
Customer Experience: The Definitive Guide

By Dr Nicola Davies



Customer Experience: The Definitive Guide

About eyeforpharma

Our mission is to make pharma more open and valued.

The ultimate driver for the pharmaceutical industry's health is meeting the needs of patients, otherwise it will cease to matter. For healthcare to be as good as it could be, the strength, skills and resources of our industry need to be fully integrated into health outcomes and we need pharma experience at the decision-making table.

We believe the industry must focus on a business model combining service with product, with patients at the center.

What does eyeforpharma do?

eyeforpharma provides a hub for senior-level pharma executives, patient advocacy groups and other health experts to exchange ideas and stay up-to-date with shifting trends and practices. We provide commentary, events, reports, and other valuable expert-driven content. We want to facilitate positive change through discussion and debate, enable dialogue and drive the positive benefits that pharmaceuticals can offer.

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Part 1:

The CX (R)evolution

What is CX?

Customer experience (CX) is a marketing revolution that's gaining ground in the pharmaceutical industry. Many industry leaders will have already heard about this concept and how it is typically associated with words such as innovation, competitive advantage, and revolution.

While there are several definitions available, in this report CX is described as the collection of a customer's interactions with a company, its products, and services over the course of the customer-company relationship.¹

CX is multifaceted says Ian Golding, Global Customer Experience Specialist and Certified Customer Experience Professional (CCXP). "CX is the sum of all experiences a customer has with a supplier of goods and/or services, over the duration of their relationship with that supplier. This can include awareness, discovery, attraction, interaction, purchase, use, cultivation and advocacy.

Developing CX involves the analysis of a customer's perception of an interaction, or set of interactions, with a company, and then leveraging insights from that analysis to shape the design and implementation of an improved experience for the customer. One of the main objectives of delivering optimal CX is to offer a customer the next best offer (NBO) at every point of interaction.² Essentially, it is an orchestration of improved interactions by using the right content and message to engage the right customers and respond to them in the right way, via the right channels and at the right time.³

As the Head of Human Channels, Customer Experience at Teva Pharmaceuticals, Davidek Herron explains, "One thing we need to understand is that CX is more than a good User Experience (UX). It comes down to a company truly understanding what is valuable to the customer at that moment in time." UX is a concept very much related to CX, and the two terms are often used interchangeably. However, many experts limit UX to the use of a particular product or service and the interaction with its interface at one time.⁴ Specifically, the priorities of a good UX design are functionality, ease-of-use, and aesthetics. In contrast, the scope of CX is the collection of interactions across different interfaces and engagements over time.

1 Kumli, F., Felber, M. and Gittermann, V. (2016). 'Embracing customer experience in the pharmaceutical industry', EY, August 25, 2016 [online].

2 Ibid.

3 Carithers, S. (2014). 'The Telecom Industry Tunes in to the Customer Experience', Teletech, 2014 [online].

4 Norman, D. and Nielsen, J. (2018). 'The Definition of User Experience (UX)', The Nielsen Norman Group. Available at:

Why is CX important?

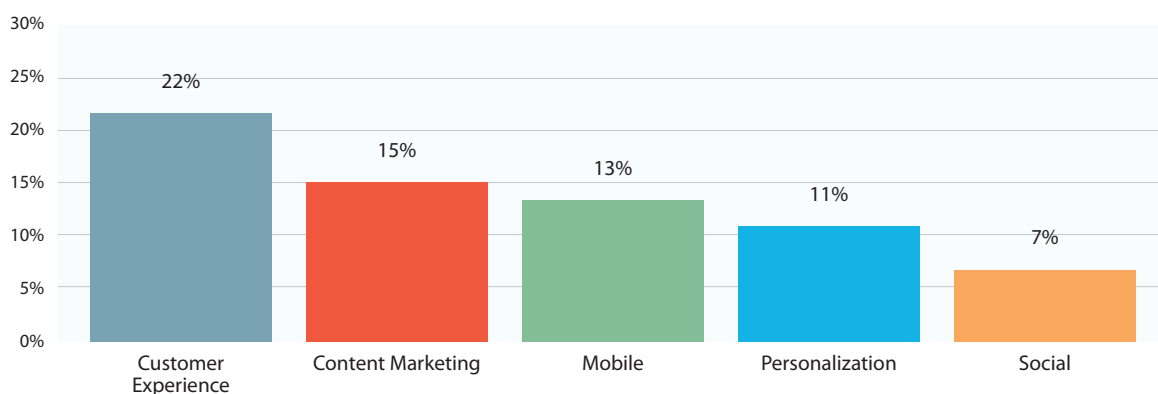
The idea behind focusing on the experience of customers is simple. Customers who are consistently satisfied with each interaction and touchpoint with a company and its services tend to develop stronger loyalty to that company compared to a competitor providing a less-than-satisfactory experience. Satisfied and loyal customers then become repeat clients who recommend the company's services to other people, thus increasing the likelihood of widening the customer base.⁵ As research shows, excellence in customer experience can contribute to revenues that are 4-8% higher than the industry average.⁶

According to Mike Bellis, Partner at the CX management consultancy PEN CX: "Improving the experience provided to customers will improve their perception of the company. Regular and new customers will become loyal customers, which will help tremendously with the company's profitability. Over time, loyal customers become advocates for the company's services. So, it is important to be very conscious of everything an organization does that can contribute to the experience delivered to customers, and then knowing how well the company does it. That is CX management in a very broad sense."

The focus on CX in pharma's business model has only increased in recent years, yet the concept of attending to the quality of experience and satisfaction levels of customers is not new to pharma marketing. Many individuals possessing the knowledge, skills and competencies to prioritize, manage, and improve experiences benefiting target customers have long existed in the industry. However, there was never an urgent need to deliberately classify their profession into a single formal industry-recognized definition.⁷ If we look at how the pharma industry was two or three decades ago, the skills of these individuals would have been considered as 'soft' skills, and perhaps even optional.⁸

The marketing landscapes across industries have since evolved, and marketers from many sectors have gained a deeper understanding of CX and its implications within business and marketing strategies. In a survey of 14,000 e-commerce professionals and global marketers, CX was the top priority for marketers in 2017, outranking content marketing, mobile strategy, personalization, and social media marketing (Figure 1).⁹

Figure 1: Marketers' top priorities (2017)



Source: Econsultancy

5 Catlin, T., Duncan, E. Fanderl, H. and Lorenz, J. (2016). *'The growth engine: Superior customer experience in insurance'*, McKinsey and Company, April 2016 [online].

6 Bain and Company (2017). *'Dialing up customer experience in telecommunications'*, Bain and Company, 2017 [online].

7 Golding, I. (2017). *'Customer Experience 2017 Reality Check – Evolution or Revolution?'*, IJ Golding Customer Experience Consultancy, October 3, 2017 [blog].

8 Ibid.

9 Sigal, T. (2016). *'Quadiant: advancing the CX industry through disruptive innovation'*, Quadiant, September 13, 2017 [online].

What's driving CX?

With technological advancements, we see an evolution in customer interactions and marketing practices.

The internet and smart, mobile devices have introduced many additional channels through which businesses can interact with customers in a more immediate, consistent and personal manner. Inevitably, these new channels and customer touchpoints have altered the relationship between customer and company.

“The most significant and obvious changes in customer experiences in recent years are the result of the mammoth advances in technology and devices, which have impacted the accessibility of these experiences,” says Golding, who has worked within CX for more than 20 years. “We are able to do things faster, smarter, and more conveniently than before.”

Despite such advancements, most organizations around the world continue to deliver random or unexpected experiences, he says. “As consumers, we rarely interact with an organization that serves up an experience that consistently meets our needs and expectations – that hasn’t changed over the last twenty years. This is largely due to businesses finding it impossible to break down the walls and silos that exist between functions. This unfortunately prevents organizations from working together collaboratively to deliver the CX – together!”

Altered customer touchpoints have also transformed the customer’s experiential expectations. Compared to a century ago, today’s ideal company-customer relationship bears much more weight when determining the success and sustainability of a business. Now, a typical customer journey involves both digital and face-to-face interactions with company representatives. As

This evolution of channels has prompted the development of omnichannel marketing, a practice that aims to provide an integrated and seamless experience to the contemporary customer who constantly switches between digital and non-digital touchpoints.¹⁰

The evolution of CX

Across all sectors, active advocacy by individuals and the emergence of CX organizations – notably the Customer Experience Professionals Association (CXPA), which provides accreditations such as the Certified Customer Experience Professionals (CCXP) – have brought CX to the forefront of marketing.¹¹

However, as a profession, CX has a distance to go before becoming a fully recognized entity. For example, in October 2017, there were only 616 people accredited as CCXPs across all industries, and only around 4,000 members of the CXPA, but these numbers are increasing.¹²

Before diving into the intricacies of CX in the pharma space, it is necessary to establish the broad context of CX’s emerging significance.

