

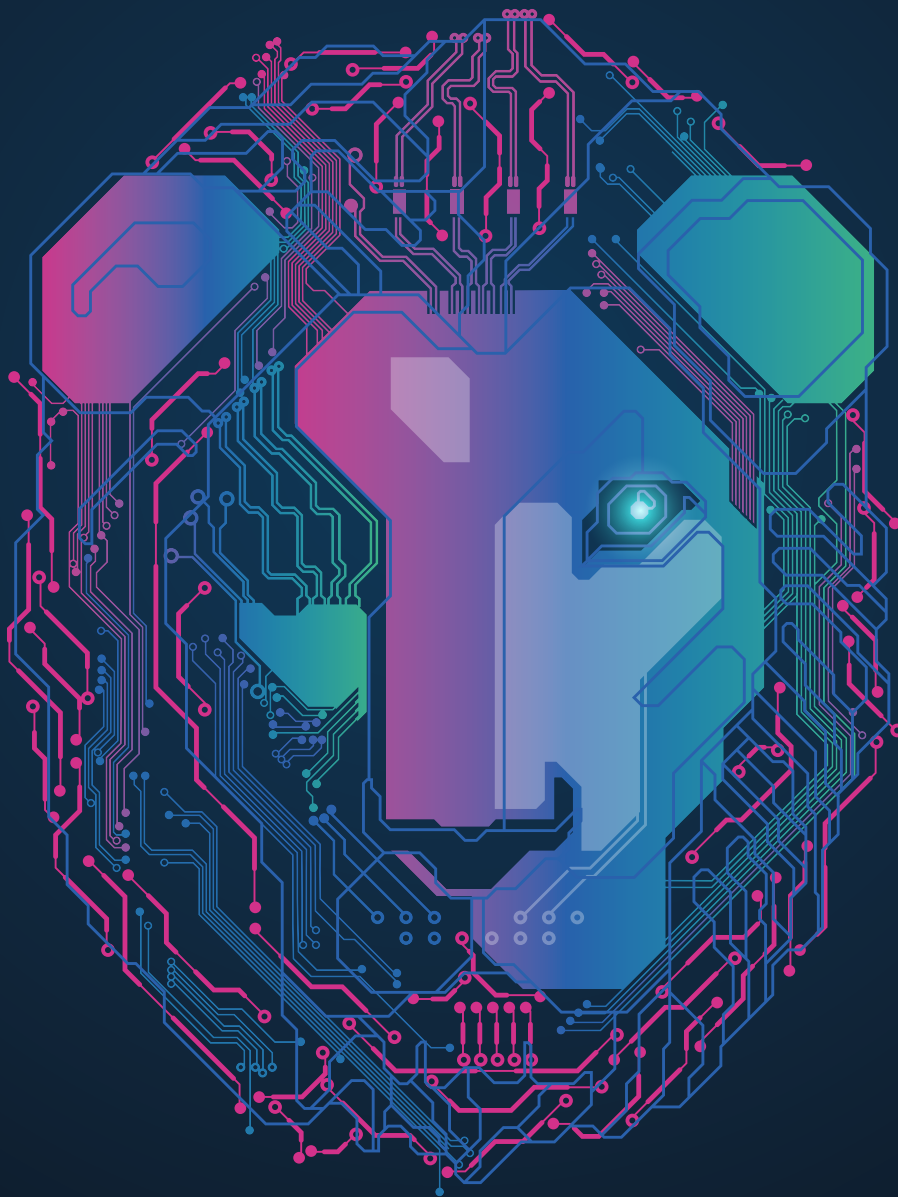


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Why Customer Experience Will Be the Difference
Between Market Leaders and Followers

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Executive summary

The pandemic and other broader transformations have rendered biopharma's "digital second" model of customer and patient experiences obsolete. After the initial disruption and the short-term adaptation of the past year, life sciences leaders now need to shift their focus to longer term strategies that will ensure sustained relevance and impact.

