

AKTANA

The Omnichannel Maturity Model for Life Sciences

Your 5-Stage Guide to Scalable,
Coordinated, and High-Impact
HCP Engagement



Introduction

Why Omnichannel Maturity Matters Now

Engaging healthcare professionals (HCPs) and other stakeholders has never been more complex. Traditional approaches—largely built around disconnected departmental tools, rep-driven models, and channel-centric campaigns—struggle to meet the rising expectations for personalized, consistent, and compliant experiences.

Fragmented data, siloed workflows, and misaligned strategies lead to:

- Inefficient field force deployment
- Delays in medical content coordination and response
- IT burden from managing disconnected platforms
- Compliance risk due to lack of oversight across touch-points

At the same time, there's increasing pressure to demonstrate impact across commercial, medical, and operational efforts—without driving up complexity or cost.

This eBook introduces a five-stage maturity model designed for life sciences organizations. It shows how to evolve from disconnected operations to intelligent, AI-driven orchestration, helping your organization:

- Benchmark current omnichannel readiness
- Unify cross-functional strategy and execution
- Automate processes without losing oversight
- Improve efficiency, compliance, and customer experience

Whether you're launching a new product, optimizing global operations, or modernizing engagement, this guide offers a roadmap for sustainable progress.

Maturity Model Progression

- **Stage 01**
Siloed & Reactive
- **Stage 02**
Channel-Centric & Emerging Integration
- **Stage 03**
Multi-Channel Coordination & Data Harmonization
- **Stage 04**
Omnichannel & Proactive Personalization
- **Stage 05**
Optimized Omnichannel & AI-Driven Autonomy

The Case for Orchestration

Why It's Foundational

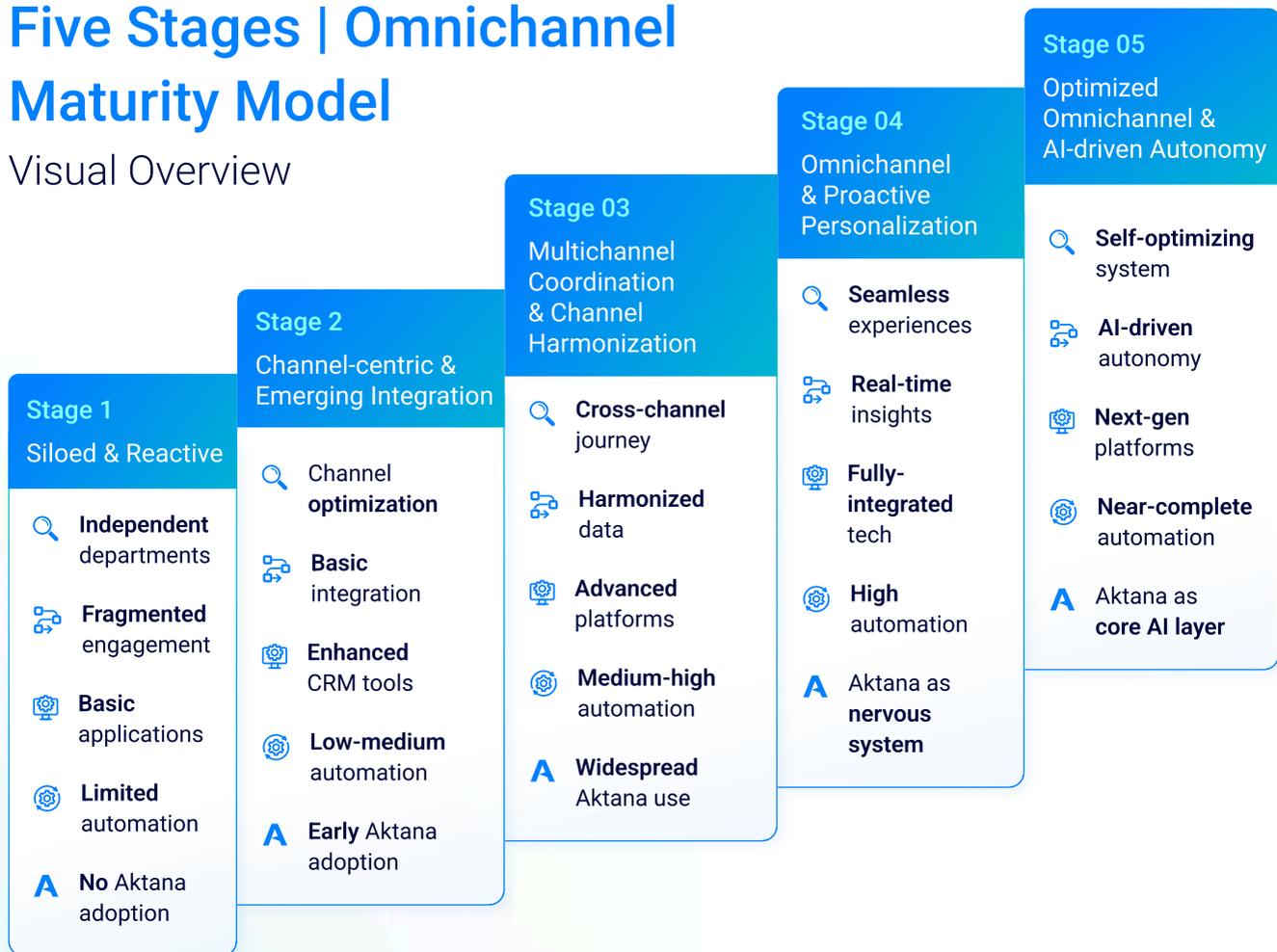
Effective omnichannel engagement doesn't come from adding more channels. It comes from aligning them—so that every field interaction, email, virtual meeting, or approved medical content contributes to a unified customer experience.

