**Customer Experience:**

*EyeforPharma CX Report*

**Part 1**

**The CX Revolution**

**What is CX?**

Customer experience (CX) is a marketing revolution that’s gaining ground in the pharmaceutical industry. Many industry leaders will have already heard about this concept and how it is typically associated with words such as innovation, competitive advantage, and revolution.

While there are several definitions available, in this report CX is described as the collection of a customer’s interactions with a company, its products, and services over the course of the customer-company relationship.[[1]](#footnote-1)

CX is multifaceted says Ian Golding, Global Customer Experience Specialist and Certified Customer Experience Professional (CCXP). “CX is the sum of all experiences a customer has with a supplier of goods and/or services, over the duration of their relationship with that supplier. This can include awareness, discovery, attraction, interaction, purchase, use, cultivation and advocacy.

Developing CX involves the analysis of a customer’s perception of an interaction, or set of interactions, with a company, and then leveraging insights from that analysis to shape the design and implementation of an improved experience for the customer. One of the main objectives of delivering optimal CX is to offer a customer the next best offer (NBO) at every point of interaction.[[2]](#footnote-2) Essentially, it is an orchestration of improved interactions by using the right content and message to engage the right customers and respond to them in the right way, via the right channels and at the right time.[[3]](#footnote-3)

As the Head of Human Channels, Customer Experience at Teva Pharmaceuticals, Davidek Herron explains, “One thing we need to understand is that CX is more than a good User Experience (UX). It comes down to a company truly understanding what is valuable to the customer at that moment in time.” UX is a concept very much related to CX, and the two terms are often used interchangeably. However, many experts limit UX to the use of a particular product or service and the interaction with its interface at one time.[[4]](#footnote-4) Specifically, the priorities of a good UX design are functionality, ease-of-use, and aesthetics. In contrast, the scope of CX is the collection of interactions across different interfaces and engagements over time.

**Why is CX important?**

The idea behind focusing on the experience of customers is simple. Customers who are consistently satisfied with each interaction and touchpoint with a company and its services tend to develop stronger loyalty to that company compared to a competitor providing a less-than-satisfactory experience. Satisfied and loyal customers then become repeat clients who recommend the company’s services to other people, thus increasing the likelihood of widening the customer base.[[5]](#footnote-5) As research shows, excellence in customer experience can contribute to revenues that are 4-8% higher than the industry average.[[6]](#footnote-6)

According to Mike Bellis, Partner at the CX management consultancy PEN CX: “Improving the experience provided to customers will improve their perception of the company. Regular and new customers will become loyal customers, which will help tremendously with the company’s profitability. Over time, loyal customers become advocates for the company’s services. So, it is important to be very conscious of everything an organization does that can contribute to the experience delivered to customers, and then knowing how well the company does it. That is CX management in a very broad sense.”

The focus on CX in pharma’s business model has only increased in recent years, yet the concept of attending to the quality of experience and satisfaction levels of customers is not new to pharma marketing. Many individuals possessing the knowledge, skills and competencies to prioritize, manage, and improve experiences benefitting target customers have long existed in the industry. However, there was never an urgent need to deliberately classify their profession into a single formal industry-recognized definition.[[7]](#footnote-7) If we look at how the pharma industry was two or three decades ago, the skills of these individuals would have been considered as ‘soft’ skills, and perhaps even optional.[[8]](#footnote-8)

The marketing landscapes across industries have since evolved, and marketers from many sectors have gained a deeper understanding of CX and its implications within business and marketing strategies. In a survey of 14,000 e-commerce professionals and global marketers, CX was the top priority for marketers in 2017, outranking content marketing, mobile strategy, personalization, and social media marketing (Figure 1). [[9]](#footnote-9)

**What’s driving CX?**

With technological advancements, we see an evolution in customer interactions and marketing practices.

The internet and smart, mobile devices have introduced many additional channels through which businesses can interact with customers in a more immediate, consistent and personal manner. Inevitably, these new channels and customer touchpoints have altered the relationship between customer and company.

“The most significant and obvious changes in customer experiences in recent years are the result of the mammoth advances in technology and devices, which have impacted the accessibility of these experiences,” says Golding, who has worked within CX for more than 20 years. “We are able to do things faster, smarter, and more conveniently than before.”

Despite such advancements, most organizations around the world continue to deliver random or unexpected experiences, he says. “As consumers, we rarely interact with an organization that serves up an experience that consistently meets our needs and expectations – that hasn’t changed over the last twenty years. This is largely due to businesses finding it impossible to break down the walls and silos that exist between functions. This unfortunately prevents organizations from working together collaboratively to deliver the CX – together!”

Altered customer touchpoints have also transformed the customer’s experiential expectations. Compared to a century ago, today’s ideal company-customer relationship bears much more weight when determining the success and sustainability of a business. Now, a typical customer journey involves both digital and face-to-face interactions with company representatives. As

This evolution of channels has prompted the development of omnichannel marketing, a practice that aims to provide an integrated and seamless experience to the contemporary customer who constantly switches between digital and non-digital touchpoints.[[10]](#footnote-10)

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| **Case study****How Spotify’s advisor program helps keeps customers happy[[11]](#footnote-11)**Spotify works hard to become an integral part of a user’s day-to-day life.[[12]](#footnote-12) The company’s hard work seems to be paying off given their 140 million active users, 60 million of whom are paying subscribers. The company is known for having a very high customer satisfaction rating; part of the reason is the proactive way they locate client complaints online. It uses search tools to detect mentions on Facebook, Instagram, Twitter, SnapChat, and other social media, and then filter these to identify customer support problems. A team of advisors then aims to settle any issue in less than two hours.Spotify provides a rigorous training program for its customer support advisor and social media teams; advisors start with customer support via email before moving to more complex channels that require tone of voice. The company is very particular when it comes to tone of voice and attitude, which customers should perceive as easy, fun and friendly.Spotify has invested a lot in training and growing the advisor and social team; in 2013, the company had 90 advisors and social team members, by 2017, the count increased to 1,200 people. The aim is to attract experienced and well-trained individuals who can view their advisory job as a serious career path, involving them in quality assessment and business processes. Company leadership also provide advisors with internal professional opportunities, believing that individuals who have worked at the front line of customer-facing activities are well placed to drive the organization forward.www.spotify.com |

**The evolution of CX**

Across all sectors, active advocacy by individuals and the emergence of CX organizations – notably the Customer Experience Professionals Association (CXPA), which provides accreditations such as the Certified Customer Experience Professionals (CCXP) – have brought CX to the forefront of marketing.[[13]](#footnote-13)

However, as a profession, CX has a distance to go before becoming a fully recognized entity. For example, in October 2017, there were only 616 people accredited as CCXPs across all industries, and only around 4,000 members of the CXPA, but these numbers are increasing.[[14]](#footnote-14)

Before diving into the intricacies of CX in the pharma space, it is necessary to establish the broad context of CX’s emerging significance.

Companies with high levels of customer loyalty are not only able to maintain trust with customers. They nurture customers who can advocate for the company and its services to other people, which drives market growth.[[15]](#footnote-15) Consequently, measuring customer satisfaction is a requirement if businesses are to gauge how well customers are receiving their products and services and to determine whether there are areas for improvement.

A survey carried out among 10,000 UK consumers benchmarked customer loyalty across a range of industries (Figure 2). The companies that topped the list were Nationwide (a credit card provider), Aldi (a supermarket), and John Lewis (a retailer), while, interestingly, BUPA (a health insurance company) was in the bottom five of 157 companies.

Loyalty was defined through four key factors: [[16]](#footnote-16)

1. Likelihood to repurchase
2. Likelihood to recommend
3. Likelihood to forgive
4. Likelihood to trust.

For CX expert Golding, there is a clear trend. “The smaller the purchase, the better the experience has become. Retail is the most advanced industry, led by the Amazon phenomenon, and leveraged advances in technology, but the hospitality sector is not far behind, although the experiences can be variable. Yet, other industries are maturing very quickly due to disruptors entering the market. Banking, for example, is evolving very quickly – again through advances in digital.”

One fact is clear – the top-scoring industries have made the transition to CX and seen the benefits. Companies with excellent CX strategies share three common traits: [[17]](#footnote-17)

1. They deliver on what they promise
2. They acknowledge, apologize for, and correct their mistakes
3. They keep customer-facing employees happy and driven to serve customers.

While novel approaches to CX are often associated with consumer sectors and nimble tech companies, the most meaningful opportunity to create improved experiences for customers lies within the traditional industries, including pharma and healthcare.[[18]](#footnote-18)

Yet, how relevant are these industries’ experiences for pharma? For Parul Kumar, CX Strategist and Global Head of Patient and Stakeholder Engagement at UCB, many companies offer valuable insights. “Expedia and eBay are great examples of understanding customer needs and meeting those needs. In their own unique way, they have both proven their great understanding of how meeting customer needs can contribute to success over many years.”

While there are clearly lessons to learn from all sectors, it is perhaps those sectors most resembling pharma that hold the greatest insights. As such, we examine examples of CX transformation in other highly regulatory industries – finance/banking, insurance, and telecommunications – where CX is considered one of the best opportunities to gain competitive differentiation.[[19]](#footnote-19)

**Out-of-industry examples of CX**

**1. Finance and Banking**

Over the years, retail banking has undergone tremendous change, partly in response to evolving consumer demographics, where most young people prefer digital-based financial transactions.[[20]](#footnote-20) In countries where access to traditional brick-and-mortar bank services is considered time-consuming and burdensome, there is also high consumer interest in trying digital financial products from trusted tech and online retail companies.

Tech firms are bringing a new perspective on how to provide financial services to consumers. Indeed, established tech companies such as Google and online retail giants such as Alibaba possess huge customer bases, are digitally savvy, and have the flexibility to extend their brand into financial services.

Examples of non-banking financial companies include online retail firm Amazon’s Amazon Cash (accepts deposits and offers loans to customers), Chinese e-commerce giant Alibaba’s MYBank (approves automated loans to customers based on their purchase and payment history), and Japanese e-commerce firm Rakuten, which issues credit cards and provides credit-related services to customers.[[21]](#footnote-21)

This move to digital banking has driven many traditional banks to start using their websites and mobiles app to digitize routine banking transactions such as deposits, money transfers, bill payments, and credit card applications. Banks such as Capital One in the US and Santander in the UK have started deploying financial service support through virtual assistants and chatbots.[[22]](#footnote-22)

One undisclosed retail bank has also reorganized its financial products and services around how a customer typically experiences its business. Rather than offering traditional products and services – such as checking accounts and risk management services – that are dictated by existing industry practices, the bank created products and services from the perspective of the consumer.

It views customer experience as *episodes* that need to be managed well; for example, ‘Consider my options’ and ‘Apply to open an account’ are seen as minor activities performed as part of a major task, in this case ‘Open an account’ (Figure 3).

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| **Case study****Atom Bank’s personalized digital experience for customers[[23]](#footnote-23)**The first digital bank in the UK, Atom Bank offers convenient banking and money management strategies to its customers. The bank targets customers between 18 and 34 who prefer to complete transactions online. Since its customer experience is fully digital, it is important that Atom Bank delivers excellent customer service. The company invests in the technical design and function of its app so that its contact center is fully integrated into the digital platform. The app’s verification process includes voice or facial recognition and PIN and password selection. It also removes the need for the typical security questions format.Added features for customer convenience include contacting customer care via email, chat, voice calls or social media without the need to verify the account each time. The online bank developed the Genesys Customer Experience Platform to provide a more direct connection between the customer and the customer care team. The app’s control panels are also customizable to suit either a left or right-handed person, allow users to change the color scheme and even rename it (eg, Anna’s Bank).The mobile-only company already offers savings accounts, mortgages, and secured loans for small business. With a recent additional investment of £83m, which raises their total company valuation to £261m, Atom Bank is set for continued customer growth and services expansion. With a new approach to engage young customers, Atom Bank has redefined the bank-customer relationship as well as the relationship young customers have with money.https://www.atombank.co.uk/ |

**2. Insurance**

Insurance companies provide very similar products and policies to consumers, creating a highly competitive sector. The rise of social media has enabled consumers to more effectively compare insurance policies, coverage, and pricing, further increasing competition and the commoditization of insurance services.