Healthcare Practitioners (HCPs) and other members of the healthcare teams have historically been the focus of field teams, account teams, event groups or other such "in person" channels. In the past, for many HCPs the experience created was often meaningful and maintained over many years. But as things have shifted to "digital first" the interactions have become generic, disconnected and unsatisfying.

This is where a digital-first experience strategy can create new value for all customers as organisations reset their course in the 'new normal' world. There is an urgency for biopharma and medical devices companies to create customer experiences already achieved by other customer-focused industries.

Although the pandemic has had tragic consequences around the world, it has also created the conditions for change, forcing the pace in digital, eroding a lot of the resistance to innovation, as well as finally showing just how willing healthcare teams are to engage and work in new and better ways.

Yet the industry is still learning about digital first execution, such as how to fully embrace the granularity that modern engagement channels can deliver and how to turn that to advantage by iterating and accelerating deployment cycles. While biopharma has rapidly adapted to the new normal with a few newer channels, has it accomplished this in a sustainable, experience-driven manner?

Creating a connected experience across multiple applications is a massive challenge in and of itself.

An essential component in achieving this involves creating a unified view of the customer from all that's known about them across the whole business. Such a unified view must be available to anyone inside the organisation, within the necessary regulatory boundaries, whether they are on the frontline, such as commercial teams, service agents or MSLs, or in marketing, medical affairs or management.

Such capabilities can enable the entire organization to engage more deeply, to work more efficiently, iterate faster and so provide more meaningful experiences.

Rather than using AI solely for providing advice to commercial representatives on how they can make their next call more effective (important as that is), more broadly harnessing AI also enables the organization to optimize the audience for a campaign, serve a different set of

content to answer an inquiry, or adjust a territory alignment to reflect actions that a representative can take to support a key account plan. The possibilities are vast.

Life sciences organisations that adopt an experience-driven customer management platform will benefit from a unified approach to data, deep omnichannel capabilities, and a 360° view of customers' needs.



Introduction

It is clear that biopharma needs to push beyond simple digital experiences such as brand websites or rep-triggered email.

The gap between customer expectations and satisfaction with the experiences they receive in biopharma is large: 22%, one of the worst results of any sector.

Closing this gap will require overcoming several challenges. Especially the “experience silos” as well as data silos which result in the inability to coordinate customer interactions across multiple internal functions, to plan in real time across brands or to understand and act on customer behaviors at scale.

One key technological challenge includes standalone CRMs and multichannel marketing (MCM) applications not fit for the new digital-first, omnichannel realities. As a 2020 Reuters Events Pharma survey showed, 75% of respondents reported that they need a more agile method of ingesting and consolidating data to derive insights across channels.

But technology is only one piece of the puzzle. Culture matters too in fostering more agile and collaborative approaches to the customer experience.

This paper aims to share the experiences of some biopharma and life sciences pioneers when it comes to transforming their CX approach.

Competitive advantage will be the reward of the life sciences businesses that get their CX approach right. A McKinsey survey of 600 physicians found that prescribers satisfied with their customer journey were twice as likely to prescribe a medication than their dissatisfied peers.

A smoother, more intelligent CX is also linked to more engagements, a better opinion of the brand or organisation, and an increased willingness to engage digitally, according to a study from DT Consulting/Aptus Health.

Reconfiguring the cultural stack

Life sciences organisations adapted quickly to the initial shock of being forced to engage differently as a result of the pandemic. Now they are addressing the organisational and cultural changes required as they rebuild their strategies to adapt to new expectations and possibilities.

Mastering the disciplines of omnichannel and delivering a unified and digital-first customer experience is now critical for long-term success, while adjusting to a changed 'in-person' channel. "It is hard to move from a brand-driven / sales-driven strategy to a fully integrated approach," says Edwin Erckens, Digital Transformation Consultant and former CIO of the General Medicines Global Business Unit at Sanofi.

Traditional working practices are still entrenched. Leaders are used to those traditional ways of working and rewarding performance that are increasingly anachronistic in a digital-first, customer-centred world. The lack of experience in the distinct digital disciplines around customer journeys and omnichannel is now acute.