Think of your organization as an air traffic control system. Without orchestration, each team might navigate safely, but there's a risk of duplication, missed opportunities, or misalignment. With orchestration, efforts are coordinated in real time, guided by shared data, guardrails, and goals.

That's the role of orchestrated omnichannel engagement in life sciences—and why it's become foundational for organizations aiming to improve commercial outcomes, enhance medical collaboration, and reduce operational friction.

Five Stages | Omnichannel Maturity Model

Visual Overview



Stage 1

Siloed & Reactive

In this first stage, life sciences organizations operate with fragmented structures, disconnected systems, and isolated departmental goals. Sales, marketing, IT, and medical teams rarely collaborate in a coordinated way. Engagement efforts tend to be manual, reactive, and focused on traditional channels. While this stage may still yield some success in a rep-driven model, it cannot scale or deliver measurable omnichannel value without foundational changes.

Characteristics

- Departments operate independently; limited cross-functional communication
- Customer engagement is fragmented and often reactive
- Sales: Heavy reliance on in-person detailing; limited digital tools
- Marketing: Campaign-centric, isolated execution; limited personalization
- IT: Focus on maintaining existing systems; minimal integration
- BI: Basic reporting on individual channel performance
- Leadership: Low awareness of omnichannel; focus on departmental KPIs

Processes & SOPs

- Disconnected customer journey mapping
- Ad-hoc lead hand-offs
- Department-specific SOPs

Key Wins at This Stage

- Identify critical inefficiencies across departments
- Build awareness of the risks of manual and siloed engagement

Applications

- Basic CRM
- Marketing Automation
- Content Management System (CMS)

Automation

Very Low: manual data entry & reporting

Aktana Relevance

Not yet adopted or very limited

At this stage, organizations typically rely on traditional engagement methods without AI-driven insights.

Milestones

- Basic CRM and CMS in place
- Manual content coordination and field execution
- Limited measurement and data governance

Stage 2

Channel Centric and Emerging Integration

Organizations begin recognizing the need for coordination and start experimenting with basic integrations. Teams show early signs of collaboration, especially around product launches and field–digital alignment.

