



Life Science in the  
Digital Era

# Mastering the Omnichannel Approach

MERGE

BUILT DIFFERENT

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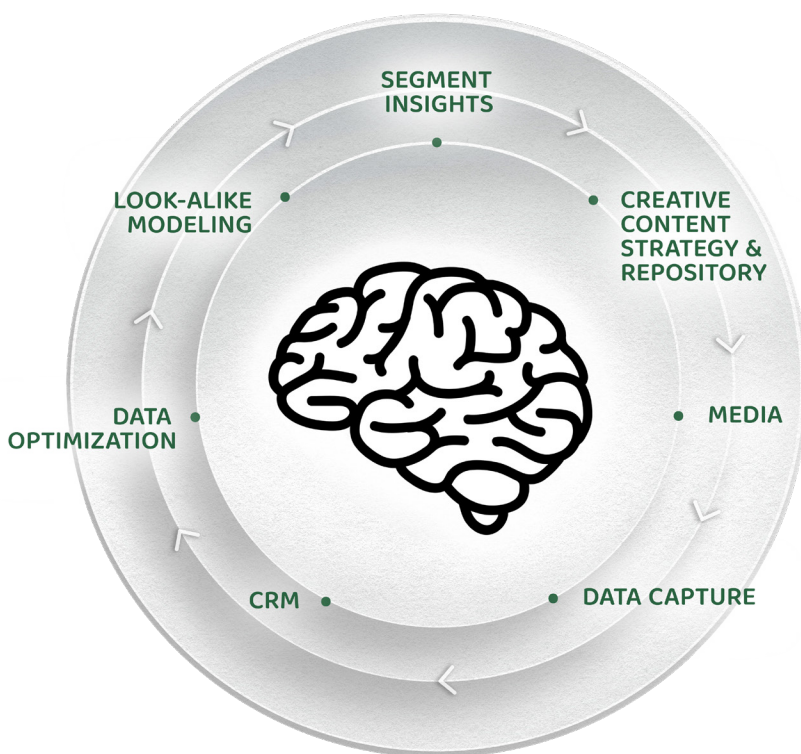
# The Omnichannel Approach

For brands and their customers, the traditional path to conversion no longer applies—at least not to the extent it used to. While leading a potential customer down the well-worn path from “awareness” to “consideration” to “conversion” hasn’t lost all relevance, its impact with the modern-day consumer is quickly waning, pressing brands to adapt or go the way of the dinosaur.

In this ever-advancing digital age, much of the path to conversion relies on messaging to targeted customers, but perhaps more importantly, it hinges on the timeliness in which customers receive targeted messages and their overall experience with your brand. With this, the onus is on brands to create and deliver a seamless and comprehensive omnichannel experience powered by the ability to share and connect data across platforms.

## What is omnichannel?

Even the most tenured individuals in marketing can get confused about what it means to employ an omnichannel strategy.



The term “omnichannel” is often confused with “multichannel,” the latter of which being an approach that many brands use today. Brands that employ a multichannel strategy do so by reaching customers through an array of mediums—both digital and physical—that help support customers during their journey. The traditional multichannel approach, while comprehensive in the ability to “make noise,” is far less efficient. In short, it creates the feeling of someone talking at you versus talking with you.

Conversely, omnichannel aims to put the customer more squarely at the center of its strategy. By using data to cater to the various ways in which target audiences engage with brands, we are able to craft messages and experiences that are consistent with where the customer is along their journey, thereby increasing relevance regardless of the channel, be it digital media, CRM, or a traditional sales call.

Creating an omnichannel experience is really about re-architecting your approach to customer engagement—moving from siloed media activation to a systems approach to audience experience design. Media activation is a part of the omnichannel experience, but just one part of a much larger and more sophisticated system.

Success in creating an omnichannel ecosystem is grounded in a deep understanding of the target audience's decision journey and having a learning system in place that is capable of providing the right content to that target audience within the right context to help them make more informed decisions.

Think of it like an oil pipeline, but in this case, what flows through the system is data. Just like oil, the data needs to be mined, refined, and delivered to where it offers the most value. In our case, that would be in the form of an insight that drives more effective actions in the future. The data should make you smarter about who you're targeting and also more relevant in what you say to those targets, allowing you to create a more personalized experience and ultimately track success of the overall omni approach.

