



AKTANA / eBook

Achieving True Omnichannel Impact in 2025 and Beyond



Introduction

Welcome to your ultimate guide to navigating the future of omnichannel engagement! As businesses face growing complexities in customer expectations and technology, achieving true omnichannel integration has never been more critical—or more exciting.

Drawing on insights from our [Omnichannel Innovation Webinar Series](#) this eBook dives deep into the challenges, opportunities, and actionable strategies shaping the life sciences industry today. Whether you're strategizing for 2025 or laying the groundwork for long-term success, you'll discover:

- The key transitions reshaping the industry.
- The evolving roles of stakeholders in this landscape.
- The must-have capabilities to stay ahead.

Alongside case studies and practical use cases that spotlight Aktana's experience in working with 350+ clients and over 1000 deployments, this e-book will serve life sciences leaders as a roadmap towards creating more meaningful customer journeys and HCP interactions.

Explore what it takes to not just keep up, but to lead in the era of experience-based customer engagement.

Chapter 1

What Has Changed and Where are We Going with Omnichannel Engagement?

Key Areas of Transition

	Where have we been?	Where are we now?	Where are we going?
Engaging Customers	<ul style="list-style-type: none">• Field reliance	<ul style="list-style-type: none">• Increasing Digital	<ul style="list-style-type: none">• Personalised experiences
Data and Analytics	<ul style="list-style-type: none">• Foundational investment	<ul style="list-style-type: none">• Advanced analytics	<ul style="list-style-type: none">• Deeply integrated AI
Brand Execution	<ul style="list-style-type: none">• Periodic and simplified	<ul style="list-style-type: none">• Segment level journeys	<ul style="list-style-type: none">• HCP level journeys
Field Support	<ul style="list-style-type: none">• SFA and information capture	<ul style="list-style-type: none">• Insights for sales and medical	<ul style="list-style-type: none">• Human centric engagement

The life sciences industry has undergone significant changes over the past decade, driven by shifting engagement methods and evolving technology.

Personalization is at the heart of it all. Creating meaningful engagements with HCPs depend on using **data**, **real-time insights**, and **high-value customer journeys** that speak to their preferences.

Today, the industry is transitioning on several key fronts, from customer engagement to brand execution and field support:

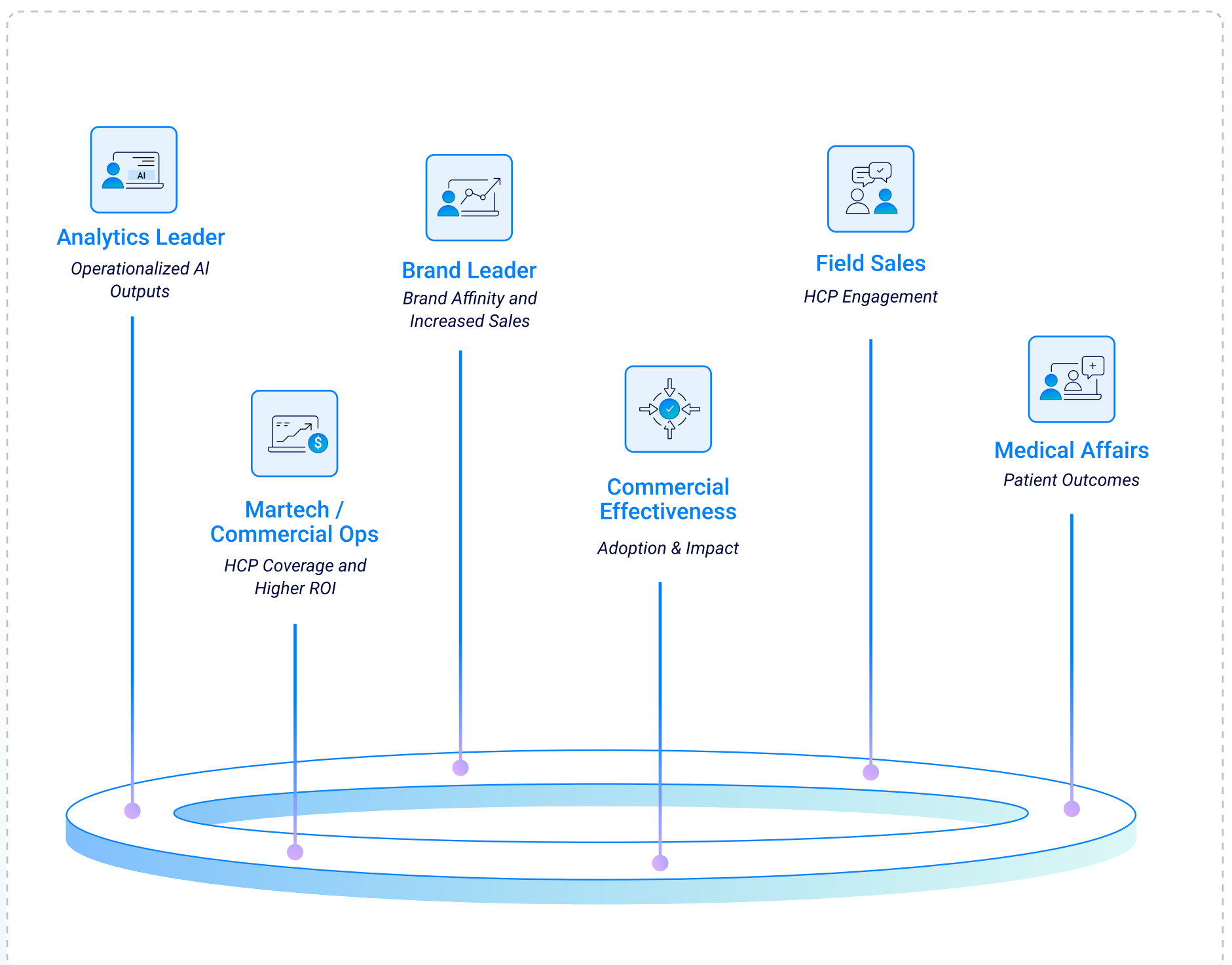
- **From Field Dependence to Digital Personalization:** Traditional reliance on field HCP interactions are giving way to digital and non-personal promotion due to access barriers, cost pressures, and an unprecedented number of product launches. This necessitates an omnichannel strategy that is robust, evolving with continuous insights, and personalized.
- **Towards Deeper AI Integration:** Tools like specialized CRMs, next-best action (NBA) systems, and foundational data analytics have improved personalization for HCPs and patients, but deeper AI integration is needed to enable dynamic, HCP-specific strategies.
- **Evolving, Human-Centric Field Tools:** Sales Force Automation (SFA) systems are being replaced with platforms that provide real-time intelligence, helping field teams enhance HCP interactions and identify high-impact actions aligned with KPIs and ROI.