Characteristics

- Beginning to recognize need for coordinated approach
- Focus on optimizing individual channels
- Sales: Increased digital tool adoption (remote detailing)
- Marketing: More targeted campaigns; multi-channel tactics
- IT: Initiating basic system integration projects
- BI: Improved multi-channel campaign reporting
- Leadership: Growing recognition of integrated engagement

Processes & SOPs

- Initial cross-functional planning for product launches
- Basic lead qualification/routing
- SOPs for multi-channel execution

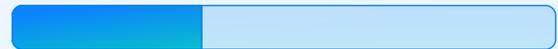
Key Wins at This Stage

- More targeted campaigns and coordination around launches
- Initial KPIs tracked across basic channel-level reporting

Applications

- Enhanced CRM
- Marketing Automation Platform
- Remote Engagement Platforms

Automation



Low to medium: automated email nurturing

Aktana Relevance

Early Adoption

Field and marketing, limited integration

Milestones

- Early CRM and MAP adoption
- Remote engagement platforms deployed
- Aktana piloted in specific use case

Stage 3

Multichannel Coordination & Channel Harmonization

At this stage, meaningful data integration and journey coordination begin to take shape. Teams move from tactical alignment to cross-functional strategy execution.

Characteristics

- Understanding customer journey across multiple touchpoints
- Data increasingly harmonized; consistent customer experience
- Sales: Proactive use of digital tools/insights
- Marketing: Integrated multi-channel campaigns; sophisticated content
- IT: Robust integrations; building CDP/data lake
- BI: Comprehensive dashboards; predictive analytics emerging
- Leadership: Omnichannel strategy formalized

Processes & SOPs

- Defined customer journey maps; closed-loop feedback
- Standardized SOPs for campaign dev, content tagging, data privacy

Key Wins at This Stage

- Holistic visibility into engagement journeys
- Improved collaboration and measurement

Applications

- Mature CRM
- Advanced Marketing Automation Platform
- CDP
- Consent Management
- Initial AI/ML Tools

Automation

Medium to high: automated customer journeys, advanced lead scoring

Aktana Relevance

Widespread Adoption

Insights integrated into workflows, leveraging AI for content and journeys

Milestones

- Aktana integrated across field, brand, and analytics workflows
- Consent management, advanced dashboards, predictive analytics introduced

Stage 4

Omnichannel Personalization & Optimization

At this stage, organizations shift from reactive execution to intelligent, proactive personalization. Engagement is shaped by real-time insights, governed by robust processes, and delivered through tightly integrated systems. Every interaction is context-aware and tailored to HCP behavior.

Characteristics

- Seamless, personalized omnichannel experiences driven by data
- Sales: Uses AI-powered insights for real-time personalization
- Marketing: Delivers dynamic content and runs advanced testing
- IT: Maintains fully integrated tech stack and strong governance
- BI: Operates with predictive analytics and unified metrics
- Leadership: Positions omnichannel as a core growth strategy

Processes & SOPs

- Agile campaign development with real-time feedback
- Automated consent management and personalization controls
- SOPs for AI ethics and adaptive targeting

Key Wins at This Stage

- Real-time KPI tracking and performance optimization
- Personalization scaled across field, digital, and medical channels

Applications

- Fully integrated CRM
- Advanced Marketing Automation Platform
- Robust CDP
- AI/ML Platforms (Aktana)
- Real-time Content Delivery

Automation

High: AI-driven personalized engagement, automated content recommendations

Aktana Relevance

Central Nervous System for Customer Engagement

Fully leveraged for predictive analytics, next-best-actions, and content

Milestones

- Aktana acts as the central nervous system for engagement
- Dynamic segmentation and next-best-action fully implemented
- Real-time consent and preference orchestration in place

Stage 5

Optimized Omnichannel & AI-Driven Autonomy

Stage 5 organizations function as adaptive, data-driven systems. AI continuously refines execution based on performance data, minimizing effort while maintaining oversight. Sales and marketing roles evolve: field teams focus on strategic relationships while AI manages content and channel delivery.