## Other foundational elements of a successful omnichannel ecosystem

A clear understanding of the brand and customer in order to deliver a consistent brand experience at every stage to build customer loyalty.

Being contextually relevant at every touch point, adjusting to each channel's nature and purpose.

Avoiding cookie-cutter content, opting instead for nuanced, creative approaches that are tailored to each audience segment.

# Mastering the Art of Journey Mapping in Pharma

Creating a customer journey map requires the fusion of several different components to provide a comprehensive interpretation of the customer's experience, which can involve mapping for a span of years or even decades. The components primarily consist of understanding what customers are thinking, feeling, and doing.



## Thinking

aids in understanding customer confusion, assumptions, and decisions by contextualizing their cognitive processes or "mental model."



## Feeling

plays a crucial role in shaping customer experiences and decisions. Negative experiences may drive product switches, while supportive ones foster loyalty, particularly among anxious patients.



## Doing

the actions customers take and their experiences within the process, providing insights crucial for understanding their journey.

In pharma, many of the customer journey issues that organizations attempt to solve involve individuals who are facing difficult and sometimes life-altering conditions. With that, the goal of creating a seamless customer journey takes on even more importance and demands even more consideration.

## Good journey mapping can help address common barriers to effective treatment:

delayed diagnosis, patient support, provider-patient communication, understanding treatment options, ongoing condition management, and better adherence

**“In this instance, it’s really about connecting with people on a human level. Sometimes all patients really want is someone to talk to and to make them feel reassured. These are more downstream places where we can use journey mapping to improve the customer experience.”**

**- Priyama Barua, VP, Customer Experience Strategy Leader at MERGE**



When it comes to constructing and delivering on the ideal-state customer journey, the service design blueprint is an important concept to understand. The service design blueprint marries personnel function with technology systems and content generation in order to operationalize the needs of the customer journey. Or, as Barua puts it, “people, systems, and artifacts.”

## People

Active participants like marketing, sales, and data analytics teams play distinct roles in shaping the customer journey. Their collaboration can be a success catalyst.

## Systems

Systems should be unified across different teams. For instance, patient access specialists, sales, and marketing should have compatible systems to share data effectively.

## Artifacts

Websites, newsletters, or any other customer-facing content are artifacts. They help in tracking customer behavior and contribute to the unified customer profile. This forms an essential part of a streamlined customer journey.



“Making sure there’s a system in place in which you are getting the maximum value out of any content piece that is generated is fundamental. **Sending [content] out to all of your channels and tracking back the metrics to determine what’s successful, what’s missing, what needs to be addressed, etc., is so important.** Oftentimes, companies end up investing so much in content that isn’t optimized, either because it wasn’t promoted, or because it wasn’t crafted with the customer’s needs in mind.”

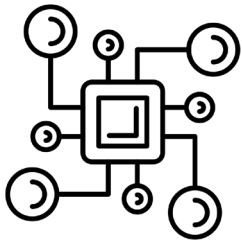
- **Priyama Barua**, VP, Customer Experience Strategy Leader at MERGE

As important as gathering data and gleaming customer insights are, knowing what to do with the information is just as integral. When employing an omnichannel strategy, being able to orchestrate the people, systems, and content in service of the journey is critical to success. Journey mapping and service design blueprinting have proven to be essential foundational steps in helping organizations develop clear protocols and next best actions tailored to amplify experience for the patients and HCPs they serve.

# Captivating Customers With Creative Content

Considering today's highly fractionalized digital marketplace, omnichannel marketing has become a crucial strategy for organizations to reach their target audience across multiple channels. Simply being present on multiple platforms is not enough to capture the attention of consumers.

**Conversion requires a delicate balance of cohesion, cadence, and creativity in content.**



The art of crafting content that is cogent, alluring, and connected is as difficult as ever, particularly when one considers the sea of competing interests vying for consumers' attention and money. With that, the demand for more personalized and smarter customer experiences is high, pushing brands to place even more emphasis on creating systems that not only bring customers to the sales funnel, but keep them moving through it. In short, generating captivating content boils down to three Cs: cohesion, cadence, and creativity.