So what's the way forward for better brand execution and more meaningful customer interactions? In our view, life sciences companies must create a roadmap powered by generative AI that balances brand strategy, market impact, and omnichannel customer engagement. Through continuous improvement and intelligent orchestration, life sciences companies can deliver value to HCPs and patients at every level in their customer journey.

Chapter 2

Who Are the Stakeholders and Players in Omnichannel Engagement?

Who Is Involved



True omnichannel engagement goes beyond technology. Collaboration between teams is a key factor in driving success. Brand leaders, commercial effectiveness teams, analytics professionals, field sales, medical affairs, and marketing technology leaders all play critical roles in this process.

- **Brand leaders** focus on brand affinity, patient outcomes, and sales growth. They need assurance that their strategies are driving the desired outcomes.
- **Commercial effectiveness teams** are responsible for executing omnichannel tactics and ensuring their adoption.
- **Analytics leaders** support the brand and commercial teams by operationalizing AI outputs to enhance decision-making.
- **Field sales teams** remain vital as they are the primary engagement point for HCPs. Their focus is on utilizing intelligence to be more relevant and effective in their interactions.
- **Medical affairs** teams, especially in today's complex environment, must focus on making their educational efforts positively impact patient outcomes.
- Finally, **marketing technology leaders** work to ensure that all tactics are scalable, effective, and future-proofed.