Characteristics

- Self-learning, continuously optimized engagement
- Sales: Role shifts to strategic CRM; AI handles routine interactions
- Marketing: Strategic leadership; AI drives personalization
- IT: Oversees scalable, ethical AI infrastructure
- BI: Delivers prescriptive insights and forecasting
- Leadership: True "learning machine" organization

Processes & SOPs

- Self-optimizing workflows with embedded compliance
- SOPs for AI governance, ethics, and retraining

Key Wins at This Stage

- Predictive insights inform strategy refinements
- Compliance and governance are embedded in workflows
- Efficiency gains and reduced cycle times across commercial and medical ops

Applications

- Autonomous AI-driven platforms
- Next-gen CRMs with embedded AI
- Advanced Analytics Suites
- Virtual Assistants

Automation

Near-complete: AI-driven autonomous engagement, self-optimizing campaigns

Aktana Relevance

Core AI Layer

- Core intelligence layer orchestrating and automating complex journeys
- Leveraging deep learning for continuous improvement
- Integration with generative AI

Milestones

- Aktana orchestrates complex, cross-functional workflows
- Actions prioritized using economic value scoring
- KPI forecasting and feedback loops are embedded
- Generative AI and virtual assistants enable autonomous execution

Scaling Omnichannel

Aktana's Platform and Deployment Approach

By the time organizations reach Stage 5, the focus shifts from delivering omnichannel engagement to scaling it reliably, repeatably, and across geographies. Aktana enables this evolution through a combination of modern platform infrastructure and a practical, field-tested deployment framework that accelerates time to value while reducing complexity.

To support large-scale orchestration, Aktana has made key investments in platform capabilities that strengthen every layer of engagement:

- **Databricks + DBT:** Provide high-speed, modular analytics and structured data modeling
- **Aktana's Omnichannel Data Interface (ODI):** Offers a unified, reusable framework that ensures consistency across markets while supporting local flexibility

These components streamline deployment, enable self-service analytics, and maintain a strong foundation for global and local orchestration.

Omnichannel maturity means little without the ability to scale it effectively—across brands, geographies, and markets. Aktana supports this with a consistent, flexible implementation framework that reduces friction and accelerates time to value.

Complementing the platform, Aktana's recommended approach for scalable implementation includes:

- **Standardized suggestions and insight files** that promote consistency and reduce guesswork
- **Repeatable alignment processes across** indications and geographies, using tools like Veeva
- **Clear implementation documentation**, including requirements for features, rep lists, translations, dismissal surveys, and more
- **Pilot-first deployment**, beginning with a focused rep subset to build alignment and enable iterative improvement

The result?

Together, these elements allow organizations to scale omnichannel maturity with confidence, resulting in faster activation, lower support overhead, and a framework that strengthens with each use.

Conclusion

Maturity is Measurable—and Achievable

These prompts can serve as conversation starters as you reflect on how to evolve your organization's omnichannel capabilities:

- How are disconnected systems affecting our ability to engage effectively?
- What's holding us back from acting on real-time data?
- How can we reduce the effort of coordination across field, brand, and medical teams?
- What areas of our operations would benefit most from orchestration today?

These questions are not just theoretical—they can reveal immediate opportunities for optimization, break down internal barriers, and create alignment for sustained transformation. Use them to guide internal workshops, inform strategic planning sessions, or assess readiness before your next pilot or rollout.

Omnichannel maturity is more than a technology upgrade—it's an organizational transformation. When strategy, data, and teams work together through orchestration, life sciences companies don't just improve engagement, they evolve how they operate.

Let's move forward
together.



AKTANA

Aktana is the leader in intelligent customer engagement for global life sciences and the medical industry. By ensuring that every customer experience is tailored to individual preferences and needs, we help life science companies strengthen their relationships with healthcare providers to inspire better patient care. Aktana transforms the commercial engagement model to make each interaction more effective with proprietary blended-AI and mobile intelligence. Today, commercial and medical teams from more than 350 brands use Aktana's next generation-AI complete orchestration to deliver personalized omnichannel engagement at scale. Headquartered in San Francisco, Aktana has offices in every major biopharma region around the world.

www.aktana.com