## Cohesion

The role of creative content within an omnichannel ecosystem is crucial for maintaining customer engagement. However, it requires a governance body to oversee content creation and strategy. This body ensures effective communication, alignment of business goals with consumer needs, and establishes program goals and objectives. It also handles incoming content requests, using common evaluative criteria to ensure content aligns with the program's goals before activation.

## Cadence

Striking the right balance in content delivery and communication frequency with target audiences is crucial. Overwhelming customers with excessive or disconnected messaging can be detrimental. Each touch point should advance the communication, not repeat or bombard customers with different messages. Brands need to be more sophisticated with their communications in terms of cadence and frequency in an omnichannel environment, as too much communication can deter customers.

## Creativity

The distinguishing factor in an omnichannel content strategy, creativity sets a brand apart from its competition. Brands that embrace originality and avoid a one-size-fits-all approach to content can achieve success. However, this requires a creative team that understands the customer, their journey, the brand, and how to deliver contextually relevant and consistent brand experiences across different channels. This approach, while challenging, can create meaningful connections and experiences for target audiences.

# Making the Most Out of Media Activation

In an era where consumers are more connected and empowered than ever before, organizations are being pushed to adapt their marketing strategies to effectively reach and engage their target audiences across multiple channels while providing a seamless and cohesive customer experience across all touch points. However, executing an omnichannel strategy requires careful planning and execution, particularly when it comes to media activation.



## Setting your media activation approach

Determining the right media activation approach within an omnichannel ecosystem begins with having a nuanced understanding of your organization's message, the target audience that is receiving and internalizing said

message and the experiences your audience is likely to encounter along their journey of discovery.

Data also plays a significant role as it relates to media activation, as it can inform virtually every aspect of an organization's media and measurement strategy. For example, during the planning and targeting phase, it's necessary to think about relevant data segments—whether they be diagnosis data or prescription data from companies—or if a client has a National Provider Identifier (NPI) list. Really, anything that enables organizations to precisely target the audience they need to reach is fundamental to successful media activation.

Measurement is also critical, as organizations should consider the data needed to calculate metrics and optimize for campaign performance. According to Deininger, organizations specifically need to think about the types of data they collect from their website, and how they're going to personalize messages and use the media data on performance to achieve the desired results.

**“Certain channels are uniquely qualified to deliver messages during different phases of the customer journey. Display, for example, can do a lot of the heavy lifting early in the customer journey toward organizational goals of driving awareness. On the other hand, things like medical journals and events are appropriate when we’re trying to convey a complicated, more detailed message that requires more explanation.”**

**- Bob Deininger**, VP, Omnichannel Media Lead at MERGE



DATA COLLECTION EXAMPLE:

## Look-alike targeting

Look-alike targeting: the practice of delivering messages to individuals who look and act similar to the members of your target audience.

This strategy works through a combination of machine-learning algorithms, marrying desired audience data with an intelligent look-alike modeling algorithm, resulting in a pattern that helps illustrate and explain user behavior.

**“We can leverage the data that we’ve used to build out a target and look at the performance of our preferred segments to expand the audience based upon physicians, for example, that may look like ones that are engaging the most.”**

- **Bob Deininger**, VP, Omnichannel  
Media Lead at MERGE



The consideration of target audience journeys, customer needs and demographics, and media consumption habits serve as the basis for any effective media activation approach. However, identifying the right channels for delivering messages to your audience and intelligently implementing data to help inform everything from planning and targeting to measurement and optimization is where organizations can truly transform and magnify their media activation efforts.

# A Deep Dive Into Data Capture and Analytics

If one thing is clear, data is king when it comes to successfully implementing an omnichannel approach for your organization. In the previous section, we discussed the critical role that data plays specifically as it relates to media activation, as it can more or less instruct every facet of an organization's engagement and measurement strategy.

In this section, we take the data discussion a step further, unpacking the “why” behind data capture, the strategy behind architecting a system that captures data, and the ways in which it informs and adds more sophistication throughout your omnichannel approach.

## When it comes to data capture, start with the end in mind

For organizations seeking to install learning systems within their omnichannel strategy, knowing the data you have at your disposal, as well as the data you want to capture, serves as the starting point. This step can require teams to revisit the foundation of their approach to data capture, and perhaps even rebuild parts of the existing system, in order to ensure that every channel is speaking as close to the same language as possible.

