experience with various channels to identify the 12 critical moments of truth that build (or break) their experience. Finally, we also checked on the transformative changes brought about by the COVID-19 pandemic and how it will continue to impact an HCP's interactions with pharma.

HOW DID WE COMPILE THIS PLAYBOOK?

We hope this playbook offers you an insight into those key components of experience that are often obvious but ignored in favor of shiny new initiatives. This playbook provides a pathway to orchestrating the superior experiences your HCP customers expect.

We would love to hear your views on what resonates most with you and where your opinions differ. Please do reach out to us at Marketing@indegene.com.

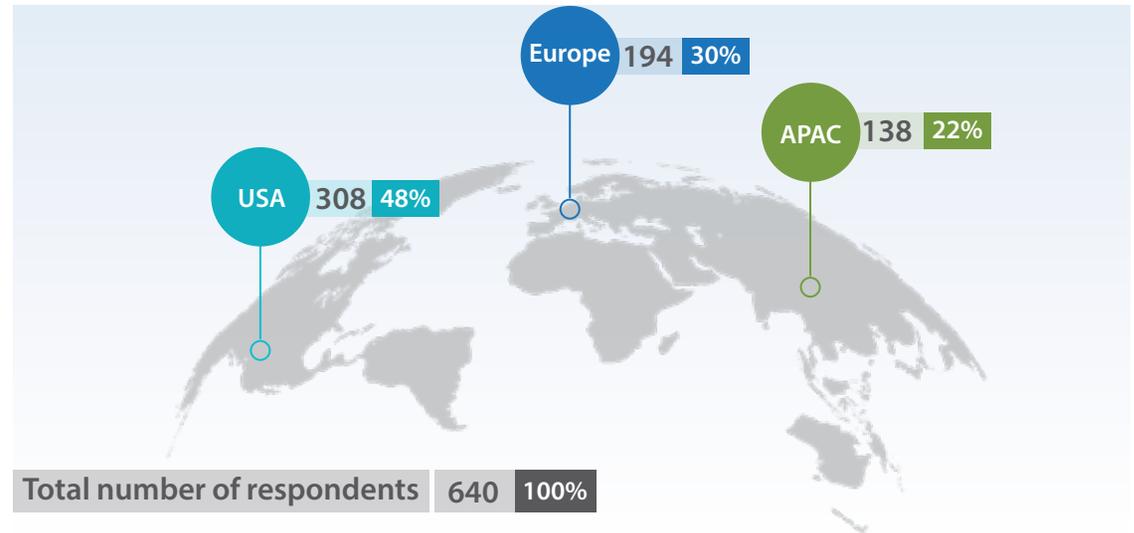
Best wishes!

Team Indegene

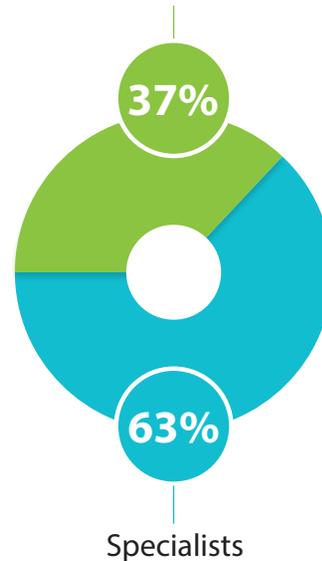
WHAT WAS OUR METHODOLOGY FOR THIS PLAYBOOK?

Indegene's objective was to understand what it takes for pharma companies to deliver outstanding experiences to HCPs. We launched a global study to find answers. We started with in-depth, open-ended discussions with over 30 HCPs, and these deep conversations set the direction for a quantitative survey of 640 HCPs.

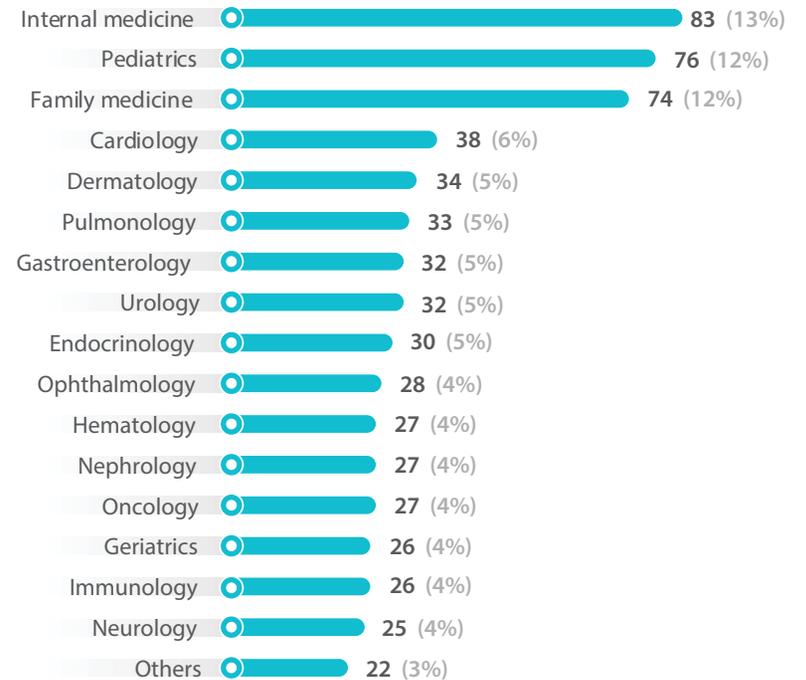
We solicited inputs from general physicians as well as specialists across North America, Europe and Asia-Pacific.



General Physicians



No. of respondents by specialization





WHAT DOES IT TAKE TO BUILD OUTSTANDING EXPERIENCES (12 MOMENTS OF TRUTH)

We saw customer journeys involve aspects that manifest before, during and after delivery of a product, a service or an event. Consequently, they extend across several touchpoints and channels over a length of time during the journey. If you adopt a siloed approach and target only a few channels, you go against the essence of a unified customer experience. Go beyond the individual touchpoints and dive into the “how” and “why” of each channel. Because experience matters to HCPs.

What does it mean to provide an excellent unified customer experience?