Providing excellent CX has become the key tool to gaining competitive advantage. Research shows that auto insurance companies in the US providing consistent and best-in-class experiences are 80% more likely to have customers renew their annual policies. Insurance providers that provide satisfying customer experiences are also able to generate two-to-four-times more new business growth than competitors.[[24]](#footnote-24)

In 2015, 79% of insurance consumers across the globe expected to use digital channels for future insurance transactions.[[25]](#footnote-25) Many insurance providers have responded by digitizing many of their existing services to allow customers to access applications, requests and claims. An example is new insurance firm, Lemonade, which uses AI to process risk evaluations and claims. This innovative approach to insurance services helps capture a new market – 87% of Lemonade’s customers are first-time policyholders.[[26]](#footnote-26)

Dutch firm, Inshared, has taken the digitization of insurance services to the next level. Insurance is typically associated with a lengthy and arduous paper trail, but Inshared can operate 100% online. Customers can go to their website, where a virtual assistant greets them, to complete non-claims transactions.[[27]](#footnote-27)

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| **Case study****Unum’s move towards digitization[[28]](#footnote-28)**With insurance services, properly filled forms are critical at each step to ensure reporting and regulatory compliance. Insurance company, Unum, considers digital channel collaboration and reduced reliance on paper-based forms as a big opportunity to drive customer experience. The company therefore aims to streamline the huge amount of paperwork typically associated with insurance transactions with the adoption of a cloud-based solution.Typically, it takes one day to request and file for a policy change. Afterwards, a client must wait a few days or weeks for the form to come back, especially when mailing is required. Unum’s cloud-based solution lets the company accept and return client request forms within 24 hours. The request forms can all be digitally filled and affixed with an electronic signature. The company sends links to the necessary forms via email. When the policyholder sends the completed forms, it is immediately rerouted to the right employee or department for processing. This transparent method for document reporting also helps to generate insights on business process enhancements.Unum is a leading global provider of financial protection for life, critical illness, accident, and disability coverage. Its core business entities include Unum US, Unum UK, and Colonial Life. With over 178,000 client groups in the US and UK markets, Unum is set to offer efficiency and convenience to a large customer base with the adoption of digitized insurance services.http://www.unum.co.uk/ |

**3. Telecommunications**

Telecommunications companies are faced with increased competition for customer loyalty, and providing consistently beneficial experiences to consumers is considered a key method of competitive differentiation.[[29]](#footnote-29)

In response to a growing preference for online customer service among consumers, many telecom companies have invested in web and mobile-based sales and customer support services. Companies are leveraging social media, live chat channels, and email to drive response times and improve customer-tracking methods.[[30]](#footnote-30)

Some telecom companies have invested in omnichannel capabilities to allow for a more integrated engagement with customers across multiple channels. For example, telecom company Verizon invested in cloud-based infrastructures to enable its mobile, TV and print marketing teams to work more closely to provide personalized messages across various devices.[[31]](#footnote-31) Other telecom companies have also adopted virtual agents and automated self-service capabilities. The telecom firm Optus in Australia and New Zealand, for instance, launched a virtual agent that uses natural language to converse with customers and help them to independently handle ‘low-complexity’ issues.[[32]](#footnote-32)

Many telecoms are now also familiar with data analytics capabilities for the gathering and analysis of vast amounts of customer data that can inform CX strategy.

T-Mobile in the US adopted data analytics to monitor the experiences of customers using its live chat channel and then benchmark those experiences against a pre-defined standard. Insights from T-Mobile’s data analytics efforts help to improve the training program of service agents as well as ensure that they are efficiently staffed and sufficiently empowered to perform their job.

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| **Case study****Republic Wireless’s peer-to-peer customer service[[33]](#footnote-33)**Waiting for customer support is one of the most burdensome aspects of mobile services. Mobile phone service provider Republic Wireless is changing the way its customers receive support with a new online ticketing system that categorizes customer support queries into tickets. Not only does this new system improve the response time, it also provides an opportunity for certain customers to be rewarded.Republic Wireless’s ticketing system evaluates the complexity of incoming customer support requests. For simple/common questions, a customer is given a Level 1 ticket and rerouted to a member of a small group of expert customers. This expert team is composed of customers who are highly knowledgeable on how to fix typical mobile service issues. Essentially, the Level 1 ticketing system is a peer-to-peer network to deal with common customer support needs.For each handled ticket, the company compensates expert customers with performance rewards. Customers interested in offering their expertise can sign up with Republic Wireless’s app development partner, Directly, to receive the necessary training, resources and tools.The Level 1 expert customer team effectively addresses about one-third of incoming calls. However, for more complex customer questions, a caller is given a Level 2 ticket, which is addressed by a member of the internal customer support team. With the dual-level ticketing system, the company’s average response time to customer support requests is only three minutes compared to other telecommunications companies that have up to an hour wait time. With improved response times, Republic Wireless’s customer satisfaction rating stands at 90%.republicwireless.com  |

**Conclusions**

The use of CX as a strategic tool can set a company apart from the competition. While the application and function of CX may slightly differ between regulated industries, there is one common factor, says PENCX’s Bellis. “CX may appear differently from company to company, department to department, or industry to industry, but decisions are made consistently and routinely to prioritize and improve the experiences delivered to customers.”

Before exploring some of the key tools needed to operationalize learnings from other industries, we present the findings of a survey around attitudes to CX within the pharmaceutical industry.

**Part 2**

**CX and Pharma**

**Where is pharma on the CX journey?**

Pharma is far from blind to the opportunities of customer experience (CX).

This is the overarching conclusion of a survey of more than 1,300 professionals in pharma, biotech and medtech carried out by eyeforpharma (with support from PEN CX) during December 2017 and January/February 2018. The majority of respondents work in marketing/digital, sales or commercial functions.

The survey highlights a generally positive recognition of CX and an awareness of its principles, but that this exists at different levels across organizations.

When asked what do you mean by the term customer experience, nearly half of respondents (48.75%) said CX was *what our customers really think of us, our interactions,* andanother quarter (24.5%) said CX was *a consequence of customer interactions*.

Of the respondents who preferred their own definitions, there was a broad spectrum of opinion. They included: *a combination of the three above – a feedback loop*; *the full customer journey, irrespective of brand*; *staying focused on customer needs and behaviors*; *new innovative ideas not same old stuff*; and, *we are still defining it so it means different things depending on the division*.

For some, simplicity was appealing, answering: *customer first*; *holistic experience*; *providing the service they expect*; and, *share of voice*. While a few respondents mentioned patients specifically: *our customers are patients so patient centricity is our goal*; *patients central*; and, *enabling the patient to get the med he needs with minimal disruption to his life*.

**What’s driving CX in pharma?**

A key driver of CX across all industries is a rise in customer expectations, although many point to CX efforts in consumer industries as the cause! As a result, we asked pharma professionals what was driving customer expectations in our own industry (Figure 5).

Only a quarter of respondents (24.6%) cited heightened expectations caused by other sectors, although another significant slice (10.4%) blamed societal changes. The largest number believed customer expectations had been most influenced by healthcare structural changes (41.2%) or frustration with low-value legacy interactions (24.6%)

More people in pharma are realizing that something must change, says Josef Bednarik, Chief Marketing Officer Russia/CIS/Israel at Eli Lilly. “They see it in their own lives because they are customers too and they engage with communications in different ways. [But] we don’t exactly know which communications and which touchpoints work better with a pull strategy and which work better with a push approach.”[[34]](#footnote-34)

CX is “the best new angle in healthcare”, says Maarten van Essen, Customer Experience Design Strategist at Takeda Pharmaceuticals Nederland. “When you see how the B2C model has evolved, there is a big gap left open in our B2B environment, but there is a lack of confidence to bridge this gap. We often do not dare to really listen to our customers because we in pharma are afraid that we won’t be allowed to fulfil many of those customer needs either from an ethical and compliance standpoint or from a business perspective.”

What is clear is that people on the ground feel pressure to match these raised customer expectations. Figure 6 shows the results of a poll taken during a 2017 eyeforpharma webinar. Here, 60% of the audience felt a strong pressure to match expectations but felt there were insufficient support and resources available to them. Nearly a quarter (24%) felt the pressure – and acted on it – on a daily basis.

For Multichannel and Marketing Cloud Expert, Steve Mason, these results were encouraging. “The consistent message we hear from other industries is that we need to deliver a connected and personalized experience. The majority of people in the poll feel strongly about it [CX in pharma], but perhaps organizations need a little bit of a push.”

Pharma needs a more consistent approach, however, says Mike Wittenstein, Managing Partner of StoryMiners Management Consulting. “There is a lot of innovative work in pharma in the formulation and the testing side, but not in how you bring customers into the fold or how you develop apps that help people monitor their health levels, remind them to take their medications, or help them get the full spectrum of care they need.

“Most of the innovative effort in healthcare is focused on efficacy and profit. If pharma companies take a stronger position in terms of helping their clients live better and more holistically, then they need to start looking at models similar to Khan Academy, Uber or retail models, wherein they have a better chance of having an effect on a patient’s quality of life and giving them the kind of information to make better decisions and support their care plan. At present, I don’t see many pharma companies doing that,” he says.

Patients’ expectations in particular will only increase, says UCB’s Kumar. “Some patients have now taken greater control of their own health; when diagnosed with a disease, they do not settle with the opinion of one specialist or whoever is providing care. They spend a lot of time researching and forming opinions for themselves. I can only see that increasing in the future.”

In our CX survey, some respondents identified more specific drivers of change in customers’ expectations, including: the consolidation of certain customer types; changes in payer policy and funding decision criteria; legislative changes; and, restrictions in interactions with prescribers.

Changes in healthcare reform have contributed to the creation of a highly competitive environment where drug manufacturers and healthcare providers need to constantly prove the value of their products and services. There is also a stronger requirement to coordinate and integrate various healthcare services to ensure an efficient, cost-effective, and therapeutically specific approach to patient care.[[35]](#footnote-35)

Several respondents cited trust – or the lack of it – as a key factor. CX expert Golding agrees, identifying three factors needed to meet customer expectations: “Firstly, we must restore trust. Throughout 2017, we’ve seen examples of organizations failing to meet basic customer expectations. In 2018, all brands across all industries need to work hard to restore trust with their customers. Secondly, we must offer value for money. We live in a world where disposable incomes continue to be challenged on an annual basis. Consumers will continue to look for brands that offer the best value for money for an end-to-end experience – and so will pharma customers. Finally, we must have honesty and transparency. Brands that do what is right for their customer – whether things go right or wrong – are those that will flourish.”

**Why should I care about CX?**

To meet customer expectations, creating precious interactions with each customer type and leveraging all channels of communication are becoming increasingly important.[[36]](#footnote-36) For many, CX is the “new battleground” for pharma (Figure 7).[[37]](#footnote-37)

Yet, what benefits will fighting this battle bring? Our survey delivered a decisive answer – improved customer loyalty and/or advocacy (46.6%, see Figure 8). Interestingly, a much smaller number focused on the benefits on brand preference or differentiation (17.8%), suggesting that pharma organizations are taking a more customer-based than brand-focused approach towards CX adoption.

Pharma as an industry may have fallen behind B2C industries, but the tide may soon turn.[[38]](#footnote-38)

Brands should not be the prime focus, says Tom Ruggia, Vice President, Global Surgical Customer Experience at Johnson & Johnson Vision. “Pharma should realize as soon as possible that CX is taking over the marketing field and we should no longer be okay with marketing pharma brands only and allowing the ecosystem to evolve on its own. So, when R&D comes up with a care innovation, we need to think about the disease state and care journey as the object of our marketing. We need to develop the devices and apps that go with that care solution and support the ecosystem with care tools focused on early and efficient patient interventions. When we focus on CX, the patient benefits in terms of better care, efficiency, cost reduction and longevity.”

Improvements will come from better patient care, he adds. “Within ten years, a diagnosed patient will receive a concierge app that will walk them through their condition. That app will come with wearable device options to monitor disease progress. Such apps will be able to communicate with the patient and the care ecosystem.”

The experience of HCPs is also ripe for improvement. By providing real-time access to branded and unbranded information and clinical insights to digitally savvy HCPs, pharma can promote engagement, trustworthiness and transparency among providers,[[39]](#footnote-39) which can have a direct impact on patient outcomes.[[40]](#footnote-40)

More providers and patients who are satisfied with the experience a company provides, and are loyal enough to positively contribute to its reputation, positioning and differentiation, will translate into a favorable bottom line.[[41]](#footnote-41) Therefore, it is urgent to place pharma on a CX trajectory.

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| **Case study****Shire’s Rare2Aware[[42]](#footnote-42)**In efforts to create more meaningful and relevant touchpoints with patients and carers dealing with rare diseases, Shire leverages social media. In a Twitter-based initiative called Rare2Aware, the drug developer provides information and support to people affected by rare conditions in the US healthcare market. The initiative is a resource for patients, loved ones and care providers on updates, advancements and events in the rare disease space. It is also a platform for patients to share their personal stories and insights on their condition and treatment as well as listen to other patients going through the same challenges. In turn, Shire can take social media insights to map the patient journey and identify opportunities to implement more meaningful interventions for patients in the early stages of diagnosis. |

**Managing the customers’ experience**

While pharma recognizes the business and strategic promise of CX, how well are companies actually managing their customers’ experiences?

“There is a growing trend of people seeing this [CX] as a new way of working; there are pockets where people are doing really good things and pockets of less good things,” says CX consultant Bellis. “To move from an unreliable customer experience to a point where they can have a consistent expectation needs an awful lot of effort to be applied.”

Yet, to introduce genuine CX management, you need to look at every part of an organization to look at how it is run and to understand how capable it is of delivering an intended experience to customers, he adds.

This begs the question – how are companies managing the experience they deliver to their customers? In our survey, over one-third of respondents (37.75%) stated that their companies did not manage the experience at all. On the more positive side, a quarter said they had specific KPIs to measure it, while another two-fifths (21.6%) had specific people who are accountable. Slightly fewer than one-in-twenty respondents reported that CX metrics were included in everyone’s performance objectives.

Getting to the meat of the matter, our survey asked a pivotal question – how well organizations have adapted to meet customer expectations (Figure 10).

Nearly half of respondents answered in the top two categories – *Very well* (20.9%) or *Sporadically, some pockets of excellence* (27.3%). However, the largest number described their organization’s adaptation as *Average, some changes in all areas but not there yet* (39%).

These results are mirrored in an eyeforpharma webinar poll in 2017, where three-fifths of respondents (61%) rated their progress on CX management and implementation as *Good* (17%) or *We have ambitious plans but it’s early days* (44%). See Figure 11.

**Does CX work?**

In our survey, we asked respondents about how confident they are in their ability to establish a cause and effect between their actions and the customer’s experience. Results show that many pharma companies lack a strategic approach towards linking their actions with customer experience (Figure 12).