“It’s never going to be perfect. Every channel is a little bit different, but **establishing those core dimensions that enable a clear cross-channel communication of data—**from tactics, to campaign name, to stages of the funnel, etc.—**can start the process of stitching together that omnichannel fabric you need to connect the dots in reporting and, ultimately, attribution.”**

- **Chad Seaver**, VP, Client  
Service Leader at MERGE

To Seaver's point, one of the biggest obstacles that organizations, both big and small, struggle with is the fact that many of them have different stakeholders separately managing owned, earned, and paid media channels; this can lend itself to gaps in tagging and overall communication, which can disrupt the flow of data.

"[Many organizations] don't have that central linchpin to ensure and instruct every channel as to what is the minimum viable product to establish an omnichannel system," says Seaver. "In other words, the paid search person—for example—should be thinking about the overall engagement strategy and the KPIs we'll be monitoring to judge success. From there, this central function should integrate the overall engagement strategy and the KPIs into the omnichannel strategy, and then focus on how to best optimize each channel's performance. Think of it as not only one big circle, but rather a collection of many smaller circles circling back on each other, connecting between email, display, paid search, and so forth, continuously

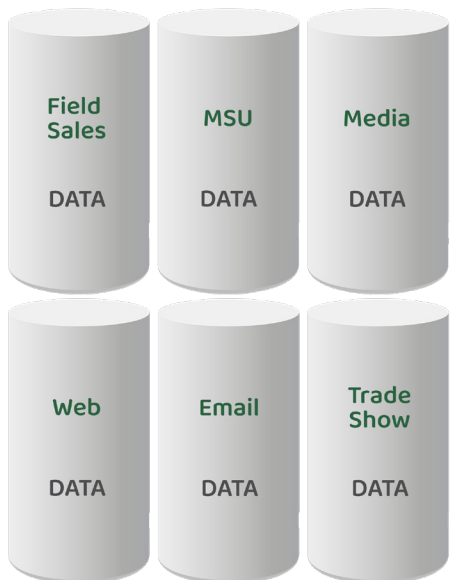
iterating and improving to foster more compelling engagement with the customer across their journey."

The end goal with omnichannel is to move from a more passive or reactive siloed channel approach to a system that is more active or, ultimately, proactive. Data gives us the ability to attribute all of the different customer touch points across various platforms with the creative and messaging that's driving the greatest engagement. Taking a systems view provides organizations with an opportunity to learn and gain efficiencies and ultimately build their own competitive advantage based on what is working best.

**"Bringing the data together in the capture method is something that has been a big change in the last few years. The omnichannel technology that exists today can be a great investment in enhancing an organization's ability to learn efficiently and understand what is happening across mobile, web, and CRM, for example." - Jason Budelmann, VP, Analytics Leader at MERGE**

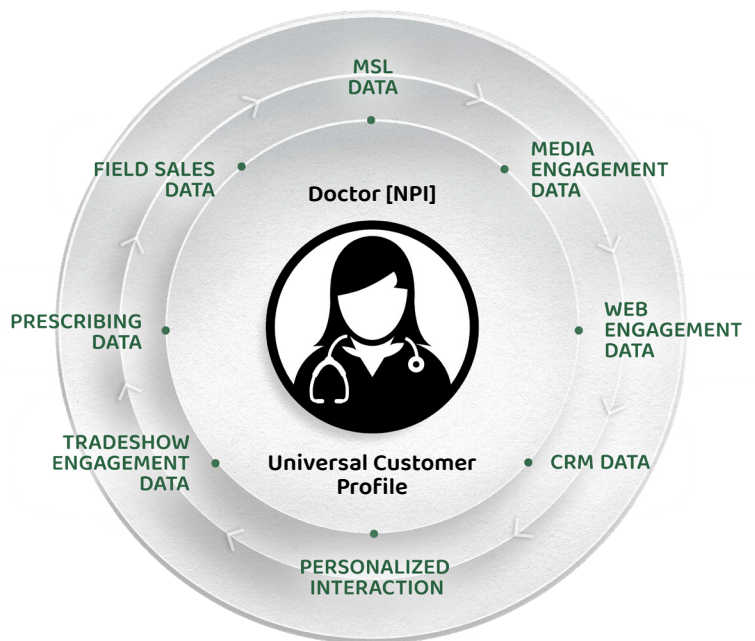
**CURRENT STATE**  
Siloed Information Silos