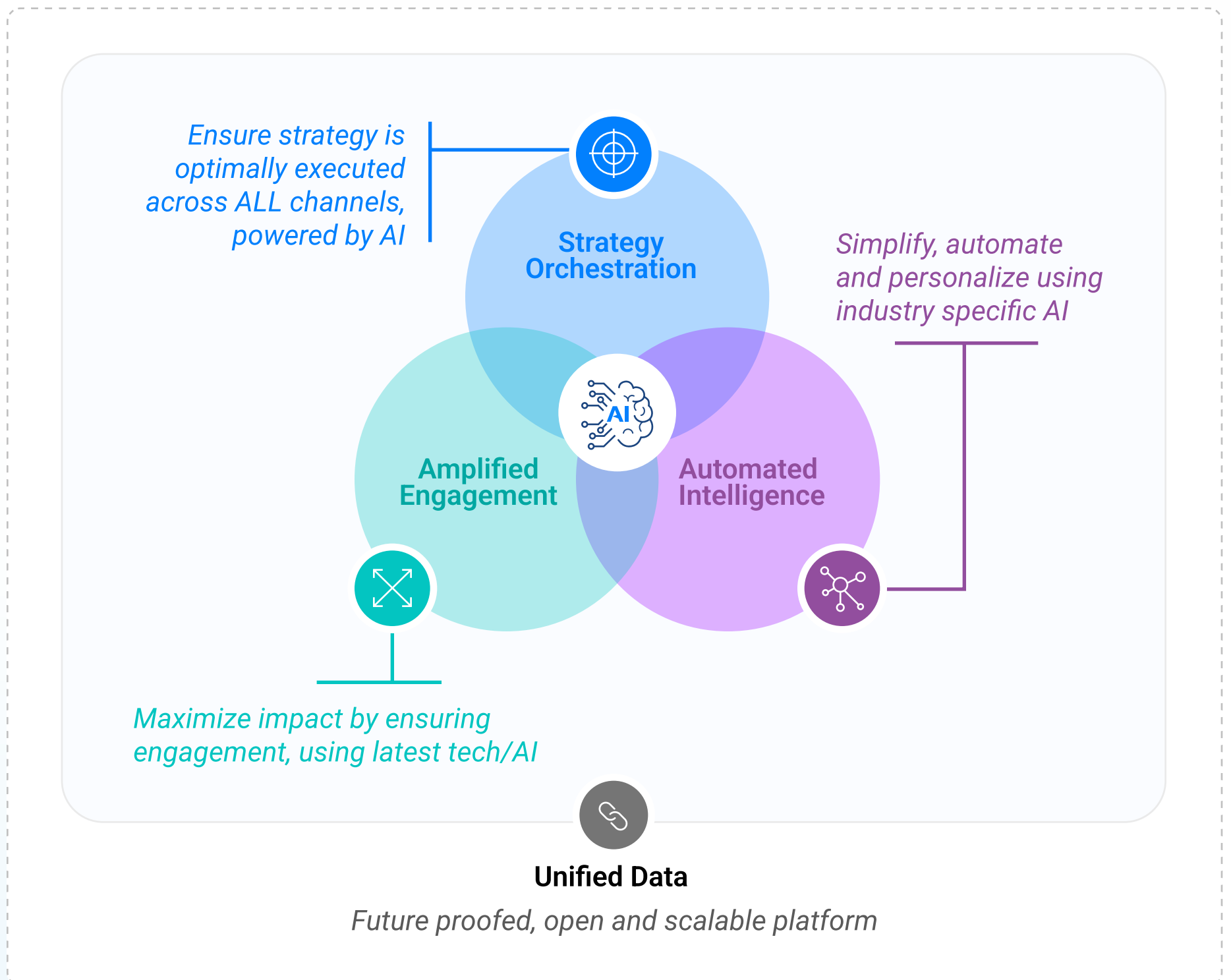
Addressing the needs of these stakeholders is increasingly challenging, but core to preparing for the future of omnichannel engagement.

In the next chapters, we will explore the capabilities necessary for omnichannel evolution, and discuss the strategies necessary for overcoming key pain points, with tangible examples of best-in-class capabilities to address them.

Chapter 3

What Are the Capabilities Necessary for Effective Omnichannel of the Future?

What does an effective omnichannel strategy require?

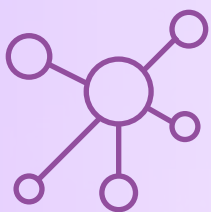


Looking across the stakeholders in the omnichannel universe, there are four key capabilities that must be intrinsically addressed going forward:



Strategy Orchestration

Ensuring that your strategy is optimally executed across every channel.



Automated Intelligence

Simplifying and automating the personalization of omnichannel engagement using AI.



Amplified Engagement

Maximizing the impact of omnichannel efforts by equipping the field with the latest technology and AI-driven insights.



Standardized Data Foundation

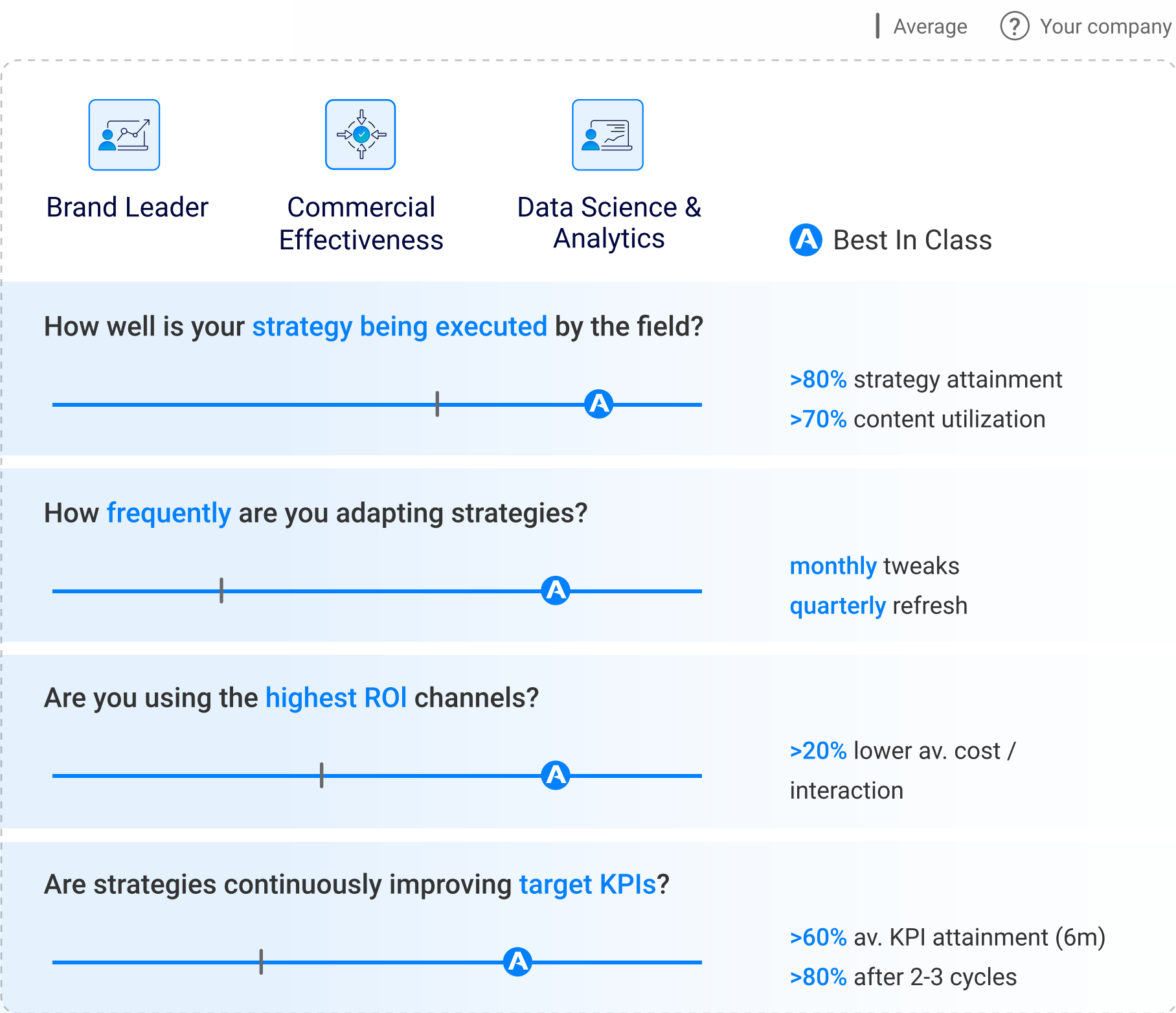
Building a future-proof, open, and scalable data platform to support all these efforts.