Only a small number of respondents (fewer than 6%) said they could establish cause and effect well enough to predict ROI. Clearly, a direct link between CX initiatives and financial returns is the most ideal situation, but given the maturity of CX in pharma, this figure is to be expected yet it raises questions around whether CX will be accepted without clear links with ROI.

Does this lack of confidence – and links between CX and the bottom line – reflects a lack of leadership support and organizational buy-in to invest in a progressive transformation?[[43]](#footnote-43) Does it suggest that companies remain culturally structured to favor brands and products rather than the customer?

“There are still too many organizations convincing themselves that they are deploying digital strategy for the benefit of the customer, when it is really for the benefit of the business, specifically, in terms of saving money,” says Golding.

Indeed, many companies are still focused on hiring people with strong pharma experience and downplaying the need to hire people with experiences in meeting high customer service expectations.[[44]](#footnote-44)

UCB’s Kumar: “Many organizations fail, and many customer and patient experience initiatives become short-lived, because there is a lack of collaboration and integrated understanding between the different functions within organizations. Organizational structure plays a massive part in the customer experience strategy.”

What other obstacles stand in the way of companies putting more effort into CX management? In a poll taken during a 2017 webinar (Figure 13), the leading issue was legacy, product-focused culture and attitudes (28%).

Commenting, Philippe Kirby, Director of Customer Engagement Capabilities at MSD, said: “The product-focused side just won’t go away; we still have a very traditional way in terms of how we execute our marketing. That’s why we need a marketing transformation, not just a digital transformation.”

For J&J’s Ruggia, the necessary transformation must take place at every stage of the customer journey. “People of pharma will either be innovators in CX or they will need to spend a great deal of money and time catching up to the leaders. Pharma marketers must forget the idea of marketing a compound and being done for the day. We need to market to each aspect of the customer experience journey,” he says.

In the poll, a similar number of respondents named poor CX management on a lack of vision of tangible ROI (27%), while just under a quarter (23%) cited regulatory and compliance concerns.

This response demonstrates the struggle for companies to concretize CX strategies in the healthcare context, indicating yet again a need for practical tools and metrics to navigate through compliance hurdles and achieve financial returns with CX.

According to Takeda’s van Essen: “We are very driven to make sure we do not cut corners and that we stay in the green zone in how we communicate and interact with our customers. Yet, at times, when we’re actually doing something different, some of the rules do not apply or are not sufficient for the given situation.”

CX consultant Wittenstein adds: “One of the biggest challenges is that all brands have to make promises to their customers. That’s what a brand is; it’s your promise and your track record of fulfilling it. But pharma companies are prohibited by law in so many ways, so it can be difficult to make promises. They have to make really long statements about all the things that can go wrong so customers get a clear picture.”

A general lack of confidence to invest in CX can also be seen in the willingness of companies to explore new channels of engagement. Respondents in a poll focused on virtual engagement (Figure 14), named ‘a lack of priority (the old model still brings the business)’ as the most important factor holding them back (38%), although a significant number cited a lack of senior buy-in and/or financial support (20%).

Virtual engagements form part of a novel approach to enhancing customer experiences and meeting heightened customer expectations, yet many pharma companies still hold back from maximizing the opportunities offered by virtual channels.

Commenting, Lisa Huse, General Manager, Management Cluster Iberia, at Roche, said: “When we have product launches or reimbursement changes, the traditional way we spread the word is through the field forces and common means to get the word out there. That has been our approach. We haven’t identified that it is intrinsically not working; we fall back on what we believe to have always worked and are afraid of the costs if we went with virtual engagements.”

Teva’s Herron points out that representatives may be unable to deliver on the doctors preferred channels of communication because their training and experience within their company prevents them from exploring other options. “You would be surprised at how many times I have asked a representative what is valuable to their customers or what channels they prefer to interact with you in, and they did not have the answer. In their defense, we have always programmed our field and marketing teams to simply deliver a message and maybe a service that is beneficial to the business,” he says.

In summary, while there is a generally positive belief around the benefits of CX in pharma, the implementation of CX initiatives is hindered by low leadership buy-in, low confidence to align the organizational functions and people skills with CX, and low willingness to potentially challenge compliance barriers.

For Hicham Naim, Senior Director and Head of Customer Experience Strategy and Operations at Takeda: “It is the mindset. Simply put, just think differently, and that’s the biggest challenge you will have. It’s the fact that the old-world way of doing marketing engagement is over. We have multiple interactions with customers now and we have to make sure that all those interactions are always consistent.”

**Who is our customer?**

It takes a lot of work to dig deep into the needs and expectations of customers. According to UCB’s Kumar: “Externally, it is really important that an organization has a good grasp on customer needs. Many organizations spend on high-level professional market research, which would look good on a presentation but will not automatically enable an organization to walk in the customer’s shoes.”

However, adding to the challenge of addressing customer needs is the increasing complexity of the healthcare customer matrix. While pharma recognizes the patient as a customer, companies still need to work through intermediaries. According to Kumar: “‘Customer’ includes patients and stakeholders such as HCPs, payers, and policymakers. It is not as easy to reach patients directly without a good understanding of your stakeholders.”

Different customer types may have contradicting needs and expectations.[[45]](#footnote-45) For van Essen: “One of the biggest challenges is asking your customers what they need because they do not know what they need. It’s like Henry Ford said, ‘If I’d asked my customers what they wanted, they would have said faster horses’ so they [customers] would never have come up with the idea of a car. That is somewhat the same as where we are now.”

A CX strategy must encompass all stakeholder experiential needs, but the needs of patients should dictate the overall CX objectives. In the process, pharma would have to work with various stakeholders to identify their respective needs and align those along patient-centric objectives.

According to J&J’s Ruggia, the customer “depends on what part of the business you are referring to. If you consider the point of view of supply chain, then the customers are the wholesalers and distributors. For Sales, it is the prescribers. For Medical Affairs, it is the patient by way of the surgeon or prescriber. In the age of digital, the patient is more than ever *the* customer, however, the points of contact in the delivery of care have not changed. As a manufacturer of healthcare products and solutions, you must customize the customer map for your product and address each pertinent point. In the end, the patient and caregivers are the most important customers in your equation.”

An initiative at Teva focused on HCP needs yet simultaneously addressed patient needs. “One of the general problems we are facing is access to HCPs and healthcare networks. By access, I do not mean getting a representative or MSL who has a relationship with a HCP to talk about that HCP’s personal life and family, but truly providing valuable solutions leveraged by the HCP, allowing them to do their jobs more effectively and spend more time with patients in need,” he says.

“In Oncology, we wanted to create a ‘brand above brands’ by finding out what was currently seen as valuable by our HCPs. The answer happened to be having more training on dealing with difficult conversations with patients. This initiative was a way for us to deliver patient-centricity through our HCPs,” he says.

Other companies have similar programs. Takeda’s van Essen: “In the Netherlands, we launched an initiative called Care Atlas, which is both a digital and printed educational tool to help patients to better understand the medical information they receive from their care team. The system allows you to digest at home the same information you received at the doctor’s office. You can even record the information from your visit and replay the audio of your physician at home. At Takeda, we have our own way of doing business. We put the patient at the center and then we build trust within society, and then follows the reinforcement of our reputation and development of our business.

**From words to action**

It is very clear that the adoption of CX as a strategy is a burning aspiration among commercial teams in the pharma industry, yet most companies are still at the earlier stages of the journey. For a few companies, the journey may not have even started yet.

As with any revolutionary new approach, there are many recurring hurdles around a lack in ability, confidence, support, and timing.

CX in pharma is also occurring in pockets; often, CX uptake is driven by the diligence and passion of one or a small number of people.[[46]](#footnote-46)

Indeed, some parts of the industry may still be stuck in gaining deeper awareness of CX benefits. Moving towards actually *applying* CX principles in the marketing and commercial setting of pharma remains a distant dream for many organizations. There is currently no unified move to embrace and prioritize CX across the industry.

“I strongly believe in putting CX in the center of what we do with our customers,” says Takeda’s van Essen. “We must build value-based partnerships. We must shift from a sales-oriented approach to a service-oriented approach. This will take time and resources, but we will learn as we go.”

He adds: “Our customer-facing roles need to acquire a different set of capabilities. Fine-tuned measurements of CX must be rolled out to continuously improve our efforts. And, as we are doing already, we need to have the customer’s voice next to our ears, so we can test and verify that what we do makes sense and fills the aspiration gaps in the customer’s journey.”

For CX expert, Golding, pharma needs to knuckle down and play the game in earnest. “If an organization has a desire to be genuinely customer-centric, then it must implement structure and rigor to intentionally manage the customer experience. CX is like a metaphorical jigsaw puzzle. On their own, the pieces mean nothing; it is essential to have a way of piecing them together to see the picture of what needs to be achieved.”

The industry requires a set of practical and appropriate approaches, tools, objectives, solutions and performance metrics to consistently progress along the CX learning curve. In Part 3 of this report, we put together a collection of practical guidance and concrete steps that can serve as a manual for pharma organizations that want to take serious and effective measures towards CX success.

**Part 3**

**A Framework for CX in Pharma**

*“For every rock you turn over in our industry, you will find an opportunity for a patient experience.”*

*–* Doug Stover, Vice President of Global Patient Experience, Neurology, UCB

The picture that clearly emerges from our survey – and other signs across the industry – is that CX has moved beyond a buzzword elevated by hyperbole. The pharma industry is wholeheartedly embracing the various component pieces of customer experience, but not necessarily in a fully strategic and integrated manner.

In this section of the report, we lay out a strategic approach to the creation and implementation of a customer experience strategy, accompanied by comment from those in the throes of delivering it in their own companies.

This approach has five components, all of which must be considered and tackled in order to transform customer engagement into a consistent, measurable and branded experience to customers.

They are:

1. CX strategy and purpose
2. CX design and governance
3. CX operations
4. CX measurement
5. People and culture

In this section, we take each part of the framework and offer a stepwise approach, raising key questions to be answered and offering on-the-ground advice.

Our thanks to Mike Bellis of PEN CX for his help in structuring this part of the report.

When some or all of these components are missing, the customer gets an ***unreliable experience***, where they are uncertain of the quality of the experience and have doubts as to whether their expectations will be met.

A company with this level of customer experience is typically reactive and internally focused rather than customer-focused. It has neither a clear vision nor the means to measure the experience it is offering its customers, much of the effort of customer interactions goes to waste.

A company that possesses three out of the five components delivers an ***intentional experience****.* Here, there is a significant level of customer understanding and empathy, as well as a clear vision for the customer experience and both metrics and governance frameworks in place.

At this level, the organization can identify and fix issues that arise within a customer’s experience. However, the threat is that the experience delivered may resemble that of a competitor and so lack a unique selling point to the experience.

“The needs of the customer are universal,” says Carl Smith, Senior Director, Lilly Marketing Institute and CX, at Eli Lilly and Company. “Customers expect – or would like – a high level of personalization but, realistically, it is not possible for every industry in every market to offer such sophistication and engagement. In pharma, the majority of companies are similar because they are facing the same set of circumstances. The ones who get ahead will be those that can navigate CX and figure it out quickly or more effectively.”

At the end of the CX journey, when all five components of the CX framework are up and running, the companies offers its customers a ***branded experience***.

At this level, the company is fueled by a passion to deliver quality and improved customer experiences across all functions. It is actively making improvements to the delivery of its experiences and how it addresses problems and learns from mistakes.

Most importantly, the customer can make a clear link between the experience they receive and the brand promise.

The framework that follows offers guidelines and best practice to shift from delivering unreliable experiences towards consistent branded experiences to all target audiences.

**Part 1 –** **CX strategy and purpose**

Successful and sustainable CX uptake begins with a purpose embedded within a strategy. The step on the CX journey is about understanding and articulating a clear role for your organization in the lives of your customers.

Defining the CX strategy and purpose sets the mood of CX within the company and is a crucial step prior to developing and executing any plans for CX. So, how can you go about this fundamental stage of the CX design?

|  |
| --- |
| **Ask yourself:*** Who is your customer?
* What is your customer promise?
* What is the purpose of the CX project?
* What are the priority experiences to focus on?
* Are you ready to deliver improved experiences?
* What resources will you need to achieve customer loyalty?
 |

**Step 1: Establish a baseline**

It is important to establish a baseline to understand how your organization is currently performing in terms of delivering targeted experiences to customers. You need to know your organization’s current state of CX, your standing when benchmarked against the competition. Using the three levels of maturity above, you need to know what level your organization is at.

Asking fundamental questions about your current business will help to align CX priorities, as well as underscoring the importance and urgency of investing in improved CX.

[[47]](#footnote-47)

There are three key questions to ask:

1. Do you know who your customers are?
2. Do you know what you are supposed to be doing for them?
3. Does everyone in the organization know the role they play in doing it?

These are very simple questions, but surprisingly, many organizations struggle to answer them, says CX expert Golding. In his experience, failure to answer these basic questions often causes significant issues later, with other framework components.

Defining the core customer – the patient – is critical in stating the purpose of a CX strategy. The patient needs to sit at the center of that purpose. If this is not the case, companies will struggle to deliver authentic and effective experiences.

For UCB’s Global Head of Patient and Stakeholder Engagement, Parul Kumar: “Pharma typically fails when senior leaders devising the patient strategies rarely leave their offices and conference rooms to walk with a patient to learn about their experience with symptoms, diagnosis and treatment – how his or her life changes. Internally, we must be clear on what our areas of focus are that we are going to dedicate our efforts to. Companies need ask patients: How do you become a new you, knowing that now you have a disease you need to include it as part of your day-to-day?”