Implementing a multitude of transactional technologies for customer relationship management, virtual meetings and marketing automation needs might support a broad range of digital tactics but creates new obstacles in planning and working across functions and building that elusive 'single journey for the customer'.

Biopharma will retain some level of value in the 'personal channel', including teams that have the best relationships

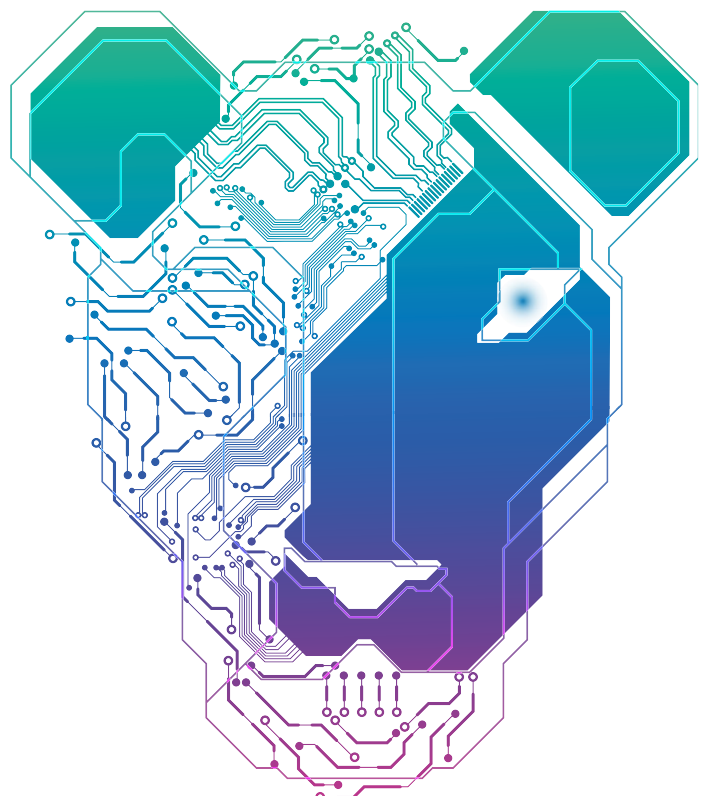
and up-to-date knowledge of key accounts and practitioners. But there is a lot more to be achieved in making this a part of a broader organizational culture that centers on advancing customer experiences overall.

The cultural challenge is not purely internal either. The varying digital capabilities of different cohorts of HCPs must be addressed as well. Some are digital natives who are easier to segment, others are not, says Dr. Urooj Siddiqui, Medical Director Gulf States, Saudi Arabia, Iraq & Iran, Viatriis. "KOLs with 30 years' experience don't have that digital savvy compared to those who started practising in 2010 and they may not leave much of a digital footprint."

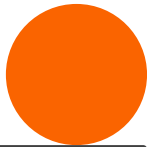
The driver, says Siddiqui, increasingly will be the younger generation who are active social media users.

"The driver, increasingly will be the younger generation who are active social media users."

Dr. Urooj Siddiqui, Medical Director Gulf States, Saudi Arabia, Iraq & Iran, Viatriis



Solutions



“There is a need now to move fast and at scale, rather than with the slow and incremental changes of the past”

Sanjay Virmani, CEO of Exeevo

Leadership

A commitment from life sciences leaders to drive the transformation to customer experience has been secondary in the past but the path is now more clear, and that path is digital first.

“There is a need now to move fast and at scale, rather than with the slow and incremental changes of the past that have often centered on testing the water with numerous pilots or making a major investment in launching a new digital initiative without connecting it with the rest of the business,” says Sanjay Virmani, CEO of Exeevo.

The pioneers are now addressing implementation at scale, examining the capabilities of their existing technologies and approaches and the speed with which they can make the necessary transformations, he adds.

They recognize the need to provide personalised digital experiences for customers regardless of whether they are HCPs, pharmacists, distributors, patients or caregivers. “They acknowledge that they have to make those right-angle changes. They recognise that it has to be done in an agile way and not to aim for perfection,” says Virmani.