Chapter 4

Unlocking the Power of Strategy Orchestration

Strategy Orchestration

Ensure strategy is optimally executed across ALL channels, informed by AI/analytics



Data Science & Analytics

A

Best In Class

How well is your strategy being executed by the field?

>80% strategy attainment

>70% content utilization

How frequently are you adapting strategies?

monthly tweaks

quarterly refresh

Are you using the highest ROI channels?

>20% lower av. cost / interaction

Are strategies continuously improving target KPIs?

>60% av. KPI attainment (6m)

>80% after 2-3 cycles

Strategy orchestration often flies under the radar, yet it's the cornerstone of maximizing ROI and driving continuous improvement. Many organizations discover —sometimes the hard way—that machine learning models alone can't deliver results. True success comes from seamless collaboration between brand leaders, commercial effectiveness teams, and analytics experts.

How well-orchestrated is your strategy? Ask yourself:

- Are field teams executing your strategy effectively?
- How often do you refine and adapt your strategies?
- Are you leveraging the most impactful channels for customer engagement?
- Is your strategy consistently improving key performance indicators (KPIs)?



Leading organizations set themselves apart by excelling in execution, frequently optimizing their strategies, and using advanced analytics to fine-tune their channels. They don't just track progress—they ensure every strategy drives measurable impact and evolves to meet business goals.

Achieving strategy orchestration isn't optional—it's essential for sustained growth.

Case Study

[A top-10 pharmaceutical company increased annual sales potential by \\$30M](#) of a signature brand by orchestrating and refining their strategies. They utilized [Aktana's orchestration tools](#) to integrate and enrich their data science models, optimize outputs daily based on latest data, and orchestrate their Next Best Action (NBA) suggestions across channels in a coordinated way. Highly engaged field representatives achieved 14% higher sales in nine months, producing a significant sales lift of 6+ percent.

Top-10 Pharma poised to unlock \$30M incremental annual sales for signature brand

After trialing a number of NBA solutions, the company still did not see clear ROI.

Here's how Aktana made a difference:

- Localized content to fit real-time market needs
- Orchestrated HCP/KOL experience across all channels
- Outputs refined daily with latest engagement and context
- Dynamic success probability assessment per suggestion



14% higher sales

from high-adopters of NBA suggestions



6.5% sales lift overall



Projected \$8M

in annualized incremental sales



\$30M independently projected by brand

as possible annual upside with deeper investment in adoption

Chapter 5

Transforming Automated Intelligence into a Competitive Edge

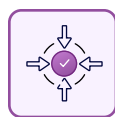
Automated Intelligence

AI-driven recommendations that are aligned to business objectives and self improve

| Average ? Your company



Brand Leader



Commercial Effectiveness



Data Science & Analytics

A Best In Class

How much **time/effort** is it to setup and maintain?



<4 weeks to go live
<1 week to evolve tactics

How well are you **leveraging your resources**, including digital channels?



>80% utilization of field capacity
>30% of actions in digital channels

How **engaging** are the recommendations?



>90% engagement by field
>25% AI generated reasons

How **personalized** are journeys (tactics and content) for each HCP?



