5 Steps to Intelligent Omnichannel Engagement

A practical playbook for transitioning to the next-generation commercial model
INTRODUCTION

STEP 01
Create a clear picture of your customer

STEP 02
Break down silos with real-time visibility

STEP 03
Bake agility into your brand strategy

STEP 04
Balance optimal brand experience with optimal resource use

STEP 05
Start small and scale

PUT OMNICHANNEL INTO ACTION TODAY
The future just showed up.


The intelligent omnichannel customer journey has been the brand marketer’s dream for some time now—perhaps even longer than life sciences has been right on the cusp of embracing a new commercial model. The evolution of HCP expectations for personalized engagement, coupled with decreasing access, provided some momentum for change. But in the end, a global pandemic would serve as the ultimate catalyst for a commercial transformation that’s been “just around the corner” for years. As one of our customers said, “the future just showed up.”

As life sciences navigates this critical inflection point, we’d like to share our playbook for using AI to ease the shift to intelligent omnichannel engagement in a way that balances achieving quick wins with laying a strong foundation for the next-generation commercial model.

Too many commercial teams find themselves making a tradeoff between scalability and impact, but with the right omnichannel implementation strategy, you don’t have to. From data to deployment, these are the principles that drive our approach.
01.
Create a clear picture of your customer

Understanding who your customers are, how they prefer to be reached, and what they care about most is the first step in orchestrating a successful omnichannel campaign. After all, there’s a reason commercial teams invest huge sums of money in data and consultants to determine how to segment, prioritize and engage their targets. When your potential for brand impact is directly related to your ability to consistently deliver relevant, valuable information to each HCP, getting the details right is paramount.

How do I extract the right insights from my data?

**RELEVANCE**

Between the data you purchase and the insights gathered by your CRM, marketing automation platform and other third-party tools, you already have a solid start for understanding how individual HCPs typically interact with your brand. Lack of data isn’t the problem. The challenge lies in considering all sources simultaneously while separating the signal from the noise—a challenge that machine learning tools are well suited to address.

Working within the context of your brand strategy, machine learning algorithms can efficiently sift through mountains of internal and external data to confidently predict which combination of channel, engagement time and marketing message will yield the greatest impact.
Which channel should I use?

CHANNEL AFFINITY

It’s possible to make broad assumptions about channel affinity based on audience segments and market research. *(Think: Younger HCPs prefer email.)* But HCPs are people first, and people are complex: different attributes will carry different weights depending on the physician. Working with one rule-of-thumb heuristic at a time is too simple and time-consuming to be effective.

Machine learning, on the other hand, can allow you to easily and automatically make complex assessments at the individual level, evaluating every characteristic—from specialty and patient coverage data to, yes, when they graduated medical school—against a large dataset of HCPs to determine communication preferences and likelihood to engage on a one-to-one level.

<table>
<thead>
<tr>
<th>Characteristic of HCP X</th>
<th>Average chance to engage by group</th>
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<tbody>
<tr>
<td></td>
<td>F2F</td>
</tr>
<tr>
<td>Cardiologist</td>
<td>76%</td>
</tr>
<tr>
<td>Greater than 70% Patients with Tier 1 Coverage</td>
<td>40%</td>
</tr>
<tr>
<td>University Medical Center</td>
<td>37%</td>
</tr>
<tr>
<td>Graduated Med School 10-20 Years Ago</td>
<td>62%</td>
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<td>...</td>
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When should I reach out?

**HCP ENGAGEMENT TIMING**

Like channel affinity, machine learning tools are also extremely effective at pinpointing the best time to reach out to an HCP. They excel at evaluating multiple inputs (like interaction history, therapeutic area and demographic data) simultaneously to consider their impact as a whole.

Knowing when an HCP has historically accepted visits or opened emails is one part of the equation, but how can you predict the optimal time to engage when a new channel is added to the mix? In addition to using key HCP attributes as predictors, ensuring your AI tool can apply what it learns from one environment to the next is critical. We call this Contextual Intelligence, and it’s the difference between AI that “thinks” like a human and AI that performs rote calculations like a machine. Even when COVID-19 pushed all interactions to non-personal channels, for example, knowing when HCPs typically accepted rep visits—and, therefore, likely had a spare moment in their day—would still be valuable information to have.
What should I talk about?