Companies with high levels of customer loyalty are not only able to maintain trust with customers. They nurture customers who can advocate for the company and its services to other people, which drives market growth.¹³ Consequently, measuring customer satisfaction is a requirement if businesses are to gauge how well customers are receiving their products and services and to determine whether there are areas for improvement.

¹⁰ TaskUs (2016). *'The Evolution of Customer Experience: Digital'*, TaskUs, March 6, 2016 [online].

¹¹ Golding, I. (2017). *'Customer Experience 2017 Reality Check – Evolution or Revolution?'*, IJ Golding Customer Experience Consultancy, October 3, 2017 [blog].

¹² Ibid.

¹³ Kumli, F., Felber, M. and Gittermann, V. (2016). *'Embracing customer experience in the pharmaceutical industry'*, EY, August 25, 2016 [online].

CASE STUDY



How Spotify's advisor program helps keeps customers happy¹

Spotify works hard to become an integral part of a user's day-to-day life.² The company's hard work seems to be paying off given their 140 million active users, 60 million of whom are paying subscribers.

The company is known for having a very high customer satisfaction rating; part of the reason is the proactive way they locate client complaints online. It uses search tools to detect mentions on Facebook, Instagram, Twitter, SnapChat, and other social media, and then filter these to identify customer support problems. A team of advisors then aims to settle any issue in less than two hours.

Spotify provides a rigorous training program for its customer support advisor and social media teams; advisors start with customer support via email before moving to more complex channels that

require tone of voice. The company is very particular when it comes to tone of voice and attitude, which customers should perceive as easy, fun and friendly.

Spotify has invested a lot in training and growing the advisor and social team; in 2013, the company had 90 advisors and social team members, by 2017, the count increased to 1,200 people.

The aim is to attract experienced and well-trained individuals who can view their advisory job as a serious career path, involving them in quality assessment and business processes. Company leadership also provide advisors with internal professional opportunities, believing that individuals who have worked at the front line of customer-facing activities are well placed to drive the organization forward.

www.spotify.com

¹ Haughey, P. (2017). 'How Spotify keeps 99% of its customers happy', Voxpro, November 14, 2017 [online].

² Chapman, A. (2017). 'The Digital Disruption', eyeforpharma, October 23, 2017 [online].

A survey carried out among 10,000 UK consumers benchmarked customer loyalty across a range of industries (Figure 2). The companies that topped the list were Nationwide (a credit card provider), Aldi (a supermarket), and John Lewis (a retailer), while, interestingly, BUPA (a health insurance company) was in the bottom five of 157 companies.

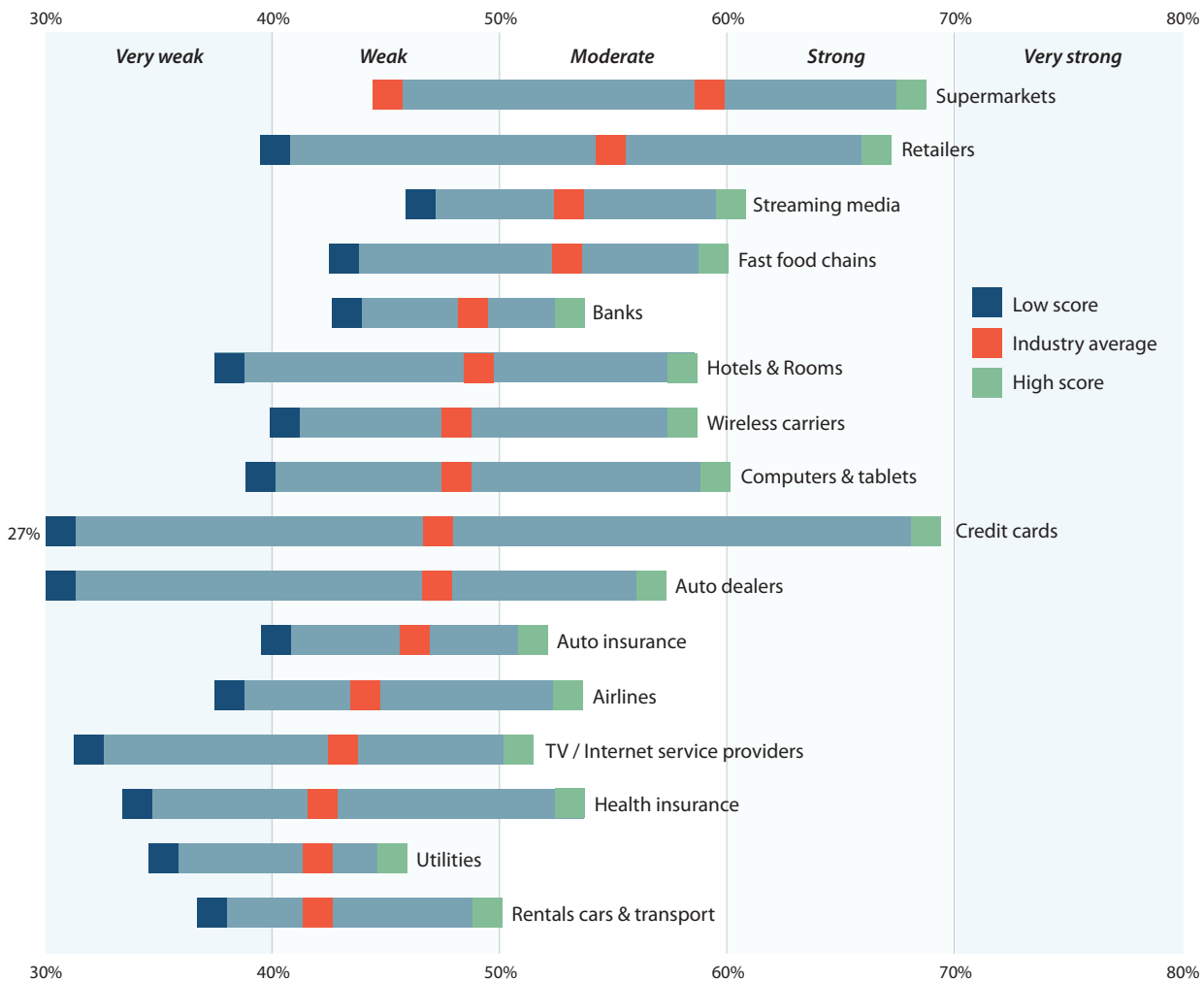
Loyalty was defined through four key factors:¹⁴

- Likelihood to repurchase
- Likelihood to recommend
- Likelihood to forgive
- Likelihood to trust.

For CX expert Golding, there is a clear trend. "The smaller the purchase, the better the experience has become. Retail is the most advanced industry, led by the Amazon phenomenon, and leveraged advances in technology, but the hospitality sector is not far behind, although the experiences can be variable. Yet, other industries are maturing very quickly due to disruptors entering the market. Banking, for example, is evolving very quickly – again through advances in digital." One fact is clear – the top-scoring industries have made the transition to CX and seen the benefits.

¹⁴ Temkin, B. (2017). 'Nationwide, Aldi, and John Lewis Have Most Loyal Customers in UK', LinkedIn, November 20, 2017 [online].

Figure 2: Temkin Loyalty Index 2017 (United Kingdom)



Source: Temkin Group

Companies with excellent CX strategies share three common traits:¹⁵

- They deliver on what they promise
- They acknowledge, apologize for, and correct their mistakes
- They keep customer-facing employees happy and driven to serve customers.

While novel approaches to CX are often associated with consumer sectors and nimble tech companies, the most meaningful opportunity to create improved experiences for customers lies within the traditional industries, including pharma and healthcare.¹⁶

Yet, how relevant are these industries' experiences for pharma? For Parul Kumar, CX Strategist and Global Head of Patient and Stakeholder Engagement at UCB, many companies offer valuable insights. "Expedia and eBay are great examples of understanding customer needs and meeting those needs. In their own unique way, they have both proven their great understanding of how meeting customer needs can contribute to success over many years."

¹⁵ Edinger, H. (2017). 'Customer Experience 101'; LinkedIn, November 23, 2017 [online].

¹⁶ Kumli, F., Felber, M. and Gittermann, V. (2016). 'Embracing customer experience in the pharmaceutical industry'; EY, August 25, 2016 [online].

While there are clearly lessons to learn from all sectors, it is perhaps those sectors most resembling pharma that hold the greatest insights. As such, we examine examples of CX transformation in other highly regulatory industries – finance/banking, insurance, and telecommunications – where CX is considered one of the best opportunities to gain competitive differentiation.¹⁷

¹⁷ MyCustomer (2017). ['Financial services: Five strategies for creating winning customer experiences'](#), MyCustomer, January 18, 2017 [online].

