

# Life Sciences CXM Evaluation

How does CXM compare with CRM?



## Introduction

Selecting the right customer management platform is an important decision that can greatly impact the growth and performance of pharma, biotech and medical devices companies.

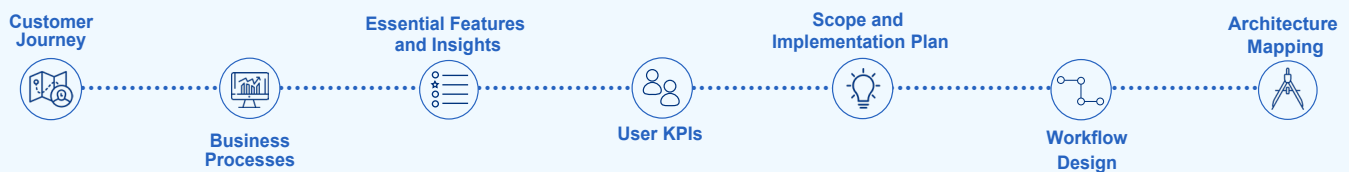
Today, transforming the customer journey from a series of transactions to a true end-to-end experience for life sciences means the involvement of the whole business as well as complex integrations. Breaking down internal siloes and adopting an omnichannel journey execution has shown tremendous value and advantage for early adopters. Customer experience management (CXM) defines the next generation of customer management solutions, where one platform enables your organization to deliver a personalized experience for HCPs and patients throughout their journey.

Looking to keep customers informed and satisfied throughout their journey, CXMs have distinct capabilities from traditional CRMs. This evaluation has been created to help you make the right choice for your organization and your customers' needs.



## Recommended Planning Process

The below steps are designed to guide you in determining your requirements and their scope so that your evaluation of customer management platforms is more accurate.



### 1. Define the Customer Journey

Define the customer and identify who is responsible for what part of the customer journey. Map what the customer journey should look like and get buy in from each group. Step one likely involves determining if the customer journey is handled at the organizational level, business unit level, portfolio level or wholly owned by each commercial team or brand.

An end-to-end customer journey should include all touchpoints, highlighting areas of significant opportunities to improve and enable the customer experience as well as related business outcomes.



### 2. Re-evaluate Business Processes

We recommend a 3-step approach:

- A. Determine which stakeholders need to be involved for each business process (users, agencies, departments including legal and compliance groups)
- B. Identify of customer-facing processes that the CRM/CXM will manage
- C. Validate which processes need an overhaul
- i e. Unifying communications between sales, medical, and marketing

## Recommended Planning Process



### 3. List Essential Features & Customer Insights

After speaking to each team, make a list of essential features. Measure the business impact of the platform-generated customer insights by reviewing the potential insight scenarios provided, including out-of-the-box.



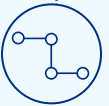
### 4. Define User KPIs

Work with various departments to redefine the qualitative and quantitative key performance metrics relating to customer experiences along with the related incentives. Ideally, establish organizational level and departmental level KPIs for CX to ensure siloed team efforts do not take place. KPIs may be dependent on the product's life cycle (mature product vs launch phase) and will be highly influenced by its competitive landscape.



### 5. Determine the Scope and Implementation Plan

Identify improvements across the customer journey, and determine the ROI for each in order to create a timeline for the implementation time of the CRM/CXM which provides a step-by-step overview across the organization's needs and functions.



### 6. Workflow Design

Evaluate the workflows and data needed to support the functional requirements of end users.



### 7. Architecture Mapping

Look for details on code bases (APEX vs standard java script and HTML), extension frameworks and ease of customizability to determine development opportunities and related costs.



## CXM vs CRM Features Checklist

### Omnichannel vs Multichannel Capabilities

- ☐ Does the platform provide all the channels your organization needs?
- ☐ Does the platform appear to be futureproof with its channel enablement?
- ☐ Do you need to upgrade to gain access to all channels or is each channel an add-on cost?
- ☐ Do the channels enabled focus only on the commercial or medical user experience (multichannel) or does it put the needs of the customer front and center (omnichannel) and let the customer reach out?
- ☐ Does the depth of social media integration meet your campaign requirements?

## Sales Force Automation Capabilities

- ☐ Does the platform improve performance for Commercial teams, Key Account, Managers (KAMs) and Medical Affairs teams compared to current platform?
- ☐ Does it unify the data across departments for the creation of one deep customer profile?
- ☐ Does it auto-populate records or forms and support complex consent capture?
- ☐ Does it validate the accuracy of contact data?
- ☐ Can it automate the call planning process?
- ☐ Does it allow the customer operations admin to define different business rules for task assignment?
- ☐ Does it offer AI-based customer recommendations for the commercial and medical teams to provide a better customer experience, tracking preferred channels, relationships, and interests?
- ☐ Does it offer digital content management without an add-on cost?
- ☐ Does it offer interactive dashboards with all commonly used business measures at no additional cost?
- ☐ Does it offer interactive dashboards with all commonly used business measures at no additional cost?
- ☐ Does it offer compliant messaging and consent management across email, SMS, social media, and messenger platforms?
- ☐ Does it offer trade management, i.e. contract to order trade promotions, planograms, and store check?

## Workflow & Automation Capabilities

- ☐ Does it provide customer insights embedded directly into the workflow?
- ☐ Can it create automated workflows to define and distribute sales targets for the field force?
- ☐ Does it have a centralized automated approval flow which can be configured for various sales business process?

- ☐ Can it create workflow configurations for efficient territory alignment of the field force?
- ☐ Can it create workflows to keep the contact and account profile information up to date captured across departmental initiatives and channel engagement (MDM)?