Understanding your organization’s state of readiness for the uptake of CX initiatives is essential. Ask: What are our strengths and weaknesses in terms of delivering experiences and interacting with our customers? It is also beneficial to conduct a preliminary assessment of existing processes, technologies and customer-facing skills-sets.[[48]](#footnote-48)

**Step 2: Define your purpose – and do it together**

For CX consultant, Mike Bellis, there are two fundamental elements of CX purpose:

1. An understanding of why the organization exists in the lives of your customers
2. Developing customer promises.

Your CX purpose should be compelling, emotionally engaging, and concise, he says. “It is not a positioning statement or a long corporate document, but a description of the company’s role in the customer’s life. It typically begins with ‘Our purpose is’ or ‘We exist because’. This purpose is different from the mission, such as ‘to develop innovative medicines to treat patients,’ although they may sound like two sides of the same coin.”

By explicitly describing the company’s purpose in customers’ lives, you acknowledge the expectations of the customer and begin to aim at meeting those expectations. Furthermore, people in the company start to understand what their daily behavior should be like.

“The role of the customer promise is to start making that purpose into something tangible and real,” he adds. It can be applied to individual operations and touchpoints to inform the organizational design, whether that be roles and responsibilities, metrics, reimbursement, colleague remuneration, or annual planning, among others. By taking that purpose and making promises and applying those into different areas of the customer journey, you can start to inform all sorts of areas of your business design operations.”

Defining your purpose can also be thought of as defining your strategic intent.[[49]](#footnote-49) Which patient types will you prioritize? Which customer segments (patient, provider, payer or caregiver) will be the focus in the delivery of improved experiences? What are you committing to your target customer? What do you want the company to be known for with this initiative? The customer promise needs to be embedded in every customer interaction so that customers begin to associate certain values with the company.[[50]](#footnote-50)

Indeed, experts view patients and their needs as the springboard for defining the CX purpose. According to UCB’s Kumar: “Everyone has their own view on a framework to create CX. My simplistic view on how to create the right experience really starts by knowing who your customer is, what their needs are, and which of those needs you can legitimately address. It all boils down to how well we understand the customers for whom we are designing the experience, how many times we have walked in their shoes, and how well we understand the needs that they themselves cannot see but we can since we have a slightly different perspective.”

Customer needs and company objectives must both be served, says Kasper Jerlang, Head of Digital Pharma Transformation at LEO Pharma A/S. “We have tried both in isolation, and neither works well. So, starting with truly understanding what our customers need is key, and then finding the space where the solution we build and offer also supports the objectives of LEO Pharma.”

LEO Pharma’s unique setup is an advantage, says its Customer Service Manager, Christian Pfeiffer Agertoft. “We are unique in generating value for customers; as we are 100% owned by the LEO Foundation, all profits are channeled back to the company, to R&D, and to helping more patients get better in the future. Our decisions, strategies and mindset are not affected by quarterly performance reviews from investors, and we don’t have to look outside the company for additional funding.

“As part of our strategy towards 2025, we will double our investments in R&D to provide better and more innovative solutions for more people living with skin diseases around the world. Not only through products, but also through digital services. From a market perspective, we are looking towards multichannel marketing strategies to accommodate for the hectic environment that surrounds HCP’s busy schedules and limited time for rep visits. Through this, we are striving to increase the value we generate for HCPs with key messages related to publications relevant to our products, services that support patients adhering to treatments, and sparring with other HCPs/KOLs [key opinion leaders] in the same field,” he says.

At UCB, they are focused on making it easier for customers to interact with the company, says Stover. “The idea around a customer experience is, how do you begin to remove the friction that exists when an individual interacts with our organization? How do we make UCB easier to interact with? For example, if you have been prescribed a UCB medicine, what can we do to ensure that we are available when you need us, that we know how you want to interact with us, and that we’re easy to work with?

“A lot of this requires thinking about where you make information available and how you make it available; are you putting it in channels that we know are constantly used for those specific needs and purposes? We know that patients are using different channels based on their needs, so how do we understand where to make information available?” he asks.

Defining the CX purpose also includes defining what a successful CX program is in your company. For Carolina Correa, Customer Excellence Director, Abbvie: “Success means having a complete in-field team alignment on the methodology, clear expectations, solid metrics, on-going feedback, and proper use of multiple channels.”

**Step 3: CX – From concept to living mindset**

In defining the CX purpose and customer promises, it is important to rally each individual behind a common vision. Turning CX into a living mindset is essential for people to see the value of working together towards achieving CX success.

However, this can be a struggle for traditional companies, says Marie Knopp CCXP, former CX Manager at Pfizer Essential Health, now CX consultant. “It is a really tough gig for established pharmacos. If you were a start-up, this wouldn't be an issue. New organizations know to be clear on what they offer and why customers should choose to buy from them. Pharma has a background of making good returns from high share of voice – big sales activity leading to big revenue. Pharmacos are still full of former sales leaders who experienced this back in the day, so the shift is hard to make.

“At Pfizer, we kept talking about Uber and black cabs, and kept asking colleagues what sort of a company they wanted to work for. We had to change the mindset to that of a start-up, which was tough but it ignited a passion for the business we hadn't had in a while,” she says.

To change the mindset of pharma employees, you need to convince colleagues of the long-term value of delivering improved experiences.

For Takeda’s Head of Customer Experience Strategy and Operations, Hicham Naim, all activities involved a customer’s experience need to stem from a shared vision. “The first thing I work on is a common vision; we must understand what we mean by ‘customer experience’ and what our vision for it is, only then can we start to create awareness about the customer. Last year, we introduced the idea of customer experience, this year, we wanted to drive our purpose for delivering customer experience, which is to make the experience individualized – patients have a specific need and they want you to think of them as individuals,” he explains.

According to AbbVie’s Correa: “You need to set clear expectations, define the rationale for change, take employees through that change, and have leadership alignment.”

Lilly’s Smith agrees: “Our vision for customer experience is that we want our customers to feel like we care for them, that we are easy to engage with, we are easy to work with, and that they can actually trust us.”

Everyone must buy in to the concept, says Jason DeGoes, SVP, Global Patient Solutions at Teva Pharmaceuticals “Patients are becoming more knowledgeable, more empowered, and in many cases there is more responsibility being put on them as consumers. The rest of the business – the sales and marketing teams, commercial infrastructure, executive leadership – they all have to buy in to CX as being important not only for patients but for the business. The CX program must be another benefit that this medication brings to patients, physicians, and caregivers. The sales, marketing, and brand teams really need to believe that.”

Takeda’s Naim shares an example of an action as simple as relocating patients to a separate area from other patient types to improve their experience: “Sometimes, IBD [inflammatory bowel disease] patients have to be treated in the same room as patients receiving oncology treatment. Most IBD patients are young and putting them in a ward with an older population under palliative treatment can have a negative impact on their outlook. So, you have to think about changes within the hospital setting, finding a separate location such as at home or in a mobile clinic truck.”

Having a framework for delivering optimal CX drives a common vision and helps to embed the customer promise into the daily behaviors of colleagues. Frameworks differ but there are similar themes. For example, LEO Pharma’s Jerlang shares his framework for optimal CX (Figure 17).

“We work to educate doctors about psoriasis as well as our products,” says Jerlang, sharing an example of the framework in practice. “We do this via a partner where we use a combination of digital solutions and in-person interactions. Doctors are profiled based on their interests and needs for education – this is done via a survey, and we then offer them different kinds of on-line education.

“What makes this program interesting is that we actively reach out via messaging to the participating doctors and start a dialogue on their further needs and, for those interested, we customize the information and education to their wants. The interaction can move between messaging, phone calls, and in-person meetings – seamlessly.  We have some powerful KPIs defined and everything is based on customer journey design and insights, so I have great expectations,” he says.

**Step 4: The importance of disruption**

In defining your CX purpose and setting a common vision to drive a living CX mindset, it is important to set the expectations within the company. One of those internal expectations may involve the level of ambition in terms of the disruption the company envisions.[[51]](#footnote-51) But, should disruption be the target?

There are two types of disruption to consider, says Takeda’s Naim. “A disruption does not immediately mean success; it just changes the way you do things normally. We spent a lot of time devising a definition of disruption, which can be very tricky. Disruption can happen either by changing the way you do business or changing the way you deliver healthcare services. For instance, in changing the way you do business, it could mean changing how your pricing mechanism and access link not only to the product but also to the services you provide.

“Today, the business is mainly around price and reimbursements, so if you come up with an offering that combines product, service and a value-based model this could be a disruption because you are changing the way things are normally done. A second form of disruption is about changing the way healthcare is delivered; for instance, if the classical set-up is in a hospital setting and you come up with a new home setting, because you identified that patients don’t have the best experience, this could be a form of disruption.”

He adds that disruption does not happen overnight. Rather, it involves a sequence of incremental innovations and a combination of ideas leading to disruption.

**Part 2 – CX design and governance**

After defining the overall CX strategy and integrating this into your organization’s purpose, the next stage is identifying the general plan of how the experience will appear to customers and how you will ensure it is delivered in the manner you intend.

CX design and governance is when you map the CX road ahead, outlining the twists and turns – capabilities, processes and technological infrastructure – that need to be navigated in order to deliver a consistent, quality experience.

During this stage, companies must identify the interactions building towards the target experience and describe how these interactions will be sequenced.[[52]](#footnote-52) Specifically, a company must use customer journeys, identify the digital and face-to-face channels and how these will be sequenced, and plan for content.

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| --- |
| **Ask yourself:*** What is the specific experience you want to deliver?
* What is the scale and timeframe of the experience?
* What internal structures do you need to deliver your CX strategy across all touchpoints?
* What is the sequence of interactions with the customer to contribute to an improved experience?
* What measures will you put in place to ensure the desired experience is delivered?
 |

**Step 1: Building the customer journey**

The design of CX should align with the needs and expectations of the target customer.

An optimal CX design includes efficient planning for customer engagement, says Abbvie’s Correa. “In our framework, we consider account planning, behavioral segmentation, the use of different channels, and a clear engagement methodology.” These tools demonstrate the relationship between customer engagement, understanding their needs and behaviors, and coming up with a plan of action for CX.

This relationship can best be explored by depicting customer journeys by mapping the various touchpoints customers will have with the company throughout their journey. Experts agree that mapping the customer journey is a key element of delivering improved customer experiences. These maps can help identify and understand customer needs and expectations, as well as their channel and content preferences, which is a preliminary step to shaping the CX design.[[53]](#footnote-53)

Patient journeys are central, says Lilly’s Smith. “We aim to understand the lived experience that a patient has as they live with a disease or disorder, and how the healthcare ecosystem can help facilitate or inhibit that journey.”

In our global CX survey, we asked how aligned teams were around customer journeys (Figure 18). Fewer than a quarter of respondents (23.6%) reported that all teams were aligned to the customer journey, although a large percentage stated that some teams were aligned (41.5%). These results show how varied pharma organizations are in terms of using the right tools to understand customers and aligning internal organizational members to meet customer needs.

While the terms patient journey is used extensively, UCB’s Stover questions whether it encompasses all the experiences of a patient from “the beginning to the end – from symptoms to diagnosis, to being prescribed the first medicine”. Crucially, a full understanding of the patient journey cannot come from the clinical perspective alone. “It is about beginning to think from a patient's perspective.”

He adds: “At UCB, we look at CX from diagnosis – from the moment a prescription is written – to when they have the pill and are able to take the pill, helping them understand how to maintain their medication routines, as well as how they may need to change their lifestyle.”

Stover identifies key questions to ask when building customer journeys:

* Where do customers go for information?
* Where do they go for services?
* What are some of the roadblocks and barriers they face?
* If they are diagnosed and prescribed a first treatment, how long does it take them, what paperwork do they need to fill out, or what is the interaction between the physician and the nurse’s office?
* What are their frustrations with the overall healthcare landscape?
* What do they like and dislike with available treatments and specific brands or companies?[[54]](#footnote-54)

It is also important to identify your data sources for mapping the customer journey. Reps and the customer relationship management system are your readily available sources for customer data.

Reps gain insights through real-life experience of what customers value and demand, says LEO Pharma’s Pfeiffer Agertoft. “On top of this, we also gather insights from social media and through R&D, where we liaise with patients and patient groups to get feedback on how their patient journey is from the first indication of disease through to diagnosis, collection of their prescription, support and guidance, appliance, and adherence.”

Availability of data is not necessarily an issue, says Takeda’s Naim. “We have a lot of information about our customers sitting in our systems or the heads of our people. So, we start discovering and really understanding what matters for the customer but also how the needs of the physicians are in line with the needs of our patients.”

He cites a component of the company’s digital health strategy, called the Integrated Care Solutions for IBD patients, where – through observation of customers and data gathering – Takeda identified three key elements to be incorporated into the CX design. They are:

*There were too many solutions*

IBD patients have an app for toilet assignment, an app for food and treatment centers in different places for when you travel, and an app for tracking activities and diet. “For each touchpoint problem, you have a touchpoint solution,” says Naim. “That’s the first element – coming up with a more holistic way of serving IBD patients so they can take control of their condition and be part of decision-making.”

*There was little or no coordination between patient, caregiver, nurses and doctors*

How can we collect data from the patient that they can share with HCPs and caregivers for better coordination? “Most of the time, patients see their doctor twice a year and only remember important information pertaining to the last two weeks before the scheduled appointment. So, if patients have a diary where they can record information prior to an appointment, then the patient and the HCP can have a more constructive conversation.”

*Payers want to know about patient outcomes, clinical efficiency and cost-efficiency*

A key learning for Takeda was the need for the solution to be brand agnostic and combined with a value-based approach, says Naim. “Through the solution, patients can type in the data they are willing to share with other patients to compare treatments, and payers can access that data. The solution can help payers decide on the right treatments for the right patients at the right cost.”