>90% with segments updated monthly

Automated intelligence isn't just about being smart—it's about making intelligent processes scalable, sustainable, and truly AI-driven. For brand leaders and commercial teams, this often means navigating time-consuming, manual workflows. The solution? Strong collaboration with data science and analytics teams who can supercharge intelligence automation.

Is your automated intelligence delivering maximum value?

Consider these questions:

- How much time and effort go into setting up and maintaining your solution?
- Are you fully leveraging resources like digital channels?
- Do AI-generated recommendations truly engage your audience?
- Are HCP journeys tailored and personalized at scale?



Top-performing organizations use AI to simplify operations, create compelling recommendations, and deliver personalized experiences that resonate. With the right approach, automated intelligence can be the game-changer that drives efficiency, engagement, and measurable results.

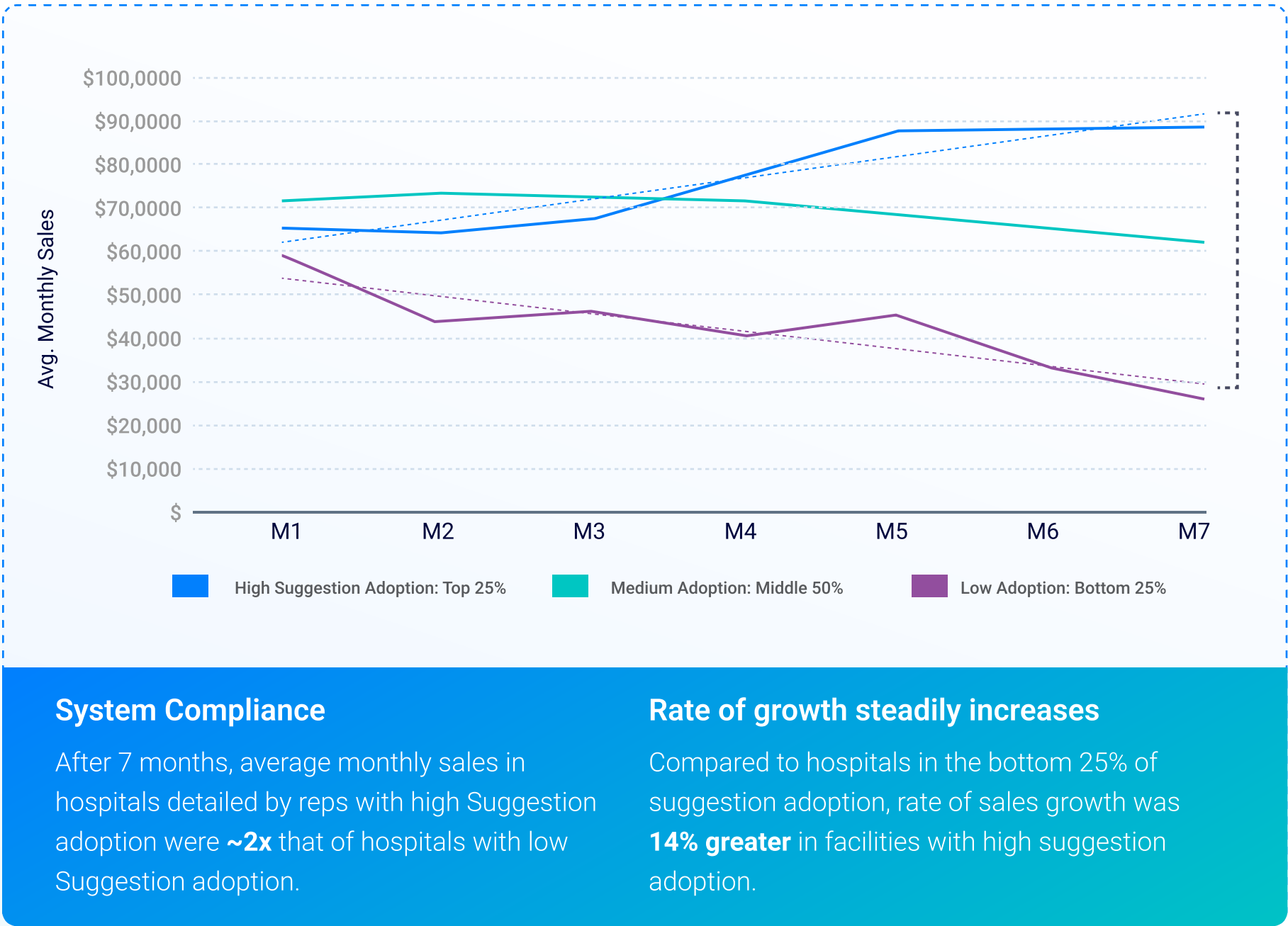
Case Study

A [top global pharmaceutical company used Aktana's Automated Intelligence](#) capabilities to improve sales growth during an indication launch of an innovative oncology drug, accelerating sales growth by 14%. Using AI-based segmentation and perception management, they were able to personalize omnichannel engagement for every targeted HCP, steadily improving sales performance.