Out-of-industry examples of CX

Finance and Banking

Over the years, retail banking has undergone tremendous change, partly in response to evolving consumer demographics, where most young people prefer digital-based financial transactions.¹⁸ In countries where access to traditional brick-and-mortar bank services is considered time-consuming and burdensome, there is also high consumer interest in trying digital financial products from trusted tech and online retail companies.

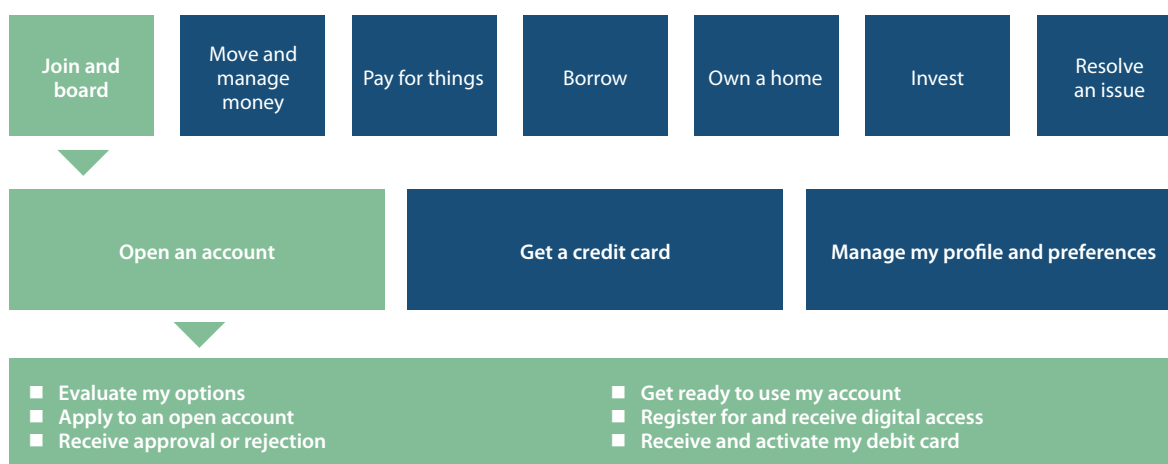
Tech firms are bringing a new perspective on how to provide financial services to consumers. Indeed, established tech companies such as Google and online retail giants such as Alibaba possess huge customer bases, are digitally savvy, and have the flexibility to extend their brand into financial services.

Examples of non-banking financial companies include online retail firm Amazon's Amazon Cash (accepts deposits and offers loans to customers), Chinese e-commerce giant Alibaba's MYBank (approves automated loans to customers based on their purchase and payment history), and Japanese e-commerce firm Rakuten, which issues credit cards and provides credit-related services to customers.¹⁹

This move to digital banking has driven many traditional banks to start using their websites and mobile app to digitize routine banking transactions such as deposits, money transfers, bill payments, and credit card applications. Banks such as Capital One in the US and Santander in the UK have started deploying financial service support through virtual assistants and chatbots.²⁰

One undisclosed retail bank has also reorganized its financial products and services around how a customer typically experiences its business. Rather than offering traditional products and services – such as checking accounts and risk management services – that are dictated by existing industry practices, the bank created products and services from the perspective of the consumer.

Figure 3: Customer episodes for 'Open an account'



Source: Bain and Company

¹⁸ Vecchio, D. (2016). 'Digital Demand in the Banking Industry and the Impact on Legacy Systems,' Gartner, June 15, 2016 [online].

¹⁹ Du Toit, G. and Maureen Burns, M. (2017). 'Evolving the Customer Experience in Banking: 'Alexa, Move My Bank Accounts to ...'', Bain and Company, November 20, 2017 [online].

²⁰ Ibid.

CASE STUDY



Atom Bank's personalized digital experience for customers¹

The first digital bank in the UK, Atom Bank offers convenient banking and money management strategies to its customers. The bank targets customers between 18 and 34 who prefer to complete transactions online.

Since its customer experience is fully digital, it is important that Atom Bank delivers excellent customer service. The company invests in the technical design and function of its app so that its contact center is fully integrated into the digital platform. The app's verification process includes voice or facial recognition and PIN and password selection. It also removes the need for the typical security questions format.

Added features for customer convenience include contacting customer care via email, chat, voice calls or social media without the need to verify the

account each time. The online bank developed the Genesys Customer Experience Platform to provide a more direct connection between the customer and the customer care team. The app's control panels are also customizable to suit either a left or right-handed person, allow users to change the color scheme and even rename it (eg, Anna's Bank).

The mobile-only company already offers savings accounts, mortgages, and secured loans for small business. With a recent additional investment of £83m, which raises their total company valuation to £261m, Atom Bank is set for continued customer growth and services expansion. With a new approach to engage young customers, Atom Bank has redefined the bank-customer relationship as well as the relationship young customers have with money.

www.atombank.co.uk

¹ Lunden, I. (2017). *'Atom Bank raises \$102M at \$320M valuation for a mobile-only bank for millennials'*; Tech Crunch, March 3, 2017 [online].

It views customer experience as episodes that need to be managed well; for example, 'Consider my options' and 'Apply to open an account' are seen as minor activities performed as part of a major task, in this case 'Open an account' (Figure 3).

Insurance

Insurance companies provide very similar products and policies to consumers, creating a highly competitive sector. The rise of social media has enabled consumers to more effectively compare insurance policies, coverage, and pricing, further increasing competition and the commoditization of insurance services.

Providing excellent CX has become the key tool to gaining competitive advantage. Research shows that auto insurance companies in the US providing consistent and best-in-class experiences are 80% more likely to have customers renew their annual policies. Insurance providers that provide satisfying customer experiences are also able to generate two-to-four-times more new business growth than competitors.²¹

In 2015, 79% of insurance consumers across the globe expected to use digital channels for future insurance transactions.²² Many insurance providers have responded by digitizing many of their existing services to allow customers to access applications, requests and claims. An example is new insurance firm, Lemonade, which uses AI to process risk evaluations and claims. This innovative approach to insurance services helps capture a new market – 87% of Lemonade's customers are first-time policyholders.²³

²¹ Catlin, T., Duncan, E. Fanderl, H. and Lorenz, J. (2016). *'The growth engine: Superior customer experience in insurance'*; McKinsey and Company, April 2016 [online].

²² Gascoigne, C. (2016). *'Improving customer experience in the insurance industry'*; Raconteur, October 12, 2016 [online].

²³ Morgan, B. (2017). *'5 Fresh Examples of Customer Experience Innovation'*; Forbes, July 17, 2017 [online].

CASE STUDY



Unum's move towards digitization¹

With insurance services, properly filled forms are critical at each step to ensure reporting and regulatory compliance. Insurance company, Unum, considers digital channel collaboration and reduced reliance on paper-based forms as a big opportunity to drive customer experience. The company therefore aims to streamline the huge amount of paperwork typically associated with insurance transactions with the adoption of a cloud-based solution.

Typically, it takes one day to request and file for a policy change. Afterwards, a client must wait a few days or weeks for the form to come back, especially when mailing is required. Unum's cloud-based solution lets the company accept and return client request forms within 24 hours. The request forms can all be digitally filled and affixed with an electronic

signature. The company sends links to the necessary forms via email. When the policyholder sends the completed forms, it is immediately rerouted to the right employee or department for processing. This transparent method for document reporting also helps to generate insights on business process enhancements.

Unum is a leading global provider of financial protection for life, critical illness, accident, and disability coverage. Its core business entities include Unum US, Unum UK, and Colonial Life. With over 178,000 client groups in the US and UK markets, Unum is set to offer efficiency and convenience to a large customer base with the adoption of digitized insurance services.

www.unum.co.uk

¹ Adobe (2016). '[Unum, ensuring outstanding customer service](#)', Adobe, August 2016 [pdf].

Dutch firm, Inshared, has taken the digitization of insurance services to the next level. Insurance is typically associated with a lengthy and arduous paper trail, but Inshared can operate 100% online. Customers can go to their website, where a virtual assistant greets them, to complete non-claims transactions.²⁴

Telecommunications

Telecommunications companies are faced with increased competition for customer loyalty, and providing consistently beneficial experiences to consumers is considered a key method of competitive differentiation.²⁵

In response to a growing preference for online customer service among consumers, many telecom companies have invested in web and mobile-based sales and customer support services. Companies are leveraging social media, live chat channels, and email to drive response times and improve customer-tracking methods.²⁶

Some telecom companies have invested in omnichannel capabilities to allow for a more integrated engagement with customers across multiple channels. For example, telecom company Verizon invested in cloud-based infrastructures to enable its mobile, TV and print marketing teams to work more closely to provide personalized messages across various devices.²⁷ Other telecom companies have also adopted virtual agents and automated self-service capabilities. The telecom firm Optus in Australia and New Zealand, for instance, launched a virtual agent that uses natural language to converse with customers and help them to independently handle 'low-complexity' issues.²⁸

²⁴ Gascoigne, C. (2016). '[Improving customer experience in the insurance industry](#)', Raconteur, October 12, 2016 [online].