**Step 2: Using the customer journey exhaustively to identify CX opportunities**

Mapping the customer journey is not enough to meet customer experiential needs. The map is only a tool, which should be used thoroughly in the design process.

“This sounds obvious, but it is amazing how many companies map the journey, stick it on a wall, and let it gather dust,” says CX expert, Golding.

Customer journey mapping should be written into the operations planning, adds fellow CX consultant, Knopp. “It’s not just a colorful infographic produced by one team; it’s a plan of attack for all teams.”

To manage the customer journey, companies must map it, measure it, and improve it as a continuous, never-ending cycle of activity (Figure 19).

“A business strategy needs to continually connect to it,” says Golding. “In a world where businesses are obsessing about digital, no digital strategy should be conceived without understanding how it will better enable the delivery of the customer journey first.”

Mapping the journey applies to all customers, including HCPs, says Takeda’s Naim. “The patient framework starts from the physician. How many patients and what type of patient does a particular physician see? What would influence their prescription behavior? Some physicians are focused on the patient, on the process, or on the therapy. So, you need to find out what they care about. When you have the information on what the physician’s need, you can determine the right way to engage with them. Do they like to interact with pharma or not? Do they like to interact via face-to-face or via online? What is their preference in terms of content? Do they like detailed information or infographics?

“Collecting patient-report outcomes also has a positive impact on patient outcomes. Being able to collect those outcomes and share them with the HCPs can help in the coordination of care between HCPs and patients. This can also help physicians to do their own work better day-to-day,” he says.

Marc Delavarenne, Customer Experience Director at Bristol-Myers Squibb, uses a five-step approach to meet the needs of his customers, primarily HCPs and oncologists (Figure 20).

Using this closed-loop framework, the customer journey (or ‘customer corridor’) can be mapped to identify customer needs, gather feedback, and then close a feedback loop to shape CX design.

Delavarenne explains BMS’ journey. “Four years ago, we started to create a CX program, mainly focused on this five-step approach. It starts with designing the customer corridor to find all of the key touchpoints between our customers and us (Step 1).”

Net Promoter Scores or customer relationship surveys can be used at key touchpoints (Step 2). However, the company found surveys “too quantitative” and prevented the team from creating the ‘wow’ factor to their CX, leading to the creation of Step 3. Here the company closes the loop with the customer with a call to discuss the survey or feedback.

It is someone from Bristol-Myers Squibb directly – not from an external call center – who contacts the customer and closes the feedback loop, emphasizes Delavarenne. It could be anyone – from field sales reps to general managers to the head of IT or HR – meaning that BMS has invested heavily in training employees on the closed-loop approach.

“We call customers back within 24 hours [of receiving feedback],” he says. “True customer needs come from this because we are not asking only for their feedback on a satisfaction survey. Satisfaction scores are not capturing true customer needs.”

In Step 4, the company analyses verbatim feedback from the customer as well as from any open-ended questions from surveys. “Finally, in Step 5, we send the customer what we call the CLP2 call or email thanking them for completing the survey and providing feedback. This allows us to highlight that the company is working with this feedback and to share any new processes put in place. It’s a new way to really show our customers that we care about them.”

So, how exactly does BMS conduct the all-important Customer Corridor Mapping? “Creating a customer corridor map can be very easy,” says Delavarenne. “You put people from different departments into one room and ask them to note the key customer touchpoints that they know. This can then be mapped out on a piece of paper on the wall. This can be done in two hours.”

In other words, customer corridor or journey mapping does not always have to be a long and complex process. While, there are different levels of mapping, a Level 1 customer journey must always be in place, he says. “I should be able to show you on a small piece of paper the key touchpoints of the customer within two minutes.”

The customer journey can become more complex, he adds, citing Congress attendance, which may be a Level 1 customer journey map but contains several sub-levels – being invited, booking the plane, travelling, etc.

“We are now training each marketer to be autonomous in their scope and faculty to design a customer journey map by themselves.” These maps can then be used as the basis for a brand plan. “Starting with the customer journey map and sending out satisfaction surveys is a reactive approach to understanding customer needs.”

“You ask for the feedback and then you react. Based on the feedback, you can improve your processes and try to do better. It’s a good way, but it’s very operational and can be painful for the team because you keep asking the customer for their feedback. The ‘wow’ effect comes from this detail, but it can be a painful long process.”

Consequently, Delavarenne is currently working on making the process more proactive, where the focus is on changing product-focused mindsets to customer-focused mindsets.

Companies do not need to address every single interaction a customer has with healthcare, he adds. Mapping the customer journey identifies “moments of truth” that, if improved, will offer a significant benefit to the customer’s overall experience.

Customer journey mapping is about seeing the entire picture of a customer’s actual and broad experience and creating an opportunity for the company to prioritize certain interactions and make impactful customer engagement decisions. Impacts on customer engagement could, at times, be ceasing certain interactions that, unknown to the company, are quickly becoming a burden to a customer. For example, some physicians do not welcome daily emails.[[55]](#footnote-55)

**Step 3: Select the best channels and digital platforms – and be economical**

When selecting the channels and technological platforms on which to deliver customer interactions, simplicity and functionality are key elements. There are many different channels to choose from, including social media, email, digital platforms, apps, face-to-face meetings, and conferences.

It is about understanding how to fit into a patient’s life, says UCB’s Stover. “It is about fitting into how they navigate and the different channels they use instead of trying to create different channels or additional solutions. They just overcomplicate things. We are finding that a lot of the digital investments companies are making are not going to yield the returns because you are basically adding additional layers and increasing the CX challenge.”

The sequence of engagements with a customer and the integration of the digital and non-digital touchpoints are key considerations in the CX design, although creating the flow of targeted interactions may be easier said than done.

You need to keep coming back to your CX purpose and the promise you want to make to your customer, says CX consultant Bellis. “If you have a strategy based upon your purpose and promises, you then look at how you can operationally deliver that in the most effective way across the customer care pathway. Deciding what should be digital and non-digital experiences becomes much easier. You determine what the touchpoints are and how they should feel, and you can start to blend the use of digital and non-digital touchpoints so that they are flawlessly interwoven.”

However, aiming for a perfectly crafted flow of customer engagements may not only be too ambitious but, at times, unnecessary, he says. “Making all the interactions flawlessly interwoven may not be the most important thing. It can be quite costly and it sets a very high expectation. As long as there is consistency and a sense of understanding and empathy across the journey, I would say that is a good starting point. Are we meeting the customer’s expectation? Are we empathizing with them? Flawlessly interwoven is not necessarily a prerequisite to delivering great experiences for the customer.”

It is not a requirement to adopt over-complicated digital platforms, which may only overwhelm the customer. Companies should, in fact, capitalize on existing technology, says Takeda Netherlands’ Customer Experience Design Strategist, Maarten van Essen. “Often, it’s better to make use of existing solutions and systems that customers or peers use. Sometimes, just simply linking these existing solutions together can greatly increase customer satisfaction.”

For UCB’s Stover, pharma needs to plug into existing platforms. “With the proliferation of apps and digital solutions, and the investment as an industry, at some point we are going to reach a tipping point where people are not able to absorb them all, and then they are not going to use them all,” he says.

“It is about recognizing that the patient is not *just* a patient living with a disease, say, epilepsy. They are a patient living with epilepsy so it may be important to connect to the disease in a standalone manner, but if I develop a whole portfolio of epilepsy-specific solutions, I may actually over-complicate things for my patient population. At times, I should be identifying, creating or plugging in to where they are and making these resources available.”

Still, when the unmet need of the target customer calls for the development of a new digital platform, companies do need to explore that avenue, says Head of Human Channels, Customer Experience at Teva, Davidek Herron. “An example of a multichannel management system is Teva On-Demand,” he says. “Imagine a representative having a conversation with a HCP and an unsolicited request for medical information came up to speak with a medical science liaison (MSL). A standard industry process is that a rep submits an MIRF [medical information request form] to Medical Affairs and it typically takes around two weeks for a follow-up meeting to happen between the MSL and HCP. With the Teva On-Demand platform, we reduced two weeks to minutes, and it was well-received by parties. For me, this platform defines what CX initiatives should aspire to achieve.”

**Step 4: Use content to inform, engage and compel customers to take action**

Content can be text, video, infographics or one of countless other formats, all of which can be embedded into available channels. It is a dynamic engagement tool, which can, and should, be tailored depending on the preference and information needs of the target customer.

“We try not to jam content into channels,” says Takeda’s Naim. “First, we try to see what the story is that we want to tell the customer; you need a message behind the story and relevant content surrounding it. For example, if we talk about a new study, we must make sure the information provided is very balanced and the content does not only contain medical data. Part of the content strategy, therefore, is the selection of the format and schedule, depending on what the customer prefers. Then we integrate that into the channels where we can distribute the content.”

Takeda colleague, Maarten van Essen, adds: “We try to go beyond product information, providing fast information that is actually needed in the daily lives of the customers in order to get them to listen.”

Indeed, content is also part and parcel of information provision among patients. For UCB’s Stover: “Epilepsy and Parkinson's disease are chronic illnesses, where folks are going to have to learn how to ‘re-live’ their life – that's where CX can come in. As a company, we can benefit patients if we can identify where existing patient solutions are and point patients towards those, or if we could understand how to make that information readily available to patients. Once diagnosed with epilepsy or Parkinson’s, patients begin to understand not only the clinical side, which is about the medication and treatment regimen; there are non-clinical decisions they need to make as well. So, we can do a better job by understanding all of these pieces and making the resources available to patients.”

Information provision is important but there is more to CX, he says. “In the case of epilepsy, if you have just been diagnosed, the information you want from UCB will be different than if you have already tried other treatments. That’s the simple way [to deliver optimal CX]; you begin to think about what information you are making available based on how a patient enters the system.”

Content should also be designed to affect customer behavior. At Takeda, content is fitted into the needs of the customer along the buying cycle. “We currently operate within the ‘See – Think – Do ­– Care’ framework, which is a way to tailor your content to the mindset of customers in different phases of the buying cycle,” says van Essen (Figure 21).

“You have to respect the state of mind that customers are in, so we look at the content needed at different phases of the buying cycle. And then we try to build content around that based on customer needs and concerns. The first stage is See, in which the customer has no intent of buying anything but wants to have a look around. So, if you understand your customer, you put in information that is related to what they do and what they like. This really helps you because they will tend to come back.

“The second phase is Think, in which you help customers create a list of the choices they have for when they are ready to buy. So, the second phase is about building consideration for what is interesting, what technical details are important, and what features are available. Next, you have the Do phase, in which the customer makes the purchase and you need to deliver the product or service,” he says.

“Lastly, you have the Care phase, in which you emphasize that the buy was good and acknowledge that other people also got the service they enjoyed and so the customer can then share their experience of the product or service. This is the model we use and it’s actually working very well for us.”

Technology plays a promising part in tailoring content, says Takeda’s Naim. “If you want to have a solution that makes sense for patients in terms of service, quality and outcome, you need to be able to individualize the service to patients. That’s why we are using machine learning in the emergency room. Every time the patients are interacting with the solution, it learns about the patients and then adjusts the content to the individual patient. Of course, with this kind of thinking, we are still building the concept and we are still seeing how things will go.”

**Step 5: Co-create with customers**

Experts agree on the need to work closely with the customer to identify key areas for improved engagements and ensure optimal CX.

Takeda is already doing this with hospital clients, says van Essen. “We have to look into how we can aid customers to plot the patient flow in their hospital or in their specific departments. Where does the hospital want to go? What are the strategic pillars a particular department stands on? How can we partner with them? These are the types of conversations we have been having for a while now.”

So, how does co-creation happen? “We are trying to find different things to do and discovering how we can cooperate with customers, collaborate in finding solutions, and navigate them towards the right direction,” he adds. “Of course, you need to do your homework and build a solid hypothesis on the direction to go for. You either sit down with your designated customer and start working on a prototype or you set up a panel to capture the customer’s voice during the process of creation. Together, we decide how to make things fit, and where additions are needed for specific situations. Transparency regarding your goal and the offering you wish to bring help to start a favorable relationship. Trust is gained through consistency so display your intentions well.”

Teva has also started an organizational shift from selling to adding value, utilizing co-creation to achieve that shift, says Herron. “We have done co-creative steps through the internal sales team by training them to ask specific questions to customers and to listen, even if they do not get the answer they want to hear. We also put measures in place to monitor the effects of the added training to see the big picture of the shift.”

Takeda use of the Kano Model during co-creative exercises, says van Essen. “Customer experience is all about understanding the frustrations and delights along the journey of your customer. I use the Kano Model to pin point where you can make the most relevant difference. Taking on one pain point at a time can help you work your way through the journey. Co-creating solutions together with your customers ensures that you have immediate customer feedback on the prototypes of the service or solution that you are creating. Co-creation also demonstrates that you understand the ecosystem surrounding your customers.”

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| **The Kano model**The Kano model categorizes product or service features affecting customer satisfaction levels into five types: [[56]](#footnote-56)1. **Expected quality** – This feature is expected, but more of it will not increase customer satisfaction.
2. **Desired quality** – The more of this quality is present, the higher the satisfaction level.
3. **Excited quality** – The absence of this quality does not lead to dissatisfaction, but its presence adds to customer delight.
4. **Indifferent** – The customer is indifferent to the quality’s presence or absence.
5. **Reverse** – The presence of this quality leads to dissatisfaction.