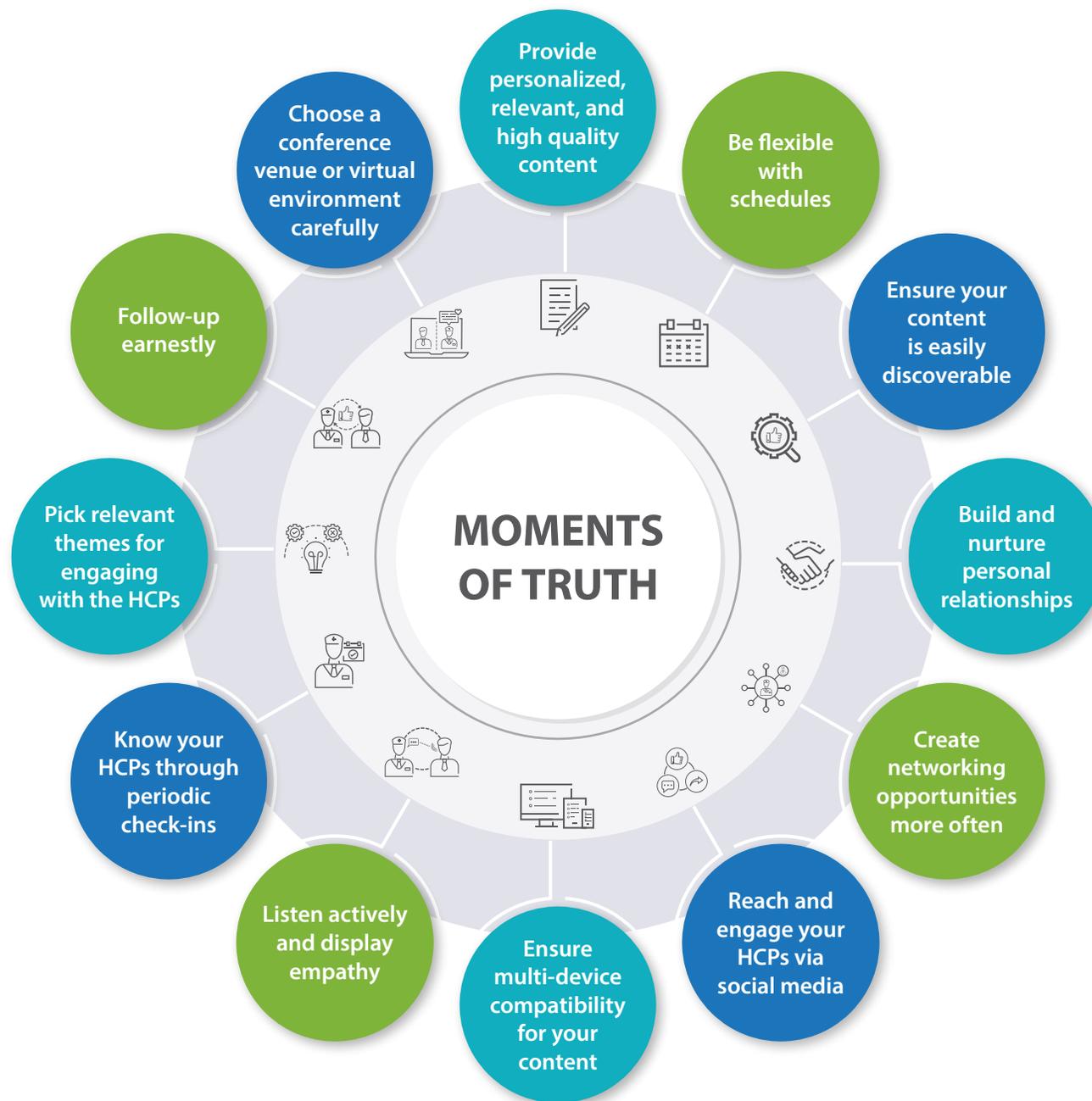
It means you must deliver content, functionality and your brand personality consistently across touchpoints. Further, you must align it with your customer's

expectations, context and needs. The HCP should connect with your brand in the same way, every time, be it through an in-person meeting or conference or webinar. The channel should not distract the HCP from the message you are trying to convey. It is no longer a choice but an imperative for your success.

This philosophy steered us to the 12 cornerstones that can “make or break” an experience. These cornerstones represent a unique interaction aspect along the customer journey and apply to all touchpoints. They will help you view the interactions through the HCP's eyes. Use them as your guiding principle when you chart your customer journey, raise the bar and impress the HCP at every contact.



MOMENTS OF TRUTH (MOT) - THE CORNERSTONES OF BUILDING OUTSTANDING EXPERIENCES



01.



Provide personalized, relevant, and high quality content – resonating with the HCP's expectations

CASE IN POINT:

'Quality of content showcased' ranks as the #1 factor determining the HCP's overall satisfaction with MSLs.

Create the content on relevant and current topics tailored to the HCP's persona, and deliver in downloadable, bite-sized, and animated format. Don't forget to lead with evidence for the products, else trust will never be gained. Facts and statistics are usually well received, and rich content will position your brand as a credible resource.

02.



Be flexible with schedules – unlocking access to HCPs

CASE IN POINT:

It is interesting to note that almost 30% of the HCP's overall satisfaction with remote meetings depends on its 'ease of scheduling.'

As personal and professional lives converge, it becomes even more vital to be flexible while scheduling your touchpoint with HCPs. With the onset of the COVID-19 pandemic and wide adoption of telemedicine, HCPs seek flexibility and greater control over how and when they want to interact with pharma companies. Provide self-scheduling options where HCPs can set up, move, and cancel meetings at their convenience.

03.



Ensure your content is easily discoverable – cutting through the clutter

CASE IN POINT:

About 40% of the overall satisfaction with various brands' websites is determined by the ease of finding the right content.

You are not the only brand engaging an HCP. S/he is flooded with similar messages from many other brands. To cut through the clutter, make it easy to discover relevant information and save time for the HCPs, who would otherwise have to go through layers of marketing literature to understand the products.

04.



Build and nurture personal relationships – succeeding in the digital age

CASE IN POINT:

Relationship building ranks as the top factor determining the HCP's overall satisfaction with Sales Reps.

HCPs respond better to those they trust. Relationships are developed over time by taking a keen interest in HCP's aspirations and priorities, and ensuring transparency in all communication.

Invest in learning about what matters to your HCP, beyond their apparent professional requirement. For instance, there are occasions where tenured sales reps with more in-depth relationships with HCPs were successful in motivating a shift to virtual interactions than their tech-savvy counterparts.



05.



Create networking opportunities more often – making yourself more valuable to the HCP

CASE IN POINT:

We saw that facilitating networking opportunities for HCPs (connecting with KOLs and speakers) ranks among the top four factors that determine their overall satisfaction with MSLs.

Connecting with like-minded peers or experts from the same field amplifies learning for an HCP. When you orchestrate this HCP network, you stand to gain substantial goodwill. Seek opportunities to build a personal network for your HCPs.

06.



Reach and engage your HCPs via Social Media – uncovering the new dynamic in HCP engagement

CASE IN POINT:

A staggering 82% of HCPs satisfaction across all social media engagements is driven by the type of branding on social media, including interest areas, product knowledge, and updates on industry developments.

HCPs learn about new healthcare trends and therapies from social media platforms, online communities, and forums. Engage them in open, educative conversations and communicate through social media frequently. Brands often jump to selling products directly; instead, nurture your HCP network through multi-touch campaigns on platforms and content that they prefer.

07.



Ensure multi-device compatibility for your content – moving toward a unified customer experience

CASE IN POINT:

Multi-screen engagement is the most effective way for doctors to access content. Research suggests that nearly 63% of HCPs are now “triple-screen” users (Source: http://media.mmm-online.com/documents/168/healthcasts_whitepaper_41894.pdf). Interestingly, compatibility with devices ranks among the top three factors that influence HCP overall satisfaction with mobile applications.

At home, on the go, or at work, HCPs experience your brand through various mobile/computer devices and operating systems. Regardless of the device, they expect a consistent and unified experience.

08.



Listen actively and display empathy – laying foundational blocks for a valuable interaction

CASE IN POINT:

The second most crucial factor that impacts overall satisfaction with sales reps is ‘listening actively, displaying empathy, and interpersonal skills’.

In a world where everyone has a voice and a platform to express it, active listening is often a rare and under-appreciated trait. Given the busy schedule of HCPs, it is essential to listen intently and understand their needs in a dynamically evolving environment.

Empathize with HCPs and help them achieve their objectives. Deeper empathy can be demonstrated by focusing on “patient care” and “patient first” mentality, as a shared objective of HCPs and pharma, rather than a pure brand focus.

09.



Know your HCPs through periodic check-ins – keeping your finger on the pulse

CASE IN POINT:

Communicating a call plan and periodically checking-in to ensure effective collaboration ranks among the top three drivers of experience for HCPs, experience through the telephonic channel.

HCPs needs and expectations change as their context changes. Perhaps your announcements on a new disease realization for a patient or recent novel drug discovery has piqued their interest in your brand.

Remain on top of an HCP's mind in real-time with periodic check-ins. Check-ins need to be done not just from a sales and promotion perspective but from an educational and customer service standpoint as well.