Disconnected data & systems makes insight mining & personalization difficult to impossible



**FUTURE STATE**  
Systems Approach

Systems approach makes you smarter about the audience & more likable as a brand

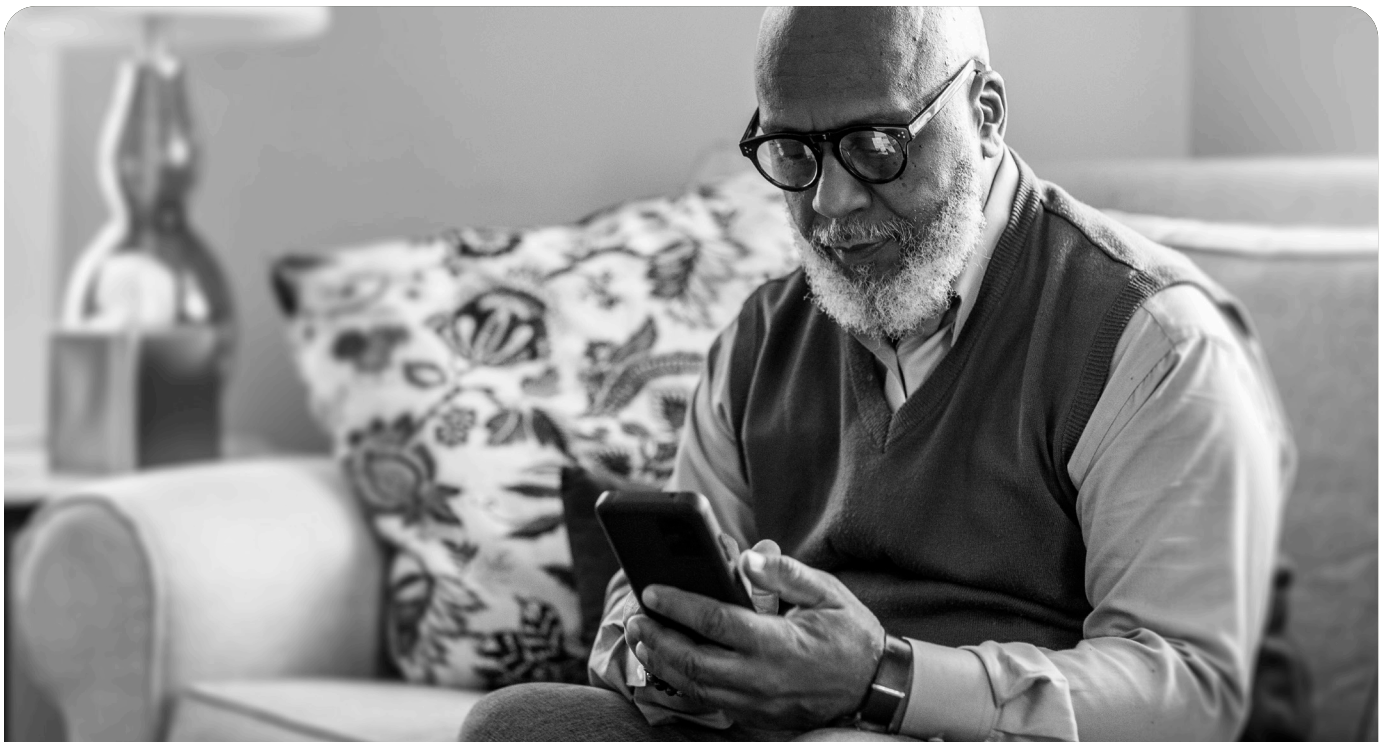


Propensity modeling and segmentation analyses are additional approaches that can unlock value prior to engaging in the omnichannel experience. This level of analysis prior to activation provides organizations with a greater understanding of who their best potential customers are, how they should be marketed to, and the optimal reach and frequency for conversion.

Segmentation analysis and propensity modeling provide organizations with a strong record of data to build upon. Once the omnichannel approach is activated, this approach can help serve as a benchmark measuring effectiveness, ultimately helping to form a learning system that creates and maximizes growth.