²⁵ Carithers, S. (2014). '[The Telecom Industry Tunes in to the Customer Experience](#)', Teletech, 2014 [online].

²⁶ Telus International (2016). '[What telecoms are doing right in customer service – Best practices from Telstra, TELUS, and Republic Wireless](#)', Telus International, September 7, 2016 [online].

²⁷ Carithers, S. (2014). '[The Telecom Industry Tunes in to the Customer Experience](#)', Teletech, 2014 [online].

²⁸ Ibid.

CASE STUDY



Republic Wireless's peer-to-peer customer service¹

Waiting for customer support is one of the most burdensome aspects of mobile services. Mobile phone service provider Republic Wireless is changing the way its customers receive support with a new online ticketing system that categorizes customer support queries into tickets. Not only does this new system improve the response time, it also provides an opportunity for certain customers to be rewarded.

Republic Wireless's ticketing system evaluates the complexity of incoming customer support requests. For simple/common questions, a customer is given a Level 1 ticket and rerouted to a member of a small group of expert customers. This expert team is composed of customers who are highly knowledgeable on how to fix typical mobile service issues. Essentially, the Level 1 ticketing system is a peer-to-peer network to deal with common customer support needs.

For each handled ticket, the company compensates expert customers with performance rewards. Customers interested in offering their expertise can sign up with Republic Wireless's app development partner, Directly, to receive the necessary training, resources and tools.

The Level 1 expert customer team effectively addresses about one-third of incoming calls. However, for more complex customer questions, a caller is given a Level 2 ticket, which is addressed by a member of the internal customer support team. With the dual-level ticketing system, the company's average response time to customer support requests is only three minutes compared to other telecommunications companies that have up to an hour wait time. With improved response times, Republic Wireless's customer satisfaction rating stands at 90%.

republicwireless.com

¹ Telus International (2016). *What telecoms are doing right in customer service – Best practices from Telstra, TELUS, and Republic Wireless*. Telus International, September 7, 2016 [online].

Many telecoms are now also familiar with data analytics capabilities for the gathering and analysis of vast amounts of customer data that can inform CX strategy.

T-Mobile in the US adopted data analytics to monitor the experiences of customers using its live chat channel and then benchmark those experiences against a pre-defined standard. Insights from T-Mobile's data analytics efforts help to improve the training program of service agents as well as ensure that they are efficiently staffed and sufficiently empowered to perform their job.

Conclusions

The use of CX as a strategic tool can set a company apart from the competition. While the application and function of CX may slightly differ between regulated industries, there is one common factor, says PENCX's Bellis. "CX may appear differently from company to company, department to department, or industry to industry, but decisions are made consistently and routinely to prioritize and improve the experiences delivered to customers." Wittenstein adds: "Focusing continuously on customers, helps make the business healthier too. Doing more for customers not only increases sales and favor, it forces any business to build unique capabilities that distinguish them from competitors."

Before exploring some of the key tools needed to operationalize learnings from other industries, we present the findings of a survey around attitudes to CX within the pharmaceutical industry.

Part 2

Where is pharma on the CX journey?

Pharma is far from blind to the opportunities of customer experience (CX)

This is the overarching conclusion of a survey of more than 1,300 professionals in pharma, biotech and medtech carried out by eyeforpharma (with support from PEN CX) during December 2017 and January/February 2018. The majority of respondents work in marketing/digital, sales or commercial functions.

The survey highlights a generally positive recognition of CX and an awareness of its principles, but that this exists at different levels across organizations.

When asked what do you mean by the term customer experience, nearly half of respondents (48.75%) said CX was what our customers really think of us, our interactions, and another quarter (24.5%) said CX was a consequence of customer interactions.

Of the respondents who preferred their own definitions, there was a broad spectrum of opinion. They included: a combination of the three above – a feedback loop; the full customer journey, irrespective of brand; staying focused on customer needs and behaviors; new innovative ideas not same old stuff; and, we are still defining it so it means different things depending on the division.

For some, simplicity was appealing, answering: customer first; holistic experience; providing the service they expect; and, share of voice. While a few respondents mentioned patients specifically: our customers are patients so patient centricity is our goal; patients central; and, enabling the patient to get the med he needs with minimal disruption to his life.

Figure 4. What do you (or your organization) mean by customer experience?

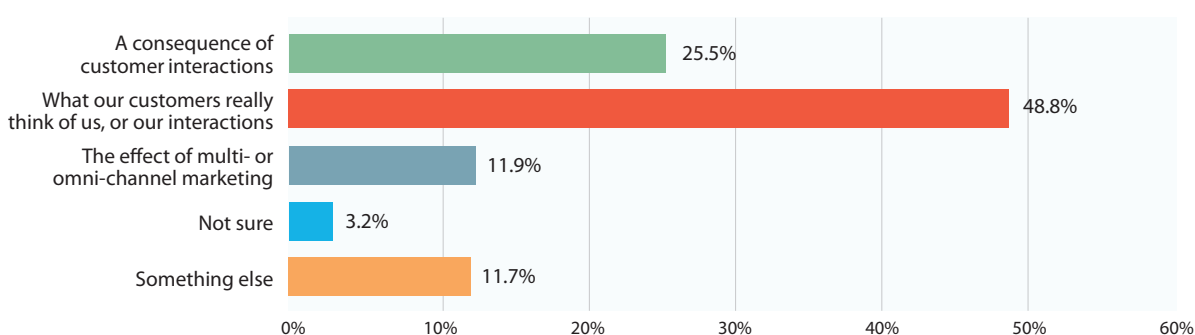
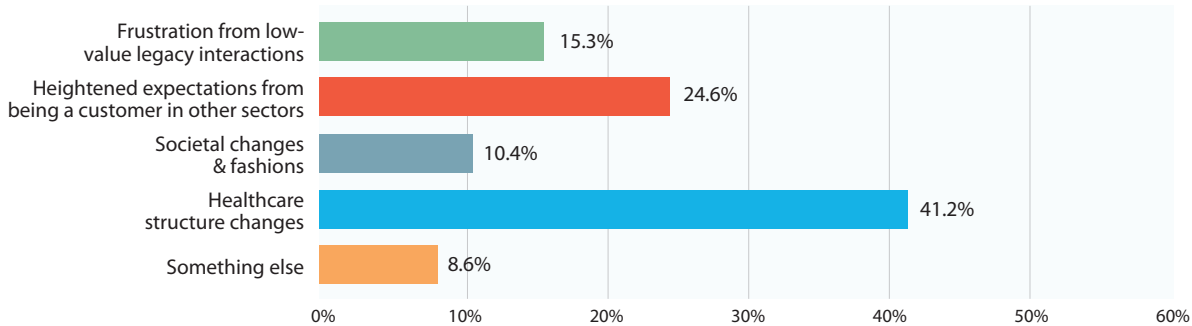


Figure 5: What has been the strongest driver of change in your customers' expectations of pharma over the last 10-15 years?



What's driving CX in pharma?

A key driver of CX across all industries is a rise in customer expectations, although many point to CX efforts in consumer industries as the cause! As a result, we asked pharma professionals what was driving customer expectations in our own industry (Figure 5).

Only a quarter of respondents (24.6%) cited heightened expectations caused by other sectors, although another significant slice (10.4%) blamed societal changes. The largest number believed customer expectations had been most influenced by healthcare structural changes (41.2%) or frustration with low-value legacy interactions (24.6%)

More people in pharma are realizing that something must change, says Josef Bednarik, Chief Marketing Officer Russia/CIS/Israel at Eli Lilly. "They see it in their own lives because they are customers too and they engage with communications in different ways. [But] we don't exactly know which communications and which touchpoints work better with a pull strategy and which work better with a push approach."²⁹

CX is "the best new angle in healthcare", says Maarten van Essen, Customer Experience Design Strategist at Takeda Pharmaceuticals Nederland. "When you see how the B2C model has evolved, there is a big gap left open in our B2B environment, but there is a lack of confidence to bridge this gap. We often do not dare to really listen to our customers because we in pharma are afraid that we won't be allowed to fulfil many of those customer needs either from an ethical and compliance standpoint or from a business perspective."