Product and service can add value, detract from value, or create new value.[[57]](#footnote-57) So, in conducting a Kano analysis with CX projects, you can determine the service features in need of improvements or prioritization.  |

Co-creation can tremendously lower the risk of your CX design failing because it can be tailored to suit the specific needs and preferences of the target audience.

For Teva’s DeGoes, the single most important factor to ensure optimal CX is to engage with your target group before the CX program is released. “In taking this direct interaction insight and co-creation with patients in the development of our programs, we can ensure the experience is going to be not only meaningful but is valuable to the patient and is something they will stick with as well,” he says.

With co-creation, the customer can more readily see the value of the experience, which will build towards a more robust bottom line. Takeda works with HCPs, patients and patient organizations from the moment we enroll them, says Naim. “We listen to them, involve them, and do their activities with them – and they start to listen to us. If we think of the way we design a service for patients, the way we engage with our customer, the way we include customers in selecting the agenda, customers can see value. And if you create a positive experience for them, business will follow afterwards.”

**Step 6: Set up a governance framework**

A governance framework will drive responsibility and accountability for the CX operation amidst all the other priorities in the business. This framework can help to ensure the CX plan does not remain a concept or theoretical exercise but flourishes into a well-implemented action plan.[[58]](#footnote-58) Governance can cover rules and regulations regarding data management and the roles and responsibilities of individual members contributing to the delivery of the CX strategy.

While pharma companies have plenty of product information and market research relating to their brands, understanding the customer experience design needs will require a much broader pool of data. Mapping the customer journey alone will rely heavily on a multidimensional view on customer data in terms of their demographics, behaviors and attitudes.[[59]](#footnote-59) However, the grand data landscape is often disjointed, restricting a pharma marketer’s view of the entire customer journey and on his or her ability to generate viable customer insights. In shaping the CX design, marketers will need the right type, quality and quantity of data.

According to Takeda’s van Essen: "We need to collect the data and find out when and how to contact our customers with relevant information. Every customer is different. We are now using advanced insights to look for segments and customer types that are relevant in terms of revenue. I think this is the way forward. But you need to gather good quality data for that. The hardest part for us pharma marketers to fulfil is the instant gratification. Compliance brings up many barriers that are not always easy to overcome.”

The governance framework should therefore define how the organization aims to establish data security, anonymity of patient data, and access to data locked within different functions in the company, and access to data in external datasets.

Collecting, curating, managing and processing the various data sets will require a robust data governance framework that can ensure a capability to manage and secure information across integrated channels and platforms.[[60]](#footnote-60)

Pharma companies should consider: [[61]](#footnote-61)

* Data source – Where was the data generated (especially for external sources)?
* Process – How was the data generated and stored?
* Reliability – What is the likelihood that data is accurate and credible?
* Timeliness – How fresh is the data?

In addition to governance through data management, companies also need to ensure that, prior to deployment of the CX plan, individuals and teams are equipped with the right skills and abilities to perform their roles in the CX design. Most especially, companies must ensure that the people tasked to operationalize the CX project will have ample knowledge of the legal and regulatory implications of customer engagements.[[62]](#footnote-62)

The CX design and governance stage should, therefore, include early activities such as creating an inventory of existing capabilities, defining the capability-building requirements for people and processes, developing training programs to bridge capability gaps, and equipping teams with specific manuals and protocols. These early activities must be co-decided and co-created between leaders, managers and the people who will be at the front line.

However, non-customer-facing people also need capability building in the CX design, says Teva’s DeGoes. “With people who have direct interaction with patients, we do a lot of training on how to interact with them, how to understand what is driving and motivating them, and the beliefs and behaviors a patient may have, positive or negative, that impact their ability to be successful with therapy. It is equally important for people who do not have direct contact with patients to understand how a patient might interact with the information we produce.”

Lastly, the governance framework should include a timeframe to refine the plan and deploy the final design and how much disruption the company is willing to make or accept once the CX plan is enacted.

Transformations takes time, says Takeda’s Naim. “The timeframe is a good consideration as people must understand that doing a very good transformation in customer experience can take up to five years. You start small before going big, so changing the mindset is not a quick fix. It can take decades and a lot of trial and error to change your processes.”

He has a rule for deciding the mix of initiatives with varying levels of disruption. “Once we identified these different unmet needs, we developed different solutions. Some were very disruptive while others were basic, yet all were equally important. We tried to use the 70-20-10 rule; 70% of our solutions were based on established innovations, 20% on more innovative solutions, and 10% constituted disruption.”

Once these final elements of the governance framework are defined, you will already have completed your roadmap and overall CX plan. The next section provides guidelines on operationalizing that plan.

**Part 3 – CX operations**

After planning the design and governance framework, the next step is to start using the CX roadmap you’ve created to start the real-life journey. CX operations defines what will happen when the CX project is up and running.

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| **Ask yourself:*** How will you manage the process of delivering on various touchpoints?
* How will you streamline the performance of each touchpoint individually and together?
* How will you ensure that you continue to meet or exceed customer expectations?
* How will you orchestrate the operation of each CX Design component?
* How will you monitor the performance of each aspect of the CX Design?
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**Step 1: Set objectives**

To ensure a truly hands-on deployment of the CX plan, where all internal members are engaged and certain of the role they are to play throughout the operation of CX, companies need to have a step-by-step description of what teams in the company are expected to do daily within CX operations.

“Each and every colleague needs to have CX written into his or her objectives,” says CX consultant, Knopp. Specifically, setting short-term objectives for individuals within each function is important to operationalize the CX plan into the organization’s day-to-day workflow.

We want customers to feel genuinely cared for and that they can trust us, says Lilly’s Smith. “Those are the goals we are working towards and all employees have a role to play in developing the overall customer experience. We need to figure out what it is we actually do in each function to bring those goals to life and how we can track against those goals. So, we do regular monitoring and check-ins to ensure we are succeeding against those goals.”

For CX consultant Bellis, CX success is tied with improved customer loyalty and advocacy, and each function needs specific goals that align to those goals. “You can develop a way to prioritize the achievement of customer loyalty and advocacy through experience at different levels – corporate, brand, business, country,” he says. “So, key strategic success factors and main areas of focus and investment should all be orientated towards loyalty and advocacy as the primary target, as opposed to brand, revenue, or something else.”

**Step 2: Ensure cross-functional, open communication lines**

In setting day-to-day CX objectives for different functions, companies may find the need to make on-going changes to internal organizational structures.

J&J Vision’s VP of Global Surgical Customer Experience, Tom Ruggia, suggests emulating medical device companies. “For them, CX may be more complicated because it might have many implications on the operations, so you might see CX as a stand-alone department in medical device companies, covering CX strategy and execution. Pharma companies can learn from that and include the CX strategy in their marketing departments,” he says.

However, drastic organizational changes are not always necessary, says UCB’s Stover. “The challenge and opportunity with customer experience today is to work through a company’s existing model, marketing, sales and service departments, and understand how to influence their behavior and influence their decisions – but also to identify opportunities where you can bring marketing, services, and sales together, so that they are operating from the same platform. So, you are not seeing these large, customer experience teams that are massive divisions within an organization. Instead, companies are working through the existing structures and helping to pivot them to be able to take into account that if they make certain decisions it will have a particular impact downstream on their patient or on their colleague’s ability to have an impact on that customer’s experience. You start to see how all the pieces [departments] are connected in delivering the customer experience.”

Ultimately, to successfully lift a CX plan off the ground, it is about working with what you have and then capitalizing on the strengths of the organization as much as possible. “We have found this approach to be successful here [at UCB], to be working through our existing resources,” says Stover.

It is important to be able to pull all the functions together on a regular basis to consistently deliver on the objectives of the CX strategy. Consistency can become an issue over time in CX operations, endangering the ability to sustain the quality of the target experience. *[See the People and Culture section for more on how to nurture a team of internal advocates and keep the CX flame alive].*

It is not just preserving the quality of the experience, but keeping it fresh, says Teva’s DeGoes. “For example, once a patient is enrolled in a clinical program, it very often becomes a part of how they manage their condition. There has to be a commitment on behalf of the business itself to focus on program quality as much as they focus on product quality,” he says.

Maintaining a clear focus on the CX program quality and securing cross-functioning requires open and constant communication between functions and also between employees and customers.[[63]](#footnote-63) Furthermore, to operate with consistency, companies also need to enable cross-functioning and have a clear line that integrates global strategy with local implementation.

For Takeda’s Naim, working with the local markets is essential to bring about change and drive a CX mindset requires. “We have an integral brand team that references each function and basically works with other functions around a brand or disease area. So, we don’t need separate plans – for example, a marketing plan and a market access plan. We only have one original plan. When we go to the execution, the cross-functional chain becomes a mindset where all functions are working together. We also don’t create a strategy and say to a local team, ‘Hey, you will implement this.’

“We work with the local market and local customer to build local change. We believe that is the best way to change the organizational mindset – with small winds. It is going to be a long journey, but that is change management,” he says.

Jerlang shares how LEO Pharma aligns global strategy with local implementation. “We have global coordination of CX strategy and regional/local execution. In the global team, we ensure we develop an aligned view, which is then cascaded to the regions. Here, we take into account the differences of countries, cultures and capabilities; some teams are very advanced, such as our China team, which has an industry-leading approach to both patient and HCP customer experience.”

When there is a solid integration between global strategy and local implementation, it becomes easier for each function to define and be accountable for their responsibility in the CX strategy. It also becomes more efficient for individuals to define their objectives and trace the rationale of what they do in the grander global CX strategy.

**Step 3: Make use of inner and outer feedback loops**

Part of creating open communication lines is setting up feedback loops, which are critical to achieving on-going improvement. Some experts use the Net Promoter System (NPS) to establish a feedback loop. NPS is a way for customers to score and comment on the performance of a company and its brands and products.

The customer feedback can be used to identify areas for improvement within customer-facing individuals, which creates the “inner loop,” and then across teams, processes and the overall organizational structure, which creates the “outer loop.”[[64]](#footnote-64) Closing the outer loop can be a more difficult task than closing the inner loop since it requires defining and understanding the challenges that a customer experiences due to structural misalignment within the organization. In closing the outer loop, companies should be able to identify the root causes of inefficiencies and misalignment contributing to a less-than-seamless experience for the customer.

This is similar to Bristol-Myers Squibb’s framework for understanding the needs of HCPs, where feedback loops play an essential part (see Figure 20). In general, by setting up a feedback loop, companies can better simplify, align and integrate the various operational components of the CX design.

The model and details of the feedback loop mechanism need to be planned well within the CX design and governance stage. However, a huge part of setting up the feedback loop is piloting improvements across customer-facing touchpoints and making necessary adjustments to the organizational structure and processes that affect the real-time operations of the CX initiative.[[65]](#footnote-65)

Specific tools that enable a real-time view of the performance of CX operations are also available. These tools can help to align the behavioral expectations from leadership, management and staff members in terms of delivering improved CX.

“Aligning and managing operations to deliver a CX strategy to meet or exceed your customer's expectations are possible with clear behavioral changes led from the top,” says CX consultant, Knopp. “Leadership teams must believe and act according to a shared CX strategy – there should be no empire building, no competitive behavior, and no fighting for budgets, which may be very tough for the typical pharma leader.

“It is important to be clear on what the organization agrees on as the target customer experience. Colleagues across different levels need to work through this together and communication is key – non-stop storytelling, helping colleagues see their role in delivering the CX strategy, and sharing current and desired customer experiences,” says Knopp.

Here, a 360-degree view of the customer, and a common view of the whole customer journey, become essential. “Companies need to have a shared CX dashboard, so using systems like Tableau becomes really important,” she says.

**Step 4: Make room for trial-and-error moments and iteration**

While communication lines and feedback loops are essential to identify problems in CX operations, to make the necessary changes to address those problems, much of the actual operations of CX involve making iterations and improvements and learning from the process. [[66]](#footnote-66)

As Takeda’s van Essen shares: “We try to experiment with different types of engagement. One is to make sure that your customer-facing functions have shifted from a sales-oriented approach to a more customer-oriented approach. That means we actually diminish the amount of time that customer-facing functions use for promoting the product and increase the amount of time they use for looking into efficiency with their customers. Account management plays a big part in this. Social media is starting to pay off thus far in terms of cost and we are mapping channel effectiveness. We are learning, but things are far from ideal. We are in constant contact with our customers to find the optimal playing field, improving step by step.”

If you design a program well, and you have tailored that program for the market where it is to be delivered, you can meet the needs of the patient individually, says Teva’s DeGoes. “It is understanding what the early experiences are for the patients, physicians, and often the caregivers, and course-correcting when necessary, tweaking the programs and making sure that we are learning as we go and that we are constantly improving programs to meet the patients’ needs.”

Therefore, operationalizing CX requires flexibility with trialing, and openness to possible failure. The CX operational model must have a mechanism to pilot new ideas, iterate and facilitate learning to be able to bounce back from short-term setbacks and to refine operations over time.[[67]](#footnote-67) Agility is also an important feature in CX operations – to be able to bridge the gap that typically exists between the speed that CX tools enter the market and the speed at which pharmaceutical companies can adopt them.[[68]](#footnote-68)

“Innovation is happening so quickly that there is the challenge of how you create a model that enables users to easily interact with a patient but then also utilizes these new innovations that are being moved in,” says UCB’s Stover.

Trial-and-error considerations become all the more important in the long run when competitors begin to implement their own initiatives to improve CX. “Within, say three years, of establishing your strategy and operations, every time you test something and find anything in need of improvement, then you should go back to your strategy and iterate,” says Takeda’s Naim. “If new competition comes along, then you also need to adapt the strategy, especially if what the competition is introducing might disrupt your business.”