10.



Pick relevant themes for engaging with HCPs – creating long term impact

CASE IN POINT:

A relevant theme and topic is the top factor influencing the overall satisfaction with an event or conference.

Ensure your topics, themes, and format are relevant for the audience and the situation. Create the content on relevant and current topics that match with the HCP's persona, and deliver in a compelling and engaging format.

11.



Follow-up earnestly – improving recall through post-meeting activities

CASE IN POINT:

Following-up on open items (post meetings) ranks among the top three elements that drive overall satisfaction with remote sessions.

If you promised a specific piece of information to the HCP, deliver it on time. Close all action items promptly and follow up diligently. Be sensitive to the HCP's context while following through on all open items from your engagement. However, incessant follow-up can alienate your HCP.

12.



Choose a conference venue or virtual environment carefully – ensuring a memorable experience

CASE IN POINT:

The event venue or platform and its ambiance rank among the top three criteria that affect overall satisfaction with the event.

Differentiate your experience by selecting an exciting venue and offering an ambiance that HCPs will cherish. It is usual to host a seminar in a hotel conference room. Why not pick a theme park for your next HCP event? Tactical details such as the ease of accessing the venue or lighting or setting the room temperature make all the difference in creating a standout event.

If you are going virtual, differentiate your experience by selecting an innovative virtual environment instead of the usual webinar platforms. Ensuring participants' ability to navigate easily between concurrent sessions, allowing peer-to-peer discussion, and facilitating networking matter most to HCPs.



WHAT DOES AN OUTSTANDING UNIFIED EXPERIENCE FEEL LIKE?



A week in the life of an HCP interacting with pharma company – Sales Rep Interaction

James
A 42-year-old gastroenterologist who runs a private practice in New York

INTERACTION

01

James receives a call / message from his sales rep to see if there is anything he needs.

CHANNELS

Call/Text/Email

PERCEPTION

James is pleased to receive the message.

EXPERIENCE*

Simple:
It is a channel that is easy for James to respond to (pre-agreed).

MOMENTS OF TRUTH IN PLAY



Knowing your HCPs through periodic check-ins

02

James responds and asks the sales rep about a specific product question.

Call/Text/Email

James feels relieved as he has needed to have this question answered.

Trust:
He has a good relationship with his sales rep and knows they will support him meet his need.



Building and nurturing personal relationships

03

The sales rep sends James an email requesting a meeting to discuss the answer either face-to-face or over telephone.

Email

James is reassured that the sales rep understands his question based on the meeting agenda.

Relevance:
The meeting agenda meets his needs.



Listening skills and empathy demonstrated by sales rep during meetings with HCP

04

James agrees with a remote meeting and confirms a time slot. But due to an emergency, he messages his sales rep asking them to rebook it for a new time.

Remote meeting

James is thankful he can easily reschedule.

Simple:
The meeting is easy to schedule.



Being flexible with schedules

05

James and the sales rep meet virtually, and the sales rep provides James with the information needed to answer his question. They discuss a couple of other topics.

Virtual Meeting

James is content that his question has been answered.

Relevance:
The meeting has met his needs.



Provide personalized, relevant, and high quality content

06

Post the meeting, the sales rep sends a follow-up email with some additional information on the other topics him and James discussed.

Email

James is pleased that the sales rep has followed through on the additional topic discussion points.

Trust:
The sales rep supports him with his information needs.



Following-up earnestly



*As per DT Consulting (An Indegene Company) research - trust, relevance, and simplicity are the key expectations that HCPs have for their interactions with pharmaceutical firms.

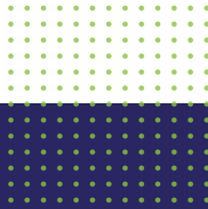
WHAT DOES IT TAKE TO BUILD UNIFIED EXPERIENCES ACROSS CHANNELS?

Today, pharma companies have a range of options to interact with HCPs. And the digital age has only added to the possibilities. How can a pharma company navigate through the maze of channels and provide a unified experience to the HCP irrespective of the channel used? The first step in delivering a harmonized experience is to gain an intimate understanding of each channel and the role they can play. It is equally important to recognize the utility and limitations of each channel.

HCPs' experience in a particular channel of interaction is defined by various touchpoints / variables, some extremely important and others not so much so. Through statistical techniques, we identified three - four key components in each channel that have the most impact on channel experience. We have also outlined a few key expectations from each channel (voiced out by HCPs) and our recommendation to best deliver on those expectations.



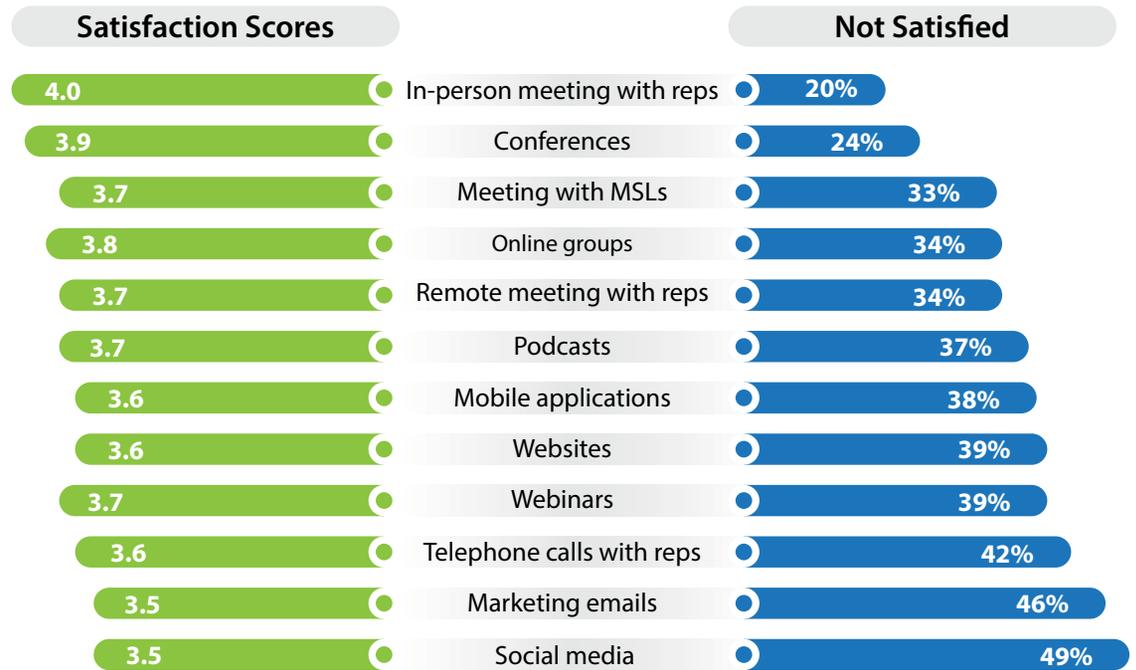
Indegene's study presents a detailed view of each channel and how HCPs perceive interactions through them. This section gives you actionable insights that you can implement to enhance the HCP experience.