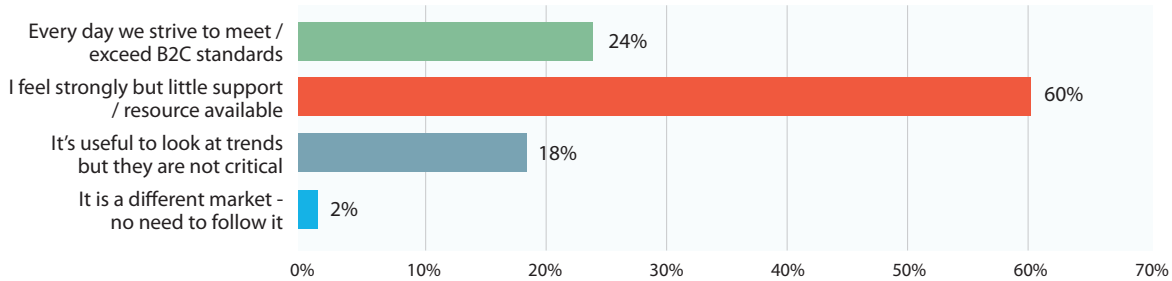
What is clear is that people on the ground feel pressure to match these raised customer expectations. Figure 6 shows the results of a poll taken during a 2017 eyeforpharma webinar. Here, 60% of the audience felt a strong pressure to match expectations but felt there were insufficient support and resources available to them. Nearly a quarter (24%) felt the pressure – and acted on it – on a daily basis.

For Multichannel and Marketing Cloud Expert, Steve Mason, these results were encouraging. "The consistent message we hear from other industries is that we need to deliver a connected and personalized experience. The majority of people in the poll feel strongly about it [CX in pharma], but perhaps organizations need a little bit of a push."

Pharma needs a more consistent approach, however, says Mike Wittenstein, Managing Partner of StoryMiners. "There is a lot of innovative work in pharma in the formulation and the testing side, but not in how you bring customers into the fold or how you develop apps that help people monitor their health levels, remind them to take their

²⁹ Gosling, H. (2017). *From Push To Pull: The Reinvention Of Marketing*; eyeforpharma; July 20, 2017 [online].

Figure 6: Webinar poll – How much pressure do you feel to match the customer/consumer experience standards set by companies outside healthcare?



medications, or help them get the full spectrum of care they need.

“Most of the innovative effort in healthcare is focused on efficacy and profit. If pharma companies take a stronger position in terms of helping their clients live better and more holistically, then they need to start looking at models similar to Khan Academy, Uber or retail models, wherein they have a better chance of having an effect on a patient’s quality of life and giving them the kind of information to make better decisions and support their care plan. At present, I don’t see many pharma companies doing that. Creating more patient value is where the smart money is,” he says..

Patients’ expectations in particular will only increase, says UCB’s Kumar. “Some patients have now taken greater control of their own health; when diagnosed with a disease, they do not settle with the opinion of one specialist or whoever is providing care. They spend a lot of time researching and forming opinions for themselves. I can only see that increasing in the future.”

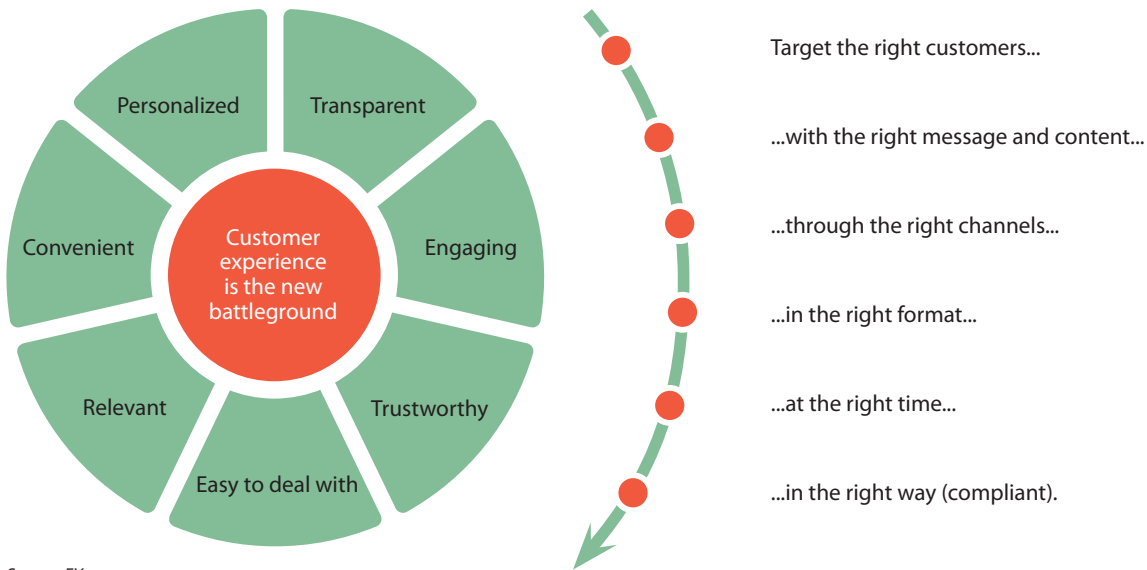
In our CX survey, some respondents identified more specific drivers of change in customers’ expectations, including: the consolidation of certain customer types; changes in payer policy and funding decision criteria; legislative changes; and, restrictions in interactions with prescribers.

Changes in healthcare reform have contributed to the creation of a highly competitive environment where drug manufacturers and healthcare providers need to constantly prove the value of their products and services. There is also a stronger requirement to coordinate and integrate various healthcare services to ensure an efficient, cost-effective, and therapeutically specific approach to patient care.³⁰

Several respondents cited trust – or the lack of it – as a key factor. CX expert Golding agrees, identifying three factors needed to meet customer expectations: “Firstly, we must restore trust. Throughout 2017, we’ve seen examples of organizations failing to meet basic customer expectations. In 2018, all brands across all industries need to work hard to restore trust with their customers. Secondly, we must offer value for money. We live in a world where disposable incomes continue to be challenged on an annual basis. Consumers will continue to look for brands that offer the best value for money for an end-to-end experience – and so will pharma customers. Finally, we must have honesty and transparency. Brands that do what is right for their customer – whether things go right or wrong – are those that will flourish.”

³⁰ Capgemini Consulting (2011). *‘Implementing Successful Key Account Management (KAM) Strategies’*. Capgemini Consulting.

Figure 7: Customer experience is the new battleground



Source: EY

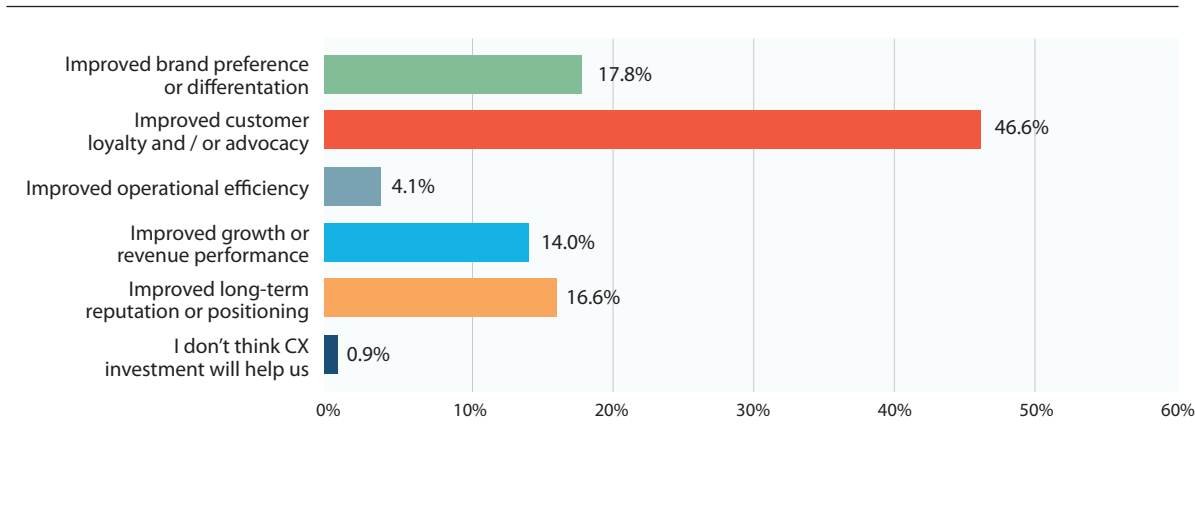
Why should I care about CX?

To meet customer expectations, creating precious interactions with each customer type and leveraging all channels of communication are becoming increasingly important.³¹ For many, CX is the “new battleground” for pharma (Figure 7).³²

Yet, what benefits will fighting this battle bring? Our survey delivered a decisive answer – improved customer loyalty and/or advocacy (46.6%, see Figure 8). Interestingly, a much smaller number focused on the benefits on brand preference or differentiation (17.8%), suggesting that pharma organizations are taking a more customer-based than brand-focused approach towards CX adoption.

