

ZS **Impact** Webinar

Pharma's next evolution: Marketing and the machine

November 2023

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The evolution toward a more customer-centric way of marketing has only just started in pharma organizations



5 insights from across the industry

Based on a survey across U.S. pharma marketing talent n=103



There is not a clear “one way” of marketing



Customer-centric lens is elusive with entrenched product orientation



Data and tech investments are maturing but not fully capitalized



Marketing team structures are nascent in evolving to support CX



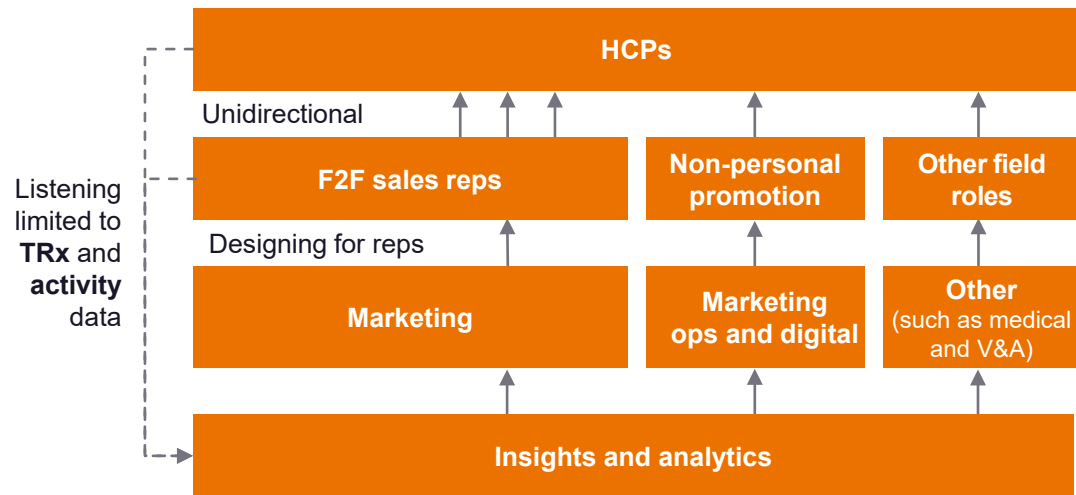
Talent continues to draw heavily from pharma sales expertise, some shift towards digital skills

Pharma marketing organizations are on a journey to customer centricity, but have a long way to go



We see a future model where the terms of customer ownership are redefined and a new way of operating emerges

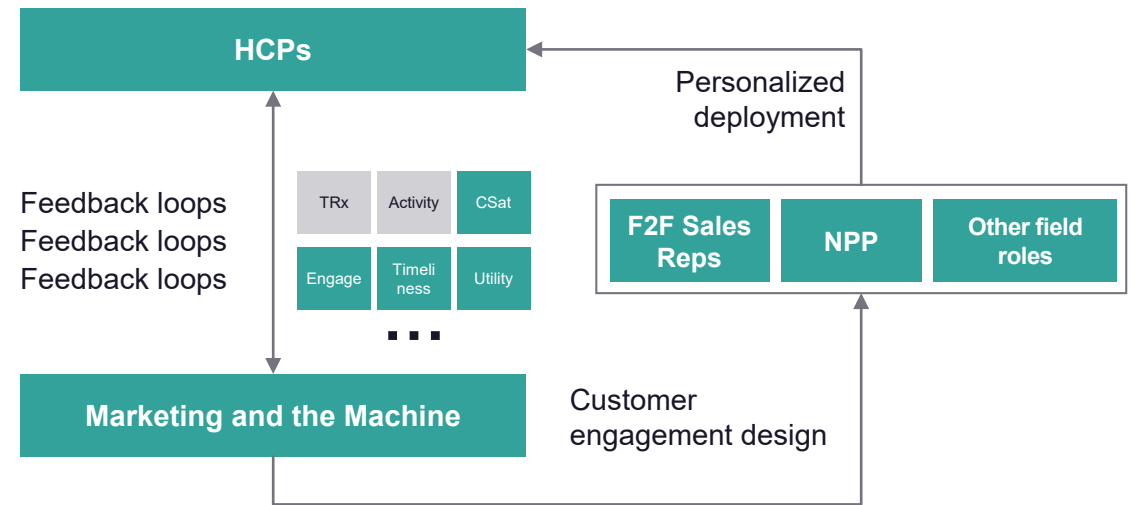
Today



When product sales owns the customer

- Limited visibility by HQ of individual customer needs
- Limited ability to drive patient outcomes across the healthcare ecosystem
- Reliance on the F2F rep to “do everything”
- Functionally siloed engagement
- A lack of institutional learning