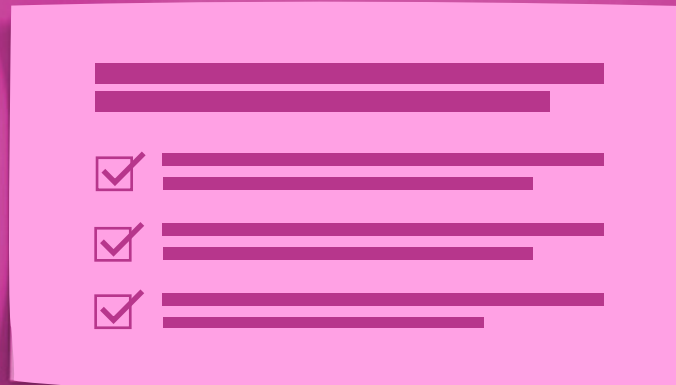
## **Customer Journey Management, Marketing Automation and Event Management Capabilities**

- ☐ Can it automate or schedule the multiple touchpoints across the HCP journey and score engagement to help with the nurturing of customers through the customer journey?
- ☐ Does it offer event management with speaker controls, complex agendas, participant registration/attendance/feedback, vendor and venue tracking at no additional cost?
- ☐ Does it offer omnichannel content sharing, i.e. face-to-face, email, digital follow-ups, rich remote engagement, including on-demand and live inquiries?
- ☐ Does it offer omnichannel campaign execution including brand planning and complex corporate email campaigns with tokens for deep personalization and user triggered emails?
- ☐ Does it offer advanced tools for content automation and personalization?
- ☐ Does it offer omnichannel content planning with CX simulators?
- ☐ Can it create and track landing pages as well as create registration forms?

## **Case Management and Self-Service Capabilities**

- ☐ Does it offer contact center capabilities with telephony integration?
- ☐ Does it provide configurable business process flows to move cases from intake to resolved?
- ☐ Does it provide case interpretation and case creation in the platform from the emails received?





- ☐ Does it offer self-service portals to customers and allow access to all the interactions and requests logged by the customer along with logging of cases or getting connected with a rep for a query?
- ☐ Does it offer the ability for customers to raise financial reimbursements?

## User Experience and Customer Insights Capabilities

- ☐ Does the platform work on any device for users and customers, with offline capabilities?
- ☐ Does it offer compliant collaboration tools for productivity within teams?
- ☐ Is there a customer success portal to streamline requests? Does the customer success team have enough life sciences experience to effectively act on requests with little effort?
- ☐ Does it offer AI-driven assistants to help customer facing teams with tasks?
- ☐ Does it offer life sciences-trained bots for channel engagement?



- ☐ Does the platform offer AI-driven customer insights and predictions from public and private data sets to maximize customer engagement?
- ☐ Does it include a Master Data Management system for customer insights or is that management through another provider or at an extra cost?

## **Security, Integrations, Customization and Extensibility**

- ☐ Is security well managed? Is identity management made easy? Can this solution meet your data security and privacy requirements?
- ☐ Does it natively integrate with other productivity tools like Office 365 including calendar and email systems at no additional cost?
- ☐ What kind of integration features does the platform have across data sources?
- ☐ Does it integrate with ad platforms?
- ☐ Does this solution provide the governance tools you need? Does the vendor support this?
- ☐ Does this solution enable us to meet your regulatory and compliance requirements such as workflow and content approvals?
- ☐ Is the platform optimized for extensibility and customization?

## **Customization & Extensibility**

- ☐ Does the platform support an open API for easy integration?
- ☐ Is it easy to integrate the platform with your current technology landscape?
- ☐ Are out-of-the-box connectors available for integration with other systems?
- ☐ Does the provided ecosystem around the platform enhance productivity through other commonly used day-to-day applications?
- ☐ Is it easy to customize your platform to meet your unique business needs
- ☐ Is it easy to create reports and derive analytics from the data generated by your platform

- ☐ Does the provided ecosystem around the platform enhance productivity through other commonly used day-to-day applications?
- ☐ Is it easy to customize your platform to meet your unique business needs
- ☐ Is it easy to create reports and derive analytics from the data generated by your platform

## **Platform Hosting, Compliance & Security**

- ☐ Do you have the freedom to choose where your data is stored?
- ☐ Does your platform allow you to maintain compliance in the cloud with help from a comprehensive set of over 90 offerings?
- ☐ Does your platform offer transparent cross-geo replication for fault tolerance?
- ☐ Is your hosting provider committed to ensuring the privacy of organizations through contractual agreements and by providing user control and transparency?
- ☐ Does your hosting provider actively collaborate with customers and regulators to foresee and shape compliance regulations?
- ☐ Does cloud solution meet government standards for regulated sectors?
- ☐ Does your hosting provider allow for access to compliance reports to share with your auditors?
- ☐ Does your hosting provider respect your local privacy laws and fight for legal protection of your privacy as a fundamental human right?

## **Single or Multi-Tenant Software**

- ☐ Do you have control of your own application version?
- ☐ How frequent are the platform upgrades per year?



## Pricing / Total Cost of Ownership (TCO)

- ☐ Do the pricing models and levels align with your budget considerations?
- ☐ Are there any upcharges, additional product, server license or maintenance charges?
- ☐ Are there other charges and fees you might incur over the lifetime of this solution?
- ☐ Are there charges for usage above preset limits and for storage of files?
- ☐ Are there charges for integrating applications and data sources?
- ☐ Are there limits on API calls?

## Vendor Requirements

- ☐ Do they provide a knowledge base, case portal, or other online resources?
- ☐ Do they offer packaged connectors to critical features?
- ☐ Is their ecosystem broad/deep enough? Are they part of a wider network of deployment partners?
- ☐ Is the type of customer support is included with the solution suitable for you?  
Do they offer extended phone-based technical support packages?