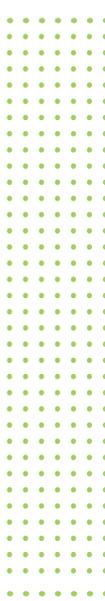
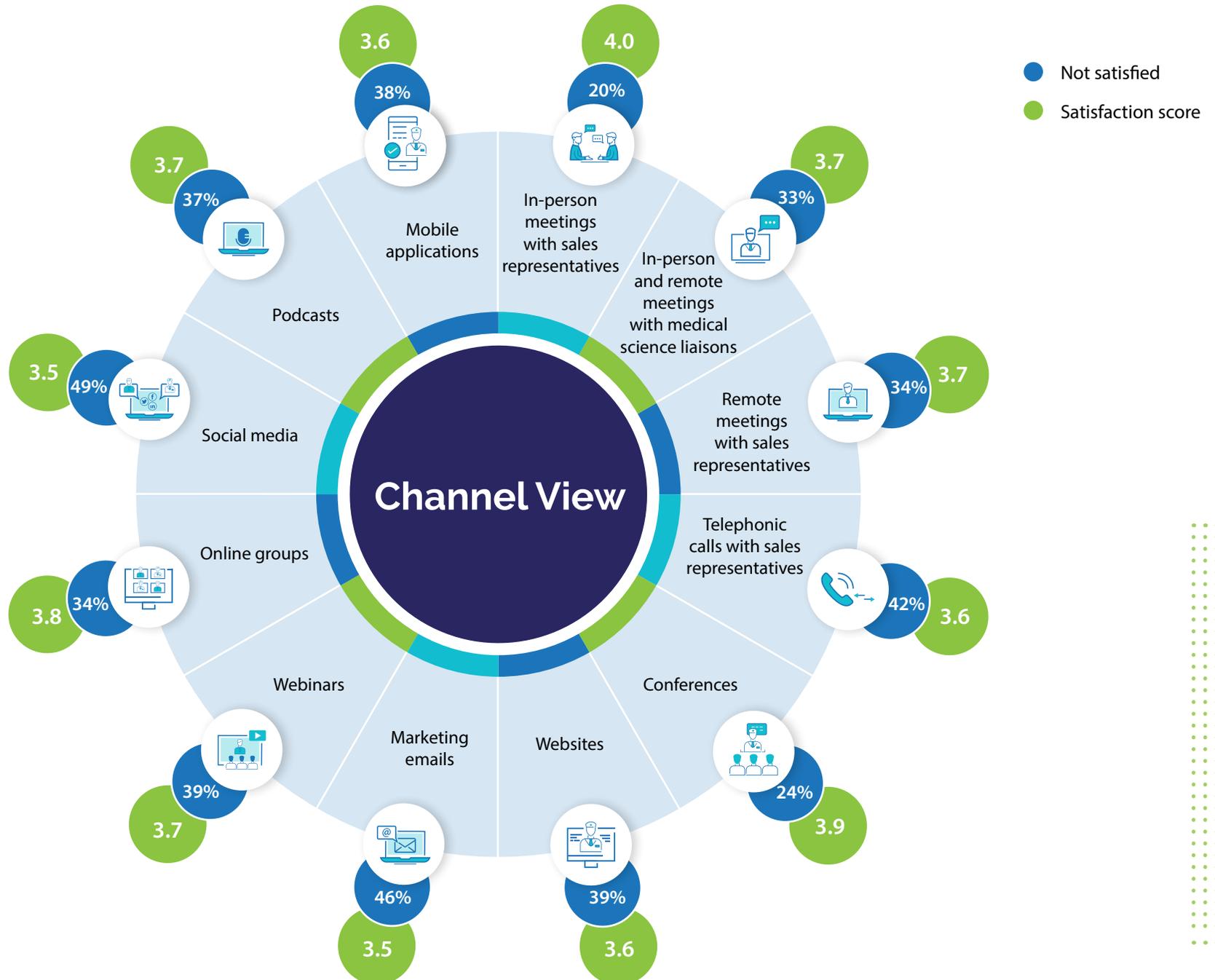
SATISFACTION WITH THE TYPICAL CHANNELS OF ENGAGEMENT

Although the average satisfaction scores are 3.7 on a scale of 5, on an average, at least 1 in 3 HCPs is not satisfied with his/her experience from the 12 channels that Life sciences organizations typically deploy.

Customers rarely perceive channels of engagement in itself but perceive the brands through the experience that is driven to them by means of these channels. Customers associate a dissatisfactory experience with even one channel as a dissatisfactory experience with the entire brand. Hence, a unified experience cannot be viewed through the prism of channel satisfaction scores in isolation and warrants deeper introspection.



HCPs' SATISFACTION WITH TYPICAL CHANNELS OF ENGAGEMENT





In-person meetings with sales representatives

We found out that **77%** of the surveyed HCPs interact with sales reps through in-person meetings and **80%** among them deem them effective to achieve their goals.



OVERALL SATISFACTION SCORE
4.0/5



HCPs are satisfied with

Product Knowledge (4.1)

Interpersonal and listening skills, and empathy (4.0)

Sales reps' ability to answer questions (4.0)

HCPs are dissatisfied with

Sharing pre-reads, or lack thereof (3.4)

Meeting without a pre-set agenda (3.5)

Sharing of industry insights, or lack thereof (3.6)



Our survey indicates that

30% of HCPs who used to prefer in-person meetings with sales reps before COVID would no longer prefer it after the pandemic.

Key components that impact overall channel experience*

- Build lasting relationships
- Focus on listening, interpersonal skills and empathy
- Creative product demonstration
- Have high quality conversations

*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touch points against the overall channel satisfaction rating provided by the surveyed HCPs.

Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS	AGENDA & SCHEDULE	INTERACTIONS	CONTENT	BEYOND THE PRODUCT	CONTINUOUS FEEDBACK
HCPs EXPECT	<ul style="list-style-type: none"> Updated product information Sample sharing A friendly, polite, honest and close relationship Brevity and respect for the HCP's time 	<ul style="list-style-type: none"> Minimize cognitive load (number of meetings) Enable flexibility on schedule Provide context for the conversation 	<ul style="list-style-type: none"> Short duration meetings (4-5 minutes) Personalized conversations 	<ul style="list-style-type: none"> More visuals and engaging videos Information beyond product efficacy More interactive tools 	<ul style="list-style-type: none"> Information on training programs Patient support information 	<ul style="list-style-type: none"> Receive feedback on interactions Anytime query feeds
PHARMA NEEDS TO	<ul style="list-style-type: none"> Tailor the meeting agenda and discussion around HCPs interests Build digital sample distribution capabilities that reps can orchestrate Demonstrate empathy and brevity 	<ul style="list-style-type: none"> Calendarize meeting in advance Share agenda and allow HCPs to modify it Share pre-reads 	<ul style="list-style-type: none"> Stick to the agenda Know your HCP – Interest-based/ history-based interactions 	<ul style="list-style-type: none"> Leverage video and other interactive formats of content to drive product detailing Leverage tools/ dashboards/ simulations to present data 	<ul style="list-style-type: none"> Showcase organizational initiatives Stay updated on patient support information 	<ul style="list-style-type: none"> Build ultra-short surveys to capture feedback after each interaction Deploy chatbot/ query form built into calendars for writing queries



Sales reps often do not communicate the reason for the meeting, or the amount of time required. It is hard to structure our workday, and we must find a large amount of time for them unexpectedly - and then receive little information of value. It is more manageable when there is a defined agenda before the meeting.

- A US BASED SPECIALIST





In-person and remote meetings

with medical science liaisons

The HCPs perceive the medical science liaisons (MSLs) as a valuable source of in-depth scientific, disease and therapy-related knowledge. Around **53%** of the surveyed HCPs interact with MSLs through in-person and remote meetings, and **81%** of that subset deem them effective in achieving their goals.



HCPs are satisfied with

MSLs knowledge of the therapeutic area (3.9)

MSLs scientific knowledge (3.9)

Valuable insights shared by MSLs (3.8)



OVERALL SATISFACTION SCORE
3.7/5



HCPs are dissatisfied with

The way MSLs are being introduced (3.4)

The way MSLs credentials are being shared (3.5)

Ease of scheduling meetings, or lack thereof (3.6)

Key components that impact overall channel experience*

- Showcase high-quality content
- Meet the HCPs at their convenience (place and time)
- Demonstrate research skills
- Facilitate peer-to-peer networking

*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.



Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS	AGENDA & SCHEDULE	INTERACTIONS	CONTENT	VALUE ADDITION
HCPs EXPECT	<ul style="list-style-type: none"> In-depth scientific know-how New treatment, development and product education Data and evidence 	<ul style="list-style-type: none"> Showcasing credentials and achievements before the meeting Pre-set the agenda and communicate the need/objectives clearly Flexibility of meeting (time and place) 	<ul style="list-style-type: none"> Periodic communication effectiveness Crisp and well-articulated communication Ability to weave in multiple data sets, scenarios, case studies 	<ul style="list-style-type: none"> Presentation of findings (intuitive visuals, digital content, videos) Learning new aspects/ value addition at every meeting 	<ul style="list-style-type: none"> To be involved in publications / early research trials Act as trusted advisor that saves time of research and provides credible information Unbiased and non-commercial discussions
PHARMA NEEDS TO	<ul style="list-style-type: none"> Educate the HCPs - Share content in easy learning modules Share new developments proactively Pivot your interactions on data and evidence 	<ul style="list-style-type: none"> Intuitive, crisp, and visual CVs of MSLs Improve the meeting scheduling experience by leveraging digital tools 	<ul style="list-style-type: none"> Summarize conversations and track progress over time Present complex data in creative ways Narrate by integrating multiple data sets 	<ul style="list-style-type: none"> Create digital content repositories for MSLs to answer/respond quickly Share fresh scientific content and new developments 	<ul style="list-style-type: none"> Create opportunities for HCPs to be collaborate on scientific research and publications Showcase periodic recap of interactions over a period of time and highlight value added



MSLs should work more like a partner with the physicians.

- A US-BASED SPECIALIST





Remote meetings with sales representatives

The HCPs have demonstrated a greater willingness to interact with sales reps through remote meetings in recent times. Around **48%** of the surveyed HCPs actively interact with sales reps through remote meetings, and **64%** of that subset deem it effective to achieve their goals.





HCPs are satisfied with

Content showcased (3.7)

Quality of detailing (3.7)

Ease of navigation of remote meeting tools (3.7)



OVERALL SATISFACTION SCORE
3.7/5



HCPs are dissatisfied with

Relationship building ability virtually (3.3)

Intuitiveness of remote meeting tools (3.5)

Sharing pre-reads, or lack thereof (3.5)



A third of surveyed HCPs report that **remote meetings** would be in their **top 3** preferred channels, even after the "in-person" channels return. Companies can expect a 3X rise in usage of remote meetings compared to pre-pandemic volumes.

Key components that impact overall channel experience*

- Be flexible with scheduling meetings
- Promptly follow up on open items post the meeting
- Improve the usability of remote meeting tools/platforms
- Improve the look and feel of the remote meeting interface

*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.

Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS	AGENDA & SCHEDULE	INTERACTIONS	CONTENT & DIGITAL TOOLS
HCPs EXPECT	<ul style="list-style-type: none"> Efficient information exchange, interactive meetings and answers to specific queries Ease of scheduling meetings Clear, concise and visually appealing content 	<ul style="list-style-type: none"> Crisp and right-timed sessions Ability to choose slots at convenience Agenda, pre-read content and option to request specifics before the meeting 	<ul style="list-style-type: none"> In-depth scientific know-how New treatment, development and product education Data and evidence 	<ul style="list-style-type: none"> Visually appealing content Interacting with presentations Good UX
PHARMA NEEDS TO	<ul style="list-style-type: none"> Create content that can be shared as pre-reads, to which HCPs can annex their questions Shift towards tools that allow HCPs a greater control over scheduling 	<ul style="list-style-type: none"> Streamline the meetings Adopt scheduling tools that allow two-way scheduling functionalities 	<ul style="list-style-type: none"> Adhere to virtual meeting protocols and etiquettes Personalize the remote meeting experiences <ul style="list-style-type: none"> Understand individual preferences (time, duration, frequency, etc.) 	<ul style="list-style-type: none"> Leverage interactive digital content forms Customize UI/UX as per HCP preferences



We need something like a pre-call handout to review and prepare for any questions we may have.

- A US-BASED SPECIALIST





Telephonic calls

with sales representatives

The HCPs perceive the obvious limitations of telephonic calls with sales reps in their ability to engage beyond basic interactions. However, **49%** of the surveyed HCPs do interact with sales reps through telephonic calls, but only **54%** of that subset deem them effective to achieve their goals.



HCPs are satisfied with

Ease of using the telephonic medium (3.6)

Quality of detailing (3.6)

Sales reps' ability to answer questions (3.7)

OVERALL SATISFACTION SCORE
3.6/5



HCPs are dissatisfied with

Ease of scheduling, or lack thereof (3.4)

Collaboration efforts through periodic calls (3.4)

The way reps are adapting to HCPs' schedule (3.4)

Key components that impact overall channel experience*

- Listen attentively
- Convey the information succinctly
- Ensure periodic check-ins
- Adopt a calling routine as per the HCPs' preferences



*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.

Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS
HCPs EXPECT	<ul style="list-style-type: none"> • Product information • A way to keep in touch • Brevity of conversations
PHARMA NEEDS TO	<ul style="list-style-type: none"> • Make sure to keep the call short • Condense the information • Plan regular follow-up calls



I expect them to respect my time when they call and professionally present their product.

– A SPAIN-BASED OPHTHALMOLOGIST





Conferences

For HCPs, conferences, events, or training programs are great ways to gain insights and learn about new developments in the field. Around **75%** of the surveyed HCPs attend conferences and live events, and **90%** of that subset deem it effective to achieve their goals.



HCPs are satisfied with

Venue and ambiance (3.9)

Quality of discussions (3.9)

Quality of content showcased (3.9)



OVERALL SATISFACTION SCORE
3.9/5



HCPs are dissatisfied with

Conference details not being showcased on social media (3.5)

Quality of mobile apps for conference (3.5)

Sharing of attendee details, or lack thereof (3.5)



We expect the physical conferences to come back post pandemic, with 1 out of 2 of the surveyed HCPs still choosing physical conferences as their preferred channel of engagement. However, based on the survey responses, we estimate a **16% decline** in channel usage post pandemic.

Key components that impact overall channel experience*

- Seamless content sharing
- Sharp focus on relevant themes and topics
- Interesting venue and ambiance
- Easy enrollment and registration

*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.

Here's what the HCPs said and what we recommend you do to meet their expectation.