Pharma as an industry may have fallen behind B2C industries, but the tide may soon turn.³³

Figure 8: What, do you believe, is the greatest benefit you/your organization will develop from managing customer experience?



31 Sigal, T. (2016). 'Quadiant: advancing the CX industry through disruptive innovation,' Quadiant, September 13, 2017 [online].
 32 Kumli, F., Felber, M. and Gittermann, V. (2016). 'Embracing customer experience in the pharmaceutical industry,' EY, August 25, 2016 [online].
 33 Chapman, A. (2017). 'The Digital Disruption,' eyeforpharma, October 23, 2017 [online]. Available at:

CASE STUDY



Shire's Rare2Aware¹

In efforts to create more meaningful and relevant touchpoints with patients and carers dealing with rare diseases, Shire leverages social media. In a Twitter-based initiative called Rare2Aware, the drug developer provides information and support to people affected by rare conditions in the US healthcare market.

The initiative is a resource for patients, loved ones and care providers on updates, advancements

and events in the rare disease space. It is also a platform for patients to share their personal stories and insights on their condition and treatment as well as listen to other patients going through the same challenges. In turn, Shire can take social media insights to map the patient journey and identify opportunities to implement more meaningful interventions for patients in the early stages of diagnosis.

¹ Chapman, A. (2017). *'The Digital Disruption'*, eyeforpharma, October 23, 2017 [online]. Available at:

Brands should not be the prime focus, says Tom Ruggia, Vice President, Global Surgical Customer Experience at Johnson & Johnson Vision. "Pharma should realize as soon as possible that CX is taking over the marketing field and we should no longer be okay with marketing pharma brands only and allowing the ecosystem to evolve on its own. So, when R&D comes up with a care innovation, we need to think about the disease state and care journey as the object of our marketing. We need to develop the devices and apps that go with that care solution and support the ecosystem with care tools focused on early and efficient patient interventions. When we focus on CX, the patient benefits in terms of better care, efficiency, cost reduction and longevity."

Improvements will come from better patient care, he adds. "Within ten years, a diagnosed patient will receive a concierge app that will walk them through their condition. That app will come with wearable device options to monitor disease progress. Such apps will be able to communicate with the patient and the care ecosystem."

The experience of HCPs is also ripe for improvement. By providing real-time access to branded and unbranded information and clinical insights to digitally savvy HCPs, pharma can promote engagement, trustworthiness and transparency among providers,³⁴ which can have a direct impact on patient outcomes.³⁵

More providers and patients who are satisfied with the experience a company provides, and are loyal enough to positively contribute to its reputation, positioning and differentiation, will translate into a favorable bottom line.³⁶ Therefore, it is urgent to place pharma on a CX trajectory.

Managing customers' experience

While pharma recognizes the business and strategic promise of CX, how well are companies actually managing their customers' experiences?

"There is a growing trend of people seeing this [CX] as a new way of working; there are pockets where people are doing really good things and pockets of less good things," says CX consultant Bellis. "To move from an unreliable customer experience to a point where they can have a consistent expectation needs an awful lot of effort to be applied."

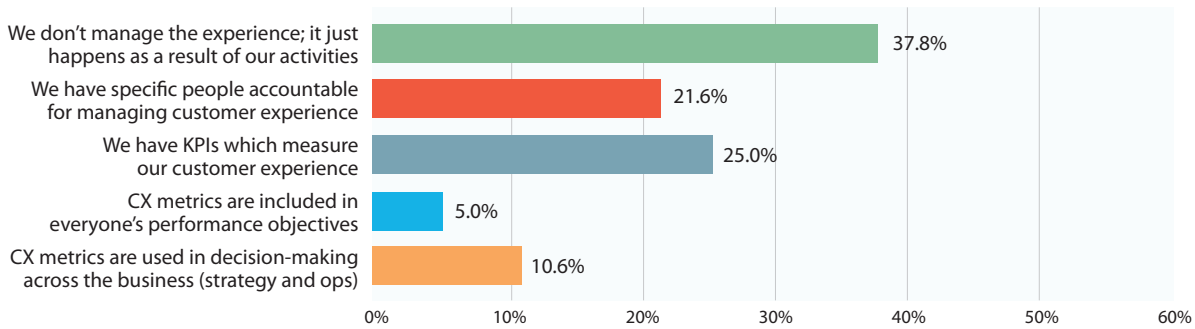
³⁴ Kumli, F., Felber, M. and Gittermann, V. (2016). *'Embracing customer experience in the pharmaceutical industry'*, EY, August 25, 2016 [online].

³⁵ Ibid.

³⁶ Edinger, H. (2017). *'Customer Experience 101'*, LinkedIn, November 23, 2017 [online]. Available at:



Figure 9: How does your organization manage the experience it delivers?



Yet, to introduce genuine CX management, you need to look at every part of an organization to look at how it is run and to understand how capable it is of delivering an intended experience to customers, he adds.

This begs the question – how are companies managing the experience they deliver to their customers? In our survey, over one-third of respondents (37.75%) stated that their companies did not manage the experience at all (Figure 9).. On the more positive side, a quarter said they had specific KPIs to measure it, while another two-fifths (21.6%) had specific people who are accountable. Slightly fewer than one-in-twenty respondents reported that CX metrics were included in everyone’s performance objectives.

Getting to the meat of the matter, our survey asked a pivotal question – how well organizations have adapted to meet customer expectations (Figure 10).

Nearly half of respondents answered in the top two categories – Very well (20.9%) or Sporadically, some pockets of excellence but not widespread (27.3%). However, the largest number described their organization’s adaptation as Average, some changes in all areas but not there yet (39%).

These results are mirrored in an eyeforpharma webinar poll in 2017, where three-fifths of respondents (61%) rated their progress on CX management and implementation as Good (17%) or We have ambitious plans but it’s early days (44%). See Figure 11.

Figure 10: How well do you believe your organization has adapted to this change and met customer expectations?

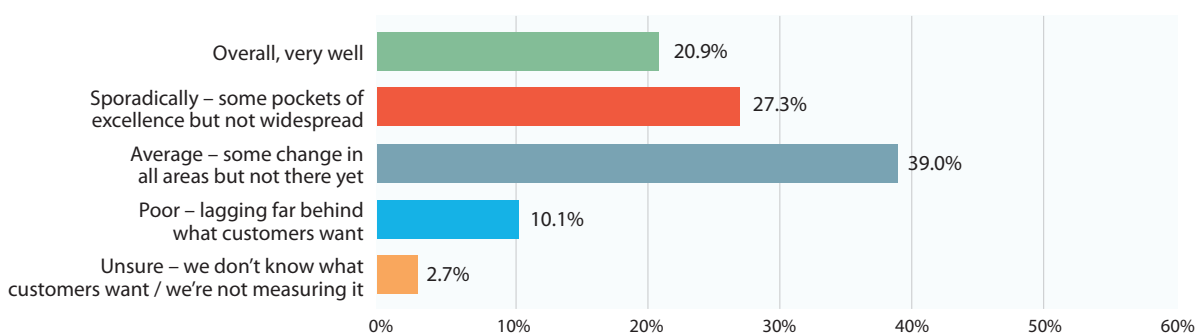
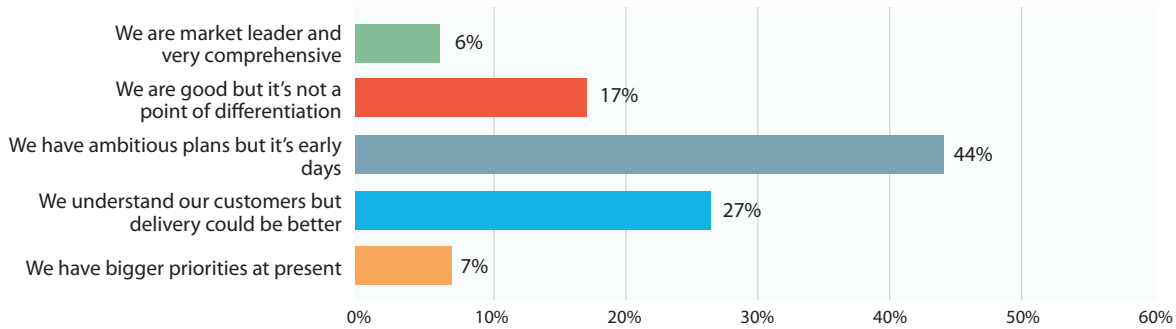


Figure 11: Webinar poll – How well are you doing in CX management and implementation?


Does CX work?

In our survey, we asked respondents about how confident they are in their ability to establish a cause and effect between their actions and the customer's experience. Results show that many pharma companies lack a strategic approach towards linking their actions with customer experience (Figure 12).