Aktana accelerates sales growth by 14% during oncology indication launch

HCP Perception AI + Contextual Intelligence Engine

AI-based HCP segmentation and perception platform optimizes targeting and improves collaboration between sales and marketing teams



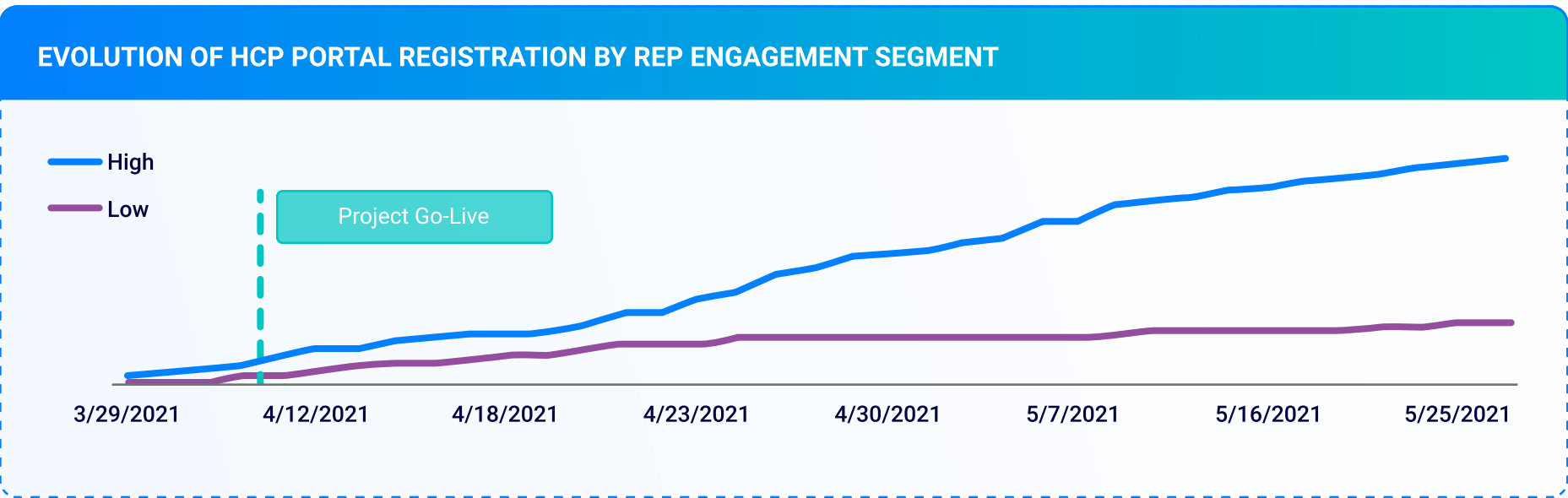
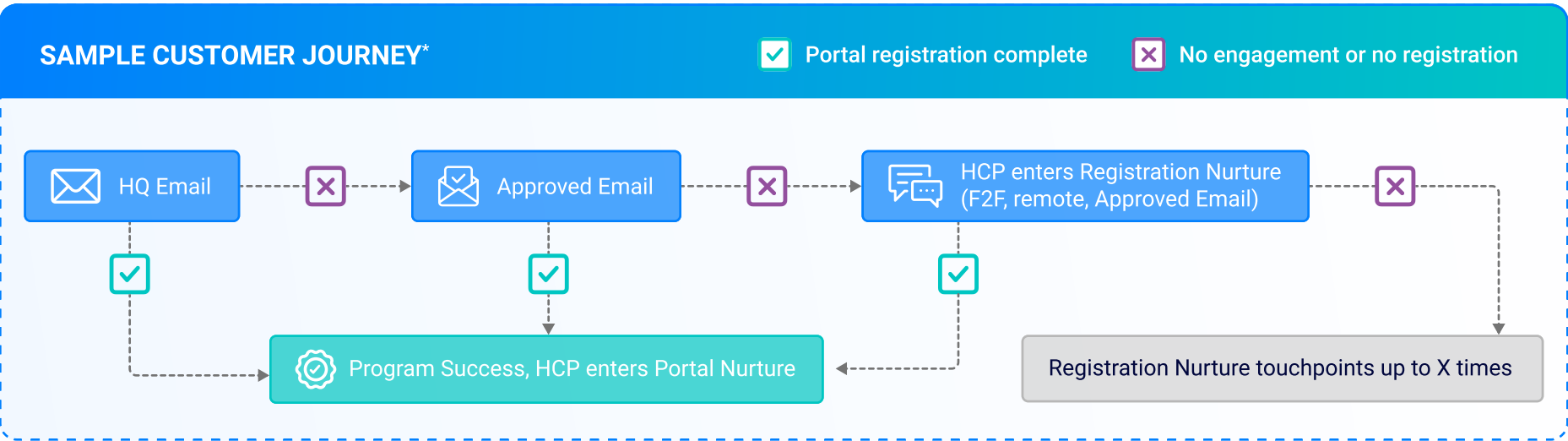
Case Study

A pharmaceutical company implemented Aktana’s Automated Intelligence tools to [create AI-generated customer journeys to help persuade HCPs to register](#) for their new web portal. 80% of the registrations are the result of the intelligence-driven outreach.