The initial reactions to the disruptions of COVID-19 are now giving way to plans for deeper transformation. “When this started in 2020, everyone wanted virtual meetings but being able to do virtual meetings even globally is not transformation, it is step one,” he says. “The questions now are: What is happening with self-service, what is happening with automating conversational interactions within your contact centre, what is happening to optimize your customer journey planning?”

“In this process, being given agency by top leadership in the organisation has been important,” says Manuel Seemann, Senior Director, Head of Customer Engagement Solutions, Daiichi Sankyo. “The step from marketing to omnichannel is a big one. Giving teams the mandate to trigger changes and try new things helps people recognise that the old ways of working with customers will not succeed.

“Modern technology can support such a journey, but you need to convince everyone of the benefits of using it, regardless if head office or customer facing. That especially involves colleagues not prone to using new tech. Additional training, focus on change management and new ways to incentivize can support such transformation.”

This is a reminder of the importance of thinking about the experience of staff in the CX transformation as well as the customer experience. Making new tools easy to explore and relevant to individuals in their day-to-day roles is important, rather than simply tools to collect data.

Collaborating cross-functionally

Aligning different functions operationally to provide meaningful experiences for individual HCPs is a central means of achieving true customer centricity.

"This is essential in order to gain a holistic view of the customer and to understand and respond to their needs in real time," says Axel Drews, Vice President Commercial, Paion. "To really understand what the individual customer needs and to serve them, you need to call on all resources, to work together to work out how to implement.

"It requires much stronger collaboration between marketing, medical, IT, business systems, and market access on a much more granular, sometimes customer-specific basis, by hospital account or hospital chain rather than by country, for example.

"Individual customers need you to work cross-functionally and to draw upon all knowledge and resources that you have to try to find that answer," says Drews. "If there is an urgent, important need of a customer, those teams should be able to very quickly convene and find solutions. Everybody who's working on or with a customer needs to act as part of a tag team to provide solutions."

The new digital-first realities are helping take some friction out of the practical aspects of working cross-functionally, adds Drews. "Virtual communication helps, because there's no need to find a room and check agendas. You can quickly identify the issue and try to solve it."

Upskilling for the right approach

Digital communications can pose a challenge to an established, arguably entrenched, sales force culture, so having the right people in place with the right attitude and approach to orchestrating non-sales force communications based on customer needs is proving an important part of getting the approach to omnichannel right, says Drews.

"Many of the members of the customer facing teams are not digital natives. So they still have to adjust. Asking them to do virtual calls or host educational events on digital platforms or to consider follow-up emails is such a big change from what they have been doing for years. You have to look for and develop people who are versatile in their use of digital tools.

"It's a key thing for us in the recruitment process that we look for the people that have the right attitude. An openness to accept and make use of digital channels."

Cultivating the right skills is essential on the technical and operational side as well as the commercial one, adds his colleague Thomas Milcher, Director Business Information Systems, at Paion. "You need to have people that are really open for change and open to different perspectives also. Everybody needs to tailor the experience for a specific customer."

Some, such as AstraZeneca, are also re-imagining the role of the medical field force with the creation of the 'digital MSL', whose role will be to orchestrate digital HCP engagement.

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New working patterns

Current patterns of working are not optimally suited to a world where customers now engage when and how they wish. New work patterns will need to emerge, to deal not only with the hybrid digital/personal reality but also the varying times in which customers seek to engage.

There needs to be a multi-shift approach to deal with different engagement modes and preferences, says Drews. "We need to adjust much more towards not only the content needs of our customers, but also to when is the best time for them to come to us.

"I think it will probably bring a change to classical working hours. I would foresee that they are probably going to work similar to restaurants, where there is a shift in the morning and the shift in the afternoon and a break in between. And if they have a strong focus on education or events or something like that, there might be a shift towards evenings, for example."

Defining a new role for the field force

HCPs may welcome the flexibility that comes with virtual communications and the freedom it brings to engage on their terms.

But there is still a role for field forces in cultivating a clear understanding of a customer's needs and in establishing the most optimal responses. To do this, commercial representatives and MSLs must be given the tools to understand how to manage all the capabilities of the digital mix.