**“Once you begin to embrace an omnichannel approach with the right level of data capture, it can be a stepping stone where you can add on and test as you move forward...all in an effort to provide consistent and sequential messaging to your target audience that ultimately leads them to conversion.”**

**- Jason Budelmann, VP,  
Analytics Leader at MERGE**



# Keys to Supercharging Your CRM Program

In today's digital age, organizations in the field of life sciences find themselves at the intersection of cutting-edge research, evolving healthcare ecosystems, and the ever-increasing demand for personalized engagement with patients. And within this dynamic landscape, a well-crafted Customer Relationship Management (CRM) program can serve as a cornerstone of a comprehensive omnichannel ecosystem. In many ways, it's the compass that guides an organization's interactions, enabling teams to not only meet customer needs, but exceed expectations.

## Defining CRM and Assessing Maturity

Similar to the overarching idea of an omnichannel marketing ecosystem, everyone has a different definition of what CRM is and how it should be considered within an overall omnichannel strategy. We see CRM as the system that extends the access of all of your channels, using data as the fiber to enhance audience experience and fuel growth based on your organization's needs.

**"It's really the notion of connecting the different platforms and using data in the right way to accomplish your objectives, providing meaningful and personalized content to extend the conversation and move audiences forward."**

**- Niki Stone,**  
VP, Stratgey Leader at MERGE

Assessing digital maturity level is really the first step when it comes to instituting a CRM program that connects all channels and leverages data to support personalized experiences in every interaction. At the most basic level, Stone asks, "Are the channels connecting? Is email connecting to the site, or is email connecting to an app in order to extend conversations with customers?" Leading-edge brands such as Netflix, Starbucks, and Amazon have paved the way for consumer expectations in this regard. In pharma, there are higher regulation and compliance issues that make those expectations more difficult to meet. However, in the consumer's mind, as long as their privacy isn't at risk, they still expect that connection to be made so they can be led through their journey seamlessly and without having to repeat steps unnecessarily.

The next level up, according to Stone, is how organizations make the user's journey simpler and more personalized. Is the organization adding value from the consumer's perspective because they're inferring logic based on the data they're receiving to personalize and enhance the experience for the consumer? If so, a fully integrated CRM program isn't far from realization.

## Understanding Priorities, Identifying Gaps, and Prescribing Solutions

Understanding priorities from a business perspective and pinpointing where the biggest gaps are from the target audience's perspective sounds simple enough in practice. For many organizations, however, the process is easier said than done.

"We see a lot of organizations are paralyzed because of all of the competing agendas internally," says Stone. "That really is often our biggest challenge. Everybody has a different priority because they are often organized in silos." With this in mind, MERGE prides itself in partnering with our clients to build consensus.

Deriving insights from owned, first-party data and painting a holistic "current state" picture unified around the target audience are often the starting points to stitch together how competing agendas can have common goals. This helps teams understand how their targets are engaging throughout the life cycle of their relationship and across channels to reveal gaps and opportunities in the experience. It also helps to lay a foundation to operate as one team, in sync with continuity around the goal to enhance the customer experience.



**“For several clients, we’ve taken a proof-of-concept approach. Knowing the challenges and the mix of priorities across our client’s stakeholders, the proof of concept can help us establish a precedent to show the enterprise, ‘This is how we can take a step forward in a low-risk way to demonstrate impact and solve a clear problem.’”**

**- Niki Stone, VP, Strategy  
Leader at MERGE**



According to Stone, the proof-of-concept approach is effective because it's agile and customizable based on organizational pain points. It's not about “boiling the ocean,” but rather, prescribing solutions based on needs. For example, if an organization wants to achieve personalization at scale, the proof of concept might be to adapt the newsletter to be more personalized as a minimum viable product (MVP) to test.

“From there, we might even change up the actual asset so that it's modular and iterable based on different segments within our first-party data, but at the end of the day, we're testing this approach for a more personalized experience within an MVP space.”

As part of this approach, we also establish getting past the notion of “perfect,” knowing that consumer needs are ever evolving. We help clients embrace “progress” when prioritizing. We design experiences that recognize and reinforce that we are working within a dynamic business landscape and that customers are not merely passive recipients of products; they are dynamic individuals with ever-evolving needs and aspirations. With this, we nurture more lasting and meaningful relationships.