Future



When the organization owns the customer

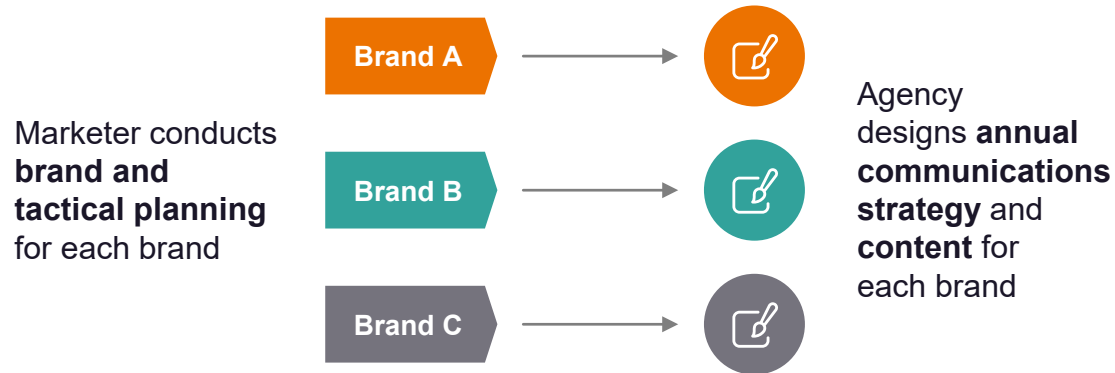
- True customer-centric mindset
- Managed personalization at scale
- Customization of the experience
- Institutionalized learning around the customer
- Enhanced ability to improve patient outcomes

Marketing needs to split into product and portfolio strategy and customer engagement strategy



A new working model is required to optimize customer engagement

Current

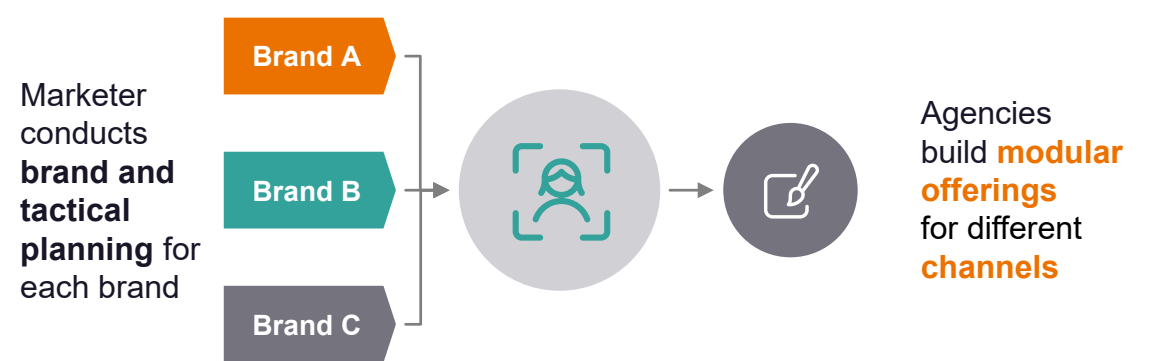


Challenges

The agency makes strategic messaging decisions without a portfolio and cross-functional perspective of the customer.

Communication strategy design and content planning is conducted annually, preventing customization throughout the year.

Future



A new marketing approach to address these challenges

Customer Engagement Planning:

Optimizes experience with a strategic lens (versus the operational focus that is common today) at a customer level based on customer insights and spans activities across the portfolio and functions.

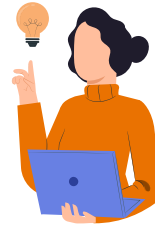
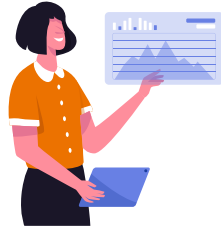
Modular Offerings:

Services, information, visuals and other assets are broken down into parts (elements) so they can be combined to drive hyperpersonalized experiences across channels to meet an individual customer's need.

Three talent types will be required to enable the future commercial model

Shapes key strategic inputs to feed into the machine

Supports machine operations



Product Strategists

Customer Engagement Strategists

Execution Engine (may or may not be within marketing)

Early Product Development

- Aligns pipeline and portfolio decisions to customer needs
- Focuses on deep cross-functional collaboration beyond the context of the lifecycle management plan

Cross-functional Strategy

- Develops an actionable strategy based on insights, including prioritization and tactical planning
- Partners cross-functions to develop a cohesive global value story

Customer Engagement Plan

- Designs data-backed tailored engagement plans for each customer, optimizing product and channel mix
- Defines metrics to measure engagement success

CX Design

- Defines the customer experience strategy leveraging data, analytics, and behavioral science

Modular Content Plan

- Works with content CoEs/agencies to develop the modular content message, creative, and solutions
- Continuously evaluates the content to optimize based on feedback

Channel Expert

- Delivers an integrated, omnichannel CX
- Monitors performance and uses customer feedback loops to rapidly adapt and enable smarter deployment

Purpose

Global

Local

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Thank you!



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