Very close collaboration between different types of field forces is essential as well as a more granular 'micro-marketing' approach to engagement with marketing and medical affairs colleagues working together here, says Drews. "The left hand needs to know what the right hand is doing and vice versa."

New incentives

New metrics and incentives need to be defined and set for the various customer facing teams and functions in this more blended, more connected future. "The best thing to measure is always behaviour, especially requests for information; that is a good indicator of satisfaction," says Erckens.

Incentivizing the teams with how many digital connections they make is desirable, perhaps ultimately earning equal importance to the number of personal connections, says one senior life sciences leader. "We are seeing a lot of benefits because the doctors do not want representatives to visit the clinics but are happy to connect digitally. A blended model is the way ahead."

Measuring the performance of customer facing teams and incentivising it appropriately in the new omnichannel model may be tricky, however. Having variable compensation is hard to change and disconnecting digital work from business results altogether is not desirable. It is likely, however, that the new mix of metrics and incentives will need to evolve over time to include longer term correlations as well.

"Those who were unwilling to engage remotely before the pandemic are willing to do so today, more than I would have expected"

Ambaw Bellete, Chief Operating Officer, FerGene

Training and education

A central part of the process of evolving the organisation into a more CX-driven approach is training.

"You don't just give your people a new CRM system and then start using it," says Seemann. "We also focus on change management, training programmes and the different skill sets that need to be embedded."

Training needs to go beyond technical training for the functionality of a particular technology so that users also understand why they are asked to use it in particular ways, adds Seemann. "It needs to be embedded into a bigger picture from a business perspective. We want to close that gap of users using a system but not being aware of why they use certain things, why certain information should be collected and what they get back from it as a result."

The education process should extend to training around the legal prerequisites

that have to be met. This is especially important given the broader set of employees who may now be customer facing and who have access to customer data as a result, says Seemann. "Educating people about these things is all part of the digital journey."

Training in the specifics of digital engagement is also essential, says Ambaw Bellete, Chief Operating Officer, at bladder cancer gene therapy company FerGene, which has developed a range of virtual engagement workshops. "Those who were unwilling to engage remotely before the pandemic are willing to do so today, more than I would have expected, but their time is more valuable because they are giving you their undivided attention."

Ongoing virtual training to sharpen commercial teams' ability to engage with customers to deliver value quickly is therefore essential, says Bellette. "We have a seasoned team of individuals but we have had to train them up to be virtually ready."

Re-engineering the technology stack

Speed is of the essence in the new world driven by customer experience. The faster an organization can adapt to an individual customer's need, the more chance it has of building deeper and more meaningful relationships rather than losing them to rivals.

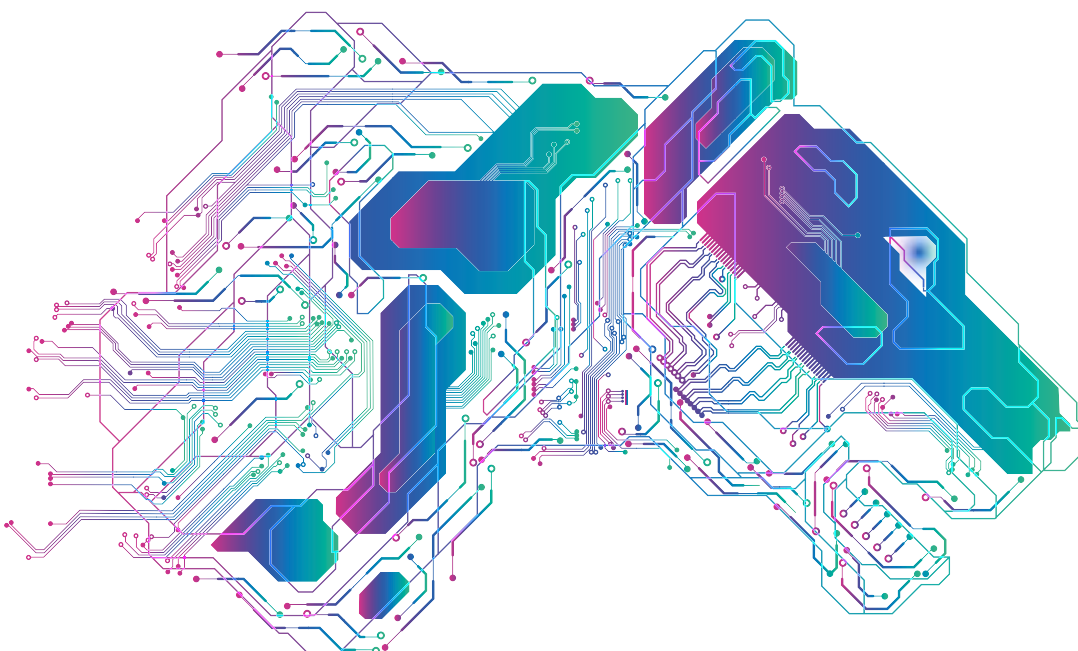
"These adaptations include serving up content when it's needed and without spamming customers with undifferentiated electronic communication", says Paion's Drews. "We are all spammed with electronic communications, a lot of which we don't even read through. We need to have the individual customer in mind and tailor communications to their individual needs."