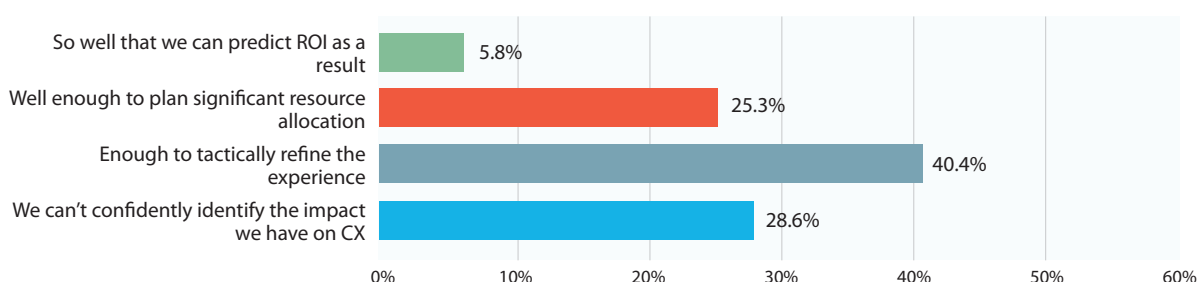
Only a small number of respondents (fewer than 6%) said they could establish cause and effect well enough to predict ROI. Clearly, a direct link between CX initiatives and financial returns is the most ideal situation, but given the maturity of CX in pharma, this figure is to be expected yet it raises questions around whether CX will be accepted without clear links with ROI.

Does this lack of confidence – and links between CX and the bottom line – reflects a lack of leadership support and organizational buy-in to invest in a progressive transformation?³⁷ Does it suggest that companies remain culturally structured to favor brands and products rather than the customer?

"There are still too many organizations convincing themselves that they are deploying digital strategy for the benefit of the customer, when it is really for the benefit of the business, specifically, in terms of saving money," says Golding.

Indeed, many companies are still focused on hiring people with strong pharma experience and downplaying the need to hire people with experiences in meeting high customer service expectations.³⁸

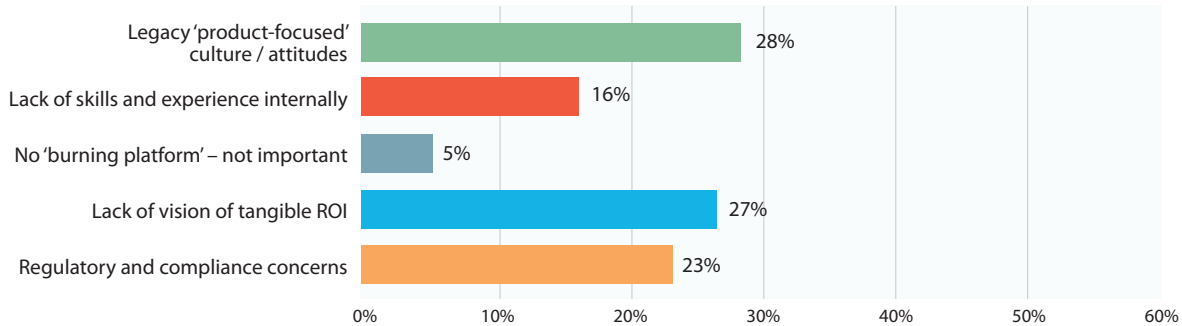
UCB's Kumar: "Many organizations fail, and many customer and patient experience initiatives become short-lived,

Figure 12: How confidently can you establish the cause-and-effect impact of your actions on your customers' experience?


³⁷ Chapman, A. (2017). *The Digital Disruption*; eyeforpharma, October 23, 2017 [online].

³⁸ Ibid

Figure 13: Webinar poll – What is the biggest issue preventing your organization doing more to establish CX management?



because there is a lack of collaboration and integrated understanding between the different functions within organizations. Organizational structure plays a massive part in the customer experience strategy.”

What other obstacles stand in the way of companies putting more effort into CX management? In a poll taken during a 2017 webinar (Figure 13), the leading issue was legacy, product-focused culture and attitudes (28%).

Commenting, Philippe Kirby, Director of Customer Engagement Capabilities at MSD, said: “The product-focused side just won’t go away; we still have a very traditional way in terms of how we execute our marketing. That’s why we need a marketing transformation, not just a digital transformation.”

For J&J’s Ruggia, the necessary transformation must take place at every stage of the customer journey. “People of pharma will either be innovators in CX or they will need to spend a great deal of money and time catching up to the leaders. Pharma marketers must forget the idea of marketing a compound and being done for the day. We need to market to each aspect of the customer experience journey,” he says.

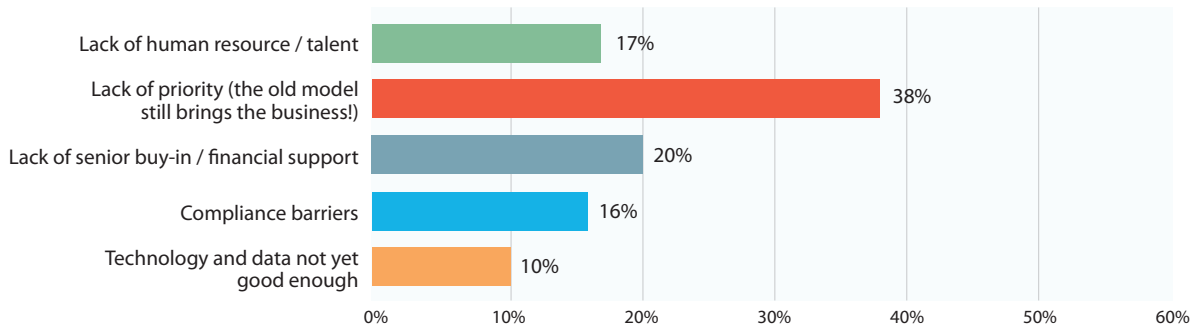
In the poll, a similar number of respondents named poor CX management on a lack of vision of tangible ROI (27%), while just under a quarter (23%) cited regulatory and compliance concerns.

This response demonstrates the struggle for companies to concretize CX strategies in the healthcare context, indicating yet again a need for practical tools and metrics to navigate through compliance hurdles and achieve financial returns with CX.

According to Takeda’s van Essen: “We are very driven to make sure we do not cut corners and that we stay in the green zone in how we communicate and interact with our customers. Yet, at times, when we’re actually doing something different, some of the rules do not apply or are not sufficient for the given situation.”

CX designer/consultant Wittenstein adds: “One of the biggest challenges is that customers expect each brands that serves them to make a meaningful promise. After all, that’s all a brand is; your promises and your track record of fulfilling them. But, as pharma companies are constrained by so many regulations, it can be difficult to make promises about outcomes. Long statements about all the things that can go wrong don’t give customers a clear picture. It can be quite scary for them.”

A general lack of confidence to invest in CX can also be seen in the willingness of companies to explore new channels of engagement. Respondents in a poll focused on virtual engagement (Figure 14), named ‘a lack of priority (the old model still brings the business)’ as the most important factor holding them back (38%), although a significant number cited a lack of senior buy-in and/or financial support (20%).

Figure 14: Webinar poll – What is holding you back from using more virtual engagement?


Virtual engagements form part of a novel approach to enhancing customer experiences and meeting heightened customer expectations, yet many pharma companies still hold back from maximizing the opportunities offered by virtual channels.

Commenting during the webinar, Lisa Huse, General Manager, Management Cluster Iberia, at Roche, said: “When we have product launches or reimbursement changes, the traditional way we spread the word is through the field forces and common means to get the word out there. That has been our approach. We haven’t identified that it is intrinsically not working; we fall back on what we believe to have always worked and are afraid of the costs if we went with virtual engagements.”

Teva’s Herron points out that representatives may be unable to deliver on the doctors preferred channels of communication because their training and experience within their company prevents them from exploring other options. “You would be surprised at how many times I have asked a representative what is valuable to their customers or what channels they prefer to interact with you in, and they did not have the answer. In their defense, we have always programmed our field and marketing teams to simply deliver a message and maybe a service that is beneficial to the business,” he says.

In summary, while there is a generally positive belief around the benefits of CX in pharma, the implementation of CX initiatives is hindered by low leadership buy-in, low confidence to align the organizational functions and people skills with CX, and low willingness to potentially challenge compliance barriers.

“It is a mindset shift,” says For Hicham Naim, Senior Director and Head of Customer Experience Strategy and Operations at Takeda. “Yes, we are in specialty care. Yes, data and product features matter. But, we are also in the customer and patient-experience business. We recognize that *how* we deliver value for customers is beginning to be as important as *what* we deliver. CX is now one of our must-win battles, and is endorsed by our executive leadership.”