Incubating or piloting a CX plan is also important to ease the initiative into the overall company operations. For Stover: “There are decisions that need to be made on a very short-term basis. When you are looking at your annual numbers, you need to make quick decisions based on what’s happening in the existing environment. At the same time, we are also incubating ideas outside of the daily operations – the best way to bring in some of these new ideas around CX is to incubate them and slowly phase them in. That’s where we seem to have the most success. This enables the business unit to be aware of the new idea; they can fund and support it. However, the business unit does not need to depend on that solution to help hit their numbers today. The idea can become part of the future business model, and so the business units can prepare for that and ease the idea in.”

Technology also plays a key role in the CX operating model, says Lilly’s Smith. “There is an expectation in the consumer’s mind that there should be a digital engagement in healthcare like what they see outside healthcare,” he says, adding that technology is part of the “three-legged stool” that enables a balanced implementation and management of organizational change. The other legs are people and process; implementation will fail in the absence of any one of these three components.

When it comes to CX, companies will not be able to dramatically improve customer interfaces without the use of technology.[[69]](#footnote-69) And the selection of technological tools is a significant factor in determining how agile and able companies are in addressing evolving needs and managing continuous streams of data affecting the CX strategy. Companies can leverage advancements such as marketing automation, artificial Intelligence (AI), and analytics capabilities to gather, process and analyze customer data and upgrade customer and employee interfaces. For example, AI can be used to track patient data, creating a platform that prescribers can use to identify key insights, anticipate patient needs, and enhance conversations with patients.[[70]](#footnote-70)

**Part 4 – CX measurement**

Metrics are a critical component of CX transformation. Companies need to measure the experience of the customer, the performance of the organization and of individuals with respect to the delivery of that experience, and the impact the customer experience has on business metrics.

The CX measurement stage is about assessing the overall performance of CX operations and the potential of the CX design and CX strategy to enable constant improvement.

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| **Ask yourself:*** How will you calculate your impact on the customer’s experience?
* How will you track customer reactions and behaviors?
* How will you identify the elements that need to be improved to deliver the target experience?
* What conversions in customer satisfaction or behavior do you expect?
* How will you evaluate the performance of each aspect of the CX Operations?
* How can you ensure ROI with CX?
 |

CX measurement helps establish the cause-and-effect link between efforts to improve CX and tangible improvements to the actual experience, something that many pharma companies are currently struggling to establish (Figure 12).

For CX consultant Bellis, there are three factors a company needs to link in order to establish this cause-and-effect relationship. They are:

* What the company is doing? (The action of the company)
* What impact does the company’s action have on the *experience* being delivered? (The actual experience of the customer)
* What impact does the action have on the *customer’s perception* of the company? (Brand perception and company reputation).

In other words, specific metrics should be used to calculate the experience of the customer and to completely understand the factors affecting that experience.[[71]](#footnote-71)

A company should be able to define the actual experience a customer is having and interpret their brand and company as perceived by the customer. More importantly, it should be clear with the organization how their actions have contributed to shaping the actual customer experience and brand perception. From there, you can determine how big an opportunity you have to impact on customer experience and brand reputation.

“In aligning these three things, you can determine the cause and effect in a robust way,” says Bellis. “You can also begin to see the closed loop governance system behind these things to show what is working and what isn’t from an experience and brand perception standpoint. You can then focus on the areas where you can make the biggest difference. This alignment allows businesses to focus on driving improvements in the experience. This type of focus can help bring financial rewards quicker.”

In our global CX survey, we asked whether respondents took steps to measure CX (Figure 22). While nearly three-quarters of respondents reported that their companies did measure CX, the largest group (35.8%) answered ‘Sort of – We can gain some insights from related metrics’.

These results highlight how many companies have not yet not aligned towards providing intentional experiences to customers at an organizational level.

So, how can companies measure their CX strategy? Here are some of the specific metrics used by experts.

**CX design sustainability and its impact on ROI**

Measuring CX can link to measuring ROI, which can drive the habit of making constant improvements to the delivery of CX.

For UCB’s Stover: “To ensure we are getting ROI, there is the operational piece (the metrics), but there is also just being able to understand the patient experience; are we interacting with them and are we delivering value? Then, that will obviously end up looking at the return around efficiencies as well as the overall experience and the impact we can deliver. Ultimately, if we are bringing the right medicine to the right patient at the right time, we are doing our job.”

He cites three ways to look at ROI:

1. **Is the CX desirable for the patient?** “It must solve a problem that they have, it must deliver a break point, and it must be desirable from our perspective of something we think we can do.”
2. **Is the CX plan feasible?** “We may have a wonderful solution, but can we actually stand it up, are we actually able to deliver?”
3. **Is it sustainable?** “That’s where revenue comes in – no margin, no mission. If money was no object then we could do anything we wanted, but we need to be able to operate within some guard rails that suggest that these decisions are sustainable, these are things that we will be able to move and carry on, and as we scale up and make it available to a larger population, it is something that will continue to be feasible for our organization as well."

**Marketing metrics**

Measuring the impacts on experience, and establishing a link between CX and the bottom line, can take time, but there are several other metrics that, while not directly linked to product sales, are beneficial nonetheless.

***Colleague engagement and operation efficiency***

“When people feel they are doing something that helps the patient, they also begin to feel better about their work, which creates a more positive work environment that gets people more aligned with the CX strategy,” says Bellis.

He suggests that when “the inevitable question” arises around ROI and CX, it can be helpful to say, ‘Let’s not just look at sales. Let’s first look at the organizational alignment, because there is a story there to tell here.’

***Brand perception***

When brand perception is high, the cost of engaging customers goes down, says Bellis. “Imagine calling a doctor five times to get them to listen to a sales message versus a doctor that responds to the first call. This also helps in recovering customers, whom the company has spent a lot to engage in the first place, having a bad experience that takes them to a competitor if the brand perception is low. However, with CX management, customers are more likely to stay engaged even when something goes wrong in the service or the experience. Simply, you can turn things around more easily.”

In addition, it becomes easier and more efficient to prospect customers because they may already know who you are, and you can be much more straightforward with them since you know how those customer types behave based on your customer journey mapping insights, he says.

***The Kano model***

The Kano model classifies product or service features into five categories – expected quality; desired quality; excited quality; indifferent; and reverse.[[72]](#footnote-72) [See page x for more on the Kano model]. Marketers can assess and break down customer experiences based on satisfaction levels with each type of product and service feature.

Takeda’s van Essen has experience using the model. “With the Kano model, you can design your activity in such a way that it ensures customer satisfaction. The model offers a tangible way of determining whether you are in the sweet spot, in need of fixing the basic qualities of the services, or in need of added value.”

The model can be used to analyze the performance of a CX project, linking back to customer journey mapping then incrementally introducing improvements to the overall experience.

“In your customer journey map, you can look at your customers’ aspirations and then find the gaps in their current situation. From there, you would know where to focus. You can then try to elevate the experience one touchpoint at a time,” adds van Essen.

***The Objectives, Goals, Strategic Initiatives and Measures (OGSM) model***

The selection of metrics also depends on objectives set for the CX strategy and CX design.

Revisiting objectives is part of Teva’s CX measurement framework, says Herron. “To make sure you are aligning to ROI objectives, you need to first take a step back. I like to use the old P&G [Proctor and Gamble] model with OGSM [objectives, goals, strategic initiatives, and measures]. Everything you do should align to your overall business objective. Leadership also needs to be aligned on these measures before moving forward.”

Linking the financial return of a CX project is very important to senior leadership. Measuring progress with key business objectives can help to directly link improvements in CX with the bottom line. Furthermore, measuring the performance of a project based on its set objectives can help a company to weigh the costs of the project against the benefits to better monitor the strength of the CX project’s business case.

Takeda’s Naim explains the need for short-term objectives and monitoring of baselines. “Having a trial-and-error phase is about coming up with concrete pragmatic use cases. This phase could take months, but in that period, we are able to learn more about our customer. The entire trial-and-error stage is all about learning and so you better measure for you to learn. Every time we do a CX initiative, we need to see if we are moving the needle or not.”

***The customer journey from three voices (customer, employee, and process/business)***

Golding uses a framework for change with three parts: strategy; measurement; and people.

“Most organizations are not measuring CX well,” he says. “CX is a fact-based methodology. If you know what your proposition is, with the use of data, you should then also understand how capable you are at bringing that proposition to life within the customer journey. To understand that, you must be able to measure the customer journey from three perspectives: the customer, the employee, and the business or process. If a business wants to deploy the most robust way of measuring CX, it needs to listen to and capture three voices.” See Figure 23.

The three voices are:

*Voice of the Customer (VOC)*

Most industries measure some form of VOC – although pharma probably does it the least, says Golding. “Just because most companies measure VOC, that does not mean they measure it well. This voice represents the external perception of your ability to deliver the customer journey,” he says, identifying the three most common survey and scoring mechanisms to measure VOC:

* **Net Promoter Score (NPS)** – indicates customer and employee loyalty to a firm
* **Customer Satisfaction (CSat) survey** - indicates the level of customer satisfaction with a product or service
* **Customer Effort Score (CES)** – indicates the ease of experience a customer has with a service firm.

*Voice of the Employee (VOE)*

VOE is not about measuring employee engagement, rather, it represents the employees’ perception of your ability to deliver on the customer journey, says Golding. He believes VOE is not measured often enough across different industries.

*Voice of the Process (VOP)*

An internal perception of a company’s ability to deliver on the customer journey.

“It measures what the company actually does,” says Golding. “It is the least common voice to see among the three, yet it is the most powerful. CX is all about cause and effect. What an organization does – which constitutes VOP – causes the customer to feel the way they feel, shaping VOC. So, if you can align VOP with VOC, you will be able to drive predictable and tangible improvement to the customer journey.”

Listening to these three voices, and relating what they say to any impacts on the customer journey, is the area where most companies across industries fail, he says. “If you can measure the customer journey based on these three voices, you should then be able to prioritize the small details within it that, if fixed, will have the greatest effect on improving customer perception as well as commercial goals,” he explains.

Gathering feedback from the customer, the employee and the organization as a whole should be done on a regular basis – for AbbVie’s Correa, surveys and bi-monthly reviews are useful for identifying gaps in customer satisfaction levels and closing those gaps.

***Customer journey benchmarking (and more on the NPS)***

Monitoring customer experiences and customer behavior based on the customer journey map is essential to creating a qualitative measurement of the CX strategy.According to Teva’s Herron: “If you can define the customer journey, you can see where customers are falling off and then you can fix it.”

Methods of measurement should clearly link back to the customer journey, says Lilly’s Stover. “From a best-practice perspective, the first step for us is to ask: Are we mapping the process? What is the process the patient goes through, and where are the breakpoints? What channels are patients using, what solutions do they use?

“The next step is to look at how you are measuring the process, so there are operational measurements that we can use that are also then tied into patient experience. Indeed, a key piece of a CX framework is the way you are measuring how a patient interacts with these different points within their journey; what ‘good’ looks like is a critical piece; and then how you're using that information to further reinforce the framework and to learn. It’s an ever-evolving ecosystem, with new technologies obviously changing the way that we interact,” says Stover.

The customer journey is the springboard of CX measurement for Herron. “Everything starts with understanding the customer journey and mapping this out. Many teams can't get past this point, and if this is the case, you will find it difficult to measure CX past the typical NPS. You need to have an integrated measurement system that has clear links between metrics at each point of that customer journey.”

Despite Herron’s emphasis on the need to go beyond NPS, many experts cite it as a key metric to measure the experience of customers. “You can measure NPS and you can see if it is moving in a positive direction,” says Lilly’s Smith, while for CX consultant, Knopp: “NPS gives an organization a way of inviting real-time feedback from customers on all touchpoints.”

It means the whole organization moves from reviewing revenue data alone – which is traditionally feedback for sales teams – to reviewing the whole customer experience, she says. “This focuses every function on ‘what can I do to improve CX?’ rather than whether sales teams are meeting their targets. Colleagues are so often frustrated at not being able to support customers in a way they know will work for both customer and colleague. Systems such as Qualtrics allow you to aggregate data and for the whole organization to view data and real-time feedback from customers,” says Knopp.

For Stover: “I can almost say that there is a little bit of logistics in delivering optimal CX – understanding where customers are going for information, how they are navigating the system, and how we can begin to make that easier. To do that, though, we need to be able to measure. Some of the metrics for us is more of an operational perspective, so in the case of epilepsy, for example, we might look at the time from first prescription to actually getting the medication. Those are some key operational metrics that you can begin to look at to determine what is best practice.

“There are also metrics to determine customer behavior; how are they interacting with the solutions you are putting forward? Are you measuring the impact and amount of usage? And then finally, and this is where it gets a bit more difficult, depending on the community that you have, can you begin to understand if they’re going through and taking advantage of the services you provide? Are they working through your funnel? What is the experience that they have? That’s where you start to look at things like NPS and Patient Experience Scores,” he says.

In a 2017 eyeforpharma webinar, we asked participants about some possible mechanisms to measure CX (Figure 24). While our experts identify NPS as an important metric for customer satisfaction, it was a far less popular KPI for measuring CX – where customer loyalty (50%) and customer satisfaction (33%) came out on top.

“It’s ultimately about the goal that you are trying to achieve,” said Bellis during the webinar. “You need all of [these metrics] to a certain extent to understand different things. People put a lot of money and effort into doing those things [changes during a CX transformation] and need a way to find out whether those are working. I don’t think there is one KPI to understand that. I try to help people by determining what it is they are trying to achieve. What is your purpose in the life of customers you wish to serve? How are you trying to do it? And then measure that. Ultimately, metrics should be a reflection of what you intend to do or not.”