"Digital marketing is funnelling towards the individual customer needs. The quicker I go through this funnel, and the quicker I carve out an individual customer profile, the less likely it is the customer turns away from me."

"In digital communication it's much easier for the customer to walk away. Once they opt out, this customer is gone for me for digital communication, so the quicker I understand what's the value for my customer, the higher the chances of me keeping them."

"Digital marketing is funnelling towards the individual customer needs. The quicker I go through this funnel, and the quicker I carve out an individual customer profile, the less likely it is the customer turns away from me"

Axel Drews, Vice President Commercial, Paion



The end of one-size-fits-all

The new environment calls for smarter segmentation and personalization capabilities, say Milcher. "It requires much more thinking in a segmented way. For a long time, we tried the one-size-fits-all approach. Now we are thinking how to segment customer groups into different behaviours that we can trace and track, to look at what those behaviours tell us about their interests and the best next step."

There is also a need to be better connected to smarter marketing campaigns, including functionality, such as linking them to the logistics for webinars, in order to be able to analyse what is working and what is not to create clarity on next best actions.

A comprehensive view of the customer is vital, says Ben Smeets, President, at consultancy Smeets Advisory Services. "They need everything in one place with everything about that customer and what is driving them. Which insurance companies are covered, is your product reimbursed? I need a message tuned for that office so that I know what resonates for you. The CRM should provide that information."

Yet legacy applications such as CRMs and campaign management tools, used primarily to measure and execute classical approaches, are not connected to analytics and other personalization engines. In many cases the lack of common data standards makes synthesising disparate data sets very difficult.

Dis-integrated data

The reason that many are still working out how to do this is that data sources in many cases are not yet fully integrated, with labor intensive processes needed to make all the interfaces work.

"Companies have a huge amount of data but it is very disjointed and they are struggling to make that data work for them," says Smeets. "Anyone can create a dashboard but that is meaningless if it does not tell you what the next step is or help you make decisions."

Bringing in MSLs, sales representatives, account managers and market access people on one platform and integrating them is therefore vital, he says. "Many established systems are good on transactions but not on intelligence. Of foremost importance is getting the data in one place so that everyone looks at the same data."

A common solution of recent years has involved extracting disparate sources of data from a data 'lake' and synthesising them with CRM or marketing data for analysis. This is unwieldy and unsuited to the new imperatives of real-time personalisation and agile omnichannel capabilities. The seamless and rapid flow of data is therefore a work in progress for most.

A common data model that lends itself to faster analytics and deeper insights is one attribute of the next generation approach more suited to the realities of customer engagement today.

For one senior top-ten pharma IT leader, interviewed for this report, ending the manual consolidation of data and reporting, in order to be able to aggregate HCP engagements faster has been vital. "We had a lot of manual processes and we are still not a fully integrated organisation with seamless integration. There are still some areas of manual intervention to make these interfaces work together, although it is much better than it was.