# Optimizing Your Omnichannel Strategy With Data and Look-Alike Models

In the rapidly evolving field of life science, marketing efficiency and cost-effectiveness are more crucial than ever. As organizations strive to reach the right audiences with tailored messaging while maximizing efficiency and minimizing costs, the role of data-driven decision-making and the utilization of cutting-edge look-alike models have become vitally important.

## The Challenges and Opportunities of Leveraging and Optimizing Data Within Your Omnichannel Strategy

With an abundance of data at their disposal, it can be daunting for some organizations to determine which data is truly effective in measuring outcomes. According to Bob Deininger, Vice President, Integrated Media Lead at MERGE, this abundance of data is actually one of the biggest obstacles for organizations when it comes to optimizing marketing efforts.

“What we try to do with clients is think about their goal, the KPIs, the metrics to measure that goal, and then the data. Sometimes there is so much data it can be hard to find what is most relevant, useful, and actionable, so our main priority is to sift through the noise to uncover the insights that truly drive informed decisions and meaningful outcomes.”

- **Bob Deininger**, VP, Omnichannel  
Media Lead at MERGE

Adding even more complexity to the data overload is the fact that many organizations encounter data lags, a relatively common occurrence in the life science sector, where some critical data, such as claims data, may have a significant lag, which can impede real-time decision-making.

“Claims data oftentimes helps inform how impactful media was, though it typically has a two-month plus lag,” says Sara Van Kuiken, Director of Integrated Media at MERGE. “If we’re doing a prescription lift analysis, to get the relevant claims data and to be able to analyze and optimize against that, there’s usually a very small window of data that can be analyzed in order to make optimizations mid-flight to impact the rest of the campaign.”



# What types of data are most valuable for optimizing an omnichannel marketing strategy?

## ■ National Provider Identifier (NPI) Data

Useful for identifying specific healthcare professionals (HCPs) visiting your website or landing page. It can be used to link different data sets, enabling more accurate tracking of campaign effectiveness.

## ■ Historical Data

Preferred over third-party data for its specificity and relevance to the brand's own interactions and transactions.

## ■ Physician-Level Data (PLD)

Provides information on which physician (by NPI number) was reached, if they clicked an ad, visited the site, etc., allowing for a more precise understanding of campaign impact.

## ■ Look-Alike Targeting

Utilizes NPI data or physician lists to identify individuals with similar characteristics to the target audience. By studying specialties and prescribing habits, algorithmic look-alike modeling can predict actions and identify potential high-prescribers.

## ■ Attribution

Allows measurement of what touches are needed to lead a target audience to a desired end point or business outcome. Attribution measurement is critical in omnichannel marketing as it helps shape the overall campaign strategy and understand which creative or touch prompted the customer action.

It's no secret that the traditional path to converting customers is evolving rapidly, compelling brands and organizations to adapt or risk becoming obsolete. The solution? The implementation of a seamless omnichannel experience—one where messaging is not just targeted, but timely, and the overall customer journey is prioritized.

# The Wrap

To achieve success, it demands a deep understanding of the target audience's decision journey and the creation of a learning system capable of providing relevant content. Whether navigating the complexities of pharma journeys, generating creative content, or activating media strategically, an omnichannel approach is the linchpin. From data capture to CRM and analytics, organizations need to architect systems that capture and utilize data efficiently to bring their prospective omnichannel ecosystem full circle. Focus on embracing progress, not perfection, and continuously refining the approach to foster meaningful customer relationships that drive success in the ever-evolving digital landscape.

## About M=RGE

MERGE practice areas span the entire healthcare ecosystem and beyond, including life sciences, health providers, and payers, as well as financial services and leading consumer and commerce brands. MERGE offers marketing and technology clients full-service, omnichannel capabilities including strategy, creative, experience design, performance marketing, media, digital platform development, shopper marketing, and more. We are embedded in 7 priority markets with offices in Atlanta, Boston, Chicago, Denver, Kansas City, Montreal, and New York.

<https://mergeworld.com/industries/pharma>

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BUILT DIFFERENT