CONTENT OPTIMIZATION

HCPs have less time and more communication fatigue than ever before. If the answer to “Why should I care?” isn’t immediately clear, the probability of an HCP engaging with your content is next to nil. Relevance is the key to personalization that provides real value.

From prescribing habits and patient demographics to research interests and event attendance, every relevant piece of information should be considered.

This includes qualitative intelligence from the field, behavior trends gleaned from past campaigns, and any recent interactions with the brand. It’s a lot to consider, but what was once impossible to do at scale is now fully within reach with AI working to surface the most salient piece of content for each HCP interaction.
What do I need to start?

Before you begin working with an intelligence partner to put machine learning in play, you should be able to answer the following questions:

**FOR EACH CHANNEL:**
- Who in the organization manages this channel?
- What are the KPIs they are using to measure their success?
- Where does the interaction data reside?
- How is the audience selected and prioritized for this channel?
- Do we have the ability to specify individual customer touchpoints, or are they managed in an aggregated way by another vendor?

**FOR ALL CONTENT:**
- Do we have a single point of view into what content is available across all channels?
- Is the mapping between content in different channels clear, or would the intelligence engine need to derive that?
- How will we measure engagement with each piece of content? Where is that data stored and who owns it?
- What new content is planned in the next 3-6 months?

**FOR HCP PRIORITIZATION:**
- Do we have a unified view of HCP prioritization across marketing and sales teams? If so, who owns that and what does it look like?
- Does our HCP prioritization include channel-specific sales response analytics? If not, is there a separate source of insight for Marketing Mix optimization?
- Does HCP prioritization vary by time of year, or by marketing objective? What logic determines how HCP prioritization changes based on context?
Orchestrating a unified customer journey is all but impossible without a real-time, top-down view of every actor. Between the number of channels, stakeholders and tools in play, this would be a Herculean feat without the aid of technology. Thankfully, brand marketers no longer have to resign themselves to manually updating spreadsheets, hoping that the sales force, field medical and the orchestrators of non-personal channels are all working from a common understanding of each physician’s interests and patients’ needs.

Get all of your channels under one roof

It’s likely that some of the tools in your stack have APIs that easily integrate into a host of other systems (and are probably already connected to your CRM). But what about touchpoints that aren’t conveniently packaged in a dedicated piece of software? All departments and communication streams must not only be focused on the same goals, but also coordinated in such a way that every touchpoint in the customer journey strategically augments what precedes it and sets the stage for what follows.
An intelligence engine can help accomplish this in two ways:

Serve as your commercial command center, tethering all channel inputs into a single, intuitive interface that provides the necessary perspective to create and deploy effective cross-channel campaigns.

Successful omnichannel orchestration depends largely on your ability to easily construct workflows across every possible touchpoint that the HCP might encounter with your brand. It’s unlikely that the first iteration of your strategy will ultimately be the most effective approach. Intelligence engines learn from the outcomes of every interaction for immediate optimization and long-term strategy refinement. This automatic intelligence gathering makes it easy to stay agile, monitor performance at the HCP level and tweak campaigns as necessary.

Use Next-Best-Actions to link execution and strategy in a virtuous cycle, empowering users to understand how their efforts fit into the larger brand strategy and capturing feedback in real-time to improve future interactions across all channels, including digital.

Serving up daily suggestions and insights directly into your team’s workflow not only ensures that they’re carrying out the brand strategy as it was intended, but also that execution tactics are informed by the most current and complete situational context for each HCP. This is just as true for the field as it is for those tasked with coordinating digital marketing activity; in every case, customer experience is the ultimate predictor of commercial success.
Bake agility into your brand strategy

In order for your omnichannel approach to be effective, it must be optimized continuously. When every opened email, scientific engagement or conference attendance can reshape the ideal customer journey, being responsive is a must.

Translate strategy into tactics

Your omnichannel strategy needs a strong contextual backbone, something that machine learning alone can’t provide. You and your team have extensive experience turning high-level brand positioning into real-world tactics. Leverage it. Use business rules to capture your brand strategy and codify it in a format that can be easily optimized by AI.