"We are trying to connect the pieces so there is a seamless flow of data across systems in the format that is expected. There are challenges but wherever possible we are trying to reduce manual interventions and simplify processes to make sure data is available in real time."

The right data infrastructure is only part of the challenge for organisations where P&L budgets and incentives are still organised along brand, rather than customer, lines.

Serving up compelling content in real time to HCPs in the format and manner they want is another challenge for an industry used to slowly evolving content, and constrained by compliance issues.

"That is much more important to integrate now," says Smeets. "You cannot be without that anymore. You need to find out the preferred channel a person would like be approached via. All the things we have talked about in the past 20 years are suddenly here. You have to focus on customer preference."

"Anyone can create a dashboard but that is meaningless if it does not tell you what the next step is or help you make decisions"

Ben Smeets, President, at consultancy Smeets Advisory Services

Solutions



Unification

Bringing experiential channels together and streamlining the flow of data with modern platforms cuts down on labor intensive processes, making it more accurate and timely, as well as more amenable to interpretation and action. Experience silos and data silos no longer stand in the way of a successful CX strategy built on digital-first principles.

Using a new platform for digital devices is helping improve a range of engagement techniques such as field-triggered emails and online remote detailing, says one life sciences leader. "The new platform enables online remote detailing and 360-degree feedback on all channels for analysis by marketers. It enables fast cycle time of analysis and decision making and better ways of engaging with doctors."

Common data model

Having a common data model is more important than ever, preferably on one unified platform. The flexibility to ask different questions of data that is supplied in as close to real time as possible and swiftly acted on, is key to the new individualised rules of engagement.

The use of a common data model is one step towards providing the data interoperability, flexibility and analytical agility needed in the new commercial paradigm.

Enforcing a common data model helps an organisation standardise definitions across a range of categories that make rapid, even real-time analytics possible to do, along with the ability to orchestrate customer journeys.

This helps transcend the complexity and delay involved in trying to create insights by synthesising data from disparate data sets using a variety of marketing tools.

"We are trying to connect the pieces so there is a seamless flow of data across systems in the format that is expected," says one life sciences executive.

"Challenges remain but wherever possible, we are trying to reduce manual interventions and simplify processes to make sure data is available in real time."

Agile deployments

CX platforms need to make it easy to build campaigns and to build individual customer journeys and then select groups of customers for certain communications. Their implementations and adoption also needs to be simplified using agile methodologies.

All the involved functions such as IT/Digital, sales, marketing, medical affairs and others need to be able to accept ongoing iterations, and make user feedback a part of the process rather than traditional one-and-done SDLC type approaches. Being open to iterative change is therefore important so that implementations that are not working can be changed swiftly. "If the tools don't work, they are the wrong tools. There is a need to adapt on a faster and more agile rhythm," says Milcher.

In this respect being prepared to test and then adapt is often better than moving slowly in a bid to get things exactly right and taking months or years to change, he adds.

Iterations should be as simple as possible, in chunks that are organisationally digestible and which can be implemented at speed, says Smeets. "Do one iteration at a time. Don't try to boil the ocean. If you try to do everything at once it is too much.

"We implemented a CRM tool in a company I am advising now and it took three weeks. It is already moving and people see the change. If it takes too long it lowers their attention span and their enthusiasm. Don't make it too complex or you lose traction."

Artificial intelligence, machine learning and automation

AI and machine learning are key to further automating and speeding the process of tailoring the customer experience down to the level of individuals by understanding their behaviours more deeply, enabling the grouping of customers by their behaviour and then analyzing them to understand their interests more deeply so the next best experience action is clearer.

"Embedded AI / predictive analytics are appealing to us," says Milcher, "allowing us to build individual customer journeys that we can quickly learn from and adjust in a way that does not require big input from creative agencies. A lot can then be done instead by product management and sales management teams."