AI-driven cross-channel execution drives 80% of HCP web portal registrations

DETAILS

- A pharma company recently launched a web portal and partnered with Aktana to drive HCP registrations.
- The HCP customer journey spanned HQ emails through Marketo, Approved Emails, F2F visits, and remote meetings.
- High-adopters of Aktana sent **40% more approved emails** and invitations than low-adopters.
- **80% of HCP registrations** came from physicians who were visited by high-adopters of Aktana.



Chapter 6

Maximizing Field Engagement with Smart Intelligence

Amplified Engagement

Opportunities to improve engagement across key workflows for the field

| Average ? Your company



Commercial
Ops / Martech



Field
Sales



Medical
Affairs

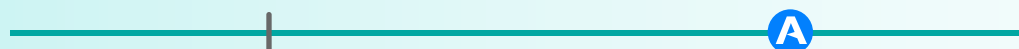
A Best In Class

How effectively does the **field engage** with intelligence?



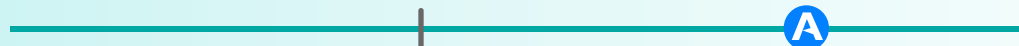
>90% suggestion engagement
>30% received "on demand"

How much of the field's activity is **aligned** with strategy?



>60% fields activity aligned with strategy

How efficiently and effectively does the field **prepare for calls**?



>85% calls are pre-call planned
<3m to prepare for each call

How efficiently and accurately does the field **log calls** and log key insights?



>95% calls logged same day
<1m spend logging each call

Amplified engagement is all about empowering field sales reps and medical science liaisons—two pivotal players in executing a seamless omnichannel strategy. The key is to simplify how they access and use intelligence in their daily workflows.

To gauge your engagement strategy, ask yourself:

- How effectively is the field tapping into intelligence?
- How well do field activities align with the overall strategy?
- How streamlined and impactful is the pre-call planning process?
- How accurate and efficient is call logging and insight capturing?



By integrating CRM-agnostic Agents, conversational AI, and intelligent nudges, you can transform field engagement—ensuring that reps work smarter, not harder, while staying fully aligned with your strategic goals.

Case Study

A specialty care brand used Aktana’s field empowerment tools and [AI-based sales change detection models](#) to provide early alerts regarding HCPs who were showing declining interest in their product. The brand activated AI-generated alerts to actively counter downward sales trends. Sales representatives who acted on the alerts were 20% more effective at mitigating the sales trends.

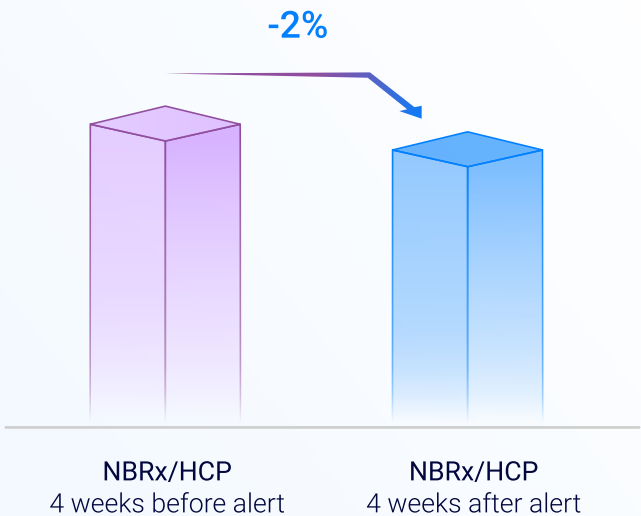
Sales Change Detection alerts minimize loss in new-to-brand Rx for specialty care brand

DETAILS

- Client with specialty care brand wanted to identify early signs of softening demand among high-volume HCPs and suggest a rapid response to the sales team.
- Deployed sales change detection AI model in combination with Aktana Contextual Intelligence Engine
 - Goal: To automatically detect unexpected sales changes in >3,000 target HCPs and generate alerts to engage with them.
- Leveraging this model, the client also was able to:
 - **Adjust** for seasonality and trends in sales data
 - **Detect** unusual changes in metrics derived from sales data
 - **Identify** gaps in purchasing or prescribing frequency