Moreover, he says it is also important to understand how the different metrics relate to each other.

The selection of CX metrics should not be done with complete finality since the entire CX uptake is still evolving in the industry, argues Teva’s DeGoes. “We try to measure the customer experience as best we can, through what I call qualitative anecdotal feedback from patients, measures like NPS, or other patient satisfaction measures. Engagement levels and satisfaction levels are the most important factors for measuring patient experience. This focus on the experience of the patient is the same way that many consumer businesses look at customer experience; it is relatively new, not just for Teva but for the industry; it is still evolving,” he says.

**Part 5 – People and culture**

Culture eats strategy for breakfast, or so the oft-repeated saying goes, so there are few aspects of a CX transformation that are more important than people and culture.

|  |
| --- |
| **As yourself:*** How will your employees connect their day-to-day behaviors with their impact on customer experience?
* What specific traits and attitudes, which promote CX success, should your people possess?
* How will you keep the CX flame alive within your organization?
 |

**Step 1: Drive CX purpose through a shared vision**

A significant part of the catalyst for CX uptake typically comes from the people with the organization. To drive the necessary cultural and mindset changes that will facilitate CX success, companies need individuals who fully recognize the connection between their job, their individual attitudes towards CX, and the success of CX.

As AbbVie’s Correa explains: “Employees need to see a clear connection between how effective they are in the field and the outcomes they are achieving. However, it is important that they understand that measuring effectiveness is not done for controlling purposes. Rather, it is to help them to achieve their objectives.” In other words, the purpose of the company and the objectives per colleague need to be clearly defined and understood from the outset.

There is also a need to constantly remind people about the purpose of CX in the company and in their day-to-day work. For UCB’s Kumar, to get the ball rolling and to spark positive customer experience conversations along company corridors, the first step is to engage the right leaders and key internal influencers early to develop a collective strategy.

“What’s important in any customer or patient experience program is that you were able to create a shared vision. And the people in the organization need to get behind the strategy. We need to ensure employees care about the goals that we want to achieve,” she says.

Identifying key internal influencers can be very effective. Companies can begin with piloting initiatives with key individuals who have a passion and talent for CX and then sharing their best practices throughout the company.

CX consultant Knopp experienced a “collective awakening” while working at Pfizer. “Many colleagues were crying out to deliver great CX, so we started enabling colleagues who were ‘natural’ at CX, allowing them to lead small initiatives. These were simple changes and we just watched and played back the story to other colleagues. This led to a realization that the future could be whatever we chose to make it. Pharma has a steep hill to climb, changing from our old sales mindset, but we have the bright ambitious colleagues to deliver.”

Piloting and demonstrating positive results can also be effective to gaining leadership buy-in, says LEO Pharma’s Jerlang. “Changing the way we do customer experience is a change project, and we treat it as a change project. For example, we spend time educating our leadership teams on the opportunities within digital CX, so we get buy-in from the top and down. We also run pilots to show how it bring results; this is very convincing to sceptics.”

As a consultant, Golding has observed that while employees often associate well with the product they work on, they are often disengaged from the company. “If you want to drive a sustainable customer-centric organization, you need people who are not just engaged with their jobs, but people who are advocates or fans of the brand. People who know what the strategy is and will do whatever it takes to make the strategy work for the customer, for themselves, and for the shareholder. This part of the framework defines the actions and initiatives to make that happen,” he says.

Getting people to embrace a shared vision and building confidence in their ability to deliver on the promise of an excellent experience will deliver dividends of the most valuable sort. Takeda’s van Essen says: “Pharma needs to build trust. If we do not manage trust and increase our credibility, other efforts will be in vain. My long-term view on CX is that we start doing it and that we keep on doing it; too many times, I see that CX is just another component of the overall strategy. Customer experience is about intent and aspiration: do you really want to improve the lives of your customers? I like to refer to the Six Laws of CX by the Temkin Group: You can’t fake it.[[73]](#footnote-73)”

He warns: “If you want to succeed in CX, every employee needs to think and operate in the interest of your customers. You must ask yourselves if you are really willing to invest in this. Start with what your customer experience aspiration is and keep that goal in mind in all you do. And then the revenues will follow.”

Risk-taking is another trait that individuals in the organization may need to improve on. A culture defined by a proactive attitude towards innovation and the risks and challenges that may come with that will be a major catalyst for strategy reform.[[74]](#footnote-74)

CX is a relatively novel endeavor for many pharma companies and so implementing a CX strategy requires a considerable appetite for risk. The culture within a pharma organization should therefore be one that is open to risk-taking.

“A huge part of customer experience is about trying different solutions because not everything works,” says UCB’s Kumar. “A big part of a successful CX program is the ability to try solutions that have not been tried before ahead of others, to challenge the status quo. Having the ability to push the boundaries by having a good understanding of them, then having the courage to say, ‘I tried this. It didn’t work. I’m going to shut it down. Let’s try the next thing that we believe might work.’ Within this context, the ability to be heard and to take risks is quite important.”

**Step 2: Keeping the CX flame burning**

In operationalizing the CX plan, UCB’s Stover points to old practices and belief systems that may challenge the new mindset. “There are things outside of your control that you need to be able to understand, prepare for, and address. And there will be things that will be within your control. One challenge is that you need to start thinking in a different way. In our industry, we have been primarily focused on the physician, so we think about marketing or operationalizing CX by targeting the physician.

“For us as an organization, the patient is at the center of the decisions we make, but even when the patient is at the center, we are dealing with legacy systems built for a different kind of model, and so it is legacy systems, legacy metrics, and legacy operations that were built based on an earlier model – that’s one of the challenges that we face when we think about how to create a customer experience,” he says.

If managers and leaders are not vigilant, the old model of interacting with customers may resurface and the flame of improved CX could die out. “CX management needs to be woven into everything the organization does in order to see the full extent of the benefits to be realized,” says Bellis. Therefore, promoting the CX mindset and culture should be an ongoing process throughout the implementation of CX activities and as results from CX Measurements come in.

Constantly driving employee engagement and advocacy is crucial, says CX expert, Golding. “If an organization is to focus on CX successfully and sustainably, it is critical to have engagement with employees to the point of advocacy. Employees who would not only be delighted to use your products and services themselves, but they also recommend them to others and are proud ambassadors of both the products and the company they work for. Unfortunately, all too often, the misconnection between leadership and employees is far too significant – leading to disengagement and resentment – two things unlikely to inspire employees to think and act in the interests of the customer. That is the key point – to be a customer-centric organization, you must enable your employees to think.”

Also, key influencers of CX do not stop serving their purpose once a collective awakening happens or when a shared vision has been created at the beginning of CX execution. They will continue to have a role in keeping the CX flame alive.

According to Bellis, the kind of people advocating for CX will depend on the maturity of the company in terms of delivering experiences, but what remains constant is that everyone has a role to play. “When the company needs to improve on its awareness about CX, you need someone with a lot of passion for CX and with a wide network in the CX field. When the company needs to drive action and proper CX management, they will need people who can lend operational support to get the right capabilities and deliver the CX strategy. In general, there should not be only one person to evangelize CX; everyone has a part to play,” he says.

Determining the operational needs of colleagues and supplying solutions to those needs are also critical to keep up the motivation throughout CX implementation. For LEO Pharma’s Jerlang, digital tools can be extremely useful. “We have a strong focus on implementing digital solutions to support in-person interactions. It is a concerted experience for the customer, coordinated by our medical representatives. There is a high interest from around the organization in running these activities, and we ensure that the medical reps also see the benefits to their daily work. It is less about replacing than supplementing – that is very motivating for this group of colleagues.”

**Step 3: Create a named position to oversee the CX implementation**

UCB’s Stover is an advocate for a dedicated person who can hold various functions accountable for CX responsibilities. “Ultimately, sales, service and marketing will be responsible for the experience your customer is having, and you need to hold them accountable,” he says. “You need to have someone sitting one step above to look at the patient as they come through the system. They need to look at the customer journey holistically, not have individuals looking at it from inside their silos.”

Some companies are starting to create CX leaders; for example, Takeda appointed Patient Engagement Managers a few years ago, says van Essen. “These managers have a clear focus on improving the lives of patients within IBD and Oncology. They try to improve the level of shared decision-making and patient education and co-create solutions for pain points in the patient journey on a daily basis.”

Smith’s role as Director of Customer Experience requires a strong grasp of the roles and abilities of various functions within Eli Lilly. “I have a capability-building role; it is really helping prepare and envision the future for the organization,” he says.

**Step 4: Set up ways for functions to better work together**

A CX strategy typically involves a matrix of offline and online interactions with the target audience. Powering a multichannel system would require joint effort across different functions.[[75]](#footnote-75)

Aligned leadership, cross-functional brand and in-field teams, CRM, business analytics, and a learning department are the key factors to deliver optimal CX, AbbVie’s Correa. Together, these factors suggest the need for methods to communicate and to work and learn together within the organization.

Working beyond silos – where departments work *with* rather than *against* each other – to create solutions that will benefit that population is essential, says UCB’s Stover. “If you look in your own silo, you may make decisions that are beneficial to your customer and to your business at that point in time but, in reality, create a lot of problems once that customer gets handed off to the next segment of your business. So, you might have made a promise to Marketing that made a lot of sense and was easy for them to build a campaign around, but unfortunately the Sales and Service teams can’t execute around that promise. In this case, you have actually created more problems downstream and unsatisfied colleagues begin to leave.”

Companies need to have integration across the different business units that are interacting with customers, so that the messaging and the experience are consistent all the way through.

Working together and learning from each other is fundamental to a strong organizational culture, enabling the sharing of new ways of collaborating and unearthing opportunities to benefit the patient. Stover adds: “At UCB, the first question we ask is: does it bring value to the patient? If it does not bring value to the patient, we are not even going to move forward with it. That’s the critical component – to realize that all of us collectively are more powerful than we are individually; together we can bring more ideas to the market faster. What we are learning in one country we can bring to another to benefit the patient population.”

The key message here is that organizations can achieve much more for patients and customers when ideas are explored and activities executed in integrated teams, rather than as individuals or disjointed teams.

**Part 4**

**Keys Lessons for the Future of Pharma CX**

This report has illuminated how much potential for growth and innovation the pharma industry has in the Customer Experience space. Consumer industries are leading the pack in adopting CX advancements, but pharma is caught behind traditional mindsets, structures and behaviors. Despite the challenges to a successful CX uptake, however, the business case of improved customer experiences in pharma and healthcare remains strong.

While the interest to deliver improved experiences and the intention to make significant changes to customer touchpoints are present, critical factors such as leadership support, digital capabilities, resources, and organizational alignment are not visible within all pharma companies.

Indeed, pharma has a long way to go along the CX trajectory but as we listened to the examples and insights of our experts, five key lessons emerged to help you ensure a bright future for CX in your company.

1. **Aim to deliver a branded experience**

The five management components in this report – CX strategy and purpose; CX design and governance; CX operations; CX measurement; and People and culture – can be used to assess your organization’s level of readiness and capability to invest in CX programs.

Furthermore, this framework addresses all of the important aspects of CX to ensure a balanced and well-prepared CX program that enables continual improvement. Each of these five components is critical to deliver a branded experience that is consistent, is apart from the competition, and exceeds the expectation of the customer.

1. **CX purpose begins with the patient**

All decisions and actions within the CX program begin with the patient. Time and again, all CX initiatives return to what patients truly need. The patient is at the core and is always the priority, including efforts to improve the experience of other stakeholders such as prescribers, caregivers and payers. Acknowledging the patient as the core customer should exude from senior leadership and cascade throughout the organization. Hence, defining the customer promise and rallying people behind a common vision that benefits the patient are important preliminary steps.

1. **Keeping the flame alive is essential**

Without enough passion, capability and accountability among colleagues, the interest in CX may lose steam over time. To keep the CX flame alive, you must be vigilant with the use of financial and non-financial metrics to assess performance and close feedback loops. To keep discussions about CX along the corridors of the company and to ensure freshness in the ideas and initiatives to improve experience, you need to ensure that communication lines between functions, between senior leadership and employees, and between the company and the customer are always open and clear.

1. **Working together is critical**

In addition to open communication lines, working together on all aspects of the CX delivery is also important. All functions contribute to the overall customer experience. In improving the customer’s experience, there is value to the overall business, the individual function, and individual colleagues – and teams need to be able to understand this multi-level opportunity for the organization, so they can appreciate the significance of their individual objectives, the cross-functional systems, and the alignments between global strategy and local implementation.

1. **Just start. Learn as you go and keep on going**

Regardless of level of readiness and capability to deliver optimal experiences, it is a standard requirement for all companies to just start their CX plans. All companies need to set the process in motion for improved experiences.

The first step may be to establish a clear vision and purpose, to drive awareness of CX across the company, study how companies in consumer industries tackle CX, invest in digital infrastructures, or build CX capabilities among colleagues, among other possible actions. What is important is to learn as you go along the planning and implementation phases of your CX program.

Piloting and learning from mistakes are important to stay on the CX trajectory. Companies simply need to keep on going until the shift from a product-focus towards a customer-focus is complete, customer loyalty and customer advocacy levels improve, and the ambition of a fully operational and sustainable CX model becomes a reality.

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* **Ian Golding CCXP**, Global Customer Experience Specialist and Certified Customer Experience Professional – Golding is the CEO and Founder of the Customer Experience Consultancy, and non-executive editor of the Customer Experience Magazine. Specializing in CX strategy, frameworks, people engagement and measurement systems, Golding is a leader in customer experience and advises businesses across various industries, including the pharma industry.
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