Who is our customer?

It takes a lot of work to dig deep into the needs and expectations of customers. According to UCB’s Kumar: “Externally, it is really important that an organization has a good grasp on customer needs. Many organizations spend on high-level professional market research, which would look good on a presentation but will not automatically enable an organization to walk in the customer’s shoes.”

However, adding to the challenge of addressing customer needs is the increasing complexity of the healthcare customer matrix. While pharma recognizes the patient as a customer, companies still need to work through



intermediaries. According to Kumar: “Customer’ includes patients and stakeholders such as HCPs, payers, and policymakers. It is not as easy to reach patients directly without a good understanding of your stakeholders.”

Different customer types may have contradicting needs and expectations.³⁹ For van Essen: “One of the biggest challenges is asking your customers what they need because they do not know what they need. It’s like Henry Ford said, ‘If I’d asked my customers what they wanted, they would have said faster horses’ so they [customers] would never have come up with the idea of a car. That is somewhat the same as where we are now.”

A CX strategy must encompass all stakeholder experiential needs, says Herron, but the needs of patients should dictate the overall CX objectives. In the process, pharma would have to work with various stakeholders to identify their respective needs and align those along patient-centric objectives.

According to J&J’s Ruggia, the customer “depends on what part of the business you are referring to. If you consider the point of view of supply chain, then the customers are the wholesalers and distributors. For Sales, it is the prescribers. For Medical Affairs, it is the patient by way of the surgeon or prescriber. In the age of digital, the patient is more than ever the customer, however, the points of contact in the delivery of care have not changed. As a manufacturer of healthcare products and solutions, you must customize the customer map for your product and address each pertinent point. In the end, the patient and caregivers are the most important customers in your equation.”

An initiative at Teva focused on HCP needs yet simultaneously addressed patient needs. “One of the general problems we are facing is access to HCPs and healthcare networks. By access, I do not mean getting a representative or MSL who has a relationship with a HCP to talk about that HCP’s personal life and family, but truly providing valuable solutions leveraged by the HCP, allowing them to do their jobs more effectively and spend more time with patients in need,” he says.

“In Oncology, we wanted to create a ‘brand above brands’ by finding out what was currently seen as valuable by our HCPs. The answer happened to be having more training on dealing with difficult conversations with patients. This initiative was a way for us to deliver patient-centricity through our HCPs,” he says.

Other companies have similar programs. Takeda’s van Essen: “In the Netherlands, we launched an initiative called Care Atlas, which is both a digital and printed educational tool to help patients to better understand the medical information they receive from their care team. The system allows you to digest at home the same information you received at the doctor’s office. You can even record the information from your visit and replay the audio of your physician at home. At Takeda, we have our own way of doing business. We put the patient at the center and then we build trust within society, and then follows the reinforcement of our reputation and development of our business.

From words to action

It is very clear that the adoption of CX as a strategy is a burning aspiration among commercial teams in the pharma industry, yet most companies are still at the earlier stages of the journey. For a few companies, the journey may not have even started yet.

As with any revolutionary new approach, there are many recurring hurdles around a lack in ability, confidence, support, and timing.

³⁹ Kumli, F., Felber, M. and Gittermann, V. (2016). *‘Embracing customer experience in the pharmaceutical industry’*, EY, August 25, 2016 [online].



CX in pharma is also occurring in pockets; often, CX uptake is driven by the diligence and passion of one or a small number of people.⁴⁰

Indeed, some parts of the industry may still be stuck in gaining deeper awareness of CX benefits. Moving towards actually applying CX principles in the marketing and commercial setting of pharma remains a distant dream for many organizations. There is currently no unified move to embrace and prioritize CX across the industry.

“I strongly believe in putting CX in the center of what we do with our customers,” says Takeda’s van Essen. “We must build value-based partnerships. We must shift from a sales-oriented approach to a service-oriented approach. This will take time and resources, but we will learn as we go.”

He adds: “Our customer-facing roles need to acquire a different set of capabilities. Fine-tuned measurements of CX must be rolled out to continuously improve our efforts. And, as we are doing already, we need to have the customer’s voice next to our ears, so we can test and verify that what we do makes sense and fills the aspiration gaps in the customer’s journey.”

For CX expert, Golding, pharma needs to knuckle down and play the game in earnest. “If an organization has a desire to be genuinely customer-centric, then it must implement structure and rigor to intentionally manage the customer experience. CX is like a metaphorical jigsaw puzzle. On their own, the pieces mean nothing; it is essential to have a way of piecing them together to see the picture of what needs to be achieved.”

The industry requires a set of practical and appropriate approaches, tools, objectives, solutions and performance metrics to consistently progress along the CX learning curve. In Part 3 of this report, we put together a collection of practical guidance and concrete steps that can serve as a manual for pharma organizations that want to take serious and effective measures towards CX success.

⁴⁰ Golding, I. (2017). [‘Customer Experience 2017 Reality Check – Evolution or Revolution?’](#) IJ Golding Customer Experience Consultancy, October 3, 2017 [blog].

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- **Ian Golding CCXP**, Global Customer Experience Specialist and Certified Customer Experience Professional – Golding is the CEO and Founder of the Customer Experience Consultancy, and non-executive editor of the Customer Experience Magazine. Specializing in CX strategy, frameworks, people engagement and measurement systems, Golding is a leader in customer experience and advises businesses across various industries, including the pharma industry.
- **Mike Wittenstein**, CCXP, CSP, CMC, MBA, Managing Partner at Storyminers – Wittenstein has 30,000 hours of experience helping leadership teams face tough, game-changing opportunities. With his help, clients claim over US\$1.6 billion in added sales, reduced expenses, and new sources of revenue. He is an author, global speaker and top blogger, with experience in over 100 cities and 26 countries. He works in four languages and is on the board of several CX-related organizations and for-profit companies.

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- **Carolina Correa**, Customer Excellence Director, AbbVie – Correa has worked in the pharmaceutical industry for over 16 years, and has contributed to companies such as Novartis, Merck and Bayer. With a background in business development, marketing, and branding, Correa is currently responsible for management and innovation in the area of customer excellence at AbbVie.
- **Jason DeGoes**, Senior Vice President of Global Patient Solutions at Teva Pharmaceuticals – DeGoes has over 20 years' experience in healthcare and pharmaceuticals, and currently overseeing the Global Patient Solutions team at Teva. He is an expert in implementing support programs and patient engagement strategies.
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- **Maarten van Essen**, Marketing Strategy and Customer Experience at Takeda Pharmaceuticals Nederland - More

than 10 years' experience in branding, sales, marketing and customer experience gained first at Novo Nordisk and currently at Takeda Pharmaceuticals. A specialist in co-creating solutions, customer experience journeys, patient support programs, and omnichannel campaigns, van Essen values a collaborative approach to developing experience strategies with a long-term perspective.

- **Daidek Herron**, Head of Human Channels and Customer Experience at Teva Pharmaceuticals – Herron has over 10 years' experience in the pharmaceutical industry and is currently responsible for designing the customer experience for Teva's products. With an industry background in sales and marketing, Herron specializes in developing and implementing customer experiences across brands on a global scale.
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- **Parul Kumar**, CX Strategist, Global Head of Patient and Stakeholder Engagement, UCB – Experienced customer experience strategist, with 10 years' experience across various business areas (including e-commerce and pharmaceuticals). An expert in process improvement, project management and consumer journeys, Kumar is currently providing leadership to the Patient and Stakeholder Engagement team at UCB.
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- **Tom Ruggia**, Vice President, Global Surgical Customer Experience at Johnson & Johnson Vision – Thomas Ruggia is an executive with a strong background in the pharmaceutical and medical devices industries. Currently leading a team responsible for global customer strategy at Johnson & Johnson, he has previously worked in emerging markets, sales, and strategic marketing.
- **Carl Smith**, Senior Director at Lilly Marketing Institute and Customer Experience, Eli Lilly and Company – A leader in marketing and product launches, Smith has spent 17 years at Eli Lilly. With a background in global marketing and emerging markets, he is currently accountable for developing consistent CX frameworks based on patient insights.
- **Doug Stover**, Vice President of Global Patient Experience, Neurology, UCB – Stover has 20 years' experience in consultancy and industry and is currently Head of Patient Experience at UCB where he focuses on the area of neurological disorders. An expert in developing solutions to gain insight into patients' lives and solve unmet needs, Stover aims to empower patients by developing solutions that allow them to take control of their situations.

About the Author

Dr Nicola Davies is a health psychologist and medical writer who has published articles in hundreds of publications globally. Her expertise is in writing large research reports, white papers and dossiers for the pharmaceutical and life sciences industry. Her key aim is to go beyond the surface of a topic to offer content that is new, practical, and will help the industry move forwards.