A lot of data is collected but not yet analysed for business insights or converted to an action, says one senior life sciences executive. "That is where AI will play an important role, along with RPA, which can simplify some engagement, such as answering common questions, and also doing redundant business processes. Inserting AI into a CRM will make it cutting edge in terms of understanding and assessing the need, and increasing meaningful customer focus."

AI and machine learning should provide great scope for Paion, says Drews, in helping swiftly assess a customer's behaviour, the channels they are using and the content they are consuming to hint at their motivations to drive actionable insights. "I'm really curious to see how this works out. Without that, there's too much trial and error. The system here really supports you in setting your KPIs, in validating your assumptions."

Siddiqui agrees: "We are working now to build the capability to analyse customer preferences. Those insights with AI will help us understand the preferences and trends of the customer."

Marketeers and sales force teams should be able to analyse and act on data to improve engagement with HCPs in much shorter timeframes.

"We are still all scratching the surface when it comes to smart algorithms that can help you see things a human can't," says Smeets. "Like looking at prescription behaviour and combining it with demographics, for example, to help you understand what is on the doctor's mind and so make better decisions."

Conclusion: CX as the new competitive differentiator

Life sciences organisations are now wrestling with challenges that other industries have been addressing successfully. Most industries have been making the shift, from a brand-centric 'transactional' focus to a customer-centric 'experiential' strategy. And the leaders, such as Amazon, Tesla, Ikea, and Mastercard, are all outperforming peers by delivering an effective customer experience.

Companies that deliver superior customer experiences bring in 5.7 times more revenue than laggard competitors.

"There is no longer any doubt about the need to speed the transition to the creation of a fully realised, digital-first, customer experience", says Exeevo's Virmani.

"Digital is the only way. Now the only question is how we do we do it faster and better than competitors. This is an amazing moment of change for all of us."

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Sanjay Virmani, CEO of Exeevo.

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The pharmaceutical division at Reuters Events is to make Pharma more open and valued. More open so that the strongest ideas and insights are brought to the fore in a transparent, trustworthy manner. More valued by having an authentic approach to building products and services that matter to patients.

To do this, Reuters Events provides a hub for senior-level Pharma executives, patient groups and other health stakeholders to exchange ideas and observe shifting trends and practices. We actively respond to the aims and interests of our audience, so please get in touch.

About Exeevo + Microsoft

Exeevo and its platforms are the result of a strategic alliance established between Indegene and Microsoft in 2017. We have grown from providing a customer experience (CX) platform for commercial and medical teams to supporting the entire journey from clinical to commercial for life sciences organizations to deliver superior experiences to both healthcare teams and patients.

Exeevo is a unified, intelligent and agile digital ecosystem for life sciences organizations to revolutionize health experiences for healthcare teams and patients in their journey towards sustainable health outcomes. Built with Microsoft clouds including Dynamics 365, Azure and Teams as well as Cloud for Healthcare, Exeevo platforms are verticalized for customer and patient experiences, delivered by biopharma, medical devices, biotech and consumer health organizations.

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About Omnipresence

Exeevo Omnipresence is a unified and intelligent customer experience platform (CXM) built specifically for life sciences, the result of a strategic alliance between Indegene and Microsoft, with CRM, omnichannel engagement, advanced analytics, and AI capabilities in a single platform.

Omnipresence provides the 5 pillars necessary to catalyze the successful post-COVID-19 and “next normal” CXM strategy: a common data model for customer and patient information, omnichannel planning, omnichannel journey execution, 360 insights, and personalization at scale on a unified technology stack. Without such a modernized, CX-oriented technology stack, organizations may continue to struggle with the always time-consuming, usually fragile, integration and orchestration heavy transformation programs, which, more often than not, underachieve their business objectives. With Omnipresence, organizations can reclaim their resources to reinvest in truly elevating customer experiences.

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Single Subscription CXM

Delivers a strong business case with no hidden costs and “subscription creep”



Industry Expertise

Organizations behind Omnipresence, Indegene and Syneos Health, have been partnering with top life sciences, consumer health, and nutrition organizations for years



Next-Gen Technology

Continued technical innovations through billions of dollars of investment by Microsoft to maintain a cutting edge and future-proof platform

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