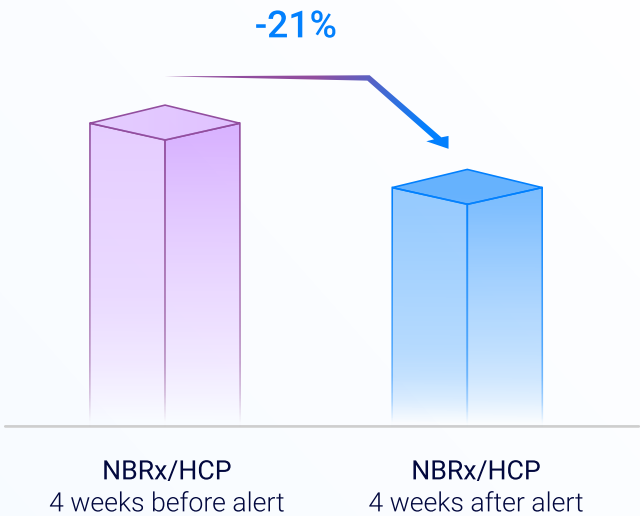
IMPACT

0.56 When reps DO follow-up on Sales Change Detection alerts, there is minimal loss in NBRx.



IMPACT

0.56 When reps DO follow-up on Sales Change Detection alerts, there is minimal loss in NBRx.



Case Study

A specialty brand seeking to achieve more effective pre-call planning and maximize the value of their existing toolkit implemented Aktana’s pre-call planning capabilities. They were able to amplify engagement by consolidating key insights from multiple tools into a single view. Overall field representative satisfaction increased by 23%. In addition, the time between HCP visits decreased significantly, leading to better quality interactions.

Specialty reps maximize the value of existing toolkit and pre-call plan more effectively

DETAILS

- 200 specialty reps across two teams in a competitive market
- Reps struggled to track scattered sales and channel interaction data
- Contextual Intelligence Engine provided in-workflow Suggestions to help reps:
 - Keep visits on-pace
 - Prioritize HCPs with key competitive trends
 - Identity key messages for each HCP
 - Simplify pre-call planning



Chapter 7

Building a Future-Ready Data Platform for Omnichannel Success

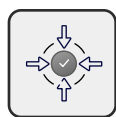
Standardized Data Foundation

Opportunities to improve engagement across key workflows for the field

| Average ? Your company



Commercial
Ops / Martech



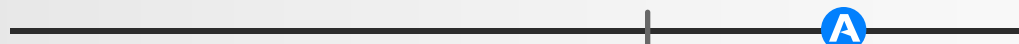
Commercial
Effectiveness



Data and
Analytics

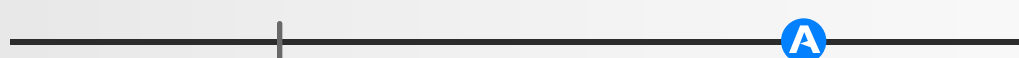
A Best In Class

How **scalable and operationally robust** is your connected ecosystem of tools?



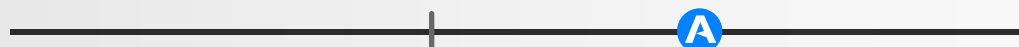
46+ countries, >250k candidates considered and 25k suggestions delivered a day, >15 channels

How **purpose built** is your data model for omnichannel engagement in life Sciences?



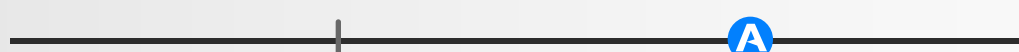
>80% of data model objects extensible to support any channel/action

How well are you delivering on **real-time personalization** expectations of HCPs



<5m from online engagement to related field notification

What will be the impact of a **CRM migration** on your Omnichannel program?



>85% coverage of most common CRM entities in CRM agnostic data model

A robust, scalable, and future-proof data platform is the backbone of any successful omnichannel strategy. Yet, the industry faces a critical juncture, as commercial and marketing tech leaders must make key decisions about their CRM platforms and data ecosystems.

To evaluate your platform's readiness, ask:

- How scalable and operationally resilient is your connected tool ecosystem?
- How well does your data model support omnichannel engagement?
- How effectively can you deliver real-time personalized experiences for HCPs?



Leading organizations use omnichannel intelligence across multiple markets, with flexible data models that seamlessly support all channels. They ensure real-time personalization is attainable, even in the most complex environments.

Case Study

[Aktana's Omnichannel Data Interface \(ODI\)](#)

Aktana recently released ODI, the only fully CRM-agnostic technology layer to support a standardized data foundation. This innovative product is designed to address the challenges posed by fragmented data systems and the ever-evolving limitations of proprietary CRM platforms.

Conclusion

Achieving true omnichannel engagement is a complex, multi-faceted journey that requires collaboration, advanced technology, and a deep understanding of customer needs. By focusing on **strategy orchestration, automated intelligence, amplified engagement, and a standardized data foundation**, you can position your organization for success in 2025 and beyond.

We hope this ebook provides valuable insights and practical guidance to help you navigate this journey. In short, **the key to success lies not just in the technology you use, but in how well you can integrate and leverage it across all stakeholders to drive meaningful outcomes.**

Resources



Webinar Series

[Aktana Omnichannel Innovation Webinar Series](#)



Article

[Evolving Intelligent Omnichannel Engagement in 2024: A World Beyond Next Best Action](#)



Article

[Leveraging Advanced AI to Automate Next Best Action](#)



Article

[Amplifying Field Engagement: Breakthrough Tools for Setting Up Your Reps for Success](#)



Article

[Continuous Improvement with AI: Connecting Customer Engagement Strategies to Impact](#)



Article [What are the Essential Omnichannel Capabilities of the Future?](#)



Whitepaper

[Best-in-Class Product Launch Customer Engagement Model](#)



Deloitte Prediction for the Future

[End-to-end transformation of pharma's commercial activities](#)



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.

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