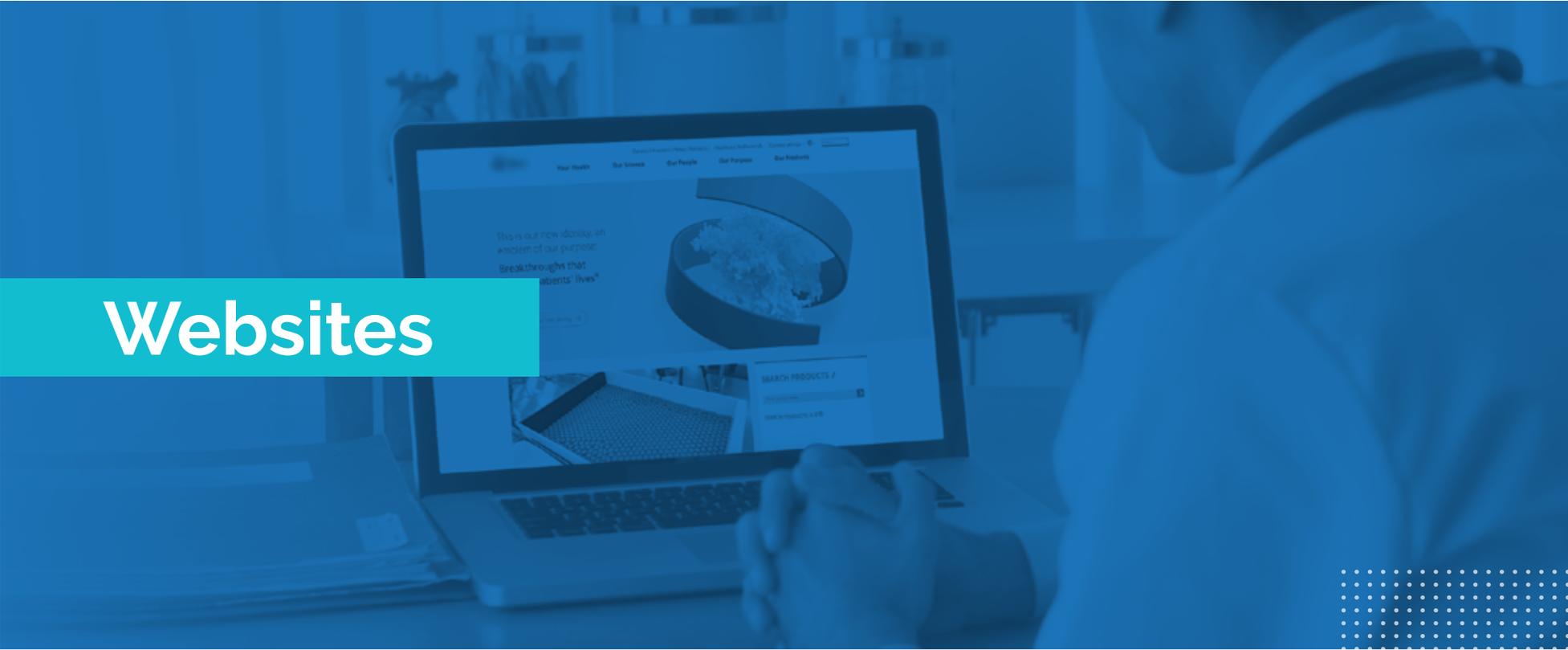
	GENERAL FOCUS	PRE-EVENT EXPERIENCES	EVENT EXPERIENCES	POST-EVENT EXPERIENCES
HCPs EXPECT	<ul style="list-style-type: none"> • Unbiased discussions on new developments • Interactions and networking with peers and key opinion leaders • Educative experience through hands-on learning and training 	<ul style="list-style-type: none"> • Detailed agenda communication • List of attendees, speaker profiles and networking possibilities • Pre-booking sessions, blocking seats and tables with select attendees 	<ul style="list-style-type: none"> • High-quality speakers and panel discussions • Industry trends, scientific data and early information 	<ul style="list-style-type: none"> • Extending value from new connects and topics discussed • Experience of "event" through take-home goodies, clinical support material • Sharing experiences with colleagues on social media
PHARMA NEEDS TO	<ul style="list-style-type: none"> • Take a subtle approach to branding and share knowledge in an unbiased manner • Design conference experiences to include focused networking between peers • Include more hands-on learning and training 	<ul style="list-style-type: none"> • Showcase attendee list digitally • Create communities for conference attendees on platforms like Slack • Provide options to choose peer groups on roundtables 	<ul style="list-style-type: none"> • Recruit high-quality speakers • Facilitate two-way communication between attendees and speakers • Focus on attendee engagement during the event 	<ul style="list-style-type: none"> • Create short webinars on topics discussed during the event • Create opportunities for real-time sharing of content and experiences on social media (e.g., tweet-worthy quotes)



Conferences help stay up to date with latest medical info and product info in a condensed format.

- A US-BASED HEMATOLOGIST





Websites

HCPs view brand websites as a source of immediate and easily accessible product and prescription information. Around **55%** of our respondents look for content on the websites of pharma firms, but only **64%** of that subset find them effective in achieving their goals.



HCPs are satisfied with

Visual appeal of the websites (3.7)

Quality of the available content (3.7)

Additional support materials available (3.6)

OVERALL SATISFACTION SCORE
3.6/5



HCPs are dissatisfied with

Product comparisons offered, or lack thereof (3.3)

Case studies showcased, or lack thereof (3.4)

Difficulty in finding the content they are looking for (3.4)



We estimate a modest **6% increase** in website usage in the post-COVID period based on the survey responses.

Key components that impact overall channel experience*

- Ease of navigation
- Product comparisons
- Ease of finding content

*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.

Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS	WEBSITE DESIGN	CONTENT	BEYOND THE PRODUCT
HCPs EXPECT	<ul style="list-style-type: none"> • Quick access to product-related information • Ease of navigation and free of clutter • Hub with links to all other non-product-related info like research papers, patient support and reimbursement information 	<ul style="list-style-type: none"> • Ease of navigation • Ease of finding the right content you are looking for • Visual appeal 	<ul style="list-style-type: none"> • Prescription info: dosage, efficacy, side effects, duration etc. • Downloadable content: patient guides, patient compliance aids, visuals for office, etc. • Clinical trial information, emerging treatments, case studies 	<ul style="list-style-type: none"> • Ease of contacting pharmaceutical company through instant messenger/ chatbot
PHARMA NEEDS TO	<ul style="list-style-type: none"> • Provide product-related info on home page or quick access links • Prioritize website responsiveness and simplicity over rich visuals and design elements • Create easily accessible content hubs 	<ul style="list-style-type: none"> • Simplify the look and feel and optimize branding for better visual appeal • Easier and intuitive navigation • Reduce layouts complexity – too many numbers and highlights; follow better segmentation practices for content 	<ul style="list-style-type: none"> • Ensure quality content; provide educational info - patient education materials • Publish scientific evidence, transparency on clinical trials and doctors associated with research on the website 	<ul style="list-style-type: none"> • Provide avenues/chatbots to post questions; use active voice for tone and language



Website navigation needs improvement across the board. I can never find what I need. The design may be great, but it's dreadful for a busy physician to navigate it.

– A US-BASED SPECIALIST





Marketing emails

Being one of the push channels, marketing emails must carry easy-to-digest information and comprise threads for the HCPs to seek out the information or service they need. Around **66%** of the surveyed HCPs engage with marketing emails, but only **43%** of that subset deem them effective to achieve their goals.



HCPs are satisfied with

Quality of the content (3.6)

Confidentiality of the email IDs shared (3.5)

OVERALL SATISFACTION SCORE
3.5/5



HCPs are dissatisfied with

Spam emails (3.2)

Lack of personalized content (3.4)

Key components that impact overall channel experience*

- Maintain confidentiality
- Control spam
- Send focused emails with fewer topics
- Share patient support info



*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.

Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS	PRIVACY	EMAIL ETIQUETTE	UX & DESIGN	CONTINUOUS FEEDBACK
HCPs EXPECT	<ul style="list-style-type: none"> • Concise information • Limit the number of emails and spam • Promotion-free emails 	<ul style="list-style-type: none"> • Secure management of email IDs • Recognized senders and representatives 	<ul style="list-style-type: none"> • Acceptable number of emails • Sending emails at appropriate time of the day 	<ul style="list-style-type: none"> • Multi-device adaptability • Better readability – less text • Visuals and video in addition to articles 	<ul style="list-style-type: none"> • More emphasis on educational content and industry developments • Information on webinars, conferences, events, KOL meetings • Patient assistance material, infographics for sharing / printing
PHARMA NEEDS TO	<ul style="list-style-type: none"> • Create snapshots of information • Dynamically modify email cadence as per individual HCP preferences • Minimize branding and promotional elements in emails 	<ul style="list-style-type: none"> • Clearly and transparently communicate privacy policy and anti-spamming info 	<ul style="list-style-type: none"> • Provide options for HCPs to choose the frequency of emails 	<ul style="list-style-type: none"> • Design emails for multiple device usage • Design interactive and visually appealing emails 	<ul style="list-style-type: none"> • Create community-based/location-based content • Create patient support info in shareable / printable formats



The company emails are essentially spam and provide little value. Personal emails from reps and MSLs are to the point and appreciated.