Living in the shadow of bigger buzzwords like AI, business logic rarely gets the appreciation it deserves. Being able to capture best practices and the nuances you’ve collected over the years for each account is incredibly powerful—when combined with machine learning to iterate and improve based on what works and what doesn’t, even more so. It’s the strategic blend of these advanced technologies that generates truly transformative results.
Adjust for the real world

With so many moving pieces, it’s not just possible that conflict or overlap between channels and analytical inputs will arise—it’s probable. To mitigate this, add rules that clarify when certain triggers should take priority, set blackout periods to prevent redundant contact and ensure compliance with local regulations, constraining the AI-driven suggestions within the boundaries of what’s reasonable for the brand and HCPs.

This is critical for producing suggestions and insights that “feel right” to end users, and ultimately, for driving adoption among your commercial team.

Don’t wait for planning cycles to pivot

Machine learning solutions can also minimize the blind spots that currently plague marketing teams, enabling them to be instantly agile on a larger scale. Instead of waiting for sales data, Marketing can look to machine learning insights as a leading indicator of strategy performance.

When combined with the work in-house analytics teams are already doing, Marketing can quickly pivot in response to underperforming strategies, market access events, and more.
If you were only communicating with one HCP at a time, optimizing brand interactions would be simple: the most preferred channel + the optimal time to engage = the ideal touchpoint.

Preference isn’t a mandate

But when you’re managing customer journeys for many HCPs at once, finite resources make it impossible to act on the most preferred action every time. Thankfully, channel preference and efficacy aren’t standard values; they vary in degree from HCP to HCP. Machine learning makes it easy to weigh the value of an action against its cost to determine the most efficient and effective next step in the customer journey.
In addition to an HCP’s bandwidth for “information overwhelm,” you also need to consider the inherent limitations of each channel. For example, how much email content do you have? How many virtual visits can a rep reasonably accomplish in a week? Establish a process for automating—and learning from—these tradeoffs to continually optimize your approach.
05. Start small and scale

Today, most teams who leverage advanced technologies to automate brand interactions do so in a very simple, linear way: If an HCP does X, then the brand does Y.

But customer journeys aren’t linear, and HCPs aren’t homogenous. The actions (or lack thereof) that trigger a reaction from the brand are consistent. **How you react shouldn’t be.**
Give AI more agency at the campaign level and work your way up from there

A great way to start incorporating intelligent omnichannel engagement in your daily workflow is on a campaign-by-campaign basis. Instead of programming one reaction to an HCP-brand interaction or external market event, let AI dynamically select the best way to respond from a portfolio of potential actions that you define.

Let’s revisit the conference example. Instead of automatically mandating a rep visit, you task AI with assessing channel affinity, engagement timing and concurrent cross-channel activity to identify the next-best-action within a 7-day window. Here’s what that might look like:

One campaign. Hundreds of customer journeys.

With this approach, you can orchestrate hundreds of highly targeted, personalized customer journeys from one campaign—without having to manually micro-segment your audience into oblivion. It’s a win-win: less work for you, more value for your HCPs.

5 Steps to Intelligent Omnichannel Engagement
Campaign objectives are the building blocks of brand objectives

Brand objectives are met when campaign objectives are accomplished en masse. As you increase the frequency of launching discrete campaigns and begin to reshape your internal processes in parallel, leveraging AI to chart the best path forward throughout the entire targeting process will be a natural next step. By taking this measured approach, you’ll lay the groundwork for a successful strategy that can easily scale.
Put omnichannel into action today

The transition to omnichannel doesn’t need to be an all or nothing proposition, and if you want to secure buy-in from the rest of your team and ease change management, it shouldn’t be.

You don’t need to completely dismantle your existing workflow or stop using the marketing tools you’ve already invested in to get started. Collaborate with an intelligence partner that seamlessly integrates with multiple sources of strategy governance, from your marketing automation system to third-party agencies, to avoid undergoing a wholesale reinvention of your commercial process all at once.

At Aktana, we’ve spent 10 years refining our playbook for launching and scaling AI while effectively shepherding organizational change through engagements with more than half of the top-20 life sciences companies in the world. We’ve helped more than 250 brands use Contextual Intelligence to power data-driven campaigns that yield deeper HCP engagement and stronger sales, and we’d love to help you do the same.

Ready to bring intelligent omnichannel campaigns to life? Contact our team to get started.

Aktana.com | 1.888.707.3125 | sales@aktana.com
This is what intelligent engagement looks like.

Using embedded artificial intelligence refined by real-time human insight, Aktana gives life sciences commercial teams the information they need to deliver a cohesive omnichannel experience that's relevant, personalized and incredibly effective.

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