– A US-BASED SPECIALIST



Webinars

Live webinars are a great way to reach HCPs globally. They offer great flexibility to the attendees over physical conferences. The pandemic has catapulted webinars to a scale never seen before. Companies now have to step up with high-quality webinars to fill the knowledge void left behind by the absence of physical conferences. Around **57%** of the surveyed HCPs attend webinars, and **74%** of that subset deem them effective to achieve their goals.



HCPs are satisfied with

Quality of the speakers (3.7)

Quality of the scientific content (3.7)

Quality of the visuals showcased (3.7)



OVERALL SATISFACTION SCORE
3.7/5



HCPs are dissatisfied with

Pre-reads shared, or lack thereof (3.4)

Lack of post-webinar networking communication (3.4)

Difficulty in discovering webinars (3.4)



We estimate an **8% growth** in webinars after the pandemic based on the survey responses. However, this growth is likely to continue, as it offers a value proposition of flexibility and time saving, which is appealing to the HCPs who are characteristically busy.

Key components that impact overall channel experience*

- Ease of webinar discovery
- Focus on the right topics
- Showcase scientific content
- Focus on post-webinar engagement

*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.

Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS	DISCOVERY	SPEAKER CREDENTIALS	CONTENT	EXPERIENCE	INTERACTIONS
HCPs EXPECT	<ul style="list-style-type: none"> • Interactions with speakers • Recorded sessions and shareable content • Short-length webinars • Unbiased discussions on new developments 	<ul style="list-style-type: none"> • Ease of webinar discovery 	<ul style="list-style-type: none"> • Speaker credentials top priority • Peer recommendations / peer enthusiasm 	<ul style="list-style-type: none"> • Quality over quantity; only high-quality topics • Fresh topics and emerging trends • Depth of content 	<ul style="list-style-type: none"> • Hassle-free sign up/ registration • Ease of attending webinar across devices without additional application installations • High-quality visuals 	<ul style="list-style-type: none"> • More time to interact - Q&A • Ability to chat / interact during sessions • Interactive polls
PHARMA NEEDS TO	<ul style="list-style-type: none"> • Arrange sessions for attendee-speaker interactions • Create easy-to-access content repositories • Create micro-series webinar formats 	<ul style="list-style-type: none"> • Utilize multichannel approach to webinar promotion • Run targeted/ community campaigns 	<ul style="list-style-type: none"> • Showcasing speaker credentials & achievements in relevant light • Create webinar promotion collaterals that can be shared among peers across multiple digital platforms 	<ul style="list-style-type: none"> • Streamline your webinar topics • Keep your finger on the pulse – track micro-trends • Curate fresh topics 	<ul style="list-style-type: none"> • Reduce the steps and friction in sign-up process • Build device agnostic and browser-based webinar platforms • Create powerful presentations to aid the talks 	<ul style="list-style-type: none"> • Integrate chats/ polls/surveys functionality to webinar hosting platforms • Enable real-time Q&A sessions and allow for post session interaction



There's never adequate follow-up content. Prefer browser-based webinars as installing apps is not desired.

– A US-BASED SPECIALIST





Online groups

Online groups offer a platform for HCPs seeking community building, exchange of information, ideas, and opinions among like-minded peers. However, only **33%** of the surveyed HCPs currently engage with online groups, and **68%** of that subset deem them effective to achieve their goals.



HCPs are satisfied with

Updates on new developments (3.6)

Quality of participating users (3.5)



OVERALL SATISFACTION SCORE
3.8/5



HCPs are dissatisfied with

Difficulty in finding the answers they are looking for (3.4)

Lack of one-to-one networking opportunities (3.4)

Key components that impact overall channel experience*

- Credible information
- Quality interactions
- Range of networking opportunities

*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.



Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS	CONTENT	ENGAGEMENT
HCPs EXPECT	<ul style="list-style-type: none"> • Exchange opinions • Sharing novel information, ideas and experiences • Discuss new cases 	<ul style="list-style-type: none"> • Sharing online content/articles/videos • Keep up with the latest content • Discuss case histories, patient success stories, medication, side effects, trials and scientific research 	<ul style="list-style-type: none"> • Networking with same-specialty HCPs and regional associations • Works as an effective search engine (my network tags me) googling the same might not give this relevant data
PHARMA NEEDS TO	<ul style="list-style-type: none"> • Engage participants better by using formats such as opinion polls and surveys • Share new developments • Initiate new cases discussions 	<ul style="list-style-type: none"> • Bring in an authoritative body/system control to screen and verify if possible • Vet and improve the accuracy and authenticity of the content 	<ul style="list-style-type: none"> • Create threads, story posts HCPs can subscribe to • Send daily digest/notifications only for relevant content



Expect to hear comments from users on clinical cases and experience with various treatments.

– A GERMANY-BASED PEDIATRICIAN



Social media



Even in this hyper-social age, HCPs have desisted using social media to accomplish their knowledge and information goals. Only **29%** of the surveyed HCPs engage with social media, and 52% of that subset deem it effective to achieve their goals. However, HCPs in the APAC region reported a slightly higher propensity (**38%**) toward social media over their European and American counterparts.



HCPs are satisfied with

Nature of the content (3.6)

Updates on new developments (3.6)



OVERALL SATISFACTION SCORE
3.5/5



HCPs are dissatisfied with

Difficulty in discovering social sites (3.3)

Lack of engagement on user posts (3.5)

Key components that impact overall channel experience*

- Type of branding
- Responsiveness
- Ease of content discovery

*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.



Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS	CONTENT	ENGAGEMENT
HCPs EXPECT	<ul style="list-style-type: none"> • Group discussions • Easy access and option to search • New case discussions 	<ul style="list-style-type: none"> • Sharing online content / articles / videos 	<ul style="list-style-type: none"> • Networking with same-specialty HCPs and regional associations • Build influence among patient population
PHARMA NEEDS TO	<ul style="list-style-type: none"> • Initiate threads that trigger engaging group conversations • Identify and leverage social KOLs and influencers • Post new cases and findings 	<ul style="list-style-type: none"> • Reduce the noise and too much randomness • Vet and improve the accuracy and authenticity of the content • Tailor the content by region to make it more relevant 	<ul style="list-style-type: none"> • Invite HCPs/KOLs to engage with patient community and clarify apprehensions, guide them to make right & accurate decisions



Social media needs to be easy to use and easy to navigate.

– A US-BASED HEMATOLOGIST



Podcasts

Podcasts are an emerging channel that the HCPs are engaging for their information needs. Podcasts offer information in an unstructured yet interesting way. Currently, **28%** of the surveyed HCPs engage with podcasts, and **64%** of that subset find it effective to achieve their goals.



HCPs are satisfied with

Quality of speakers (3.7)

Listening across devices (3.7)



OVERALL SATISFACTION SCORE
3.7/5



HCPs are dissatisfied with

Difficulty in discovering podcasts (3.3)

Evidence-based discussions, or lack thereof (3.5)

Key components that impact overall channel experience*

- Recruit high-quality speakers
- Make podcasts easily discoverable
- Have evidence-based discussions

*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.



Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS	PLANNING & AWARENESS	CONTENT
HCPs EXPECT	<ul style="list-style-type: none"> • High-quality speakers • Relevant topics • Unbiased information 	<ul style="list-style-type: none"> • Ease of discovery of podcasts • Quality of speaker discussion led by industry leaders who can deliver with clarity and authoritativeness 	<ul style="list-style-type: none"> • Authentic, unbiased, non-promotional and independent content • Wide-ranging topics – layman health, scientific developments, policy & regulation, MedTech, health economics, etc. • Ailment specific, driven by associations and regional groups • Simple content that can be recommended to patients
PHARMA NEEDS TO	<ul style="list-style-type: none"> • Recruit high-quality speakers and highlight their credibility during the promotion • Ensure the content caters to the HCP's needs • Share unbiased information and downplay product branding 	<ul style="list-style-type: none"> • Differentiate by recruiting quality speakers/KOLs • Drive awareness and set reminders for higher participation • Share pre-read (if any) in advance 	<ul style="list-style-type: none"> • Keep the length of the podcast optimal to avoid fatigue, short snippets are most preferred • Make the transcripts available to see and decide on listening



With podcasts, I can get much information in a short period and on my schedule.

– A US-BASED GERIATRICS SPECIALIST



Mobile applications



Mobile applications are fast gaining ground as mobile device usage is ever increasing. However, only **35%** of the surveyed HCPs currently use dedicated mobile applications provided by pharma companies, and **63%** of that subset find it effective to achieve their goals.



HCPs are satisfied with

Ease of installation (3.8)

Compatibility with devices (3.7)

User-friendly interface (3.7)



HCPs are dissatisfied with

Option to contact sales reps, or lack thereof (3.3)

Lack of video call option (3.3)

Key components that impact overall channel experience*

- Focus on app performance
- Ensure multi-device compatibility
- Provide easy ways to access information

*The key components that impact overall channel experience are derived based on regression analysis of the satisfaction rating for each of the touchpoints against the overall channel satisfaction rating provided by the surveyed HCPs.



Here's what the HCPs said and what we recommend you do to meet their expectation.

	GENERAL FOCUS
HCPs EXPECT	<ul style="list-style-type: none"> • Ease of navigation and use • Ease of information access • Ability to call on a sales rep
PHARMA NEEDS TO	<ul style="list-style-type: none"> • Build apps that fit into HCP's life • Enable search and on-demand information • Connect the reps, MSLS, and surrounding stakeholders in the ecosystem to the apps



Expect the mobile app to deliver relevant information in a well-organized format with supporting data and opportunity to contact representatives to explore specific products in more detail when required.

– A UK-BASED ENDOCRINOLOGIST

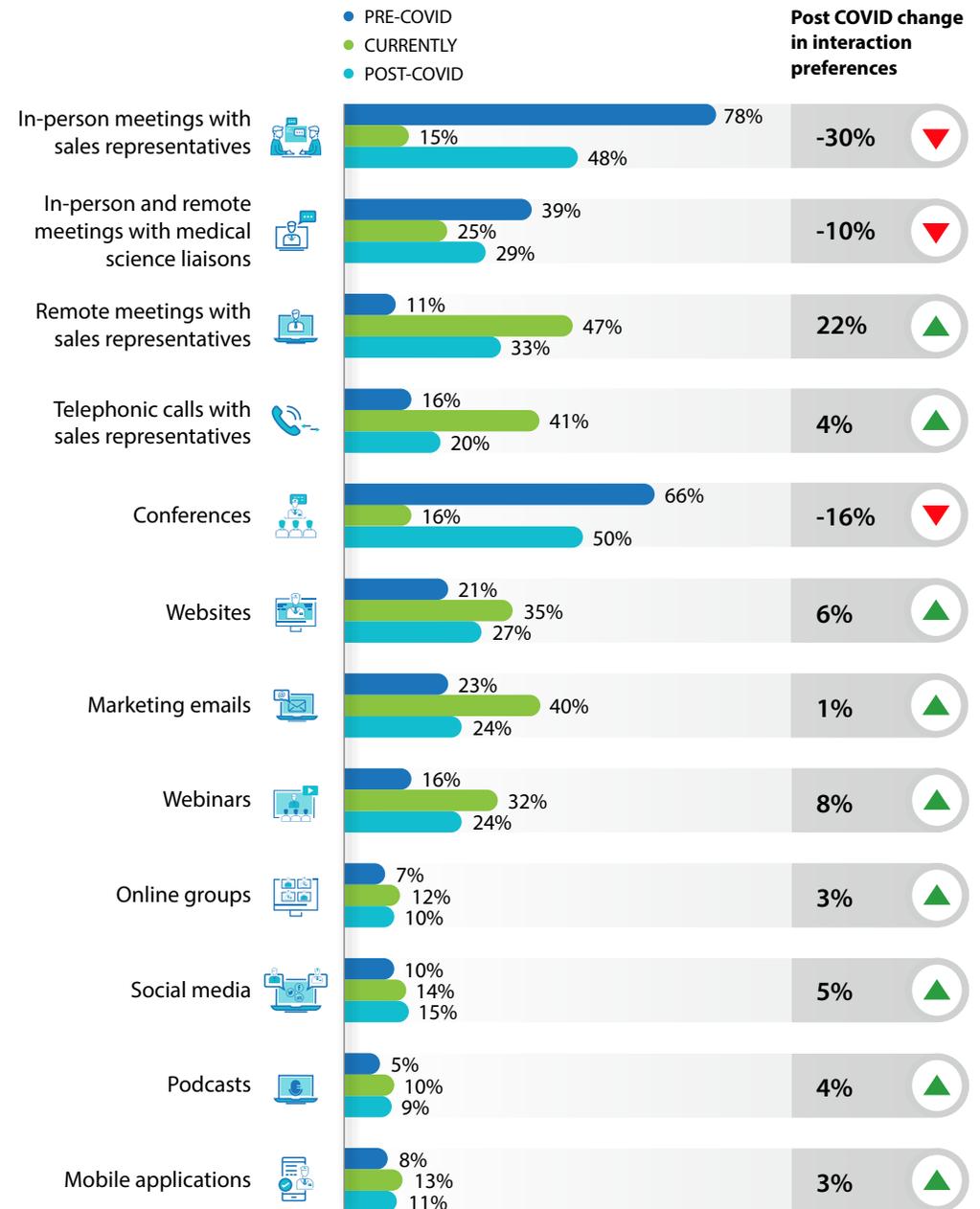


CHANNEL USAGE – THE PAST, PRESENT, AND THE FUTURE

We asked the HCPs about their channel preferences before the pandemic, now, and post the pandemic. The current COVID-19 situation has compelled the HCPs to rely more on digital and remote channels such as remote meetings, telephone calls, and emails. In the post-COVID era, expect a substantial increase in usage of conventional channels such as in-person meetings, although they may never return to the pre-pandemic levels. Also, recognize that the HCP's familiarity and comfort with digital channels have gone up significantly during the COVID-19 pandemic. In short, pharma companies must prepare a truly omnichannel strategy leveraging both online and offline channels.

The path is clear for pharma companies – they must determine which channel is appropriate for what type of interaction and ensure a seamless and personalized experience across channels.

Channel Interaction Trend



CONCLUSION



Today, best-in-class companies, such as Amazon and Netflix, are increasingly organizing their business around customer needs and expectations. While CX is a strategic priority for many within the pharmaceutical industry, there is a lack of urgency around the adoption as it represents a major shift in thinking. Apart from understanding the product requirement, it also requires understanding customers' behavioral patterns to address their needs.

Be it before or after the pandemic, the key to providing valuable experiences requires end-to-end engagement, education, and support and recognizing the moments of truth during customer engagement across channels. Use this playbook to build your toolkit for shifting from channel-led to a customer experience-focused engagement.



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